PROJECT TITLE	Halo CRM and Mobile Applications
CLIENT	Halo Auto Care, Australia
DOCUMENT NAME	Scope of Work
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Innovantes

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SCOPE OF WORK

The scope of work for the project includes all planning, execution and implementation. The following activities and deliverables are included in the SOW:

- **UI and UX design:** Designing the look and feel of the Mobile app and the CRM.
- **Development:** Development of the solution as per the requirements mentioned in Section 4.0 and the FRD
- **Testing and Deployment:** Testing and deployment of the solution on the client's hosting server..

MAJOR FUNCTIONAL REQUIREMENTS

User Type	Module	Sub Module	Description
Dealership	**CRM**	Login	1. The dealership will be able to login to the CRM using the credentials provided by the Halo Admin. The credentials will consist of the email ID and the password. The Halo Admin would just generate a single login per dealership. 2. **There will only be 1 login to the CRM per dealership.** This will be the master login for that dealership through which it would be able to create or deactivate the app logins for their Sales Consultants (SCs). SCs will only be using the app for all the working. 3. The dealership will also be able to view the following statistics in their CRM login: No. Of plans sold, total Revenue (Revenue in the dealership's case would be the price at which they sold the plans), Total Profit (Revenue minus the cost of the plans to the dealership). 4. The dealer would also be able to download (in a CSV format) the list of customer and all plans they sold. The report would consist of the Customer Name, Mobile Number, Email Address, Address, Suburb, State, Plan Name, Tenure in months, Price, Date of Purchase, Expiration Date.
Dealership	**App**	Login	1. The SCs will be able to login to the application using the credentials provided by their dealership. If their login is disabled by the dealership, they will not be able to use the app any longer.

Dealership- SC	**App**	Enquiry/ Booking	1. In the app login, the SC will be able to open an Enquiry form and enter the details of the customer- Customer's Name, Email, Phone Number, State, City, Suburb and click next. 2. On the next screen, the SC would enter the customer's VIN/Rego and the API will fetch all the details of the vehicle. Once the vehicle details have been fetched they will be pre-filled in the form in the app. 3. Another API will fetch the details of the cost of wheels and will update the same in the app screen. This API will need the user to enter their Part Number of the wheel/Tyre. The first API will get the part number on the basis of the VIN and the based on the part number returned, the second API will get the cost of the wheels. 4. The SC can change the details and submit the form. The SC will be able to edit the wheels from a drop down that will fetch the values stored in the masters in the backend. 5. **At this point this information would be classified as a Lead and saved.** 6. On submission, the backend algorithm will calculate the membership fee based on what the customer provided and present the various membership tenures. The page will display all options. There will be 3 options for the user to choose from- **Car without Wheel & Tyres, Only Wheel & Tyres, Whole Car including Wheel & Tyres.** 7. The app will also fetch the eligible repair types from the repair type masters as entered in the CRM. 8. The SC engages with the customer and once the customer agrees, the SC can edit the Sale Price. The system will check if the Sale Price is not over the List Price (Ceiling Limit). There will be check on the floor amount, the SC can enter any amount below the ceiling limit and click Save. 9. The SC will not have to sign on the app and confirm that he has read all the terms carefully and explained the same to the customer. Once he signs, on the next page the app will prompt the SC to get the customer's signature on the screen. 10. Once the customer has signed, the membership number will be generated and en email will be sent to the customer and the dealership's email ID. **At this point, the status of the customer will change from lead to sale/registered. The backend will also automatically create add the expiration date of the plan they purchased.** 11. If you have a document with the Terms and Conditions of the membership, the same can also be sent to the customer's email and the Dealership's email. **The document has to be a standard one. The document will not be generated by the system. The PDF copy will just be sent to the customer.** 12. Apart from the confirmation SMS to the user, the user will also be sent a link to download the app from the Play Store and the App Store. The user's credentials will be automatically generated once the membership has been purchased and the same will be sent to the customer in the same SMS.

