CollisionMateX

Estimate Profile

Functional Requirement Document

Version 1.0

Version History

Version	Date	Author	Reviewer/Approver	Remarks
V1.0	20-03-2024	Stuti Sharma	Mike Lopez	

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INTRODUCTION

The CMX project endeavors to develop an innovative software solution customized for collision repair centers. Its objective is to craft a robust and user-friendly platform, enhancing operational efficiency, customer interactions, and adaptability to evolving industry dynamics. This approach ensures continuous improvement, enabling the project to remain flexible and responsive to future enhancements, potentially revolutionizing the landscape of collision repair services.

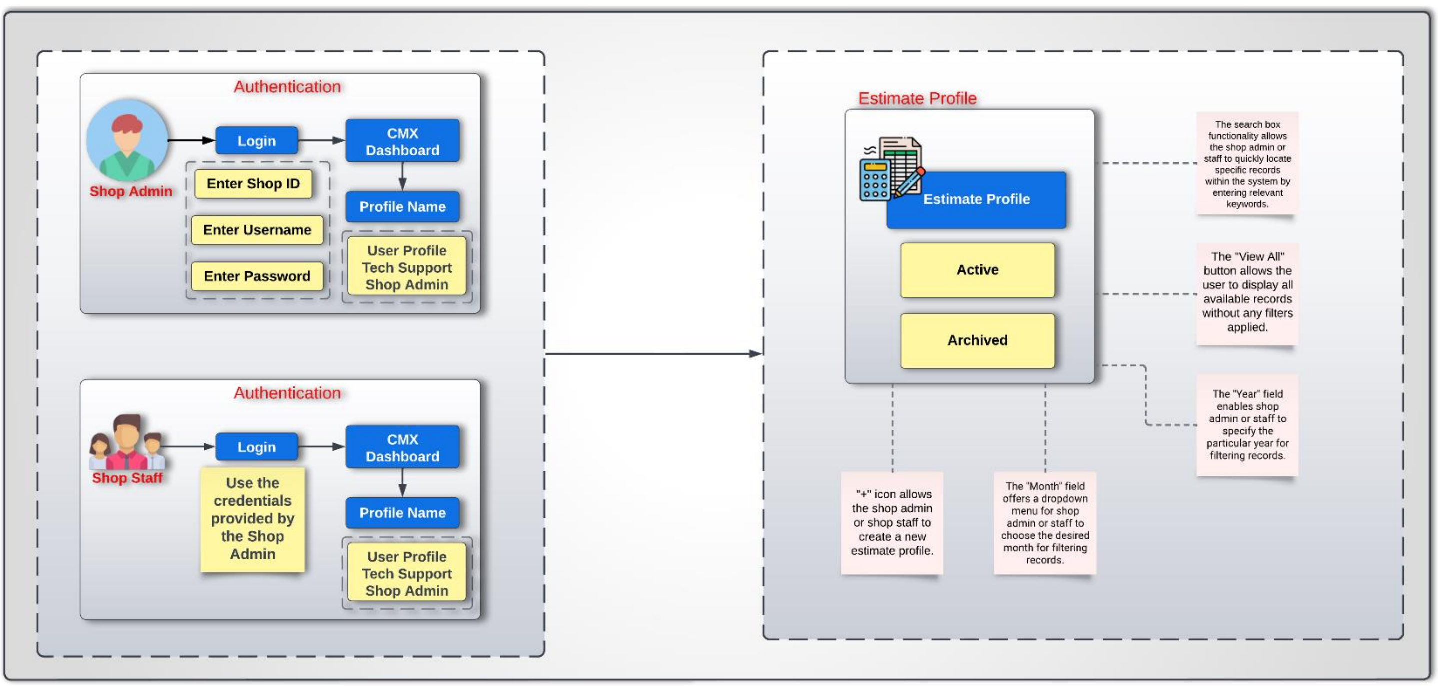
SCOPE OF THE DOCUMENT

The scope of the document is to define and explain the estimate profile module. It aims to provide a clear understanding of the features, functionalities, and objectives of this module within the system.

