

Project Report: AD Rewards Affiliated Distributors

Project Start Date: End Date:

■ Completed ■ Upcoming (next 7 days) ■ Late



Milestones and associated tasks

Total Hours: 1502 hrs 15 mins Total Estimated Time: 449 hrs Total Billable Time: 83 hrs 31 mins Total Non Billable Time: 1418 hrs 44 mins

	Milestone	Description	Due Date	Responsible	Status	Days Late	Date Completed
	Build 1.3.5 - Complete		01 Feb (2016)	Peter C.	Late	Due 171 days ago	

Tasklists	Start Date	Date Due	Assigned To	Priority	Progress	Status	Estimated	Time	Billable
Build 1.3.5 - Staging									
<div>Generate Query</div> <div>Please generate a query that pulls all of the information from the http://adrewards.ca/adr/portal/member_matrix.php page. Peter</div> <div>Comments</div> <div><div>1. Peter Carr (Affiliated Distributors) April 14 2016</div><div>Yes please. We will then run it on production. Peter</div><div>2. Mary Tambong (Affiliated Distributors) April 14 2016</div><div>Hi Peter, Kindly check the attached sql file. Thanks.</div><div>3. Peter Carr (Affiliated Distributors) April 14 2016</div><div>Thanks Mary, file received. We have run on prod and the results are what we are looking for. File sent to Jason. Task marked as complete.</div></div>		14 Apr (2016)	Mary T.		100%	Completed 14 Apr (2016)	None	35 mins	None
<div>Distributors - Ability to export customer data</div> <div>Please give the distributors access to download their customer information. We need to ensure that only their customer information is made available to download.</div> <div>Comments</div>		18 Mar (2016)	Mary T.		100%	Completed 07 Jul (2016)	None	1 hr	None
<div>Locked out based on users</div> <div>Customer would like the ability to lock out users based on their specific username and not just by account. If users for a specific account change and the specific user has amassed points, the ability to lock out that user would generate additional revenue for the client. Mike suggested adding locked out to the customer table.</div> <div>Comments</div>		01 Feb (2016)	Mary T.		100%	Completed 08 Jul (2016)	None	10 hrs 50 mins	None
<div><div>• Review Reports to determine impact of locked out based on user</div><div>Locking out the user by username and not account will have an impact on reports that filter by lock out. Graphs and reports will need to be reviewed to determine impact and adjustments may be required. Effect unregistered users, earned and use redemption rate graph. Earned and used points for unlocked accounts.</div><div>Comments</div></div>		18 Mar (2016)	Mary T.		100%	Completed 07 Jul (2016)	None	3 hrs	None
<div>Searchable Drop Downs</div> <div>Add to the customer lookup screen a searchable dro down that sorts by alphanumeric order. Current order for the drop down box appears to be order of creation.</div> <div>Comments</div>		01 Feb (2016)	Mary T.		100%	Completed 08 Jul (2016)	None	3 hrs 45 mins	None

