Strive – Functional Requirement Specification

Module Name: Details Module

Document Name: Functional Requirement Specification

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CR 1 Introduction:

This document provides a high-level overview of the Internal Web App Details module.

CR 1.1 Navigation

The user will have access to open the Strive app from any browser in the Desktop. On opening the app, the user will be navigated to the login page and can use appropriate credentials to login to the Internal Web app. The user will be navigated to the home screen upon logging in the portal.

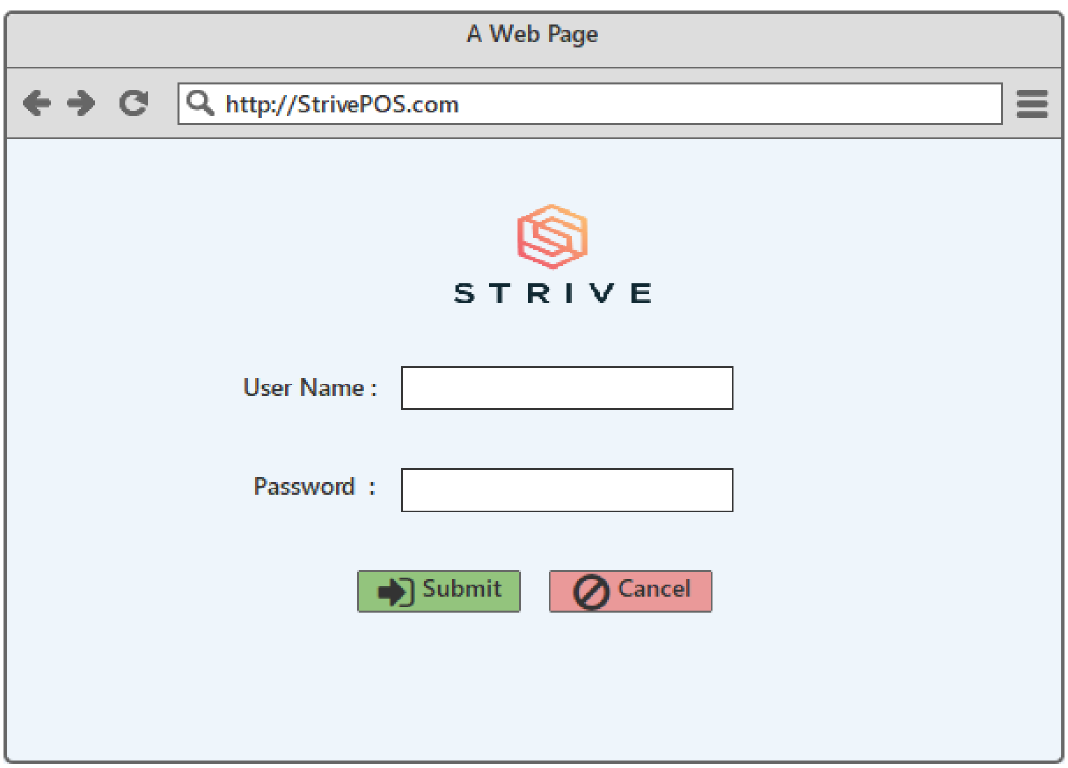
CR 1: Login page

CR 2: Login Page -> Home-> Details -> View Scheduled Details

CR 3: Login Page -> Home -> Details ->New Detail

CR 2 Login Page

The login page will display fields ‘Username’ and ‘Password” and login button.



CR 2.1 Exception Handling

Description	Activity	Post Condition
Incorrect Username or Password	System alerts user with warning message "**Username or password was incorrect.**"	Screen refreshes and loads the login page.
Username or Password not entered	System alerts user with warning message "**Username or password was incorrect.**"	Screen refreshes and loads the login page.

CR 3 Details – Internal Web App

The Strive internal web application can be accessed from any of the following browsers:

1. Safari
2. Chrome
3. Firefox
4. Edge

Upon successful login, the user will be navigated to the Home screen by default. The navigation bar for the entire web application will display the 9 icons specified below depending on the user roles.

1. Home
2. Washes
3. Detail
4. Sales
5. Messenger
6. Checkout
7. Payroll
8. Reports
9. Admin

There are 4 user roles that can access this internal web application:

1. Admin
2. Owner/Operator
3. Manager
4. Cashier

Depending on the user role, the users will either have access to the entire application or will have access to specific restricted modules in the application.

Admin and Owner/Operator User Roles will have complete access to the entire application as mentioned above. Manager and Cashier User Roles will have access to only the following modules in the web application:

1. Home/Dashboard
2. Checkout
3. Messenger
4. Sales
5. Washes
6. Details
7. Reports

This document will describe in detail about the Details Module in the Internal Web Application for Strive.

Upon successful login, all users will be navigated by default to the Home Module in the Strive Web Application. The user shall be able to navigate to the Details Module by selecting the details icon on the navigation bar as shown below:

The Details Module by default will display the following functionalities as shown in the mock:

1. Detail Dashboard Info
    a. Current No. of Washes
    b. Current No. of Details

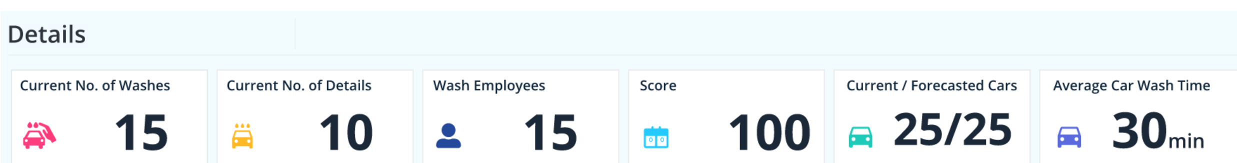
   c. Wash Employees
   d. Score
   e. Wash Time
2. Detail Schedule by Bay:
   a. Details Calendar
   b. Date Search
   c. View Existing Schedule
   d. Schedule New Detail by Bay
   e. Update
3. Detail Schedule Queue

The functionalities are described in detail below.