BUSINESS OBJECTIVE

The business objective of the estimate profile module is to streamline the estimation process and improve operational efficiency within the shop. By segregating estimates into "Active" and "Archive" tabs, the module aims to facilitate better organization, tracking, and management of estimates. This enhances productivity, reduces errors, and ultimately leads to faster turnaround times and improved customer satisfaction.

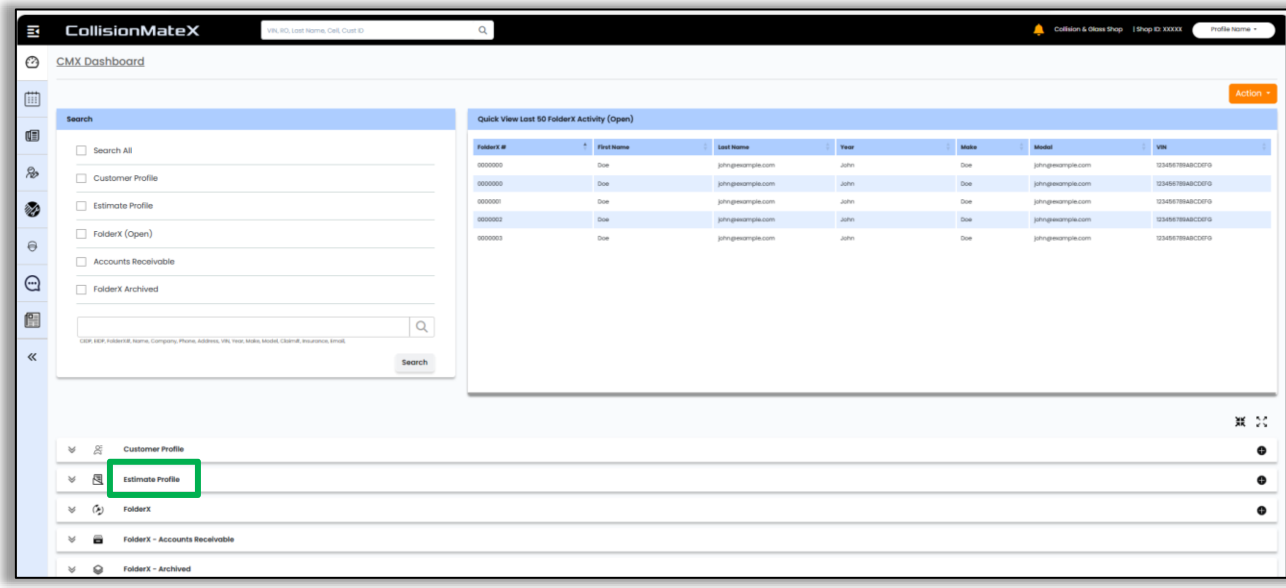
SYSTEM FLOW



FEATURES OF ESTIMATE PROFILE

Note:

- The shop admin will log in using the credentials:
    - shop ID
    - username
    - password
- The shop staff will also log in from this page using the credentials provided to them by the shop admin.
- Upon logging in, they will navigate to the CMX dashboard.
- From there, they will click on "Estimate Profile" to access customer details.



