CMX

CollisionMateX

**Shop Admin
High Level Requirement
Document**

Version 1.0

Version History

Version	Date	Author	Reviewer/Approver	Remarks
V1.0	10-03-2024	Stuti Sharma	Mike Lopez	

Contents

INTRODUCTION

The CMX project aims to create a new software system for collision repair centers. The goal is to create a strong and easy-to-use platform that helps repair centers work more efficiently, improves how they deal with customers, and can change as the industry changes. By doing things this way, the project can keep getting better over time and adapt to whatever the future brings, which could make a big difference in how collision repair works.
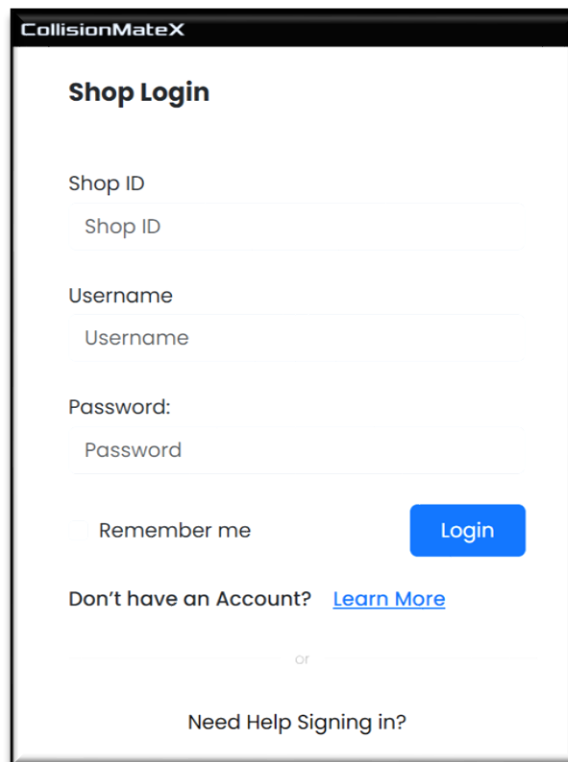
SCOPE OF THE DOCUMENT

This document describes the functionality of the shop admin module, focusing on its overall flow and features. It outlines the key tasks and capabilities of the module, providing a high-level overview of its operation within the system. The document aims to give a clear understanding of how the shop admin module functions and what it offers to users managing the shop's operations.