CR 3.1 Details Dashboard Info:

The Wash and Detail Dashboard shall display the following statistics for all users at the top of the Details Module for the current location.

1. Current Wash Count – Total no. of car washes completed today for the current store location.
2. Current Detail Count – Total no. of details completed today for the current store location.
3. Current Employee Count – Total employee count today for the current store location.
4. Score – Ratio of No. of washes to No. of Employees keeping average car wash time for each car as 1.25 hours. Typically, the ideal score is at an average of 80 given that each car wash on an average takes 1.25 hours.
5. Wash Time – The wash time corresponds to the time a customer needs to wait until they can get their car wash completed.



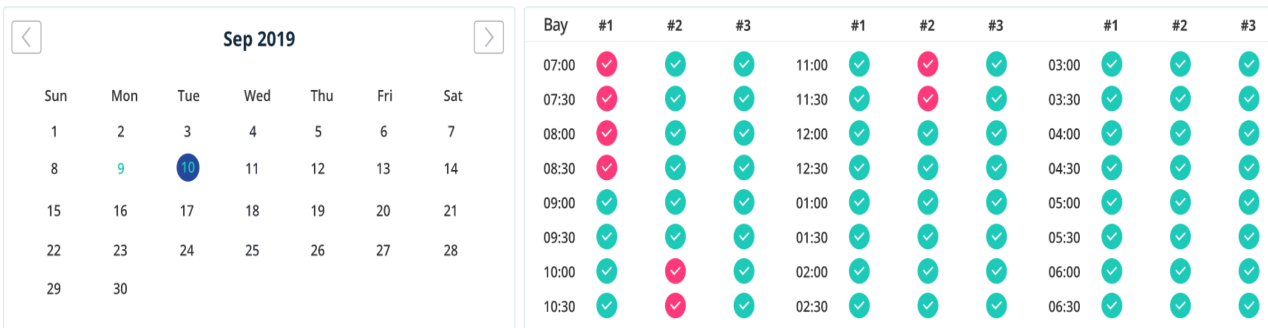
CR 3.2 Details Schedule by Bay:

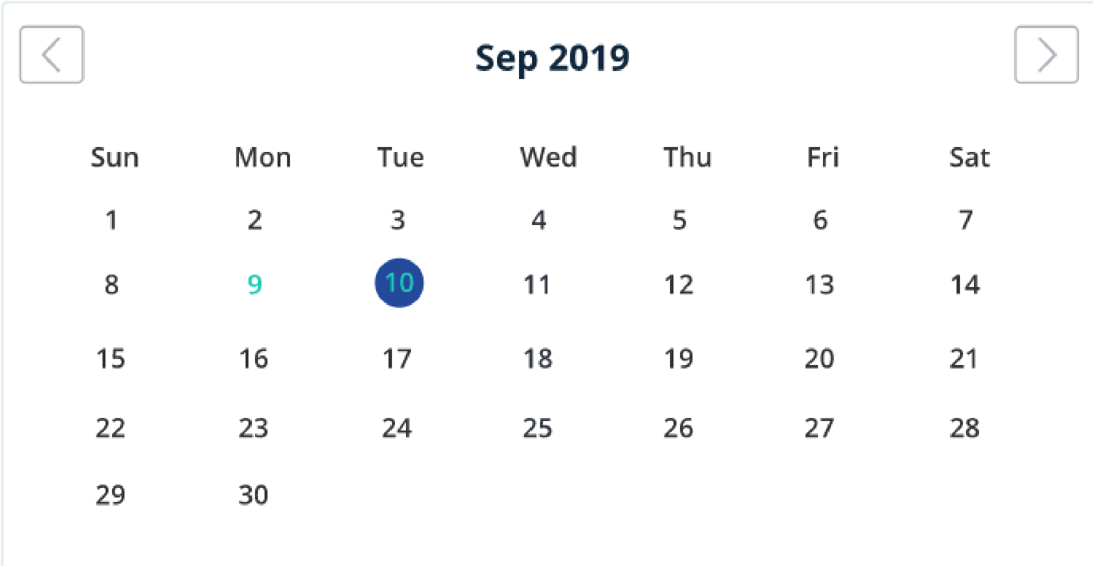
The users will be able to view and perform the following functionalities on navigating to the Details module:

1. Details Calendar
2. Date Search
3. View Existing Schedule
4. Schedule New Detail by Bay
5. Update Schedule

CR 3.2.1 Details Calendar

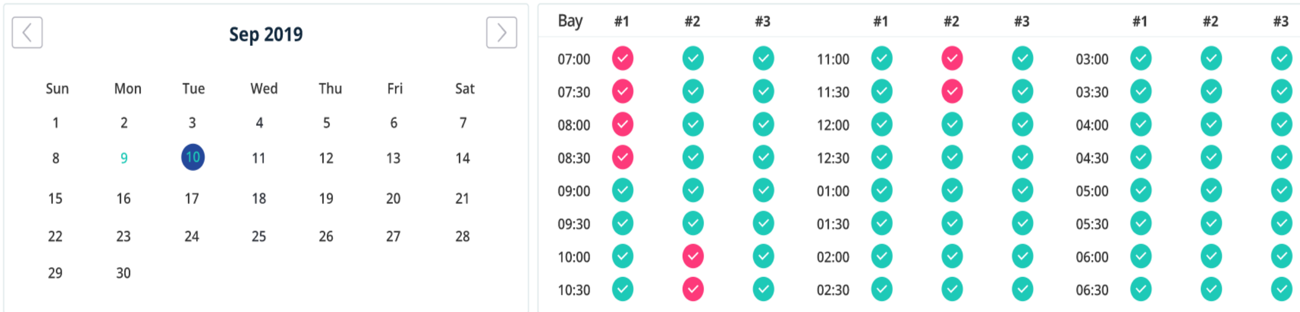
Once the user navigates to the details module, the system will display a details calendar with the Bay scheduler on the side as shown in the mock below. The details calendar will display the current month, date and year by default with the ability for the user to navigate to past months and future months. If the user chooses to navigate between previous/future months and years, the user will be able to select the month on top and choose the month from the list as shown in the mock. Similarly, if the user chooses to navigate between the previous and future years, the user shall be able to select the year icon specified above the month list, and the user will be able to choose the year from the list as shown in the mock below. Further the details calendar will display the dates that have a scheduled detail with a green check mark against those dates indicating to the user that there is a scheduled detail for that day.





