

## Summary:

- Client submit query (from now on, a “task”)
- Manager access Tasks and assign those to COLLABORATOR
- Collaborators follows up task with client until its completion (task is performed outside the website environment, but collaborator and client keeps constant communication thru website messaging, similar to messaging provided by *Guru.com* (for example: I write a message to you, then you get an email with my text, but need to enter guru’s website to answer me)).
- When the collaborator updates the PRICE TAG, the client accesses the Openpay payment gateway (must be Openpay, it is the best option for web payment in Mexico, where the majority of my clients are).
- Once the payment is done, collaborator and manager receives an update (email to COLLABORATOR and update on the TASK STATUS) when the task is completed then the collaborator will finish the task by submitting the last message to client, giving CLIENT the possibility to rate collaborator service.

## ROLES

Item name	Description
CLIENT	<ul style="list-style-type: none"> <li>• Created when client fills form with email and last four telephone digits becomes client password</li> <li>• At the same time that CLIENT is filling up his form, he is creating a TASK, which will be listed on MANAGER pending TASK list.</li> <li>• Has access to see web site public content</li> <li>• Interchanges comments with assigned COLABORATOR on communication page, make PAYMENTS and ranks COLLABORATOR service when it's done.</li> </ul>
COLLABORATOR	<ul style="list-style-type: none"> <li>• Creates user fills up the sign up form with some personal data (form to be disclosed later) and needs to send the image of three identification documents</li> <li>• All of this information remains on COLLABORATOR profile page fully accessible to MANAGER and ADMIN. CLIENT only sees COLLABORATOR's name and location.</li> <li>• Access to own profile view and edit (COLLABORATOR CATALOG own information), and interacts with designated CLIENTs on communication pages</li> </ul>
MANAGER	<ul style="list-style-type: none"> <li>• Has access to CLIENT TASKs and assigns those to COLLABORATORs</li> <li>• Has access to view CLIENT-COLLABORATOR communication pages, CLIENT full data and COLLABORATOR profiles,</li> <li>• Receives a notification about CLIENT payment confirmation and COLLABORATOR payment history, Can have direct communication with COLLABORATOR.</li> <li>• Access to TASKs and COLLABORATOR Catalogs (can view and edit)</li> <li>• Access CLIENT-COLLABORATOR TASK assignment log</li> </ul>
ADMIN	<ul style="list-style-type: none"> <li>• Access to same content and functions as MANAGER</li> <li>• Access to Drupal Administrative pages</li> <li>• Has full control of site</li> </ul>

## PROFILE DETAILS

Item name	Fields	Visible for (other than for himself)
CLIENT	• <b>Name</b> (Text, up to 20 characters)	• Collaborator • Manager • Admin
	• <b>Last name</b> (Text, up to 30 characters)	
	• <b>Phone number</b> (Numeric, up to 15 characters)	• Manager • Admin
	• <b>Email</b> (email)	
	• <b>Password</b> (automatically created, last four digits of phone number)	
COLLABORATOR	• <b>Name</b> (Text, up to 20 characters)	• Manager • Admin
	• <b>Last name</b> (Text, up to 30 characters)	
	• <b>Phone number</b> (Numeric, up to 15 characters)	
	• <b>Email</b> (email)	
	• <b>Password</b> (alphanumeric)	
	• <b>RFC</b> (Alphanumeric, 13 characters, CAPS only)	
	• <b>IFE1</b> (image jpg or png, up to 2MB)	
	• <b>IFERverso</b> (image jpg or png, up to 2MB)	
	• <b>RFC image</b> (image jpg or png, up to 2MB)	
	• <b>Comprobante domicilio</b> (image jpg or png, up to 2MB)	
	• <b>Home Address</b> (Text, up to 100 characters)	
	• <b>Codigo Postal</b> (Numeric, 5 Characters)	
	• <b>Send to Address</b> (Text, up to 100 Characters)	
	• <b>Sent to Codigo postal</b> (Numeric, up to 5 Characters)	
	• <b>Collaborator Rating</b> (Rating, 5 stars, visible for all profiles, only client can edit this one time only)	
	• <b>Work Location</b> (Text, up to 20 chatacters)	

