

# Auction Site Pro Portal

## Home Page

The home page can contain text, images and other media, tables, and is editable by the Admin. It has a login area for those with Pro Portal access.

⇒ Which text, images and media or as well tables you want as can you please provide sample so it can be easier to understand and we can go further. So, all this is will be display in admin side?

This is simply so that I can make a nice home page. So if a designer made a nice home page, we can implement it.

## Other Pages

The other pages also can contain text, images, media, tables, and are used to sell Pro Portal access to prospective users. The URLs are human readable.

⇒ Same query as above can you please provide sample for the prospective users.

This is simply so that I can make nice looking pages. So if a designer made a nice page, we can implement it.

## Sign Up Pages

The sign up pages collect the information for a new Pro Portal user. The new user is put into a moderation queue for someone with Admin or Customer Support privileges. Once they have been approved, then they can start using the portal.

## Admin Functions:

### Look and Feel

#### Add Logo

Add the logo for the website. (This isn't the dealer's logo but the logo for the website itself.)

#### Add Header / Hero Banner

This is where the header banner for the website can be added.

#### Change Font, Font Size, Page Colors

This is so that the dealer website can be tuned to match the styles of the main website itself.

⇒ So, it will be configured by admin so whatever admin can set the Font, size and colors that impact on dealer's view?

⇒

⇒ YES

**Change Site Name:**

Change the site name as it is used throughout the Pro Portal App.

⇒ It's also handled from admin that for particular dealer site name can change?

YES. Because we will use this dealer portal (or what I call "Pro Portal") for multiple websites that sell different things.

**Change Home Page:**

Change the home page this can be done either through editing the text from within the app or by uploading a HTML & CSS template. The home page can have images and other media included. (Which would be stored on the site itself and served from within the site.)

⇒ It's will be also be handle from admin? That admin can change and upload the HTML & CSS for particular dealer or all dealers?

**NO, not for a particular dealer but for the site itself.**

**Dealer Management:**

**Add Dealer Account Manually**

Administrators can add and edit dealer accounts.

⇒ Dealer have deferent signup page? Or we have one signup page or we can manage on the single signup by using dropdown like Dealer, Manufactural, or service provider, etc.?

**YES, Dealers have a different sign up page. Think of it this way, Dealer Management isn't for the dealer, it is for Customer Service to manage dealers. So this part of the system is for customer service.**

**Pending Dealer Accounts**

Dealer Accounts that have been applied for but not approved. Dealer information, URL, etc. is available for moderation. When a user is approved, they can then use the dealer portal. They also receive an e-mail that let's them know that they have been approved. The standard e-mail is editable by the Admin.

**List Dealer Accounts**

View Details / Activate / Deactivate / Deactivate N Days / Credit

⇒ Dealer listing page is available on admin side?

**YES, Admin needs to be able to see and potentially modify or suspend etc. listings in order to perform their customer service duties.**

### **Logo Moderation and Approval**

Dealers can submit the logo for their dealership. It needs to be able to be moderated.

⇒ Also manage by admin?

**Yes, the dealer can upload the logo for their home page on their store on the website. The logos need to be able to be moderated so that someone doesn't upload porn or similar.**

### **Turn On / Off Inventory Sources**

The Pro Portal can pull inventory information from various sources for listing under a dealer's account. Since this system can be used for a number of different websites, the sources will potentially be different. We need a way to specify which sources are able to be pulled from for a particular website.

An inventory source may be, for example, an XML file on a dealers's website that specifies their inventory. It may also be interfacing with some inventory control software somehow, etc.

⇒ Can you please provide more details?

⇒

⇒ **The system will be able to interface with one or more sources of data for the products. For example, one of the main functions of this website will be to pull data from inventory control systems that a dealer might be using to manage their inventory and feed it into the auction / sales system. (Also to update the sales listings and keep them in sync with the inventory control system.)**

**So we will have to create interfaces to one or more inventory control systems. Each system may store its data in different ways and require its own interface codes. However, some inventory control systems may not be be pertinent to the actual auction site.**

**For example, we will have a boat website and the inventory control systems used by boat dealers are different than those used by sporting goods dealers. So we wouldn't necessarily want the sporting goods inventory sources to be showing up on the boat website and vice-versa. So we want to be able to turn on-off the different interfaces that we build so that only the relevant ones are available for use.**

### **Product Category Auto Assign Lists:**

List contains product Manufacturer / Model Name and will auto categorize future listings into the specified categories. This can also be done by UPC / ISBN numbers.

⇒ Product will add by admin r dealer? Can you please provide brief description?

Admin can add a Manufacturer and Model / Product Name manually. Admin can also assign or modify a product category to a Manufacturer / Model. This way when an item is imported from a data feed, it can be auto categorized into a specific category. This is set up so an admin can easily add lots of manufacturer / models into the system.