SYSTEM FLOW

FEATURES OF SHOP ADMIN

- **Log in**
  - o The shop admin will log in using their shop ID, username, and password.
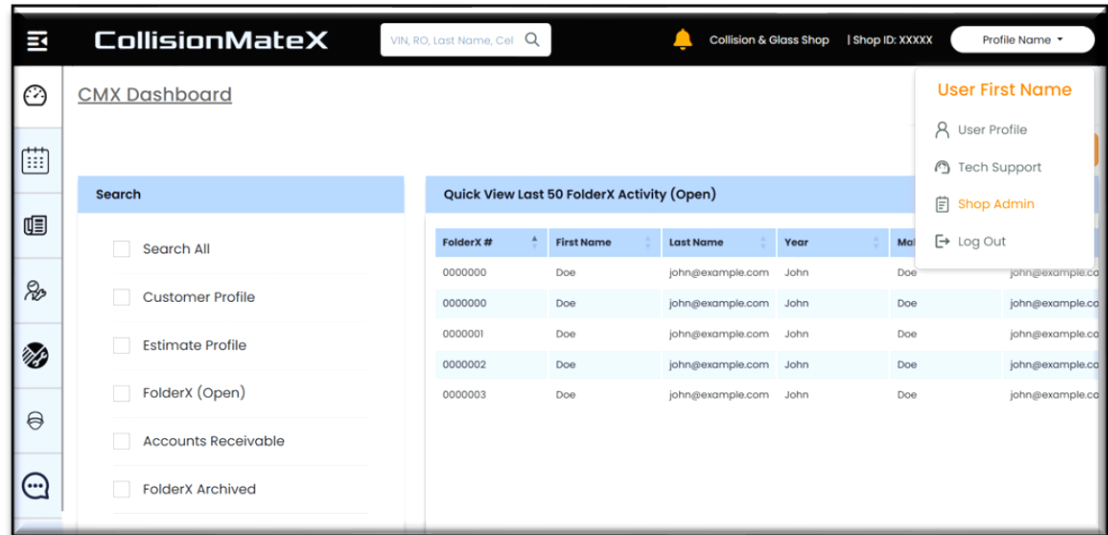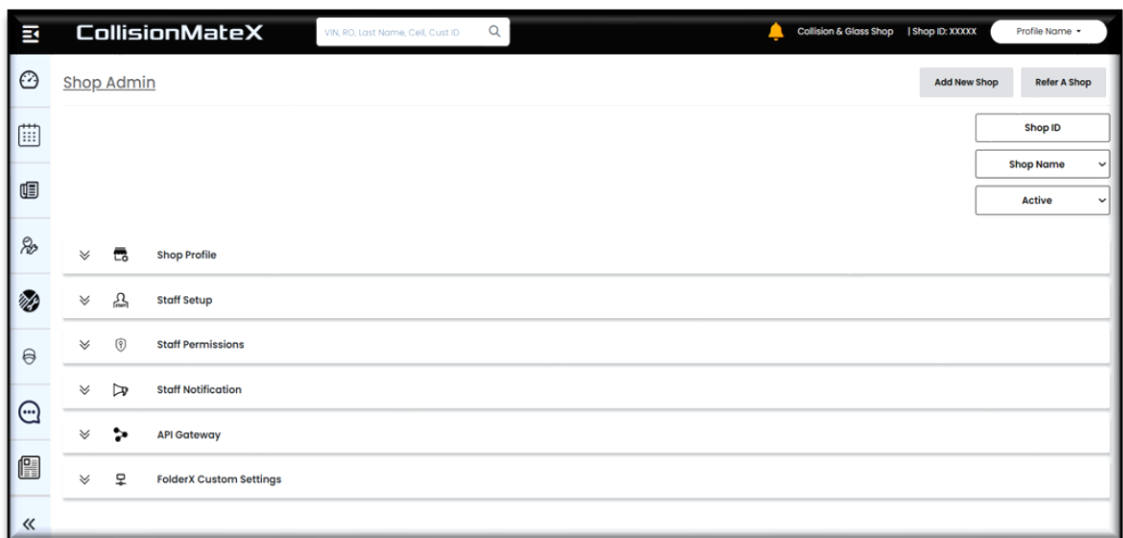

Screen 1: Log in

- **Dashboard**
  - After logging in, the shop admin will navigate to the CMX dashboard, where they will choose their profile name.

Screen 2: Dashboard

Screen 3: Shop Admin

- **Shop Profile**
  - **Shop Details**
    - The shop admin will navigate to the shop profile section and enter the details of the shop, including shop name, address, city, state, zip code, country, date format, time zone, and time format.
    - He will indicate whether the shop has a website by clicking "Yes" or "No" and enter the website if applicable.
    - The admin will also enter his full name, upload the shop's logo, and input contact and fax details.
    - Finally, he will click "Save" to save the shop details.
    - If he wishes to edit the details, he will click "Edit," and if no changes are needed, he will click "Cancel."

Screen 4: Shop Details

  - **Shop Rates**
    - In the shop rates section, there will be estimated rates for labor types along with corresponding labor type codes.
    - The flat rate for each supplied labor type will also be displayed.
    - The shop admin can apply tax types and tiered taxes as needed, and rates will be applied accordingly.
    - The two-tiered tax system will be applicable for selected states.

Screen 5: Shop Rates

- o **Settings**
  - In settings, the system setup will be configured for Estimate#, Repair Order#, Purchase Order#, and Invoice# (In-house Invoice).
  - These entries will be numeric. If the admin selects the automatic option, the system will generate numeric values automatically.
  - If the admin selects the manual option, he will need to enter numeric values manually.
  - If no option is selected, numbers will not be populated.

