



SMMS (SYANAH MAINTENANCE MANAGEMENT SYSTEM)

Primary Business Requirement Document

Version	Date	Author	Description
1.0	04/08/2020	Matrix Media Pvt. Ltd	Detailed feature and function description of the application
2.0	03/09/2020	Matrix Media Pvt. Ltd	Add few features to the scope, highlighted with BLUE.

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INTRODUCTION

A. Stakeholders/Type of Users

- Customers- Two scenarios, such as:
 - Without login: Customers can only send an enquiry to get a quotation for maintenance of their property.
 - With login (account will be created by admin): Customers can be two types such as: **(a)** Property Owner (PO)- This user is the main person with whom Syanah has signed the contract for one or multiple properties and **(b)** Property Manager (PM)- This user is assigned to a particular property to monitor and make sure to check the services are received as committed from the SP. Customers can see the previous/current/upcoming schedules. Also can request for emergency services.
- Service Providers- Account of a service provider will be created by the admin. SP can manage their profiles. Create and manage labors accounts. Review scheduled tasks and assign them to labor.
 - Labors can login to their account to see the daily assigned task and with an option to update the status of it.
- Manager (*Sub-admin*)- Managers are responsible for looking after the contracts/customers and bridge with SP.
- Admin – Admin will be able to manage all the users, contracts, tasks, schedules on the platform.

B. Business Flow

- Customers will be able to request for estimation/quote for maintenance service for their property.
- Syana Admin will create the property along with a contract to the system and assign related stakeholders such as: Manager (*sub - admin*), Customer (*Property owner as well as property manager*) and Service Provider.
- Manager will create and assign various tasks needed to be done in a property and assign them to a SP.
- Service Provider (SP) can create a laborer's account.
- Service Provider (SP) will be able to see and create the list of services to be provided to a property and can assign the tasks to a labour.
-  Labour can see the assigned list of tasks and perform them as per schedule. Once the task is completed the labor can update the status along with an **option to upload images** to inform related stakeholders of the property.

Features and flow of Customer account

1.1. Request for quote



- User can fill up a form to request a quote for maintenance services (No login is required)
- The form would be as following:
 - Location of the property (Country + State + City)
 - Property type (Option to add one or multiple)
 - Type of services required (multi selection)
 - Time of service required (options to select for every service, such as: every day, every week, every month, every quarter etc.)
 - Total years of contract
- Add basic information as following:
 - Name (First and Last name)
 - EMail address
 - Contact number
- Submit

Result:

- The respective customer will receive a confirmation mail that his submission is submitted to the admin to review.
- Admin will receive a mail to his email id with the data submitted by the user/customer.

Remarks:



- Contract will be signed and agreed by the customer offline. Once the contract is signed admin will create the account on the system and assign a Manager and SP to the account.

1.2. Sign in





- User/Customer (**PO & PM**) can login to his account with the credentials shared by the admin via email
- User have to use the same credentials he has received over email
- User will have the option to reset the password
- User can also retrieve the password if forgotten, using the email address

Result:

- If user use correct username and password will be redirected to the respective dashboard

- If user use wrong username and password then will see proper message and will be asked to use correct information to login to the account
- If user select forget password option, then will be asked to put the email address to receive a password reset link to the respective email address
- User can click on the link received and reset the password

