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| C:\Users\greenGoat\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.MSO\5CB49A2C.tmp | **Administrative Panel Functional Design**  Use Cases for the greenGoat Application  Last update: December 6, 2019 |

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| **Overview** | greenGoat is a non-profit dedicated to resource conservation related to construction.  We work with contractors and architects to find new ways to save outgoing building materials (primarily), conserve energy and water, and build in such a way that materials are easy to uninstall for reuse.  We follow “Lean Organization” principles, and we try to create templates for everything that we might do more than once.  These templates are being turned into applications within the administrative panel, plus (the PM functions) the mobile app. |
| **Top Level Functions** | An administrator needs to do the following top level functions:   1. Get project status … including status on specific items within the project 2. See and respond to incoming prospect inquiries 3. Edit projects / items 4. Run reports 5. Oversee the credit card application?? I have a contract … what now? 6. Sort upcoming activity by region in order to schedule operations 7. Upload new client data, to enrich the “tell me what my stuff is worth” app 8. Upload new item data, to enrich the “tell me what my stuff is worth” app |
| **Use Cases** | HOW I’d like the functions above to happen is in number sections to follow. There may be more than one task within each function, and I’ll describe those separately. |
| **Project Status** | (this assumes that a display begins with Project name, project address, link to photo album, project contacts (architect or GC with their name, number, email) and access notes (key, lock box code, etc), with a list of high level tasks. Each task has date entered, who is in charge of the task, and a current status.  “Dashboard”, would have a default listing of projects with the first three “hot” status items and “more” at the end of each project roll up that takes the user to that project, expanded.  I log into the app  I go to project area and select the project that interests me  The open tasks are presented (closed tasks are either below or concealed behind an “archive” link)  Projects, “edit”, scroll, “add new task” . What is job number? Presents what looks like a text box, but it doesn’t accept text. Has a check box “can be sold” … that should be applied to ITEMS. Tasks are just things that need to be done.  I read the top level upcoming tasks and select one particular task  I add a note within the task there is no notes facility, however “estimated time” has a text box.  The note gets a date and my user name  If a PM logs in, they can append that task with their own note (which gets a date and their user name)  The task can be CLOSED by me, and the closed task has my user name, date closed, and is archived. “start time” and “end time” … want to know more about these fields. I think they should be assigned automatically.  If I want to see older closed tasks, I can page down to see those (with appended notes). |
| **Project Status – add a new project** | When a prospect inquiry signs a contract, its status should switch from prospect to project, and their details should be visible within “Projects”.  I’d go into the “prospect” page, select a prospect  I click “go live” (or something), and I’m prompted for: contract date, contractor info, architect info, access info, and ZILLOW info (all Zillow information should be pre-filled)  The prospect is no longer visible in prospect links  The Prospect is now a PROJECT and is visible in the PROJECT tab. |
| **Project Status – when it’s “less hot”** | When a project doesn’t have anything going on, it fall DOWN THE PAGE (I’m not sure there’s a way to test this without more projects). I’d like to have a priority order that I set, so that the “hot” projects come to the top. This is a function \_like\_ status, but more like a scale: dormant, ramp up, active, very active, hot, urgent, ramp down, closed.  Also, if we have certain tasks that are urgent, they should be listed on the home page. That means that tasks should have a “hot” radio button or something.  I guess both the PM and I would have the ability to mark a task as “hot”  But also … certain projects are hot and others are not. I want “hot” projects to come to the top of the list. This is a default dashboard module. |
| **Item Status – uploading a catalog**  **Is this what you’re calling “products”?** | Each material item within the project has its own status. The project is composed of many different materials, and the entire list is called a catalog.  I log into the app … find a new project  I have an excel file that has catalog details (please reference the excel file we posted)  I would hit an “upload” facilitator and upload a file of data where is this done?  The Admin panel accept the file and separates the file into individual items.   * The items may be associated with a photo or photos – I don’t see existing photos for the chair listed on the “edit” field. There doesn’t seem to be a way to delete a photo, once it’s added. Also, when I tried to upload a photo, I got an error message (which I saved). * Each item is associated with a project ID … the item in test should be associated with a project code – when I associated a test item with a test project, the test project did not pre-fill upon save/select the item * Certain items from ONE project \*may\* be moved to another project (or inventory) for future sale. This is a status field. This needs to be added * The items need their own status, the ability to be GROUPED, and buyer(s) status / contact information / most recent contact date for each. This needs to be added * When an item is sold, its status changes to sold, year drop down should not go back to 2014 … can sold items move to the bottom of the list? * If an item needs delivery, delivery cost / address / date may be added need “delivery date” * Not sure if there’s a payment pending status, while we wait for credit card info or something * Different payment methods |