Screen 6: Settings

- • **Staff Setup**
  - o In the staff setup section, details of each staff member will be displayed, including their status (active or inactive).
  - o Each staff member's title, first and last name, email address, cell phone number, and user ID will be shown.
  - o The shop admin can also search for staff members.

Screen 7: Staff Setup

- o **Add Staff**
  - Shop Admin will add new staff members.
  - The shop admin will enter the contact details of the staff members, including their first name, last name, employee title, address, city, state, zip code, country, work email, cell phone number, and additional contact details.
  - He will also input the dates (hire date and termination date) and date of birth of the staff member.
  - Emergency contact details for the staff members will also be entered.
  - The shop admin will enter the login credentials (username and password) for the staff members and then send them through SMS or email to them.
  - After entering all this information, the admin will click "Next."

Screen 8: Add Staff

o **Notification**
  ▪ From here, the shop admin will enable or disable permissions for staff members.
  ▪ He will enable notifications for staff members who need to receive them, and notifications will be delivered via email or SMS.
  ▪ After completing these actions, the admin will click on the "Next" button.

Screen 9: Notification

o **Pay**
  ▪ In the third step, the shop admin will proceed to handle payments for the employees.
  ▪ The admin will see the name of the employee for whom the payment needs to be processed.
  ▪ Then, the admin will select the pay term (Yearly/Monthly/Bi-Weekly/Weekly) and pay type (Flat rate, hourly, salary, commission).
  ▪ If the pay type is commission, the admin will set commission categories and commission rates.
  ▪ Finally, the admin will select the shop admin rate type (flat rate, pay per hour, salary (12 months)).
  ▪ Once all these details are set, the admin will click on the "Complete" icon to finalize the payment setup.

Screen 10: Pay

- **Staff Permissions**
  - The staff permissions set up by the shop admin in the staff setup section will be displayed here.
  - The shop admin will also have the ability to search for staff members.
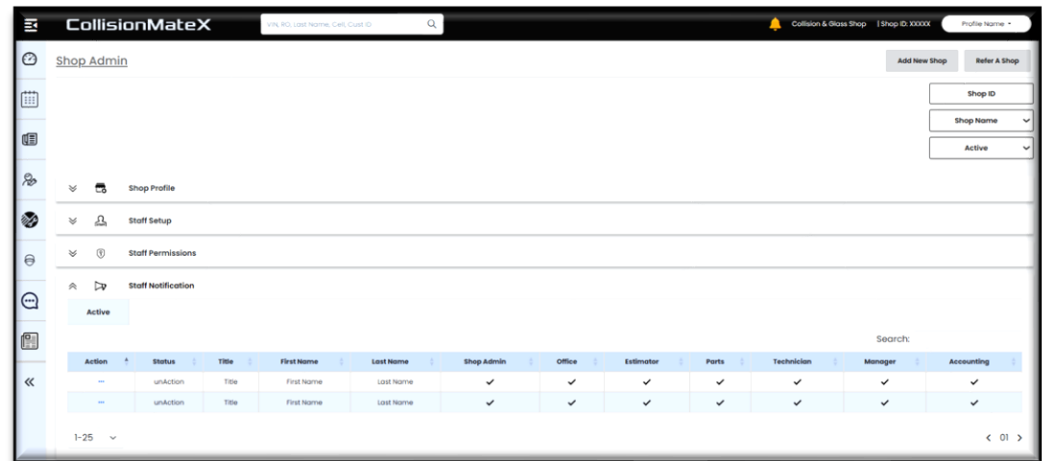

Screen 11: Staff Permissions

- **Staff Notification**
  - o The staff permissions set up by the shop admin in the staff setup section will be displayed here.
  - o The shop admin will also have the ability to search for staff members.