Screen 1: Dashboard

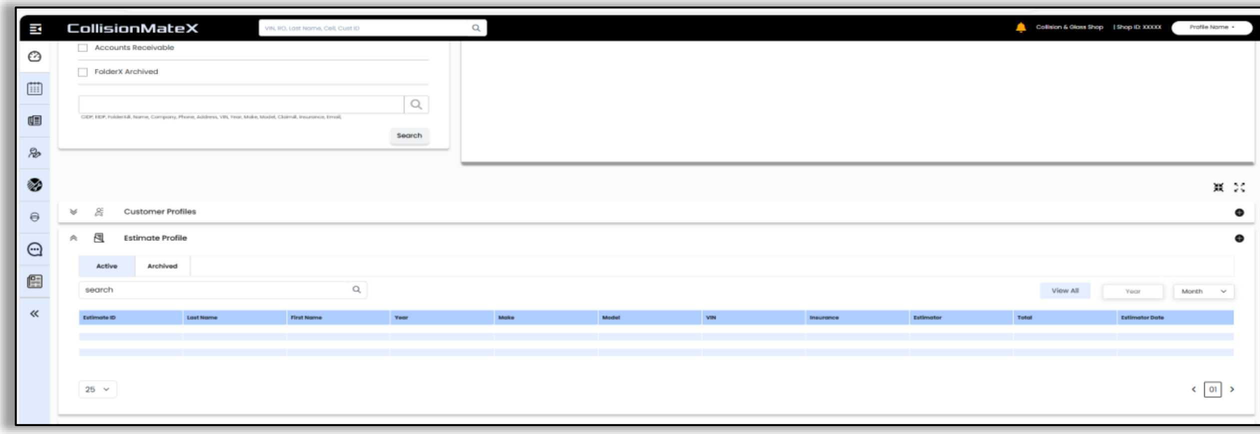
- ## Estimate Profile
    - ### Tabs
        - ***Active***

✓ This tab displays estimates that are currently in progress or pending approval.

✓ Users can actively work on and manage these estimates as they move through the estimation process.

✓ Within the "Active" tab, the following fields are displayed:

- **Estimate ID**: A unique identifier for each estimate.
- **Last Name**: The last name of the customer associated with the estimate.
- **First Name**: The first name of the customer associated with the estimate.
- **Year**: The year of the vehicle being estimated.
- **Make**: The make of the vehicle being estimated.
- **Model**: The model of the vehicle being estimated.
- **VIN**: The Vehicle Identification Number of the vehicle being estimated.
- **Insurance**: Information regarding the insurance provider associated with the estimate.
- **Estimator**: The individual responsible for preparing the estimate.
- **Total**: The total estimated cost for the repair or service.
- **Estimator Data**: Additional information or notes provided by the estimator regarding the estimate.



Screen 2: Active Tab

- ***Archived***

✓ The "Archive" tab contains historical estimates that have been completed or finalized.

✓ These estimates are no longer actively managed but are retained for reference or documentation purposes.

✓ In this tab, the same fields are present as in the "Active" tab. These fields include:

- **Estimate ID:** A unique identifier for each estimate.
- **Last Name:** The last name of the customer associated with the estimate.
- **First Name:** The first name of the customer associated with the estimate.
- **Year:** The year of the vehicle being estimated.
- **Make:** The make of the vehicle being estimated.
- **Model:** The model of the vehicle being estimated.
- **VIN:** The Vehicle Identification Number of the vehicle being estimated.
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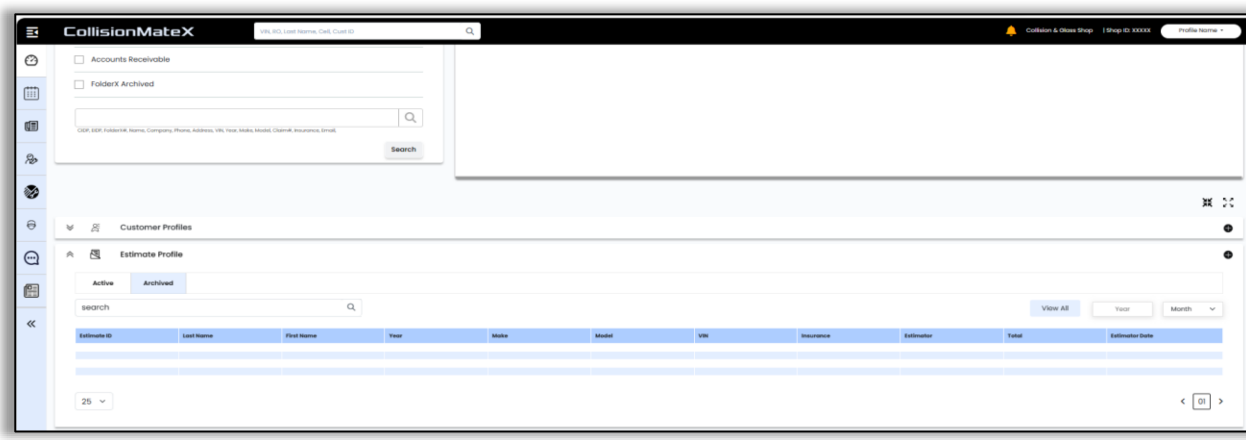