1.3. Dashboard

- User will have following quick statistics sections on the dashboard:
 -  ○ **Household (Offline survey) and Online (personal) rating statistics**
 - List of tasks with option to sort by Week/Moth. The list can be filtered by properties (*if multiple properties are there*), service type. This list will have all the scheduled tasks with its following status:
 -  ■ Completed (*Upon completion of a task, a message would go to the customer (PO and PM) in his respective notification center.*)
 - User will be able to submit their rating and review to the SP after the task is marked as completed
 - Due
 - Upcoming
 - List of unscheduled tasks and their status
 - Clicking on a task user can see its details which will have the following info: Property name, service type, labor name and image, service date and time.
 - List of all complaints and their status
 -  ■ Clicking on a complaint user can see its details which will have the following info: Submission date, detailed description, comment by the Manager, status.
 - Status of a complaint can be as following: Pending, Resolved and Revoked.
- Apart from the quick statistics, user will have following options in menu:
 - My Account
 - Calendar
 - Contract
 - Property/Sites (*Only for PO*)
 - Unscheduled Services
 - Spare parts
 -  Shared service
 - Complaints
 - Reports
 - Contact Manager/SP
- Option to logout

1.4. My account

- Here user can edit/update personal info
- User can update their profile image
- User can change password of their account

1.5. Calendar

- Here users can see a calendar with the option to change the month.
- Filter the data in calendar with location, service and backlog (*i.e.* pending tasks)
- Every date will consist of scheduled tasks. Users can click on one task to see its details which will open in a pop-up window.
- If a service is finished successfully then the box (date) will turn green, if the service is due or scheduled on a specific date then it will be yellow or if the service got overdue then red.



1.6. Contract

- Here user can see the detailed contracts (old and current) signed with Syanah
- Clicking on a contract user can see various details/info of it in different tabs such as- basic info, property location, list of tasks, attachments.
 - In the attachment section Users can find and download various contract related documents such as- .detailed contract, invoices, utility bills, installment details with its status (paid, due date and option to payment) etc.
- User will get reminder of making payment of next installment before 2 months of due date
- The contract will be uploaded by the Syanah administrator
- PO and/or PM can share their rating and review once a contract is over, this will go to the Manager (sub-admin) to review.



1.7. Property/Sites

- Here users can see a list of properties as per the contract
- User (PO) can see the PMs assigned to various property
- Users can click on one property to see the list of services a particular property has acquired.

1.8. Unscheduled Services

- Here user can see a list of all unscheduled tasks
- Users can search a task using the search bar. User can search a task using relevant keywords (eg: plumbing, cleaning)

- User can filter the list by: status and priority
- Users can click on a task to view its details such as: description, mode of service (time/duration), location, priority, status etc.
- Add an emergency service: Here if a user finds that a service is missing or needed urgently can fill up a form with specific details and generate a Work Order which will be sent to the SP. User has to share following info to create a WO-
 - List of services
 - Date
 - Time
 - Property (auto filled)- *if creating by the PM*
 - Location (auto filled)
- SP will receive the WO and accept/reject it. If rejected then flow stops here. If accepted then SP can generate an invoice which will go to the Customer. Customers will pay to Syanah and Syanaha will pay to SP.

*Note: If admin enables online payment option from the back-end then, after the WO is accepted and invoice generated by the SP, the customer will be notified and can pay the invoice amount online. (Online payment feature will be implemented in Phase 2)

1.9. Order for Spare parts

- User can review list of spare parts available and its price
- User can select one or multiple spare parts along with the unit/qty needed
- User can see total billing price and can place order
 - Note: If admin enables online payment option from the back-end then, then the customer will be able to choose between Cash and online payment option.
- The system will notify the Manger to fulfill/deliver the same

1.10. Request for Shared service

- User can review list of shared service available and its price
- User can select one or multiple shared services along with the unit/qty needed
- User can see total billing price and can place order
 - Note: If admin enables online payment option from the back-end then, then the customer will be able to choose between Cash and online payment option.
- The system will notify the Manger to fulfill/deliver the same

1.11. Complaints

- Here users can see the list of all complaints added by him and can see its status. By clicking on a complaint user can see its details.
- User can also add/post a new complaint
- User can update an existing complaint until the status is updated by the manager
- User can delete a complaint

1.12. Reports: Here user can generate following reports:

- List of services received during a specific week/month (date range), user (**PO**) can generate the report property wise as well, if there are multiple properties
- List of Due and Pending services during a specific week/month (date range)
- User can download the reports in excel and pdf (*as per the nature of the report*)