File Export of Customer Data		01 Feb (2016)	Mary T.		100%	Completed 07 Jul (2016)	None	5 hrs 45 mins	None
Jason would like the ability to export data from the customer screen to xls, xlsx, csv, etc.									
Comments									
• Export Results		15 Jan (2016)	Mary T.		100%	Completed 07 Jul (2016)	None	1 hr 55 mins	None
The export that is generated appears to have data in the wrong columns. Please see the attached download. Please review and correct to ensure that data appears in the correct column.									
Comments									
Search Box on Customer Lookup		01 Feb (2016)	Mary T.		100%	Completed 07 Jul (2016)	None	10 hrs 40 mins	None
Currently the search box searches all visible fields on the table layout. Customer would like it to search the FirstName, LastName and Email field as well. Mike spoke about adding the three fields as hidden fields on the layout. They don't have to be shown, but it adds more data to load on the layout. Mike is to explore the possibility of adding temporary fields to accomplish this task.									
Comments									
Points file process		18 Mar (2016)	Mary T.		100%	Completed 08 Jul (2016)	None	3 hrs	None
Add a verification to determine if a user is an admin user. If the user is an admin user they should be taken to the statistics are viewable and editable. If a user is not an admin user they should be taken to the report where they can see the information but cannot change it.									
Comments									
Customer E-Mail Account Changes		18 Mar (2016)	Mary T.		20%	Started	None	1 hr 30 mins	None
When an email address has been changed, due to contacts changing all current and former contacts receive the email. Need to implement MailChimp segmentation to use the load date to determine the current send list as it won't do an automatic unsubscribe.									
Comments									
EMail Outbound Language		18 Mar (2016)	Mary T.		100%	Completed 08 Jul (2016)	None	6 hrs 15 mins	None
Customers are able to select their preferred language and the statements are being generated using the language that has been selected by the distributor. Need to add language to the update screen by the customer file as understood and stated by Mike: Need to add language to the customer file. Need to hardcode PLT Language variable.									
Comments									
Articles Management	12 Oct (2015)	14 Oct (2015)	Mary T.		100%	Completed 13 Jul (2016)	24 hrs	63 hrs 5 mins	None
They want to be able to give the distributors/suppliers the ability to submit newsletters and articles to be posted. They want the ability to approve/deny any posts to ensure they are properly reviewed before they go live. The client also wants to add the ability to add pictures outside the body of a post, similar to the PLT without PDF or lead generation features. They will also need to have a french version of the post available. Will need button under the action column that creates a new post for the French version.									
Comments									
Report - Price Adjustments		05 Feb (2016)	Mary T.		100%	Completed 07 Jul (2016)	None	15 hrs 30 mins	None
Hi Mary, I would like to create a report within the portal that would allow the user to select a date range (namely quarter) and the report show what products were pushed with price modifications. So the report would only show which products were pushed that were outside of the calculated price. The report should appear on screen. We will work on the printing of the report later. Peter									
Comments									
Add field mapping for Customer File Import		01 Feb (2016)	Mary T.		100%	Completed 17 Feb (2016)	None	None	None
Initiate field mapping when importing customer files									
• Automatically create account when customer # not present in system		01 Feb (2016)	Mary T.		100%	Completed 17 Feb (2016)	None	3 hrs	None
When importing a customer file, it may contain customer numbers that are not present in the system. The import process needs to automatically create a new customer account and insert the appropriate name into the system.									
Comments									
PLT - Ability to resize images		01 Feb (2016)	Mary T.		100%	Completed 09 Feb (2016)	None	6 hrs 30 mins	None
On page supplier_product_editor.php? they have the option to upload media regarding the product. Can we add the ability to resize images uploaded to the site? Please review and provide an estimate for completion.									
Comments									

Robertson Portal - Remove all Distributor Drop Downs		15 Jan (2016)	Mary T.		100%	Completed 09 Feb (2016)	None	15 hrs 30 mins	None
Similar to this task: https://onemotion.teamwork.com/tasks/4762308 Please review the Robertson Portal and hide the distributor drop down, but have it default to Robertson so that their users do not have to select a particular distributor.									
Comments									
Customer File Import w/ Field Mapping		25 Jan (2016)	Mary T.		100%	Completed 09 Feb (2016)	None	4 hrs 30 mins	None
Please create a section similar to the Points File Upload Process where users can upload a customer file. They want to be able to map fields as many of the files they receive are unique and do not have a consistent formatting option. When importing, please check to see if the customer exists and if not, have the import sequence import the customer and capture all of the information that is in the spreadsheet. A sample file for import has been attached to the task.									
Comments									
• Customer File Import		29 Jan (2016)	Josh H.		100%	Completed 26 Jan (2016)	None	3 hrs 15 mins	None
Josh, please run the sql file on staging. Add fields to capture Branch ID and Account ManagerID									
Comments									
Robertson WordPress: Forgot Password		10 Feb (2016)	Mary T.		100%	Completed 17 Feb (2016)	2 hrs	30 mins	None
Please enable the drop down on the WordPress Forgot Password page. Please have it automatically selected as Robertson Electric as per login page.									
Comments									
Portal: http://adrewards.ca/adr/portal/reports_tool.php		10 Feb (2016)	Mary T.		100%	Completed 10 Feb (2016)	None	30 mins	None
The pages does not load; can you please determine why and correct the issue.									
Comments									
Robertson Wordpress: User Registration		10 Feb (2016)	Mary T.		100%	Completed 17 Feb (2016)	None	1 hr	None
1. Please enable Branch Selection when Robertson Users register on the site. 2. When they successfully register please have it add a "0" to the meta_key wp-approve-user									
Comments									
Portal completed_orders.php		10 Feb (2016)	Mary T.		100%	Completed 10 Feb (2016)	None	30 mins	None
http://adrewards.ca/adr/portal/completed_orders.php does not work. Please investigate and fix.									
Comments									
AD Portal: Packing Slips wrong logo and error message		10 Feb (2016)	Mary T.		100%	Completed 17 Feb (2016)	None	30 mins	None
Please see the attached screen shot for an error that is occurring on the AD portal. Please correct or provide instructions on how to correct. (I am assuming config file issues)									
Comments									
Portal: User Branch		11 Feb (2016)	Mary T.		100%	Completed 17 Feb (2016)	None	1 hr 30 mins	None
When they select a branch for a user it does not appear to be saving. When the user logs in they can see all information, but it should be limited to only their branch.									
Comments									
Robertson Portal: Customer Branch		11 Feb (2016)	Mary T.		100%	Completed 17 Feb (2016)	None	1 hr 15 mins	None
when a Robertson Brach Manager/Employee is logged into the admin site and they are looking up customers, when they want to select the specific branch they see all branches for all of our distributors, not just the Robertson branches. Can this be fixed to show only the Robertson branches? Please see the attached screenshot									
Comments									
Portal: Complete Selected		12 Feb (2016)	Mary T.		100%	Completed 17 Feb (2016)	None	1 hr	None
In both AD Admin and Robertson Admin we are unable to complete the shipping feedback (change an order from printed to complete). For example, Robertson Rewards order # 25456, I checked it off and clicked on Complete Selected. See the attached screenshot to see what happens once we click Complete Selected. Please fix and merge into master to ensure it can be deployed as a hotfix.									

