A black and white logo

Description automatically generated

**CollisionMateX**

CMX Dashboard Profiles I

High Level Requirement Document - *Version1.0*

**Version History**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Date | Author | Reviewer/Approver | Remarks |
| V1.0 | 03/19/2024 | Mike Lopez | Mike Lopez |  |

# High-Level Requirement Document for SaaS for Collision Repair Shop

# Table of Contents

1. 1. Customer Profile Module
2. 2. Estimate Profiles Module
3. 3. FolderX Module (Repair Order)
4. 4. Notifications and Alerts
5. 5. Data Storage and Management
6. 6. Reporting and Analytics
7. 7. Security and Compliance
8. 8. Future Enhancements
9. 9. Tracking System to Prevent Duplication

# 1. Customer Profile Module

- Store primary customer information: address, phone, email.  
- Assign a unique ID number to each customer, used throughout the customer journey.  
- Track all vehicles associated with the customer, including repair and estimate history.  
- Automatically update the customer profile when changes are made in the Estimate Profiles or FolderX modules.

- Customer ID number will be assigned via system generated number. Beginning within C1001 for all Shops within the SaaS

# 2. Estimate Profiles Module

- Create new Estimate Profiles for potential sales.  
- Archive Estimate Profiles after 60 days of inactivity, with options to retrieve or review.  
- Link Estimate Profiles directly to the customer profile and vehicle history.  
- Ensure any changes to customer data within this module are reflected in the Customer Profile.

- Estimate ID number will be assigned based on shop selection within the Shop Admin/Shop Profile/Settings where user will make selection, this includes automatic or manual entry.

All Esitmate ID will begin with EXXXXXX

# 3. FolderX Module (Repair Order)

- Manage repair orders for each vehicle (FolderX).  
- Link each repair order to the respective customer profile and vehicle.  
- Provide detailed information on the repair process, parts used, and service history.  
- Update the Customer Profile and vehicle history based on the repair order details.

- FolderX number will be assigned based on shop selection within the Shop Admin/Shop Profile/Settings where user will make selection, this includes automatic or manual entry.

All FolderX ID will begin with XXXXXX

# 4. Notifications and Alerts

- Implement notification system to alert users when they are about to make permanent changes to customer information within Customer Profile, Estimate Profile or FolderX.   
- Provide confirmations or warnings to prevent accidental data modifications.

Notice: Are you sure you want to make this permanent change to the Customer Profile?

# 5. Data Storage and Management

- Securely store all customer data, vehicle histories, estimate profiles, and repair orders.  
- Ensure data consistency and integrity across all modules.  
- Enable data backup and recovery processes to prevent data loss.

# 6. Reporting and Analytics (Customer Profile)

- Offer comprehensive reporting on accounts receivable, total customer revenue, TPR (Total Prior Repairs), and TCS (Total Customer Sales).  
- Provide insights into business performance, customer trends, and operational efficiency.

# 7. Security and Compliance

- Ensure compliance with relevant data protection regulations.  
- Implement robust security measures to protect customer data and business information.

# 8. Future Enhancements

- Outline potential future enhancements and expansions based on user feedback and technological advancements.

# 9. Tracking System to Prevent Duplication

The system will incorporate a robust tracking mechanism to ensure that there are no duplicate customer profiles. This feature will cross-verify customer information, such as name, contact details, and unique identifiers, to prevent the creation of duplicate entries. Any attempt to register a customer already present in the database will trigger an alert, prompting the user to review the existing profile. This not only maintains the integrity of the customer data but also streamlines the customer management process.

# 12. FolderX Accounts Receivable - Options and Reporting

The FolderX Accounts Receivable module will feature two primary categorizations for repair orders: 'Delivered' and 'In Shop.' This distinction will enable the repair shop to manage and monitor their financials more effectively, ensuring a robust cash flow and minimizing payment delays.

## Key Features

Delivered and In Shop Categorization:  
- Delivered: Focus on tracking and receiving payments for repaired and returned vehicles.  
- In Shop: Monitor ongoing jobs and associated costs and revenues to manage cash flow efficiently.

Date Matrix Reporting:  
Provide detailed financial reports based on specific timeframes to assist in financial planning and analysis.

State-of-the-Art Updates:  
Real-time financial data updates and alerts for outstanding payments to enhance revenue collection.

# 13 FolderX Archived - Management and Storage Optimization

Once a repair order (FolderX) is marked as 'Posted' or closed and all financial transactions are settled, it can be moved to an archived state. This feature helps optimize storage space while keeping records accessible for future reference.

## Key Features

Archiving Process:  
Compress and store completed FolderX entries, maintaining essential data in a compact format.

Unarchiving Capability:  
Facilitate easy retrieval and restoration of archived FolderX entries, ensuring data availability when needed.

Integration with Reporting and Analytics:  
Include archived entries in reports for a comprehensive business analysis and compliance with data retention policies.

All files after 30 days fall in Archived status. There will not be a divided list within this stage.