1.13. Contact and Notification

- User can write a message to the manager or SP with following information-
 - Write message
 - Select user and send
- Here user can see all the notifications received

Features and flow of Service Providers (SP) account

1.14. Sign in

- User/SP can login to his account with the credentials shared by the admin via email
- User have to use the same credentials he has received over email
- User will have the option to reset the password
- User can also retrieve the password if forgotten, using the email address

Result:

- If user use correct username and password will be redirected to the respective dashboard
- If user use wrong username and password then will see proper message and will be asked to use correct information to login to the account
- If user select forget password option, then will be asked to put the email address to receive a password reset link to the respective email address
- User can click on the link received and reset the password

1.15. Dashboard

- On The dashboard the user can see following quick statistics:
 - Total number of customers
 - Total number of contracts
 - Total number of properties
- A quick list of tasks
 - The list can be filtered by week/month
 - The list can be sorted by: scheduled, completed, due
- A quick view to day wise number of unscheduled tasks
- A quick list of complaints with the name of the customer and property name
- Apart from the quick stats, the dashboard will also have links to other modules/options from menu bar, which are as follows:
 - My Account
 - Manage User/Labor
 - Role Management
 - Contract Management
 - Work order
 - Task Schedule
 - Calendar
 - Complaints
 - Reports
 - Contact Manager
- Option to logout

1.16. My Account

- User can edit/update their personal information
- User can add/update their profile image
- User can change their account password

1.17. Manage User/Labour

- Here user can see list of all labours account added
- The list will have quick info as: User ID, User name, email id, phone number, option to view details
- User will have an option to search the labor quickly using a search bar
- User can view and edit account info of a labor
- User can reset password of a labour account
- User can active/inactive a labour account
- User can delete a labour account

- Users can create a labour account with following info such as: name, email id, skills, country state, city and password. The system will send notifications to the respective labour via email as well as SMS.


1.18. Role Management

- User can select a labour and assign him to one or multiple properties
- User can set his working day and off day (e.g. Friday)
- User can set his working duration and time

1.19. Contract Management

- Here users can see list of contracts assign to them by the manager of Syanah
- User can sort the list by previous, ongoing contracts
- User can view details of a contract which will have following information:
 - Parties name
 - Location info
 - Property info
 - List of services needed
 - Time and duration of the service required
 - Duration of the contract
- User can create an work order against a contract and add/schedule multiple tasks under a work order

1.20. Work Order

- Here user can see list of all work order generated/created by PM
- User can filter the list by date/month/property wise
- User can accept/reject a WO (*if the same is created by the PM*)
- User can create an work order with the following info:
 - Location (address, stat, city)
 - Maintenance Type
 - Priority (drop down)
 - Summary of order (Description box)
 - Assigned to Labor (one or more- number of labors)
 - Contract ID (System generated)
 -  Service Name (One or multiple services- select from drop down)
 - Create and add one or multiple tasks under a WO with following details:
 - Task title
 - Date
 - Time (Start - End)

- Add description
- Assign the task to a labor (select from a drop down)
- Update status



Based on each service/task, Create Schedule Maintenance

- How Often
 - Hourly (Every x Hours)
 - Daily (Every x Days)
 - Weekly (Every x week on (Saturday, Sunday, Monday, Tuesday, Wednesday, Thursday, Friday))
 - Monthly (Day x of Every x Months)
 - Yearly (Every x Year(s), on MMM, DD)
- From When and For How Long
 - Start on
 - End by



- User can update status of a WO and generate an invoice against it
- The system will send the invoice to the PO/PM as well as Manager

- User can see the rating and review submitted by the customer after completion of a task/WO