| **Item Status – group items into a group**  **(Omar will get back to me)** | Each material item within the project has its own status. Sometimes, individual items are grouped (like … several base cabinets into a kitchen) and sold together.  I log into the app … go to the project  I go to “catalog” and see the individual items.  (Once these are associated with photos) I can go in and group certain items into their own group and name the group.  Once grouped, I can price that for FB / CL / gG web site sale  Items within the group \_may\_ be sold individually. Not sure about messaging / warning messages here.  ~~Once an item has a deposit from a buyer, it may not be grouped into a sales group.~~ It may be sold to the same buyer from within a larger group. It would need a status change. |
| **Item Status -item is sold**  **Omar will add sales source 12/9 did this happen?**  **Sales from gG.com can’t be tracked (today)** | Items may be sold on line or by sales meeting on site. If a buyer contacts us and wants to see the item, here’s what happens:  Project Manager logs into project, finds item  Adds buyer name, phone number, date of inquiry, date and time of (prospective) visit, and item. This needs to be added  On the date, the PM gets an alert that a pending visit is happening  When the visit date/time arrives, the PM is prompted for a status change  PM enters sale price (which may not necessarily be the posted price, if “haggling” happens) and whether it’s cash, check, credit card. (we need sales source check boxes: FB, CL, gG, cross sell, or “other” with text field). PM also posted for pickup information – did it happen, does the buyer need us to deliver? What address, what (delivery) cost, what date?  As long as there is pending \*anything\* the item stays on the “live” list  If the pickup happens, the item can be closed, and it goes to “archive”  I need to see what is owed by the PM in terms of checks, cash. Maybe we should add a field: “remittance complete”. CC is automatic? |
| **Item Status – item is returned** | If faulty item is returned, and we refund. Any status change needs a date, user name, and text field as to what’s going on. Status can be appended by PM or by me. |
| **Item Status – item is moved (let’s add this)** | All items are associated permanently with a project. Occasionally, we need to move unsold items to the warehouse or another project for future sale.  We’d log into project … catalog … item.  Click “change location” and choose from list of live projects. This status change is given a date.  The item then appears on that projects current catalog, although the item remains associated with the closed project  If the item is moved to INVENTORY, there is a “zone” field that allows that PM to see where within the inventory room the item is located. This is an alphanumeric code. |
| **Item Status –damaged** | There should be a way to note items that are damaged, with a text field to describe that damage. Needs to be removed item from sales. Cannot lose the data here. |
| **Item Attribute – adding composition and weight** | We report on “embodied energy” to the public. To do this, we estimate the weight of 5 materials within an item: metal, wood, stone, glass, plastic and vitreous china.  I’d log into the client … into item  I’d click “estimate weight”  I’d be prompted to enter composition weights in one or more material category. Omar, I think I emailed you a list of materials – wood, metal, plastic, glass, stone, ceramic.  Hit save, and that accrues a weight total within the client  It would be great to have defaults loaded into certain code / sub code combinations. Right now “category” is a text field. I need “code” and (associated) “sub codes”. |
| **Prospect Inquiries** | Prospect inquiries come in through the mobile app  I log in and can review or respond to incoming inquiries  Once my response is sent, that message is visible on the prospect file  A project code and “nickname” needs to be added project code is alpha numeric and “nickname” is street name … would be populated as project title.  If possible, there should be an “aging” meter added so that if hot inquiries go “luke warm” without a response, there’s a NUDGE on the admin home page … see project rating “meter” |
| **Prospect Inquiries – Schedule a Site tour** | The next step in a prospect inquiry (if it is something we want to pursue) is to schedule a site tour.  I’d log into Prospects, find the prospect file, and assign a date / time to tour.  Once I do that, an email goes to both the prospect and my email address |
| **Prospect Inquiries – change status** | I might change status to any of the following: Not pursuing (this only applies to prospects … do we just ignore this as a status in project mode?), appraisal notes, proposal, or contract. If “contract” is selected, I’m prompted for Zillow information, and the prospect turns into a live project. |
| **Run Reports overview** | I would need to run a report of aging action items/tasks: reporting, operations, aging  Reporting on items waiting for uninstallation.  I would need to run a report of sales waiting for delivery: reporting, sales, status  Reporting on projects approaching demo (maybe one week before they get there)  I’d like to run a report on initial asking price versus actual sales price. **NOTE – there are potentially four fields: appraisal, asking price, adjusted price, sales price (not added)** |
| **Report: sales source** | I would like to be able to specify a date range, zip code and/or client code and get sales breakdown by sales source (Facebook, gG web site, Craigslist, cross sell, and “other” with text box) |
| **Report: PM Sales** | I would like to specify date range, PM initials, and get a sales breakdown by project manager |
| **Report: weight by client** | I would like to specify a client code and get weight associated with the project. This relates to item weights, specific to material type: wood, metal, ceramic, glass, stone, plastic |
| **Report: weight by year** | I would like to be able to get a weight total (by material type) for specific years (all clients). It would have all items, all clients by year as backup that sub-total to wood, metal, ceramic, glass, stone, plastic |
| **Upload Client Data** | Here, I was referring maybe to NON-clients, where I had Zillow information, had compiled a catalog with values, but was not assigned. I’d like to be able to have this data enrich the “tell me what my stuff is worth”, although I guess the client would go from “prospect” status to “non-client”. Hmm. OK, maybe we add Zillow data in prospect phase, and make sure that it’s included in the “WMSW” calculation as soon as the data is there. |