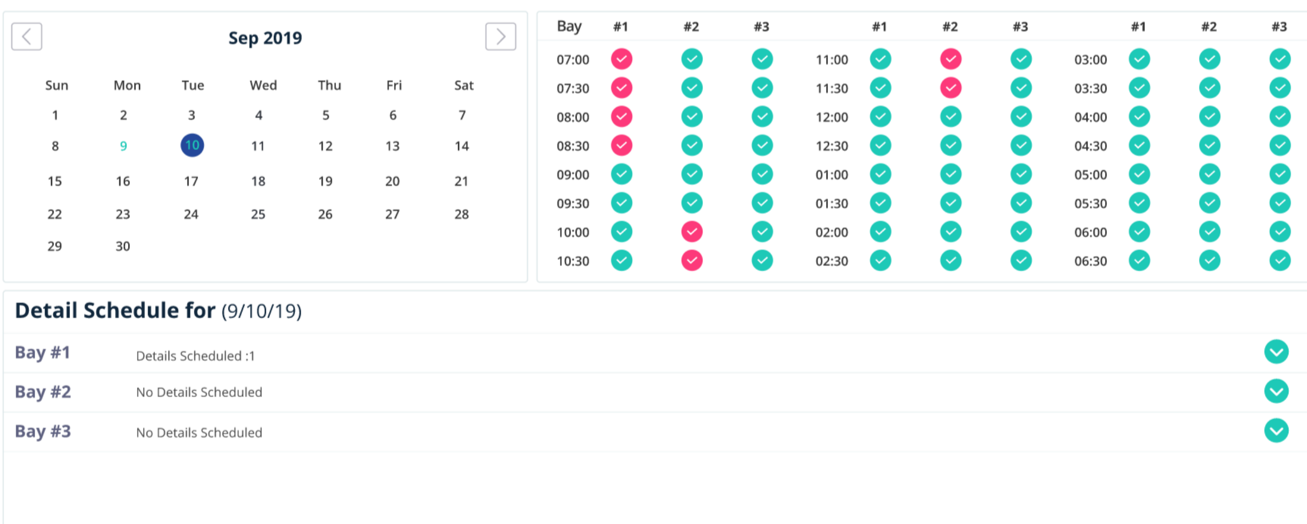
CR 3.2.2 View Existing Schedule

The user shall be able to view any existing detail schedules for each bay by selecting the desired date on the details calendar. The users' selection of date on the details calendar will display the corresponding detail schedule if any scheduled for the day on the Bay slots as shown in the mock below. If the user selects a date where there is a detail scheduled, the system will display the corresponding time slots for the scheduled bay in red. For instance. Each store may have 2-3 bay slots overall. Each bay will be listed with timeslots for each bay from 7:00 AM to 6:30 PM each day as shown in the mock below. If there is any detail scheduled for the selected date, as specified above, the bay slots for the scheduled time period will be highlighted in red. The rest of the bay slots will be highlighted in green if no details have been scheduled and new details can be scheduled in those time slots.