1.21. Calendar

- Here users can see a calendar with the option to change the month.
- Filter the data in calendar with location, service, labour, property and backlog (*i.e.* Pending tasks)
- Every date will consist of scheduled tasks. Users can click on one task to see its details which will open in a pop-up window.
- User can update status of a task
- If a service is finished successfully then the box (date) will turn green, if the service is due or scheduled on a specific date then it will be yellow or if the service got overdue then red.
- Once a service/task is completed, then the related PO/PM will be notified

1.22. Complaint

- Here users can see the list of complaints submitted by the customers
- User can see details of a complaints and update its status with a comment after solution provided
- The comment added to a complaint can only be seen by the Manager

1.23. Reports: Here user can generate following reports:

- List of services provided during a specific week/month (date range), user can generate the report property wise, labor wise as well
- List of Due and Pending services during a specific week/month (date range) as per property and labor

- User can download the reports in excel and pdf (*as per the nature of the report*)

1.24. Contact and Notification

- User can contact manager or customer with following information
- User can write a simple message for any help/assistance needed from manager
- User can write a message to the manager or customer with following information-
 - Write message
 - Select user and send
- Here user can see all the notifications received

Features and flow of Labors account

This account/interface is accessible from mobile devices, which means this section will have responsive layout.

1.25. Sign in

- User/Labor can login to his account with the credentials shared by SP via email
- User have to use the same credentials he has received over email
- User will have the option to reset the password
- User can also retrieve the password if forgotten, using the email address

Result:

- If user use correct username and password will be redirected to the respective dashboard
- If user use wrong username and password then will see proper message and will be asked to use correct information to login to the account
- If user select forget password option, then will be asked to put the email address to receive a password reset link to the respective email address
- User can click on the link received and reset the password

1.26. Dashboard

- User can see today's tasks on his dashboard which needs to be performed
- User can click on a task to see its details
- User can update status of a task
 - User can upload images while marking it as completed
- User can also leave a comment (*with reason/justification*) if a task cannot be performed due to any issue and can request SP to reschedule it
- User will have following sections/options to the menu:
 - My Account
 - My Tasks



- Contact SP

1.27. My Account

- User can edit/update their personal information
- User can add/update their profile image
- User can change their account password
- User can see his working days and time duration as set by the SP

1.28. My Tasks

- User can see list of all tasks assign to him by SP
- User can filter the list by location, date, month, time
- User can sort the list by status, property
- User can see details of a task and can update status

1.29. Contact

- User can contact his SP by filling up a form and write a message
- User can also receive messages from SP
- User will also be able to see notifications received (e.g. when a task is assigned)

Features and flow of Manager (*Sub-admin*) account

1.30. Sign in


- User/Manager can login to his account with the credentials shared by Admin (Syannah) via email
- User have to use the same credentials he has received over email
- User will have the option to reset the password
- User can also retrieve the password if forgotten, using the email address

Result:

- If user use correct username and password will be redirected to the respective dashboard
- If user use wrong username and password then will see proper message and will be asked to use correct information to login to the account
- If user select forget password option, then will be asked to put the email address to receive a password reset link to the respective email address
- User can click on the link received and reset the password

1.31. Dashboard

- Dashboard will display the following list and stats:

- Schedule Service statics
 - Total Services
 - Completed Services
 - Due Services
- Unscheduled Service statistics
 -  Number of emergency services
 - Company name who requested emergency service
 - Service Provider name assigned to that company
- Customer & Service Provider statistics
 - Number of Customers
 - Number of Service Providers
 - Number of Contracts
- New Complaint statics
 - Number of complaints
 - Company name who complained
 - Service Provider name assigned to that company
- Customer rating statistics
 - Overall ratings
 - Total number of contracts
- Apart from the statistics, following options will have on the menu-
 - My Account
 - Calendar
 - Manager Customers
 - Manager Contracts
 - Manage SP
 - Manage services
 - Manage complaints
 - Manage reports

1.32. My Account

- User can edit/update their personal information
- User can add/update their profile image
- User can change their account password