## PROFILE DETAILS

Item name	Fields	Visible for (other than for himself)
MANAGER	<ul style="list-style-type: none"> <li><b>Name</b> (Text, up to 20 characters)</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>Admin</li> </ul>
	<ul style="list-style-type: none"> <li><b>Last name</b> (Text, up to 30 characters)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Phone number</b> (Numeric, up to 15 characters)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Email</b> (email)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Password</b> (alphanumeric)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>RFC</b> (Alphanumeric, 13 characters, CAPS only)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>IFE1</b> (image jpg or png, up to 2MB)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>IFERverso</b> (image jpg or png, up to 2MB)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>RFC image</b> (image jpg or png, up to 2MB)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Comprobante domicilio</b> (image jpg or png, up to 2MB)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Home Address</b> (Text, up to 100 characters)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Codigo Postal</b> (Numeric, 5 Characters)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Send to Address</b> (Text, up to 100 Characters)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Sent to Codigo postal</b> (Numeric, up to 5 Characters)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Collaborator Rating</b> (Rating, 5 stars, visible for all profiles, only client can edit this one time only)</li> </ul>	

## Drupal ITEM description

# CONTENT TYPES

Item name	Description
BANNER_ITEM	<ul style="list-style-type: none"> <li>Contains Banner Items, with two fields: BANNER_IMAGE (1MB image, must specify which will be the ideal size for the responsive theme) and BANNER_TEXT</li> </ul>
PAGE	<ul style="list-style-type: none"> <li>Contains static text and images, for those pages such as Privacy policy, About Us, Terms and Conditions, Further Instructions, should be able to include links to Main Menu</li> </ul>
COMMENT_NODE	<ul style="list-style-type: none"> <li>Not sure if this is a node type per se, but this page contains the comment history (threaded) between CLIENT and COLLABORATOR</li> <li>Both CLIENT and COLLABORATOR should enter the COMMENT_NODE to sent messages and status updates between each other, and every time a new comment is written between them, an email should be send to their registered email. Both receives an email with comment content an a direct link to the COMMENT_NODE to write the answer (similar to Guru.com messaging system)</li> <li>Comment node should have the option for the client to upload images (2MB each, on PDF, PNG or JPG formats)</li> </ul>
PAYMENT	<ul style="list-style-type: none"> <li>Each client query equals to a new TASK, each TASK has an unique system generated ID (something like YYMMDD-NN, where YY equals to Year, MM Month, DD Day and NN is a consecutive number assigned by the system), after knowing the final price form COLLABORATOR thru the messaging system, and the CLIENT decides to go for the task, he pays for it, that's why his comment threaded list should have a link to the payment gateway which is under OpenPay platform (<a href="http://www.openpay.mx/en/docs/">http://www.openpay.mx/en/docs/</a>) and the site should be able to get payment notification feedback from Openpay , which should be informed to COLLABORATOR (as a new comment on threaded list), and MANAGER (as a new item on an STATUS ICON) THIS IS VERY IMPORTANT.</li> </ul>
CONTACT_FORM	<ul style="list-style-type: none"> <li>Contact form where the client leaves his first name, last name, email, phone number and should be able to attach up to 3 images.</li> <li>As soon as the client sends the form, his email becomes his sign-up information and the last four digits of his phone is from now on his password, web site should be able to keep client signed in by default.</li> </ul>

## Client – Site project selling process

roles

CLIENT

COLLABORATOR

MANAGER

ADMIN

Completes all three steps of the first page, this creates a TASK

Reviews CLIENT submitted TASK, and chooses a COLLABORATOR to hand it over

Provides all necessary information and makes payment (thru payment gateway Open Pay)

Gets in touch with CLIENT to provide detailed information about the TASK by the threaded COMMENT list and he can changes the PRICE TAG for the TASK

Updates total expense list and may need further communication with client via threaded COMMENT page

Finishes the TASK (out of site), but can update CLIENT about TASK status by message