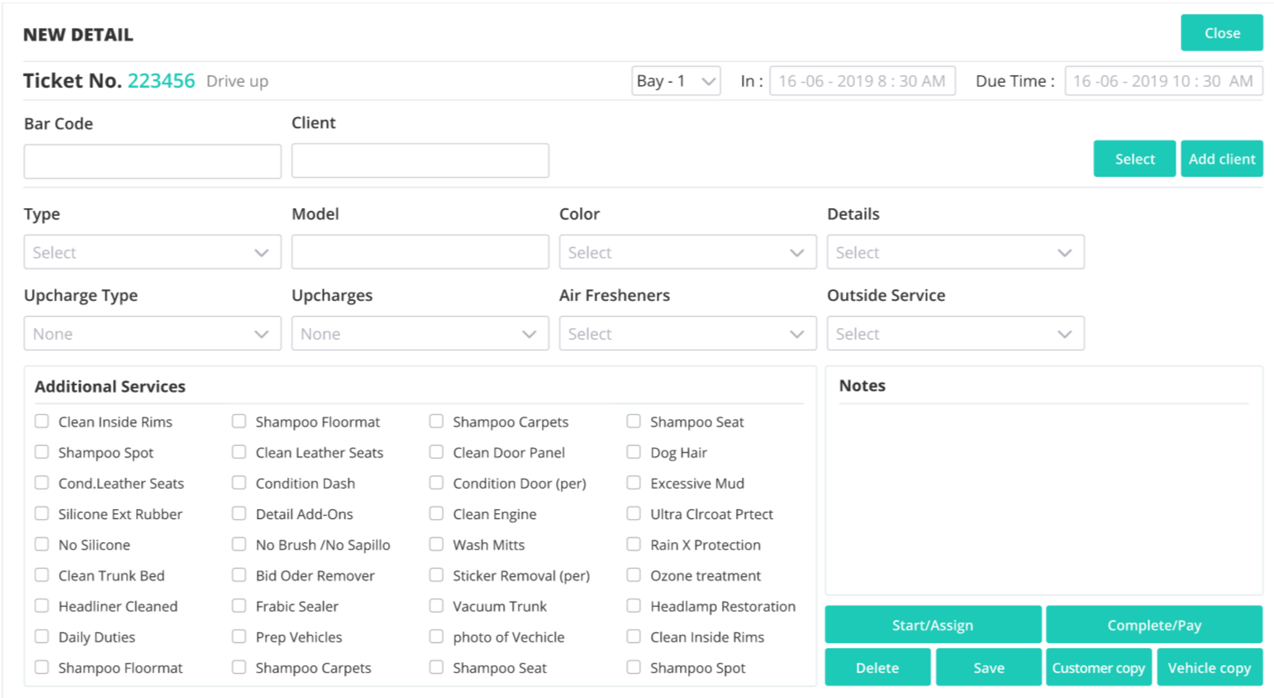


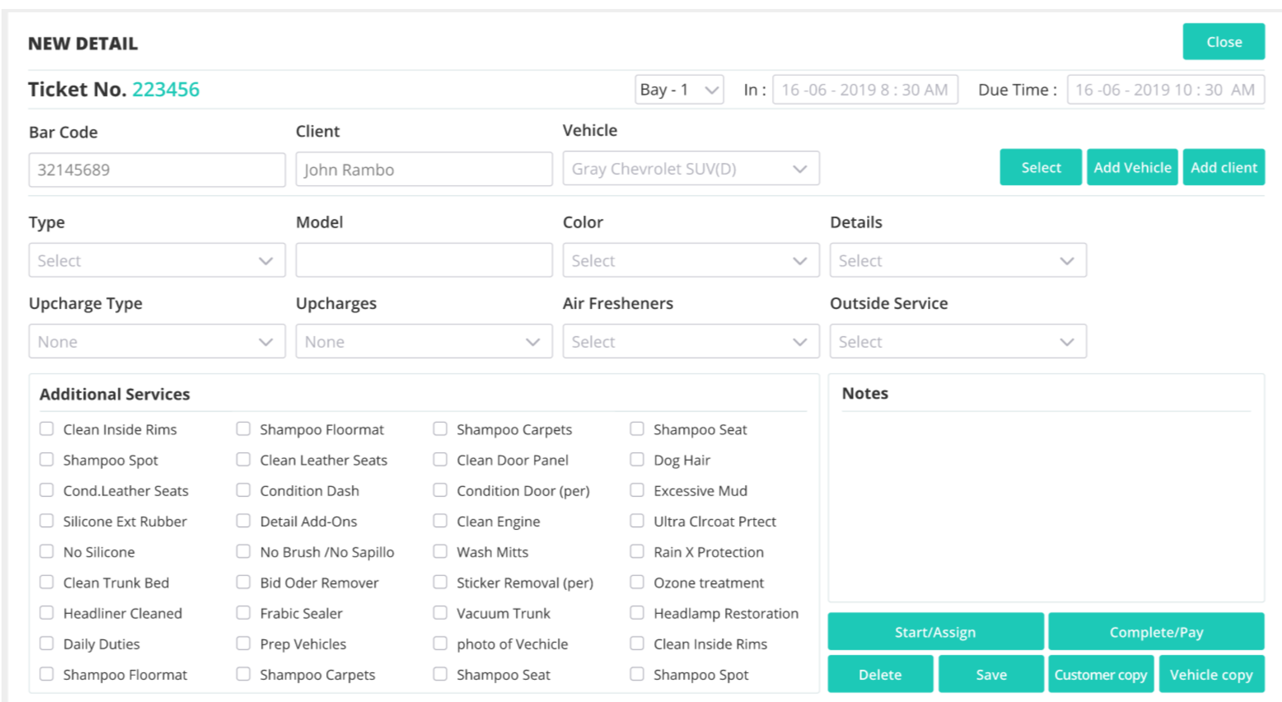
CR 3.2.3 Schedule New Detail by Bay

Users shall be able to schedule new details by selecting the desired date for scheduling the detail from the calendar. To schedule a new detail, the user should select the bay and the schedule time for the selected date, and this can be completed by selecting the preferred time slot from the bay grid. The user shall be only able to schedule a new detail in the available timeslots. The system will indicate to the user that green timeslots are available timeslots, on the other hand the red highlighted timeslots already have a detail booked. The user shall be able to select the desired bay and available timeslot from the grid.



The users' selection of any available timeslot, the system will display a "New Detail Schedule" modal window with the following features for the user to input as shown in the mock below.





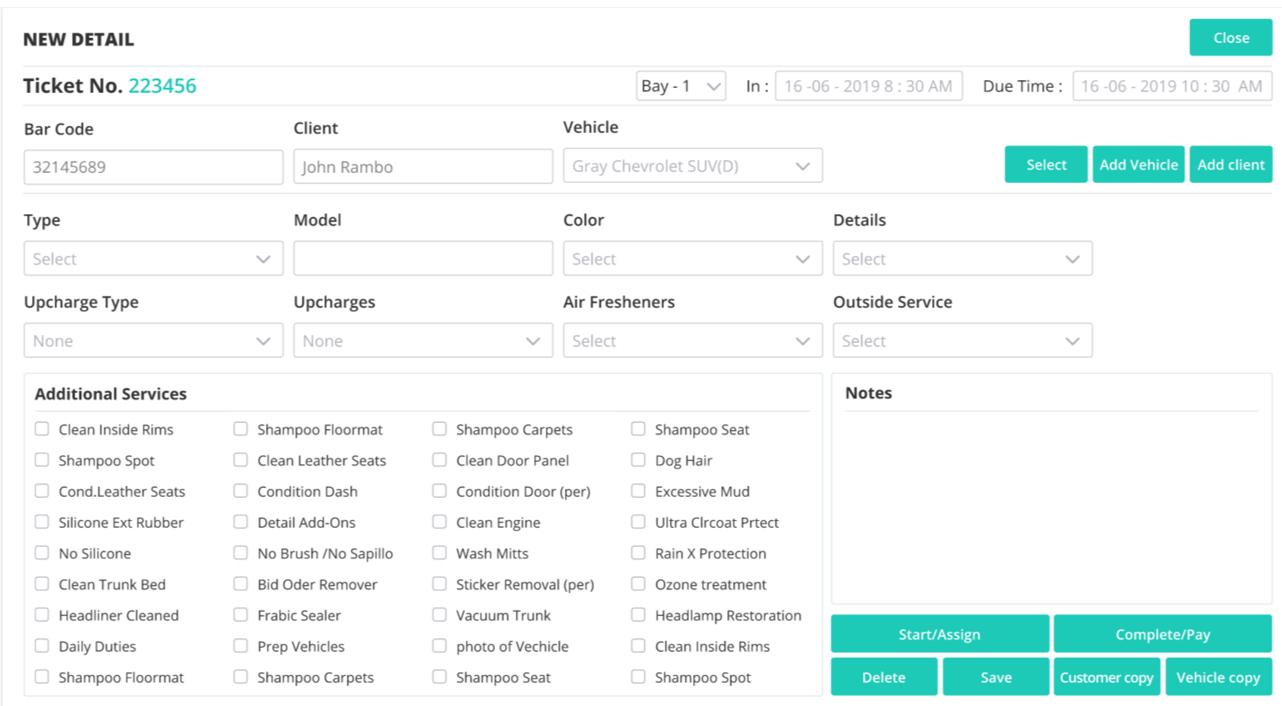
1. Ticket No. – A new ticket no. will be generated by the system when the user selects a new available timeslot on the grid.