Statistics are kept as to which categories a particular manufacturer / model are assigned to by the various dealers and users. (dealer and user stats are kept separate). So if enough dealers / users assign an item into a specific category, future listings will auto assign it into the same category. Dealers / users can change the assigned category and stats are kept on the changes. (From:, To:, Count).

Admin can also edit or remove mappings of Make / Model to Category as well as see the statistics as to where dealers and other sellers are placing a particular Make & Model.

This might need to be also visible to Customer Service workers (not just administrators). We should probably have a setting that allows this.

Also, note that things can be auto categorized into multiple auction websites. So given a Brand / Model it maps to a Website / Category.

For example, some dealers sell both boats and ATVs. The boats would map to the boat website and the ATVs would map to the ATV website.

⇒ So, the data can be imported via XML files or can be added manually?

**The inventory control system we will be working with initially stores the inventory for a boat dealer as an XML file on the dealer's website. (So all you need to know is the format for the XML file and where it is located to be able to see what is in the dealer's inventory.)**

**So we want to be able to have the system scan a dealer's XML file periodically and add new items into the auction / sales system or remove them (if they were sold and removed from the inventory control system.)**

#### **Logos:**

Logo List

Logo Approval

⇒ It's also on admin side there is one menu call "LOGO" and there is logo list by dealer? And there is Approval button for that?

⇒

**There is a list of logos that different dealers have submitted. They need to be moderated as mentioned above. But even after the logo has been moderated, we want to be able to look them up for customer service reasons.**

**Set Pricing:**

Per Item Listing Pricing

Per Month Pricing (list all you want):

Free Listing Period: Days / Months

⇒ Also, on admin side that one menu item “**Pricing**” there is list of items is categorized by dealer or it's a global?

**Global.**

**Standard Emails**

A list of standard e-mails that are sent to users to let them know of various things. The e-mails can be editable and saved by the Admin.

⇒ Can you please provide the list type of emails?

**\* A reminder e-mail that their account is going to renew and their credit card will be charged.**

**\* A weekly / monthly list of the items that they are selling or stats.**

**\* Password reminder e-mails**

**\* A sale was made.**

**\* Etc.**

## **Customer Service Functions [ It's not an admin but have different access?]**

**YES, think of Admin as a SysAdmin. You wouldn't want to have your customer service team to be able to have Root access to the system. They should only have access to what is needed to perform their jobs.**

Some of these functions are duplicated under the Administrator section.

### **Add Dealer Manually:**

Just what it sounds like. Dealers that have been added manually are automatically approved and skip moderation.

### **Pending Dealer Accounts**

(Moderate dealer accounts that have been applied for) Accounts can be edited by the moderator.

### **List Dealer Accounts:**

View Details / Activate / Deactivate / Deactivate N Days / Credit / Refunds

### **Logo Moderation and Approval:**

Dealers can submit the logo for their dealership. It needs to be able to be moderated.

### **View Dealer's Listings**

View / Activate / Deactivate various listings by a dealer.

### **Contact User:**

Contact a specific dealer via webform. An e-mail is sent to them. They can respond via a webform. A history of communication is kept for reference.

# User Functions:

## Sign Up

Name / Address / Company / Website / Email / Phone Number/etc.

Select: Dealer / Manufacturer / Service Provider

### Update Contact Information:

Name

Company Position

Address

Company Name

Company Website

Admin Email

Customer Service Email

Phone Number

Dealer Logo

Standard Terms of Sale

Note, when contact info is changed, old contact information is kept on file. This is for security purposes in case the seller is a scammer. The old version is available for view by customer service or administrator using their look up tools.

### Select Inventory Source/s

Set Inventory Source Information

More than one inventory source may be selected.

⇒ So, user can select one or more product like that?

**The dealer can pull their listings from one or more inventory sources. For example, they may have two different stores and they want to be able to pull their inventory from each store. (Each store would be its own inventory source.)**

### CSV / Excel File Import

Import items via CSV / Excel file.

**Imported Inventory List [ Can you please provide brief detail on this? ]**

**This is a list of items that have been pulled from the dealer's inventory source (their inventory control system for example) and brought into the portal. However, the dealer may not want to actually place ads for all the items that are in their inventory. So, the items need to be imported and brought into a list and then they can then select the items that they want to sell or what the options are for the sale (such as promoting certain items).**

Users can choose to import all or selected items into the auction / sales system as well as set bulk options for their bulk listings. When an item has been imported, it is removed from the imported inventory list. The user can then publish additional items (with potentially different sales options) and the process continues. There is an option to clear the list.

Dashboard. Stats for the user and the user's listings.

Active Auctions List

Sold Items List

Past Buyer's List

User Name / Items Purchased (History) / Addresses / etc. Contact Info / Contact Form.

**Billing:**

Turn On / Off Auto Billing

Add / Update / Delete Billing Information

Select Active Billing Source

⇒ Can you please provide brief details?

Dealers will be charged for listing their items or for various promotional features that they may choose to purchase.

They will be charged either on a per-item or on a monthly basis. (For example, list all the items you want for \$40/month.)