Screen 11: Staff Notification

- **Add New Shop**
  - o The shop admin will click on "Add a shop" to add the details of the new shop.
  - o He will enter the new shop's details such as shop ID, shop name, contact name, phone number, and email address.
  - o After entering the details, he will click on "Submit."
  - o The message will then be sent to the super admin, who will proceed to add the new shop.
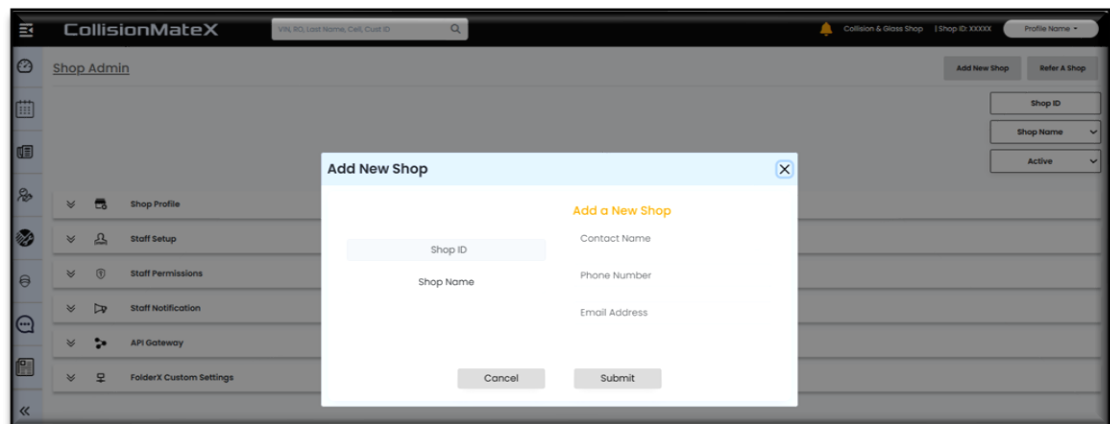
Screen 12: Add New Shop

- **Refer a Shop**
  - The shop admin will click on "Refer a shop" and then enter the shop details including shop ID, shop name, phone number, and email address.
  - After entering these details, he will submit them. The message will then be sent to the super admin.
  - The super admin will then proceed to add the shop referred by the shop admin.
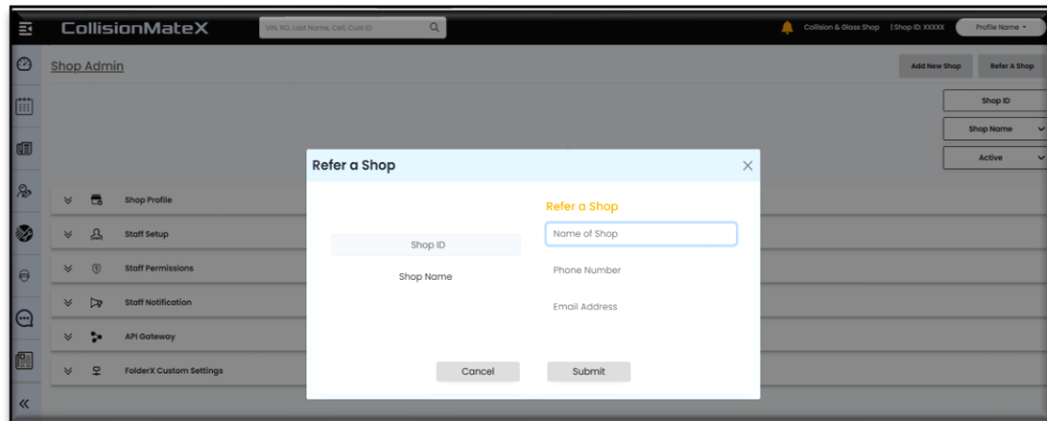
Screen 12: Refer a Shop

  - If the shop admin manages more than one shop, those shops can be linked together within the system.
  - This linkage allows for centralized management and coordination of multiple shops under the same administrative control.

