Project Report: <u>AD Rewards</u> Affiliated Distributors

Project Start Date: **End Date**:

ONE **MOTION** technologies

🟩 Completed 🟧 Upcoming (next 7 days) 🟥 Late

Milestones and associated tasks

		Milestone	Description	Due Date	Status	Days Late	Date Completed
🟧		**Build 1.1 Complete**		17 Jul (2015)	Upcoming		

		Tasklists	Start Date	Date Due	Priority	Progress	Status
		Build 1.1					
🟥		**Customers Not being Added**	17 Jun (2015)	17 Jun (2015)		90%	Started
🟥		Please see ticket for details.					
🟥		Comments					
🟥		**Portal Reports Tool**	05 Jun (2015)	05 Jun (2015)			Not Started
🟥		**• Branch Filter**	04 Jun (2015)	04 Jun (2015)		90%	Started
🟥		Add filters to all reports to allow Distributor roles to filter by branch.					
🟥		Comments					
🟥		1. **Marcus Dickinson** (Affiliated Distributors) May 15 2015					
🟥		Good question. Let me get an answer for you.					
🟥		2. **Marcus Dickinson** (Affiliated Distributors) May 15 2015					
🟥		This is referring to Dashboard Report, Child-Parent Report, Supplier Sales Report. Essentially, each user level needs to be able to filter the user level below them. Admin can filter by Distributor. Distributor can filter by Branch.					
🟥		3. **Mary Tambong** (Affiliated Distributors) June 03 2015					
🟥		Hi, Done. Pushed the changes on bitbucket. Thanks!					
🟥		**• Dashboard Report**	04 Jun (2015)	04 Jun (2015)		90%	Started
🟥		Dashboard Report as first view showing overview of: Points Earned, Points Used, Redemption Rate, Earned last 30 days, used last 30 days, new registrations last 30 days, # of accounts awaiting approval, # accts registered, # accts unregistered, Top 5 Customers unregistered					
🟥		Comments					
🟥		**• Child-Parent Report**	03 Jun (2015)	03 Jun (2015)		90%	Started
🟥		Report showing accounts that are Parents & how many children are allocated to them. Button to "Show Child accounts". This is for the Distributor. Sample SQL mock code would be SELECT * FROM Customers WHERE parent=true && WHERE memberID matches UsersMemberID That will show all the customers that are parents for a single distributor. Then you can click on any UserID to see all of the all children.					
🟥		Comments					
🟥		**Point Files Upload Report**	15 Jun (2015)	15 Jun (2015)		90%	Started
🟥		Can be viewed by Admin only for now. ·Include a filter for years ·Report to show tracking of AD Rewards point files processed ·Report should use Distributor Name as the primary column, then the months as other columns ·Fields should show date the file was processed & total points Approved oIf points approved is 0 and month processed exists, highlight cell yellow oIf date processed does not exist on a month that is 2 months less than today's date, highlight cell red (i.e. Feb turns red on April 1, March turns red on May 1...etc) ·Clicking on the fields should open the relevant "Purchase Datafile Status Page" for the relevant PID (adrewards.ca/adr/portal/ http://adrewards.ca/adr/portal/purchase_datafile_status.php?pid=*)					
🟥		Comments					

		Milestone	Description	Due Date	Status	Days Late	Date Completed
🟧		**Build 1.2 Complete**		31 Jul (2015)	Upcoming		

		Tasklists	Start Date	Date Due	Priority	Progress	Status

Build 1.2						
	Order Complete Issue		20 Jul (2015)	24 Jul (2015)		90%	Started
	Please see ticket for details.						
	Comments						
	Create Forgot Password Email		14 Jul (2015)	14 Jul (2015)			Not Started
	Create an email that passes spam filters for customers to retrieve their password.						
	Please provide the template to Jason so he can edit the wording, etc, so they can make the email template for us that avoids spam filters.						
	Comments						
	Separate Customer & Sales loading		16 Jul (2015)	16 Jul (2015)			Not Started
	As discussed with Mike initially - should split off the "Customer" and "Sales" loading files						
	Update the Sales & Customer importing tool to include built in field mapping (similar to Mailchimp)						
	• Update the "Run File Process" function		15 Jul (2015)	15 Jul (2015)			Not Started
	Update "Run File Process" to run automatically when files are uploaded. This should email Admin an error report if there are any - and email "Distributor" roles if their files had an error uploading.						
	• Overwriting notifications		14 Jul (2015)	14 Jul (2015)			Not Started
	There should be a popup when loading a file where the month loaded for already has a file allocated to it. If the file is approved, the previous file should no longer be editable, and marked as being a older file. Points loaded from this file should be overwritten with points from the new file.						