Comments									
Check location of Files		12 Feb (2016)	Mary T.		100%	Completed 17 Feb (2016)	None	40 mins	None
Please check the location of processed points files: An example of a missing file: http://adrewards.ca/adr/filedrop/processed/012016_12016houseofesl.xlsx Can you please advise when it is actually storing the files.									
Comments									
• Create processes directory	16 Feb (2016)	01 Feb (2016)	Peter C.		100%	Completed 17 Feb (2016)	None	None	None
Update Staging with recent changes		16 Feb (2016)	Mary T.		100%	Completed 16 Mar (2016)	None	13 hrs	30 mins
We have updated production with a number of changes, config file, etc. Certain areas are not working on staging (woomaster) . Can you please go through and make sure the sections work accordingly. Peter									
Comments									
Portal: Partial Complete Selected		18 Feb (2016)	Mary T.		100%	Completed 22 Feb (2016)	None	1 hr	None
When the user clicks "Partial Complete Selected"; the get the attached screenshot. Please correct and merge into master for immediate correction.									
Comments									
Portal - Customer Import not adding new users		22 Feb (2016)	Peter C.		100%	Completed 22 Feb (2016)	None	None	None
When importing a customer file it is not adding new users.									
Comments									
Robertson Portal: Adding Customers		24 Feb (2016)	Mary T.		100%	Completed 24 Feb (2016)	None	2 hrs 30 mins	None
The changes made to the customer import for AD are not working on the Robertson Side. Since they use the same code base, it must be a config file issue. Attached is the config file from production for your review. Please advise what corrections need to be made.									
Comments									
Robertson Portal: Log Out		24 Feb (2016)	Mary T.		100%	Completed 16 Mar (2016)	None	2 hrs 35 mins	None
When the Log out button is pressed on the Robertson Portal, please have it go to http://robertsonrewards.ca/adr/portal/login_robertson.php									
Comments									
Robertson Portal: Shipping Feedback		24 Feb (2016)	Mary T.		100%	Completed 16 Mar (2016)	None	2 hrs 30 mins	None
The shipping feedback buttons do not work on the Robertson Portal but do on AD. As this is probably a config file issue, I have attached the config file from production for your review.									
Comments									
Robertson Portal: Admin >> Branch Manager		25 Feb (2016)	Mary T.		100%	Completed 01 Mar (2016)	None	1 hr	None
With Branch manager selected user cannot search (filter) the results on the page. This only appears to happen when Branch manager has been selected from the drop down. Can you please review, determine why and correct the issue.									
Comments									
SQL Query - Robertson Child Accounts		25 Feb (2016)	Mary T.		100%	Completed 26 Feb (2016)	None	30 mins	None
Please create a sql query that Josh can run on production to locate all accounts in the customer table that are Robertson and are Child Accounts. Please post the SQL file to this task.									
Comments									
• Run SQL Query		26 Feb (2016)	Josh H.		100%	Completed 26 Feb (2016)	None	None	None
Please run the attached SQL query on Robertson Rewards production and attach the results to this task. Peter									
Comments									
Portal - (Robertson and AD): Footer		04 Mar (2016)	Mary T.		100%	Completed 16	None	30 mins	None