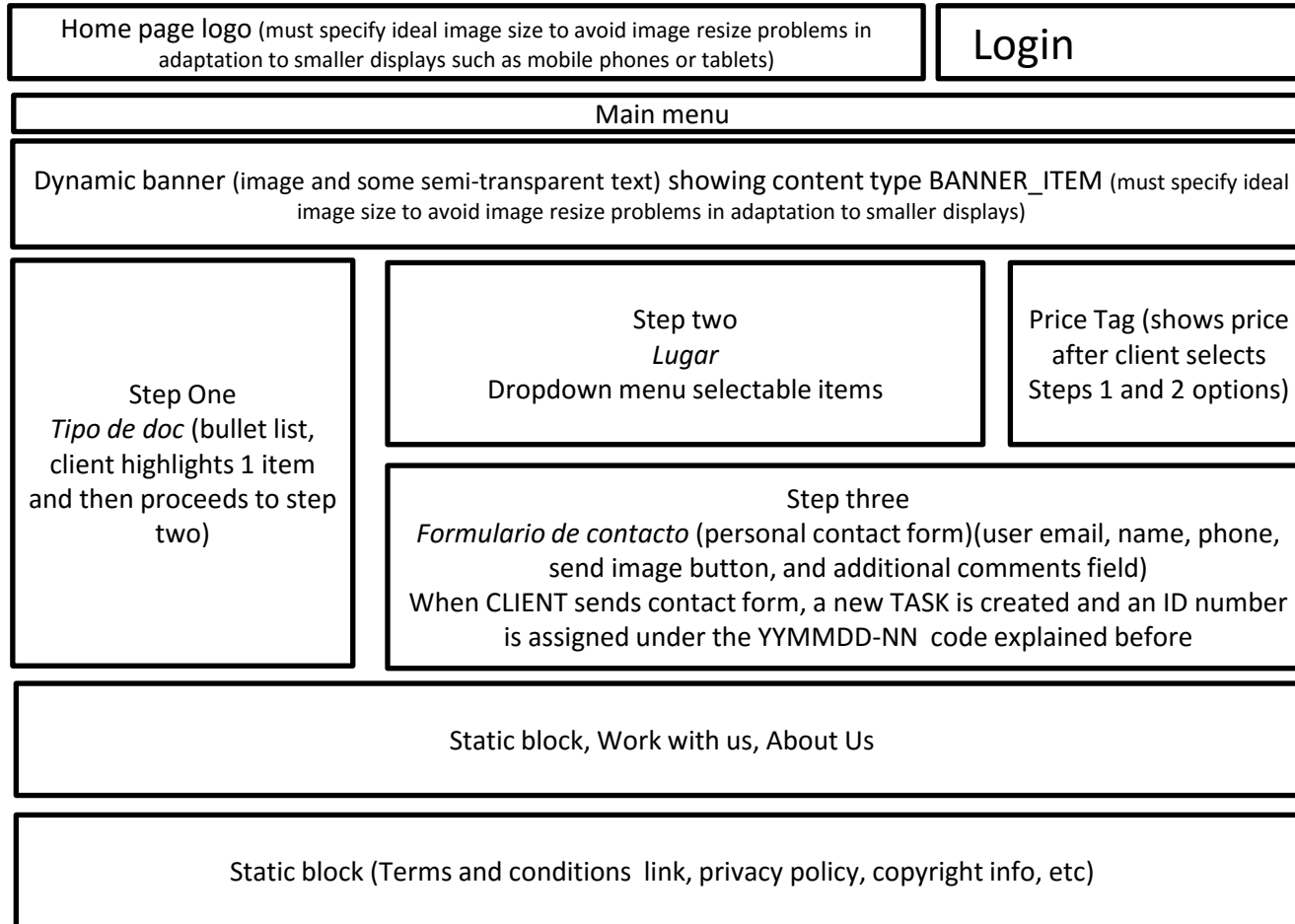
Receives email confirmation about the end of process from COLLABORATOR with a link to submit rating of the service.

Submits Task conclusion status, which is informed to CLIENT and MANAGER as well

Reviews end of project updates and prepares COLLABORATOR payments (out of site)  
Can review at any time the TASK list with COLLABORATOR name, rating and related costs

Access to all Client – Collaborator communications and a log file for every MANAGER activity within site, and the same information that MANAGER can see.

# 01-Front page structure



# 01-Front page looks like (Desktop computer monitor example)

Home page logo

Login

Menu Item 1   Menu Item 2   Menu Item 3   Menu Item 4   Menu Item 5...



