**The Housekeepers Company**

**Application Development Features Checklist**

The Housekeepers Co. is a small housekeeping / part-time cleaning company. We serve apartments, houses, and small offices in Kuwait. Our clients usually – but not necessarily – book us on a recurring (subscription) basis, once, twice, or even three times a week. Our team members are dispatched individually or in teams of 2 to 4, mainly consisting of cleaners & drivers (usually only one driver is assigned to 2 or 3 cleaners). We group certain locations together and assign specific jobs depending on where there located so it’s faster to transport. All our bookings are handled through WhatsApp and by phone. We use a field servicing scheduling software to dispatch our team and organize our jobs. We hope to achieve two things with this website. (1) to allow for online booking, making it convenient for our clients to find appointments, and (2) to notify and dispatch employees as jobs are being booked simply via email / SMS messages / app notifications. Please refer to the field servicing scheduling software "Jobber" to get an idea of the features expected.

**Back end**

**Clients**

* Admin has access to create new users (clients or employees)
* Users are stored in a database
* The admin has access to view, edit, change, or add user inputs and details (e.g. name, address(s), *area*, number(s), email, *notes*)
* The admin has access to edit, change, or add jobs of clients
* Admin may send personal emails to clients (e.g. SurveyMonkey links, service updates and products for sale)
* Emails to clients may be customized such that they are sent on a timely basis (e.g. a week before a monthly subscription ends)

**Jobs**

* The admin can book *jobs* for clients
* *Jobs* booked by the clients will be dependent on *times-slots* enabled/disabled by the admin
* In case a cleaner is disabled on a certain day of the week, all users will be restricted from booking, unless a booking has already taken place.
* Cleaners may go on leave in the future and the app must allow us to disable the cleaner on a particular start date and / or enable him/her manually or automatically on an end date
* Admin can assign *teams* to certain jobs based on both time and **location**.
* Admin must have the option to add, edit, delete, enable, or disable certain timeslots at any given time.
* The price of each job can be determined by the admin and the admin must also have access to edit old prices and or create new ones along with new *timeslots*
* Promotion code

**Employees**

* *Teams* must have a simple employee app that shows them a clear simple schedule or agenda for the day / week of active and upcoming jobs
* *Teams* must be notified as soon as a job is booked, and or anytime it is updated via app & email
* The employee app must show each team member assigned to their specific job on any day
* Drivers may be assigned to one or more cleaner. Meaning cleaners with different jobs at different times might have the same driver.
* The app must show client information as well (phone number, address, map location, name, notes)
* Employees must be able to write *notes* in the app which are stored and linked to clients’ future jobs, which serve as reminders for employees to remember client requirements or to leave suggestions for other team members. The admin should be able to view these notes.
* Admin must have access to add or delete employees.
* In the case where employees take a vacation or leave, the admin must also have access to disable employees from working on those certain days they are on leave.
* A *back-up* cleaner may be dispatched (enabled) on the times when employees are on leave (disabled)
* The admin has access to disable certain clients from booking certain cleaners (employees)

**Reports**

The following two reports are meant to be downloaded from the website’s database via CSV format for the purpose of uploads to our accounting software (QuickBooks). Please refer to the worksheet in the shared excel file with two yellow highlighted sheets titled: CSV 1 & CSV 2

**Front - end**

**Clients**

* Clients can create users for themselves (Name, address(s)*, area*, number(s), email, *notes*)
* Clients can book *jobs* for themselves and cancel jobs for themselves as well
  + Jobs must be booked at least day in advance
  + Cancelations may only be made a day in advance as well
* Clients are enabled to add different addresses and locations. They have an option to select which location they would like to book the job for.
* If a particular client wants to book recurring jobs (subscription), the same cleaner will be assigned to every job that particular client books. The client should be able to see a list of subscriptions to book from based on the availability and times of cleaners (refer to the excel file for the schedule).
* If recurring (subscription), clients will have an option to select an auto-renewal subscription feature, where their bank account is automatically deducted every month. In case they do not choose to auto-renew, an email is sent reminding them that “your subscription is ending soon, would you like to resubscribe?”
* Clients should also have the option to turn auto-renewal off when they wish to stop the subscription.
* Clients should have an account balance, where each time a visit is completed, their balance is (debited) reduced
* Clients should be able to cancel (disable) one visit per month. Weather it is on a recurring basis or a one-time basis. Clients will have this canceled appointment credited in their account balance. Client’s may choose to cancel a subscription in full but will only get one visit’s worth, refunded in to their account (they must be notified of this as they are canceling subscriptions).
* Clients should have an option to request a different cleaner

**Reminders**

* Clients get booking confirmations of the dates, times and services that will be rendered
* Clients get an email / sms reminder of subscription based bookings only once on the day before the start date
* Clients get an email / sms reminder of one-time bookings a day in advance
* Clients get an email reminder of subscription-based jobs ending a week in advance if they do not have auto renewal on. Unless they do have it on then they do not need to receive notifications of the subscription ending.
* Clients get an email of their invoice once the payment is made

**Jobs**

* Integrated local payment gateway where clients pay before the service (Tap payments Kuwait)
* Client account balance where credits may be used to pay in full or partially for jobs
* Jobs, and the availability of jobs may be filtered, such that clients may choose a preferred time, date, cleaner, location, and service duration (refer to excel file)

**Reference**

***Jobs* –** recurring bookings (subscription) or one-time bookings

***Notes* –** additional information specific to each client where the client can share specific information about their requirements, such that when a cleaner is booked, this note is included in the job details. Cleaners may add notes themselves which would be visible to the whole team or anyone assigned to that client in the future

***Area*** – A list of areas provided in our shared excel worksheet (area code index) for clients to select rather than type out. This helps link employees automatically to clients based on the area selected.

***Timeslots*** *–* A range of time which determines when clients are able to book jobs.

***Teams* –** Teams are made up of two components. (1) cleaners and (2) drivers.

***Backup cleaner* –** An agent, freelancer or part-time employee that works with our cleaning company and is only called upon when a full employee is on leave, or unable to make it to the job for any reason.