Screen 3: Archived Tab

○ Search Box

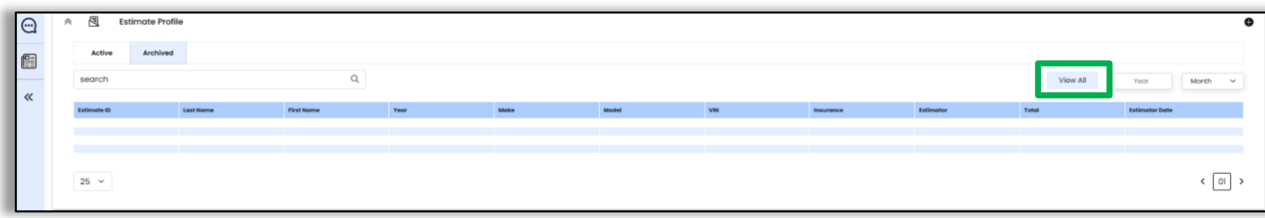
- ✓ The search box functionality allows the shop admin or staff to quickly locate specific records within the system by entering relevant keywords.
- ✓ They can search for records using unique identifiers like CID (Customer ID) or EID (Estimate ID), specific details such as customer name, company name, phone number, address, VIN (Vehicle Identification Number), year, make, or model of the vehicle.
- ✓ They can also search using other relevant information like Folder X #, claim number, insurance details, or email address.
- ✓ This comprehensive search capability enables users to efficiently find the desired records, enhancing productivity and facilitating effective data management within the shop's operations.

Screen 4: Search

○ Button

▪ *View All*

- ✓ The "View All" button allows the user to display all available records without any filters applied.
- ✓ When clicked, this button retrieves and displays every record within the system, regardless of any specific search criteria or filters previously applied.
- ✓ It provides a convenient way to view a comprehensive list of all records, offering an overview of the entire dataset at once.
- ✓ This feature is useful when shop admin or shop staff needs to browse through all records.



Screen 5: View All

- ## Attributes
  - ***Year***

✓ The "Year" attribute allows shop admin or shop staff to input or enter the specific year they want to filter records by.

✓ They can manually type the desired year into this field.

✓ Once the year is entered, the system filters the records accordingly, displaying only those associated with vehicles manufactured in the specified year.

✓ This functionality enables them to refine their search criteria based on the year of vehicle manufacture, facilitating more accurate and targeted searches within the system.

Screen 6: Year

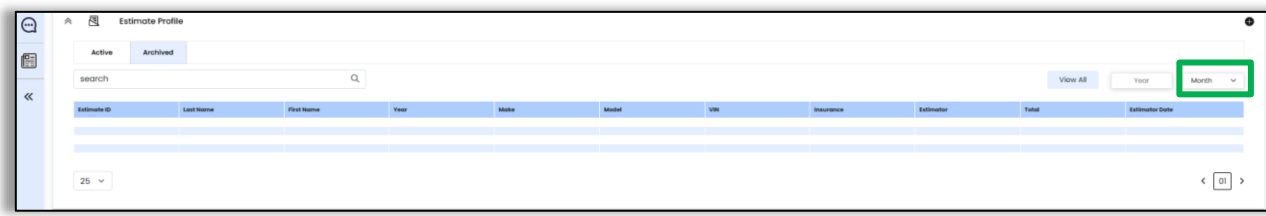
- ***Month***

✓ The "Month" attribute provides a dropdown menu where shop admin or shop staff can select the specific month, they want to filter records by.

✓ They can choose from the available options in the dropdown menu to select the desired month

✓ Once a month is selected, the system filters the records accordingly, displaying only those associated with the chosen month.

✓ This functionality enables them to refine their search criteria based on the month, facilitating more precise and targeted searches within the system.