- **Folder X Custom Settings**
  - **Timeline**
    - For every task, there exists a default timeline.
    - The shop admin can customize this timeline by editing it and then save the changes.
    - Any custom modifications made to the timeline will alter the timeline for accessing Folder X files.
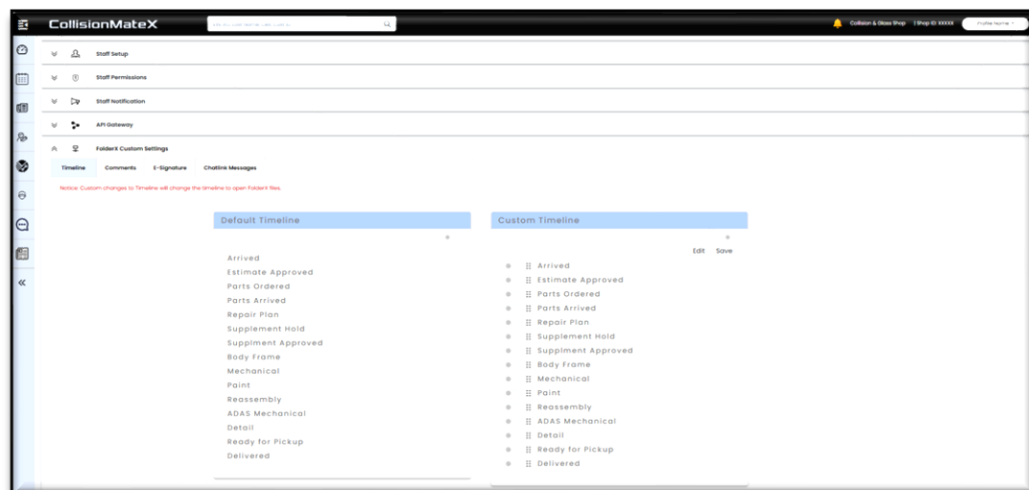
Screen 13: Timeline

  - **Comments**
    - Here, the shop admin can add, edit, and save comments related to customers, insurance, parts, payments, repairs, and supplements.

- Shop admin can enable or disable the comments.
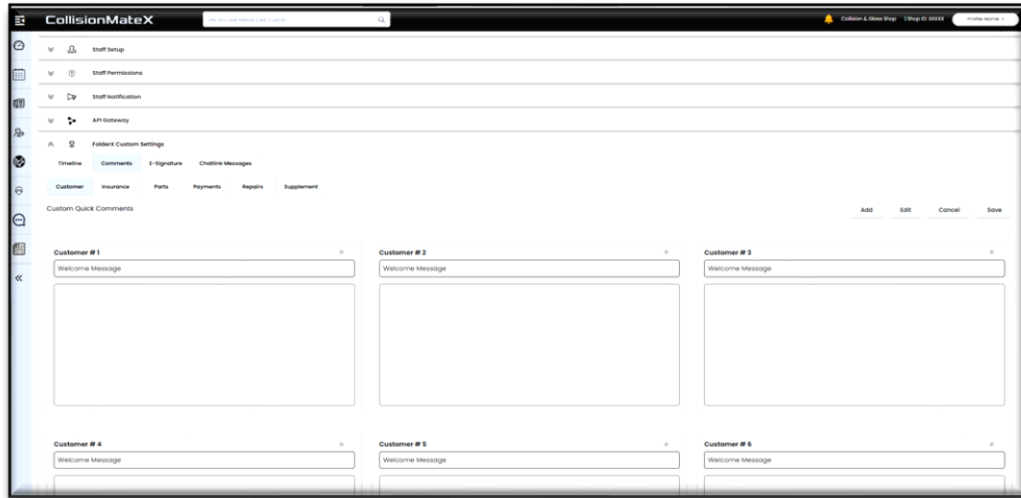
Screen 14: Comments