Customers	**App**	Download App	Customers will be able to download the app from Android play store and App store.
Customers	**App**	Direct Sign Up	1. Customers can sign up on the app and will have to provide the following details: Name, Phone Number, State, City, Suburb. 2. The customer will be verified with an OTP (One Time Password) that will be sent on their mobile number. The user will have to enter this OTP to complete the sign up process. 3. Email will be an optional field in the sign up process. After the sign up, a pop up in the app will ask the user to verify their email. Verification will be through an OTP sent on their email. The user will enter the OTP in the pop up. If the OTP matches, the email ID will be stored against that user in the database. 4. Customers can create their own password while signing up. 5. Once the customer creates the account, the information will be stored in the database. 6. Upon account creation, the customers can purchase the Halo membership. For purchasing the membership, the customer will need to enter their vehicle details (Rego/VIN). 7. Upon entering the details, the API will get the vehicle details and pre-fill the same in the form and present the customer for review. The customer can change the information if they want and click submit. 8. Once the customer click on Submit, the backend algorithm will calculate the membership fee based on what the customer provided and present the various membership tenures. The page will display all options for the customer- Tenure along with the fee for every membership plan computed based on the customer's input. 9. The customer can click to pay and the payment gateway integrated in the app will open up for payment. Once the payment is successful, the customer will be sent an email and a SMS to their mobile with the membership details. 10. The customers can purchase multiple membership plans under one login i.e. If the customer wants to purchase plans for multiple cars, he/she can do it.
Customers	**App**	Login	1. The customers can sign in to the app using their email ID as the username and the password that they set up while signing up on the app. 2. Forgot Password: If the customer does not remember the password, he/she will be able to click on the forgot password link. The next page will ask for the user's email ID. If the email ID exists in our database, the user will be sent an email with a one time password on their email ID. The user can use the same to generate a new password from the app.

Customers	App	**Repair Request**	1. Once logged-in, the customers can raise a new repair request. 2. In case the customer has purchased multiple membership plans from their login, he/she will have to select one of these for raising a new request. 3. Next, the customer will have to select the repair type from the drop down menu and add the photographs. Multiple photographs can be allowed. 4. **The customer will also have to provide the address details where they want the repair to be performed i.e. the Complete address, State, City, Suburb. They will provide this information in the text boxes. The customer can use the Google location that can be integrated in the app.** 5. Once the customer submits the request, a message will be displayed, '**Thank you for raising the repair request. Our team will review this and get back to you at the earliest**.' 6. The status of that request will change to **'Awaiting Approval'** 7. The customer will not be able to make any modification to the request once it has been raised. 8. The customer will be able to cancel the request if it has not been approved. 9. If the request if rejected, the status of that request will change to 'Rejected (Ineligible Repair)' and it will have the details of the comments that the Admin put in while rejecting the request. In this case the Admin will enter the cost of the repair and the user can accept it. This will prompt the user to pay for the repair. 10. If the request is accepted, the status will be displayed as '**Conditionally Approved**' and the customer will be asked to make the payment. The payment button will be activated against the request. The customer can use the payment gateway that will be integrated in the app to make the payment. Once the payment has been received, an invoice will be generated and the payment details will be updated against that. The customer can opt to pay at the time of repair. 11. After the payment (if the customer opts to pay for the service), the customer will be asked to select the preferred day of repair. The backend will have some days as deactivated for that customer. That will be based on the customer's suburb (Address at which the customer wants the repair to be done). Customer will be provided with an input box that will fetch the address details from Google as and when he/she types it. 12. Once the job has been allocated to the contractor by the Halo Admin, the status of the job will changed to Scheduled in the customer's login. 13. The customer will be able to view the date and time of repair as entered by the CRM Admin. 14. The customer will be able to view the payment details in their login.