1.33. Calendar

- Here users can see a calendar with the option to change the month.
- Filter the data in calendar with location, service, SP, property and backlog


- Every date will consist of scheduled tasks. Users can click on one task to see its details which will open in a pop-up window.
- User can update status of a task
- If a service is finished successfully then the box (date) will turn green, if the service is due or scheduled on a specific date then it will be yellow or if the service got overdue then red.
- User can move one task from one date to another by drag and drop

1.34. Manage Customers

- Here user can see list of all customers
- The list will have quick info as: Customer ID, Customer name, email id, phone number, option to view details
- User can edit a customer information
- User can add a customer to the system with following info
 - Name
 - Location
 - Email id
 - Contact number
 - Password

1.35. Manage Contracts

- Here user can see list of all contracts
- The list will have quick info as: Contract ID, Customer name, email id, phone number, Assign SP, option to view details
- User will have an option to search a contract quickly using a search bar
- User can view details of a contract which will consist following info-
 - Name of the customer
 - Contact info
 - Property info
 - Select from drop down
 - List of services acquired and duration/mode
 - Duration of the contract
 - SP info
 - Payment info
 - Total amount paid
 - Installments paid
 - Due Installments
- User can inactive a contract as well as active the same (in case of installment/payment is due by the customer)

- If a contract is inactive then no parties (customer & SP) will be able to see this on their account. Only related users will be notified if inactive or active by the Manager.
 - User can add/update a contract to the system with following info
 - Contract ID
 - Maintenance type
 - City
 - Customer name/ID (select from drop down)
 - Property type
 - Property location
 - List of services
 - Contract price
 - Create installments
 - Set due date of each installments (system will send notification/reminder to the customer before 2 months of Due date)
 - Contract start date
 - Contract end date
 - Assign SP
 - Mark a contract as Community Union type with its respective ID
-  ● Manager can add household (offline survey) ratings for every contract. A cumulative statistic will be displayed on Customer dashboard

1.36. Manage Property

- User can add/edit property info with following details:
 - Property Name
 - Code (Auto generate)
 - City
 - Location
 - Address
 - Neighbors/Landmark
 - Number of Units (Active / Not Active)
 - Contact Info
 - Add PM to a property (Select from drop down)
 - Water Account and due date (Select a day from each month)
 - Electricity Account and due date (Select a day from each month)
 - Attachments (multiple files to be uploaded)

1.37. Manage Service Providers

- Here user can see list of all Service Providers account added
- The list will have quick info as: User ID, User name, email id, phone number, option to view details
- User will have an option to search the SP quickly using a search bar
- User can view and edit account info of a SP
- User can reset password of a SP account
- User can active/inactive a SP account
- User can delete a SP account
- Users can create a SP account with following info such as: name, email id, address, country, state, city and password. The system will send notifications to the respective SP via email as well as SMS.

1.38. Manage Services

- Here user can see list of all services created
- User can filter the list by SP, Property, Customer
- User can sort the list by date, month, status
- User can create/schedule and update a service/task and assign it to a SP.
- To create a task user has to add the following info-
 - Select contract (drop down)
 - Select work order (drop down)
 - Select Property (drop down)
 - Select task type (general/emergency)
 - Add description
 - Add service date
 - Add time

1.39. Orders of Spare parts

- User can review list orders received from customer
- User can mark an an order as delivered
- User can download the order summary in a PDF format

1.40. Request for Shared service

- User can review list requests received from customer
- User can mark an a request as delivered
- User can download the request summary in a PDF format

1.41. Manage Complaints and Messages

- Here user can see list of complaints and messages

- User can review all the messages and complaints received
 - User can respond to both PM and SP separately as well as consolidated
- User can mark a complaint as Pending, Fesolved, Revoked
- User can review them and can reply to the respective recipient
- User can also compose message and send it to any user
- User can also see the messages received from others