2. Time In – The system will display the date and time that was chosen for scheduling the detail as chosen in the bay and time slot grid. This field will be an editable field for the user to update the date and time. The user shall be able to enter alphanumeric characters and symbols.
3. Due Time Out – The system will display the estimated time of completion of the car detail service depending on the list of services chosen.
4. Bay#: The user shall be able to select the Bay in which the detail service will be performed. Depending on the store location, the number of bays may vary from 1 to 10. Typically, most stores have around 2-3 bays. Details can be scheduled for multiple bays at the same time.
5. Bar Code – The user shall be able to input the bar code number of the vehicle for regular customers. If it's a new customer, the user shall be able to continue without inputting the barcode and just selecting the services requested, the system will display the option "Drive Up" against the Client Name field next to barcode if barcode is not entered.
6. Client – The system will display the full name of the customer. This field will be auto populated once the user enters a valid "Bar Code" if the client exists. If it's a new client, the user shall be able to add a new client and this field will be auto populated once the user adds the client to the system.
7. Select – If the users not aware of the barcode of the customer, the user shall be able to click on "Select" and the system will display a modal window, with "First Name" and "Last Name" text fields for the user to input and a search results table with corresponding customers details. By default, the system will display a blank field for both "First Name" and "Last Name". Once the user enters a character in one of the fields, the search results grid will display the search results and will work as contains. The user shall be able to select the desired customer from the search results and once the user selects the customer, the corresponding customer information will be auto-populated on the "New Detail" window as shown in the mock.
8. Add Client – The user shall be able to select "Add Client" to add a new customer to the application. Once the user selects "Add Client" option, the system will open a modal window with the following fields for the user to input and save as shown in the mock below:
    a. First Name
    b. Last Name
    c. Phone 1, Phone type (Cell, Work, Home)
    d. Phone 2, Phone type (Cell, Work, Home)
    e. Address
    f. Customer Type
        i. Regular
        ii. Corporate
        iii. Monthly
        iv. Comp
    g. Status
    h. Email
    i. Notes
    j. Save

k. Cancel

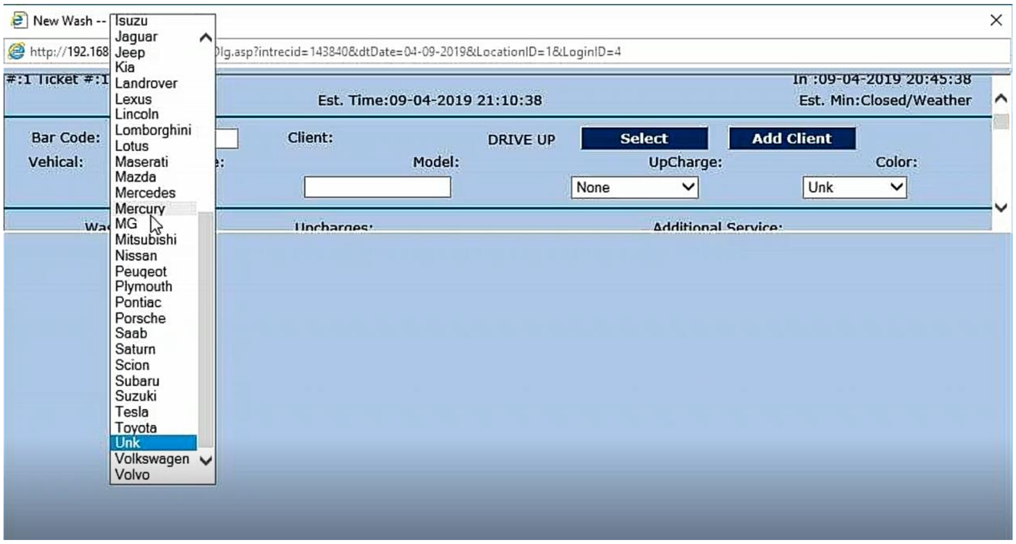
The user shall be able to input all the fields specified above and select “Save” to add the customer to the application. The user will be navigated back to the “New Detail” window upon selecting “Save” and the new user information will be saved in the database. The users’ selection of “Cancel “will navigate the user back to the “New Details” window without saving new customer information.

9. Add Vehicle – The user will be able to add multiple vehicles to existing customers. For existing customers, the user shall be able to add the existing customer using the “Select” feature and then select “Add Vehicle” to add a vehicle to the customer. If the user wants to add a new vehicle to a new customer, the user shall be able to do so by adding a new client as specified above and then select “Add Vehicle”. The user shall be able to associate up to 10 vehicles per customer.