Customer	App	**Previous Jobs**	1. The customers would be able to view the list of their requests and the status against each one of them. 2. The list of status will be as follows: Awaiting Approval, Rejected, Conditionally Approved, Scheduled**,** Completed, Cancelled, Rejected at Location.
Customer	App	**Renewals**	1. When the customer's plan is going to expire, they will be able to renew the same through the app. 2. The renewal link will become active 30 days before the expiry and the also will compute the new price based on the inputs already saved. If the customer wants to edit any information, it will only be able to edit select fields like wheels, etc. Other information cannot be edited.
Halo Admin	CRM	**Approvals**	1. The Halo Admin will be able to view all the requests raised by the customers. 2. Once the Halo Admin receives the job, it will either provide a conditional approval or reject it. 3. When a new request is raised, it will go to the bucket- Awaiting Approval. If the request if rejected by the Halo Admin, it will move to 'Rejected (Ineligible Repair)'. The Admin will be able to update a new price for the job and share the same with the customer for approval. If the customer approves it, it will be allocated to the Sub Contractor. If it is rejected by the customer, the WF will end. 4. If the request is cancelled by the customer, the status will change to 'Cancelled'. **The customer is only able to cancel the request till the time it has not been conditionally approved.** 5. If the Halo Admin approves the job, the same will move to **Conditionally Approved- Awaiting Allocation**. 6. Once allocated to the contractor, it will move to the stage- '**Scheduled**' 7. Once the repair has been performed by the contractor, it will move to- **Completed**. 8. If the Admin rejects it, it will put the comments for the rejection. These comments will be visible to the customer in their login. The Admin will have the option to send a quotation to the customer for this job separately. 9. Once the customer has made the payment, the Halo Admin will be able to view the details of the selected days and check with the sub contractors if they are available. If yes, it will allocate that to the sub contractor. The status of this job will now change to **Scheduled.** 10. If the sub contractor is not available on that day, this will be handled offline (manually) by the CRM admin and after getting an approval from the customer and the contractor, it will enter the date and time suitable to both the customer and the contractor.

Contractors	App	**Repairs**	1. Once the job has been allocated to the contractor, it will be further able to assign that job to one of the technicians. 2. In case the contractor is the technical himself, he will allocate it to himself. The technical will get the details of the job including the photographs updated by the users in their app. 3. The technician will go to the location of the customer. 4. If the technician feels the repair falls under the approved category, it will approve the job in the app. 5. Once the job has been approved, it will perform the repair and after completion close the job on the app. 6. Once the job has been completed by the technician, the status of the job will change to 'Completed'. 7. If the technician feels the job does not meet the creiria, he will be able to Disapprove the job. 8. In this case, the status of the job will change to 'Rejected at Location'. 9. In case the customer wants to get another repair done when the technician is on the premises, he will have to raise a new request and it will follow the same workflow as in any other job. 10. The payment transaction by the customer will now be revered. **This will be done manually and will not be in scope of the system.**
Halo Admin	**CRM**	**Calendar**	1. The Halo Admin would be able to view the calendar withe all the booked jobs. Booked here means confirmed with the contractor. 2. The Calendar will NOT show the jobs that have been paid for but not confirmed with the contractor. 3. The calendar will show the jobs colour coded by Contractor Only. 4. New jobs cannot be added through the calendar.
Halo Admin/Sub Contractor	**CRM**	**Quotations**	1. If the Halo Admin rejects the job as Ineligible Repair, the Halo Admin will have the option to ask for a quotation for the same from multiple vendors (To be selected manually) 2. Once the job is marked to the Contractors, they will see the same along with the photographs in their CRM logins. 3. They would be able to provide the quotation for those jobs. Quotation would include adding multiple line items and price against these. In the end the total would appear based on the sum of amounts of individual line items. 4. The Halo Admin would then quote the same to the customer based on the quotes received from the contractors. The Halo Admin will just send the overall amount of repair in the quotation and not the individual line items. The Admin will be able to see the quotes against that job and will copy and paste the amount in the customer quote. 5. An assumption here is that the quotation process would just be done once. There would not be multiple quotes that will be sent to the customer.