o **E- Signatures**
  - The shop admin has the capability to enable or disable e-signatures for the authorization of repairs I, II, and III.
  - Additionally, the admin can edit and save e-signatures as needed.
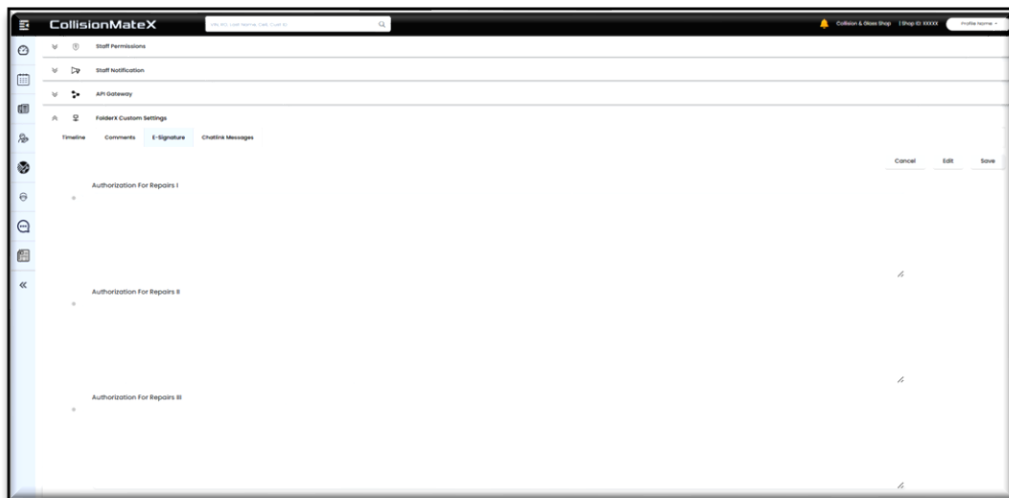

Screen 15: E-Signatures

o **Chatlink Messages**
  - The shop admin will add, edit to chat link invites for customers related to the following messages:
    - ✓ Welcome message
    - ✓ Photo X invite message for the virtual photo
    - ✓ E-sign invite message
    - ✓ Messages related to vehicle updates
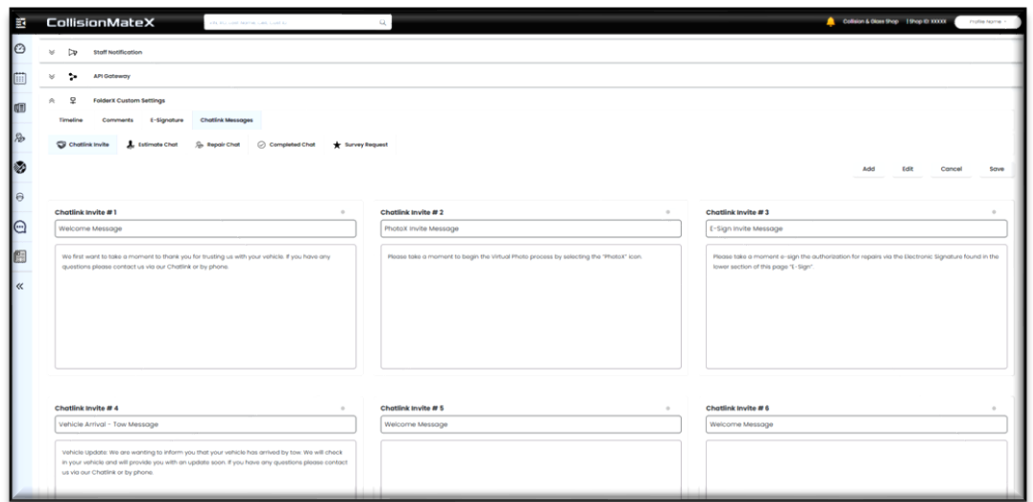
Screen 16: Chatlink Messages