The user shall be able to edit Vehicle info for Drive Up for new customers without adding them to the application as well. The users’ selection of “Add Vehicle” would display the following fields for the user to input.

a. Type – The user will be able to choose the type of the vehicle (Make) from a dropdown, the customer is getting the service for as shown in the mock below. If the type of car is not known, the user can choose “Unk” signifying “Unknown”. The default value for the Type field will be displayed as “Unk”.



b. Model – The user will be able to select the Model of the car from the dropdown list and if the model of the car is not known, the user shall be able to choose “Unk” as an option from the dropdown. By default, the system will display “Unk” for Model. The user shall be able to add new Models in the Admin Module.

c. Color: The user shall be able to choose the color of the car from the dropdown. The default value of the field will be displayed as “Unk”.
The user will be able to add new colors in the Admin module.

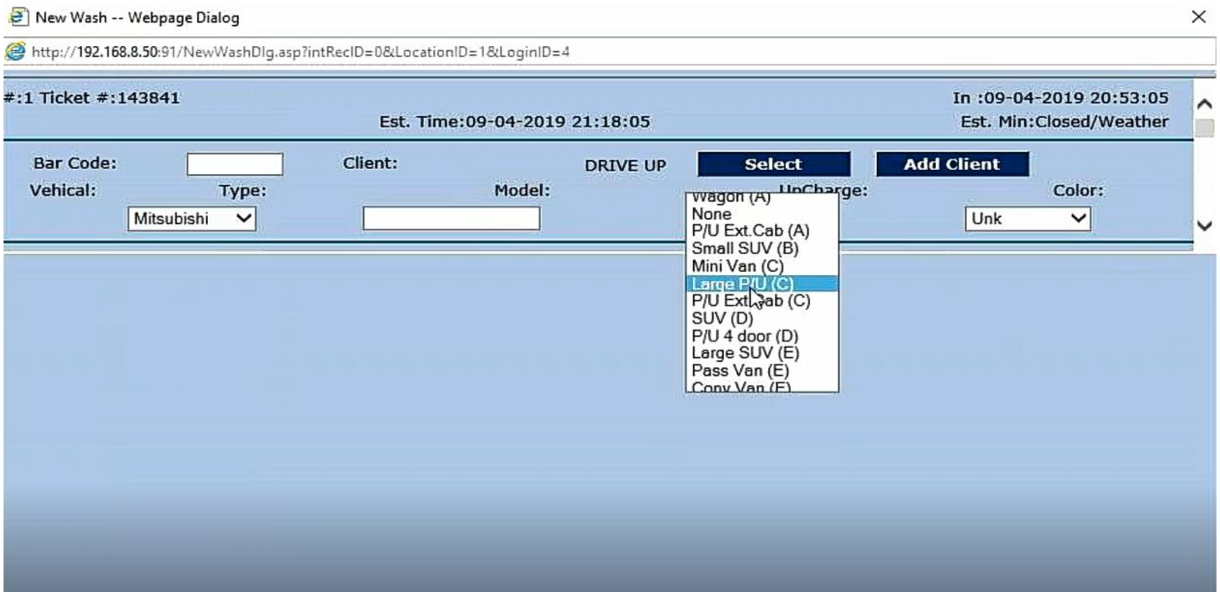
d. Details – The user shall be able to pick the detail package that is required to be performed from the dropdown. The list of detail options will be as specified below:
   i. Interior Detail
   ii. Ceramic Coating
   iii. Correct/Seal
   iv. Synthetic Seal
   v. Correct/Ceramic
   vi. Ceramic Coating +
   vii. Correct Seal +
   viii. Synthetic Seal +
   ix. Correct/Ceramic+

   Based on the detail type chosen the rates for each package will vary. All customers including account holders will be required to pay for any details they perform.

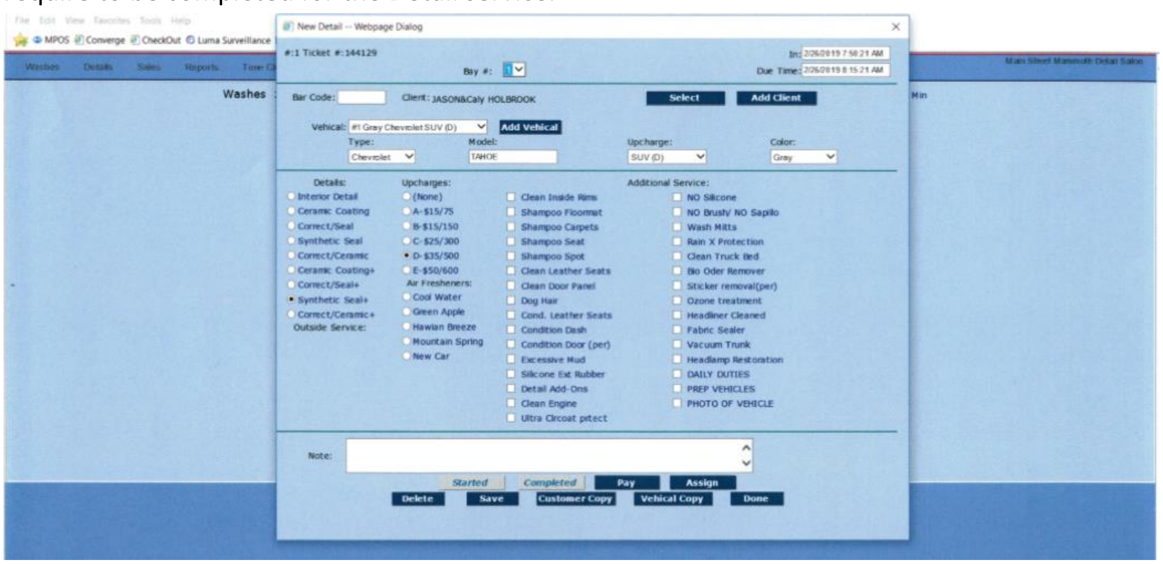
e. Upcharge Type – The user shall be able to add upcharges based on the size of the vehicle as shown in the figure below. Further if no upcharges will be added, the user shall be able to choose “None” from the dropdown. By default, the system will display “None” for upcharge type.

f. Upcharges – Based on the user’s choice of Upcharge Type the user shall be able to choose the relevant upcharges for the vehicle from the dropdown. By default, the system will display “None “, and this field is not a mandatory field.