	Please update the footer on both portals to read "Copyright MEC Rewards 2016"					Mar (2016)				
	Comments									
	Portal: Orders		04 Mar (2016)	Mary T.		100%	Completed 16 Mar (2016)	None	40 mins	None
	View you view an order the customer notes section is on top of the price. Please see the attached screenshot. Please reduce the customer notes field width and increase the height to compensate for any longer text.									
	Comments									
	Portal: Change Status from Processing to Printed		03 Mar (2016)	Mary T.		100%	Completed 16 Mar (2016)	None	None	None
	When a user attempts to change an order status from wc-processing to printed it does not work. I replicated the issue on woocommerce and confirmed that when I attempt to print an order the status does not change. Please correct this issue.									
	Comments									
	Prepping for push		14 Mar (2016)	Mary T.		100%	Completed 16 Mar (2016)	None	3 hrs 30 mins	None
	Hi Mary, Can you please investigate why when we push the Robertson orders page stops working. We attempted to push on Tuesday and it broke.									
	Comments									
	Order Details - Product Image		18 Mar (2016)	Mary T.		100%	Completed 01 Apr (2016)	None	2 hrs 30 mins	None
	The images on the order details do not load on Robertson. Please review									
	Comments									
	Footer - Robertson Portal		18 Mar (2016)	Mary T.		100%	Completed 01 Apr (2016)	None	1 hr 35 mins	None
	Can the footer on Robertson say Copyright Robertson Rewards 2016									
	Comments									
	Order Details - Staging		18 Mar (2016)	Mary T.	high	100%	Completed 01 Apr (2016)	None	7 hrs 30 mins	None
	The order details fix does not look like it was applied to staging. Mary, can you please implement when you have a moment.									
	Comments									
	Order Details - Edit Order Button		23 Mar (2016)	Mary T.		100%	Completed 01 Apr (2016)	None	4 hrs	None
	Hi Mary, Can you please look at the EDIT order link on the Order Details Screen. When someone clicks the edit order button you are taken to a blank page. Thank you. Peter									
	Comments									
	Robertson Front: Customer Information not Populating on Order screen		23 Mar (2016)	Mary T.		100%	Completed 01 Apr (2016)	None	2 hrs 30 mins	None
	When a customer attempts to complete an order on Robertson the shipping information such as phone number, address, etc are not being populated automatically. Can you please check. Please see the attached screenshot. Please fix and push to master to immediate deployment.									
	Comments									
	Robertson Slider - Add Padding		24 Mar (2016)	Peter C.		100%	Completed 01 Apr (2016)	None	None	None
	Add padding to the slider to ensure that it looks like AD.									
	Comments									
	WooMaster: Product Attributes		29 Mar (2016)	Mary T.		100%	Completed 08 Jul (2016)	None	37 hrs 30 mins	None
	Hi Mary, We need you to investigate an issue we are experiencing on production. When a product is pushed from the master catalog to the slave sites, it is not pushing some attributes. Upon investigation, we can see that the attributes on the Master Catalog are different than those on the slaves sites, but it appears that the MC is generating the attributes because it is being pushed. French translations are not being pushed, causing issues. Can you please investigate using woocommerce to determine if all attributes are being pushed to the slave sites including all translations. AD is a bilingual site.									