Screen 7: Month

For example: If shop admin or shop staff enters "2024" into the "Year" field and selects "March" from the dropdown menu in the "Month" field, the system will filter the records to display only those associated with March 2024. This allows them to view records specifically related to events that occurred in March 2024, providing a focused and targeted view of the data within the system.

Icon

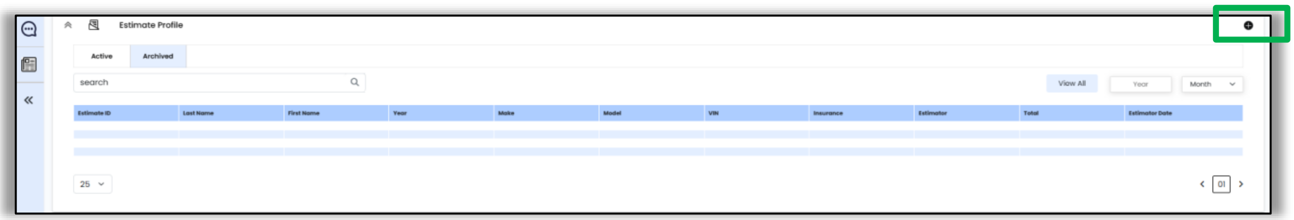
- **+**

✓ In the top-right corner, there is a "+" icon which allows the shop admin or staff to create a new estimate profile.

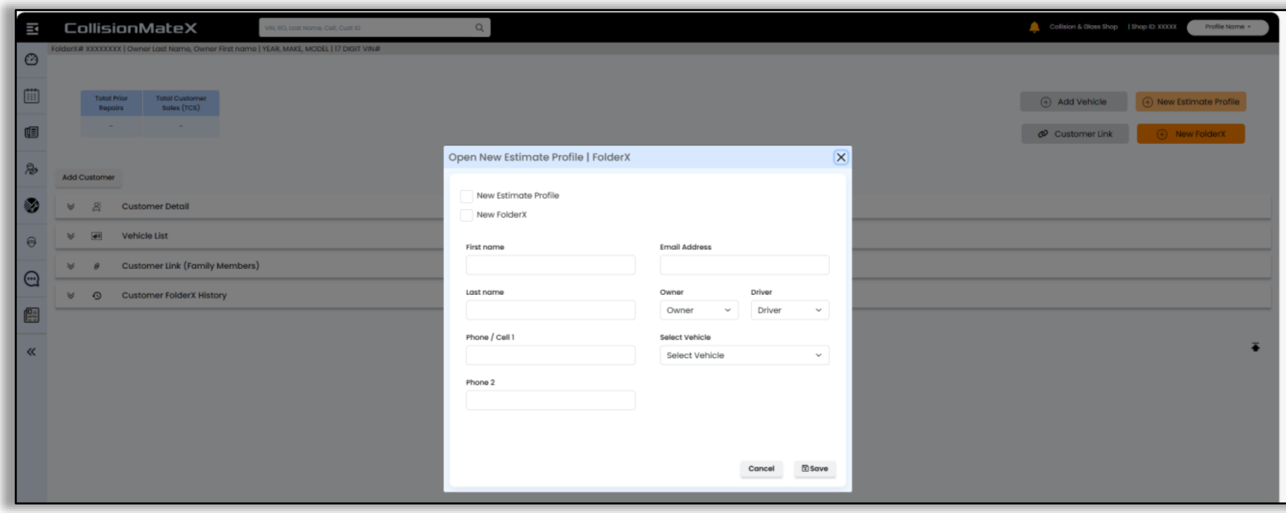
✓ When they click on this icon, it navigates them to the "New Estimate Profile" button available within the customer profile section.

✓ Upon clicking the "New Estimate Profile" button, a pop-up window opens where they can input details into fields such as first name, last name, phone number 1, phone number 2, email address, owner, driver, and select vehicle (owner, driver, and select vehicle options are available as dropdown menus).

✓ After entering the necessary information, they can click the "Save" button to save the new estimate profile.



Screen 8: "+" icon



Screen 9: New Estimate Profile