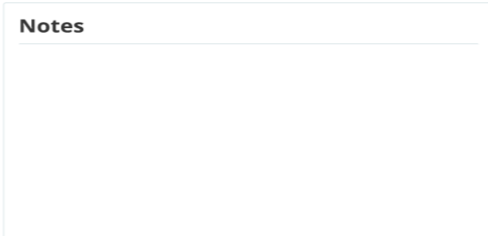
g. Air Fresheners – The user shall also be able to choose the type/flavor of air freshener that is required to be added during the detailing process inside the car. This field will be a dropdown and by default, the value of this field will be "None" and this will not be a mandatory field.



10. Type of Service required – The user shall be able to select all the detail service requirements as requested by the customer such as Detail packages, Upcharges and any additional services that require to be completed for the Detail service.

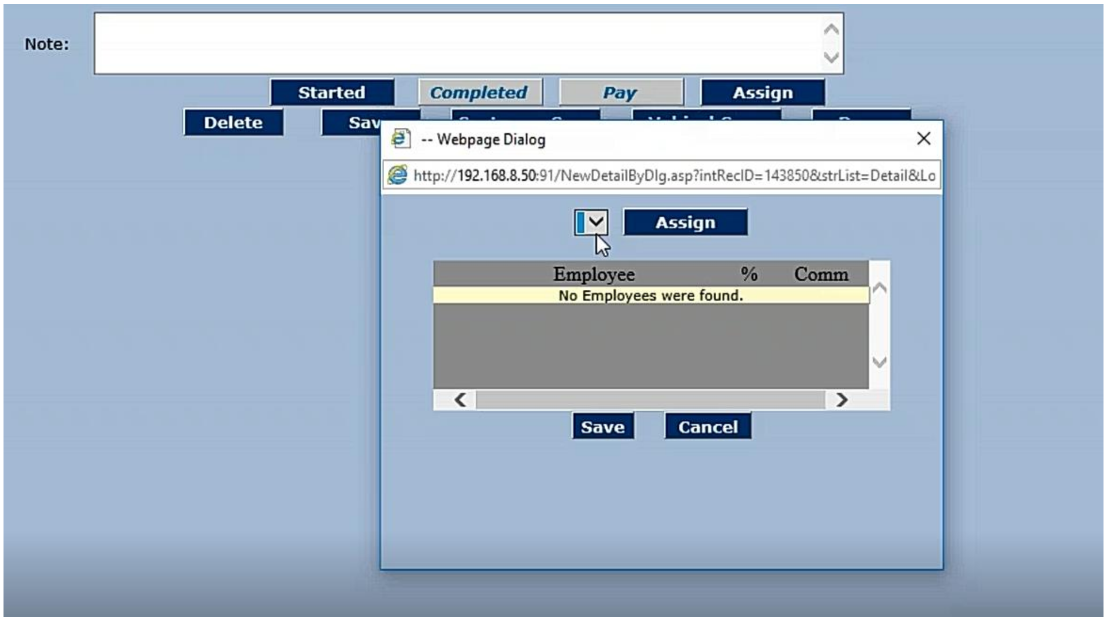


11. Notes – Notes field is a text area field that will accept alphanumeric characters and symbols. The user shall be able to enter any relevant notes for the current Detail.



12. View Past Client Notes– If there are any notes associated with the client, the system will display "View Past Client Notes" button for the user to view. Once the user selects this button, the system will display a modal window with all the client information including the client notes in a read only format. The user shall be able to select "Back" button to navigate back to the current detail information. If there are no notes associated with the client, the button will be disabled, and the user shall not be able to view any client related information unless there are client notes associated with the client.
13. Delete – The user selection of "Delete" will prompt the user with an error message "Are you sure you want to delete the ticket?". If the user selects "Yes" the system navigate the user back to the Details Queue screen, and the ticket will be deleted. This action cannot be rolled back and retrieved. The user's selection of "No", will navigate the user back to the new detail window where the user will be able to update the information and save the new detail information.
14. Start and Assign – The user will be able to select "Start" button to start the detail for the customer and assign the corresponding detailer employee for the detail task accordingly. The users' selection of "Start" will display a modal window with an employee name drop down, assign functionality and assignment grid as shown in the mock below. The user shall be able to select the detailer employee from the dropdown and select "Assign" to assign the selected employee to the current detail assignment. The users' selection of "Assign" will add the employee to the assignment grid and shall display the employee details and percentage commission for the detail that will be paid to the employee for the job. If the detail service being scheduled has multiple packages/services that needs to be completed, for instance, "Interior Detail" and "Ceramic Seal", the user shall be able to assign more than one employee for the detail job by selecting "Assign" again. The system will display the list of employees assigned in the grid with the corresponding package they will be completing. The user shall be able to select "Save" to save the assignment details and the user shall be navigated back to the new detail window. If the user doesn't want to save the assignment details, the user shall be able to select "Cancel" to navigate back to the new details window without assignment. Further, if the detailer assigned is not clocked in as a detailer, before the start time, the system will display a notification to the user that the employee is not clocked in as a detailer and the system will display the following message for the user "Assigned Employee is not clocked in as Detailer. Kindly ensure that the employee is clocked in as Detailer before selecting "Start Detail". "The system will also automatically send a notification 10 minutes before the detail start time, in the employee app reminding them to clock out as washer and clock in as a Detailer if they are clocked in as a washer. If the employee is already clocked in as a Detailer, the system will send a

notification to the Detailer regarding the upcoming detail scheduled 10 minutes before the start time. This functionality will ensure that an employee clocked in as a Detailer will not receive "Wash" payment as well as "Detail" commission for the same duration.