o **Estimate Chat**
  ▪ The shop admin will add, edit to estimate chat updates to customers for vehicle-related updates, including preliminary estimates, insurance reviews, insurance estimate approvals, and other messages pertaining to vehicle updates.
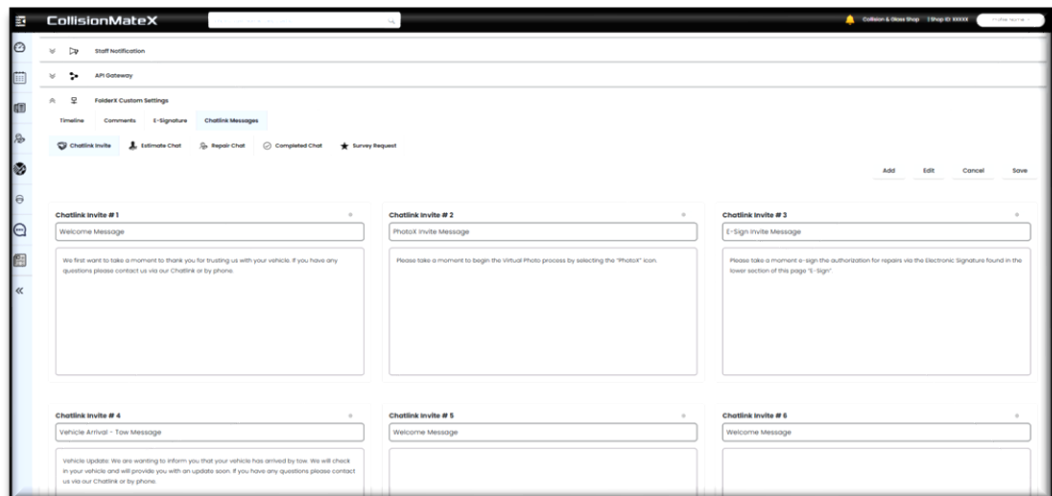
Screen 17: Estimate Chat

- o **Repair Chat**
  - ▪ The shop admin will add, edit to chat updates to customers for vehicle-related updates, including preliminary estimates, insurance reviews, insurance estimate approvals, and other messages pertaining to vehicle updates.

Screen 18: Repair Chat

- o **Completed Chat**
  - ▪ The shop admin can add, edit, or update completed chat messages related to vehicle completion updates.
  - ▪ These updates may include information such as the final amount, pickup hours, and other relevant details.
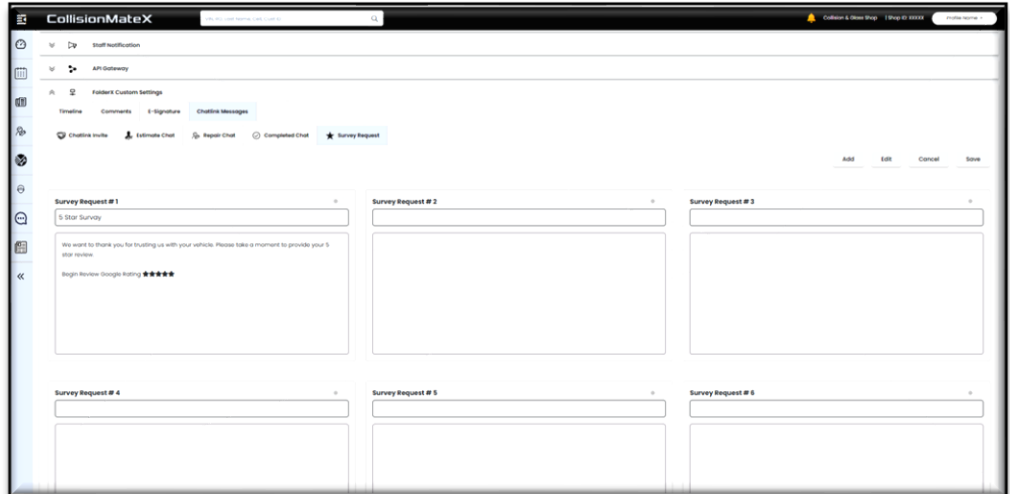

Screen 19: Completed Chat

- o **Survey Request**
  - The shop admin can add, edit, or update survey request messages for customers, which are related to reviews and ratings.

Screen 20: Survey Request

Note: <mark>The shop admin will be able to enable or disable these chats.</mark>

USER PROFILE

TECH SUPPORT