1.42. Invoice Management

- User can see the list of invoices generated by the SP
- User can see related work order against an invoice generated
- User can update status of an invoice as paid when paid to the SP/settled
- User can download the invoice in PDF format

1.43. Manage Reports

- Following are the reports that a manager can generate:
 - Schedule Compliance by Property/Project
 - Planned Maintenance List Per Property/Project
 - Maintenance Backlog (ALL/User/Technician)
 - Open Preventive Maintenance Order List
 - Upcoming Scheduled per Work Week by User/ Technician
 - Upcoming Scheduled per Work Week by Service Category
 - Number Scheduled Maintenance Upcoming per Week
 - Planned Maintenance Two Week Lookout
 - Upcoming Schedule Maintenance Detailed
 - Closed Work Orders by All Maintenance Type
 - Number Completed Work Order Per Month by Account
 - Number Work Orders Requested Vs. Completed
 - Contract/Project Status
 - Overdue Work Orders Detailed Report
 - All Work Orders Detailed Report (This report lists all work orders and user can filter the list based on different parameters)
 - Requested Work Orders List Report
 - Financial Report (list of contracts filtered by Date Range / Customer / Service Provider / etc.)

Features and flow of Admin (Syanah) account

1.44. Sign in

- Admin can login to his account with the credentials

- User will have the option to reset the password
- User can also retrieve the password if forgotten, using the email address

Result:

- If user use correct username and password will be redirected to the respective dashboard
- If user use wrong username and password then will see proper message and will be asked to use correct information to login to the account
- If user select forget password option, then will be asked to put the email address to receive a password reset link to the respective email address
- User can click on the link received and reset the password

1.45. Manage Users

- Admin can add/edit and manage users accounts. To create an account admin has to share the following info:
 - Username
 - Primary Contact Name
 - Mobile Number
 - Secondary Mobile Number
 - Email
 - City
 - Account Type (Customer, Service Provider, Manager)
 - Password
 - Select user group
 - Account Status (Active/Inactive)
- Admin can see list of all users and can filter the list by user group

1.46. Group Management

- Admin can see the list of all groups
- Admin can add/create an user group (e.g: Manager, PO, PM, SP)
- Admin can see the list of users under a group

1.47. Role Management

- Admin can see the list of Managers account
- Admin can filter the list as per active/inactive
- Admin can open a user account and can give/withdraw permission to/from various modules that the manager can use/manage

1.48. Manage dropdown/lookup value

- Admin can add/edit dropdown options under these categories
 - Cities & Location (Riyadh / Jeddah / etc.) (Olaya / Murooj / Al-Izdihar / etc.)
 - Maintenance Type (Preventive/Unscheduled / etc.)
 - Work Order Status/Color (Requested / Assigned / Work in Progress / On Hold / Completed / Incomplete / etc.)
 - Priority (High / Medium / Low / etc.)
 - Status (Active / Inactive / etc.)
 - Complaint Status (Pending / Resolved / Revoked / etc.)
 - Specialities (Electrician / Plumbing / General Services/ etc.)
 - Payment Status (Paid / half-paid / etc.)

1.49. Manage Spare parts

- Admin can add various spare parts to the system which customers can order
- Admin can set price of a spare part
- Admin can mark a spare part available/non available
- Admin can add unit/qty. available of a spare part

1.50. Manage Shared service

- Admin can add various shared services (e.g: coffee machine) to the system which customers can request
- Admin can set price of a shared services
- Admin can mark a shared services available/non available

1.51. Various configuration and settings

- Manage Configuration & Settings to the followings
 - SMS - Admin can edit/update SMS template (content) for various occasions
 - Working days / working hours
 - Email - Admin can edit/update Email template (content) for various occasions
 - VAT
 - Profit %
- Apart from these admin will also have few more general applications settings which will be discussed at the development stage

****Remarks:** Apart from the above mentioned features & functionalities of Admin account, admin will also have all of the modules that a Manager account has and highlighted in this document.