	Robertson Child Accounts		25 May (2016)	Mary T.		100%	Completed 20 Jul (2016)	None	4 hrs 15 mins	None
	Hi Mary, Since the conversion there are some accounts that were children when they were connected via AD; now their parent is no longer with Robertson and we want to convert the child account to a regular account. How should we go about this? Peter									
	Comments									
	Points File Upload Report		27 May (2016)	Mary T.		100%	Completed 13 Jul (2016)	None	1 hr 30 mins	None
	Can you please add a filter for year as the report is somewhat cumbersome when looking at all of the data. Thank you. Peter									
	Comments									
	Branch Details		27 May (2016)	Mary T.		100%	Completed 13 Jul (2016)	None	30 mins	None
	Hi Mary, What information would we need to have to import all branches from another system for INSIDE or Eddy? Thank you.									
	Comments									
	Distributors		27 May (2016)	Mary T.			Started	None	30 mins	None
	Hi Mary, As we continue to add new slave sites, some will resemble AD and others will resemble Robertson. In the case of AD there will be many distributors that will need to be shown. What steps and how long, will it take to add the filter or the data to capture which program a distributor was added under and therefore only show that information when a user of a specific program logs in.									
	Comments									
	Customer Info - Search not working		31 May (2016)	Mary T.		100%	Completed 13 Jul (2016)	None	45 mins	None
	Hi Mary, Can you please look into why the searching is not working on Woo; when on the customer details screen and I enter CLE407 (Customer Number) it finds nothing, whereas on production, it does. I don't want searching to all of a sudden stop working when we push. Peter									
	Comments									
	DB Changes - One File		31 May (2016)	Mary T.		100%	Completed 08 Jul (2016)	None	5 hrs	None
	Hi Mary, Can you please review the tasks which have the DB Changes Tag and create one file to run that contains all of the updates. We have built a new staging instance and want to test the current updates as we have trouble last time. Thank you. Peter									
	Comments									
	Update New Staging with latest plugin.		31 May (2016)	Josh H.		100%	Completed 01 Jun (2016)	None	None	None
	Hi Josh, Can you please update the staging site with the latest version of the Master Catalog Plugin? Thank you. Peter									
	Comments									
	Plugin - New Staging Site		02 Jun (2016)	Mary T.		100%	Completed 08 Jul (2016)	None	4 hrs	None
	Mary, can you please connect to the new staging site and look at the plugin. When I attempt to push any products, nothing happens but the product catalog disappears. Information on how to connect is in Links, I will be online if you need any help. Peter									
	Comments									
	QA - New Staging Site	03 Jun (2016)	03 Jun (2016)	Mary T.		100%	Completed 08 Jul (2016)	None	16 hrs 20 mins	None
	Kindly do QA on the new staging site and fix the issues if there's any. Please create a list of what are the issues encountered and indicate also on the list the status (example: Fixed, On Progress, etc) of each issue. Thank you.									
	Comments									
	Staging DB Access for Mary		06 Jun (2016)	Josh H.		100%	Completed 08 Jun (2016)	None	None	None
	Please provide Mary with access to view the DB on staging as there is a problem with the plugin not saving history.									

	Product Images - Not Showing Correctly					10 Jun (2016)	Mary T.		100%	Completed 08 Jul (2016)	None	3 hrs	None
HI Mary, On staging, can you look at this product: http://adrewards.ca/product/garmin-vivofit-3-regular-fit-6/ you will notice that when I select white nothing happens, but when I add it to the cart the white picture is displayed. Can you please troubleshoot what is wrong, plugin, etc and fix it, if possible.													
Comments													
	French Packing Slips					13 Jun (2016)	Mary T.		100%	Completed 13 Jul (2016)	None	8 hrs 10 mins	None
HI Mary, When admin attempts to print a packing slip, it is printing in french, if the french product was selected. Can you please have it display english, even if the product was a french product?													
Comments													
	Robertson Packing Slips					13 Jun (2016)	Mary T.		100%	Completed 13 Jul (2016)	None	2 hrs 30 mins	None
Customer number details and information are not showing on the Robertson packing slips, please correct.													
Comments													
	Banners - Find alternative					15 Jun (2016)	Mary T.		100%	Completed 30 Jun (2016)	None	2 hrs	None
HI Mary, please spend an hour or 2 and investigate any plugins that will allow you to use an API to insert the banner via the portal. The customer did not like the option of having to download and then upload. The banners will be by distributor and only show to their specific customers and an option so AD can post banners to all customers, so we will most likely need to build some custom code for this function.													
Comments													
	Query for Products in Master Catalog					24 Jun (2016)	Mary T.		90%	Started	None	1 hr 45 mins	None
Mary, can you please build a query so I can pull all products in Master Catalog on live. I need to see, product number, price, description, etc. Thank you.													
Comments													
	Portal - Cannot Cancel Orders					11 Jul (2016)	Mary T.		100%	Completed 20 Jul (2016)	None	12 hrs 25 mins	None
Mary, on the portal we cannot cancel orders. This stopped working after the last push. Can you please review and deploy a hotfix to master. There is no error message generated in Firebug. Thank you.													
Comments													
	Customers - Locked Out Users				20 Jul (2016)	22 Jul (2016)	Mary T.		90%	Started	None	5 hrs 30 mins	None
It appears that some customers aren't showing up on the customer list. This is both on Robertson and AD Rewards. They appear to be in the database (checked on MySQL) and show up on the "Locked Out Users" page, just not the "Customers" page – so we cannot find them. Can you please ensure that all users, included those that are locked out appear on the customers page. Thank you.													
Comments													
	Lock out by users				20 Jul (2016)	21 Jul (2016)	Mary T.			Not Started	None	None	None
Please ensure that the status of a user when viewed on the lock out by user screen is accurate to that of the user. So please have it identify if a user is locked out. Thank you													
											32 hrs	349 hrs 10 mins	30 mins
											Over/Under	317 hrs 40 mins	