15. Complete and Pay– This functionality will not be available for the user to select until the "Start Detail" functionality is selected. Once the user selects "Start Detail" functionality and an employee is assigned, the user will have the option to select "Complete and Pay "functionality and pay for the detail completed. The system will navigate the user to the Sales module upon selecting this option to pay for the detail job.
16. Save and Done – The users selection of "Save and Done" will save the new wash details and navigate the user back to the Details queue. The new detail scheduled will be listed as the last item in the queue in the corresponding bay with "Pay" button adjacent to it.
17. Print – The users' selection of "Print" will display a modal window with the following options for the user to choose from:
    a. Print Customer Copy – The users' selection of this option will print the receipt for the customer with relevant detail service details and customer details. The customer will be able to make a payment with this receipt.
    b. Print Vehicle Copy – The user will be able to print another ticket for the detailers use to know the services that have to be performed.
18. Close – The users' selection of "Close" will close the new details screen without saving any changes and navigate the user back to the Details module. If the user selects "Save" and then selects "Close", the system will navigate the user back to the Details module after saving all the information inputted on this screen.

CR 3.2.4 Update Schedule

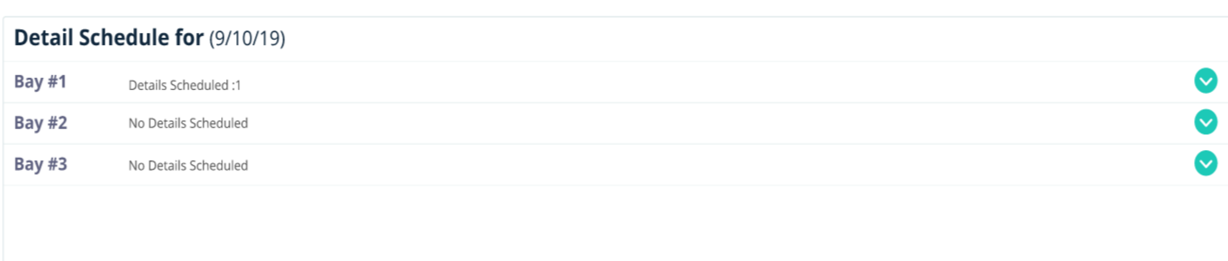
Once the user has updated an existing schedule or added a new detail, the user will be navigated back to the details window where the users' selection of "Update" will update the calendar to reflect the recent changes made.

CR 3.3 Scheduled Details Queue (Current Date):

The users shall be able to view the queue of details scheduled for the current date against the bay in which it was scheduled with additional information such as follows:

a. Bay # - The Bay in which the car detail service will be completed
b. Time In – The time the detail service is started.
c. Client Name – Full Name of the customer
d. Client Phone No. – Customer Contact Number
e. Due Time – The time the scheduled detail will be completed based on the services requested.
f. Service – All the detail services that will be completed for the vehicle.
g. Ticket # - The ticket number generated during creation of the detail.
h. Outside Service – Any additional services that will be required for the vehicle as requested by the client.
i. Detailer Name – The system will display the name(s) of the detailer that will be working on this detail job respectively.

The system by default, will display the total number of details scheduled against each bay as shown in the mock below. If there are any details scheduled for the current date against a bay, the user shall be able to select the "" icon to view the list of all the details as specified above for the selected bay. The user shall be able to collapse the list view by selecting the "". Further, if there are no details scheduled for the current date for a specific bay, "No Details Scheduled" will be displayed against the corresponding bay indicating to the user that the bays are available for scheduling new details as shown in the mock below.



Detail Schedule for (9/10/19)

Bay #1

Ticket#	Time In	Client	Phone	Time Out (Est.)	Service	Outside Service
386598	07:00	Myron Wunsch	(861) 550-2796	08:30	Unk Unk	Synthetic Seal

Bay #2 No Details Scheduled

Bay #3 No Details Scheduled

CR 3.4 Pending Details Queue (Current Date):

Once a customer has requested a detail service using genbook, the system will automatically display the list of pending schedules requested by the customer under the "Pending Details Queue". The user shall be able to select the desired pending item to view and the system will navigate the user to the details screen with all the fields auto-populated and assign employee by selecting "Assign Employee" button respectively. If the detail has multiple packages that are required to be completed, the user shall be able to assign multiple employees by package and select "Save" respectively. The system will automatically update the information and move the detail schedule from pending to "Scheduled Details Queue" accordingly.

The users shall be able to view the queue of details requested that are pending are required to be approved for the current date against the bay in which it was scheduled with additional information such as follows:

a. Bay # - The Bay in which the car detail service will be completed
b. Time In – The time the detail service is started.
c. Client Name – Full Name of the customer
d. Client Phone No. – Customer Contact Number
e. Due Time – The time the scheduled detail will be completed based on the services requested.
f. Service – All the detail services that will be completed for the vehicle.
g. Ticket # - The ticket number generated during creation of the detail.
h. Outside Service – Any additional services that will be required for the vehicle as requested by the client.

The system by default, will display the total number of details pending. Further, if there are no details pending for the current date, "No Details Pending" will be displayed indicating to the user that all the details scheduled have been assigned and approved.

CR 4 Assumptions:

1. This application being designed for Phase 1 will only be for Mammoth Car Wash and other similar car wash businesses, for other Nail Salons, Restaurants and Hair Salons, this feature will be included for Phase 2.

2. The actual representation of the mocks will vary from the FRS. The wireframes are just a representation of how the application will function, the look and feel of the application to be designed will be in accordance with design standards.
3. Payment Method by “Check” will not be included for the new system.
4. P/L Score is not included in the Wash and Details Dashboard as it is not a required parameter.
5. Mobile Unit will be included in Phase 2
6. Extendable Services and Updating Services can be done in Admin Module – Setup Services screen.
7. Gift Cards will be available only in the “Sales Module” and “Admin Module” respectively.