*Tipo de doc* and List Item (*Lugar de em*), should be linked from a *Task Catalog* that contains the next info:

Tipo de doc 1  
Tipo de doc 2  
Tipo de doc 3  
Tipo de doc N  
Tipo de doc N  
Tipo de doc N  
Tipo de doc N

**User selects one from the list (highlights the option)**

Lugar de em

- List item 1
- List item 2
- List item 3
- List item 4

Name

Last name

Phone number

Email

☐ Checkbox (More than one task)

☐ Agree with terms and conditions

Add image

Price tag

\$XXX.XX MXN

3

Tipo de doc1	Lugar 1	Price tag	Additional Info
Tipo de doc1	Lugar 2	Price tag	Additional Info
Tipo de doc1	Lugar 3	Price tag	Additional Info
Tipo de doc2	Lugar 1	Price tag	Additional Info
Tipo de doc2	Lugar 2	Price tag	Additional Info

Price tag is shown after user highlights *Tipo de doc* and selects an *Lugar* from dropdown list

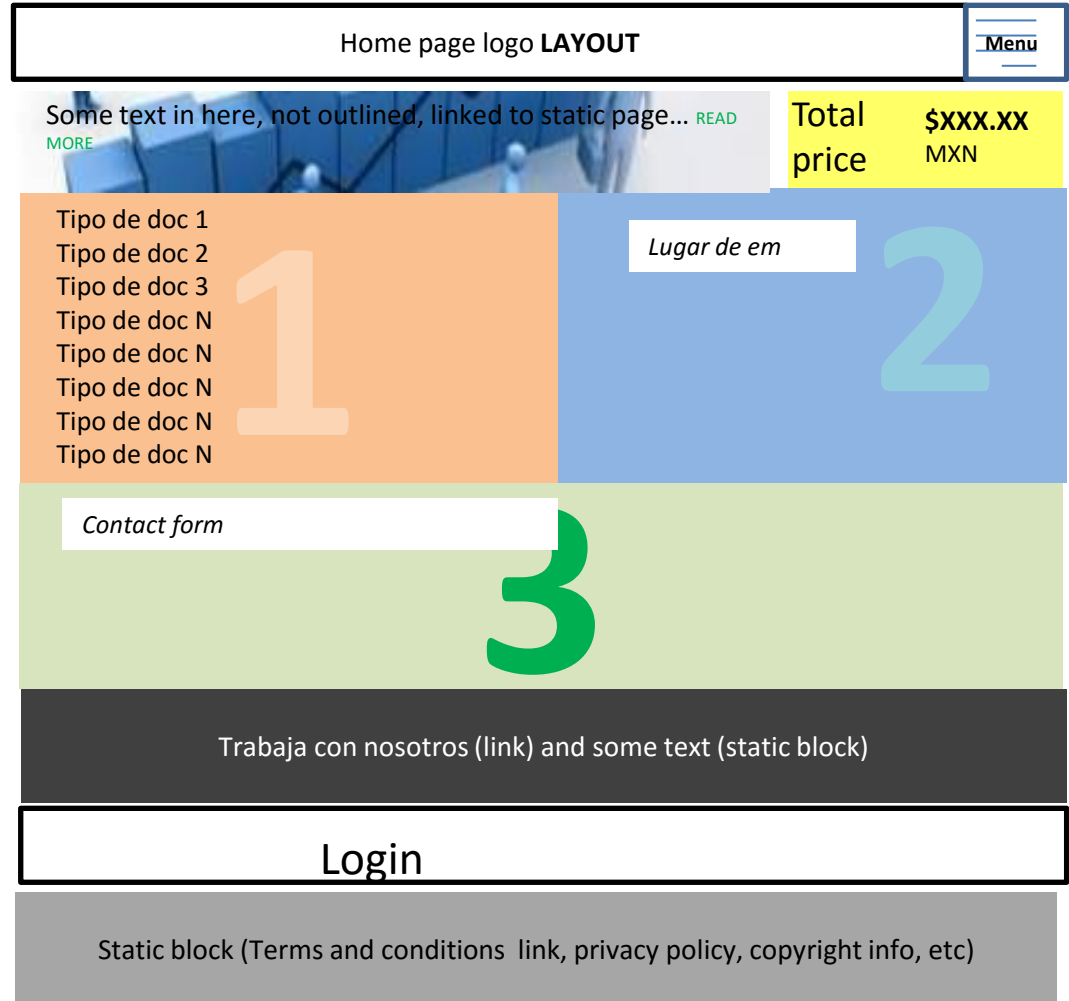
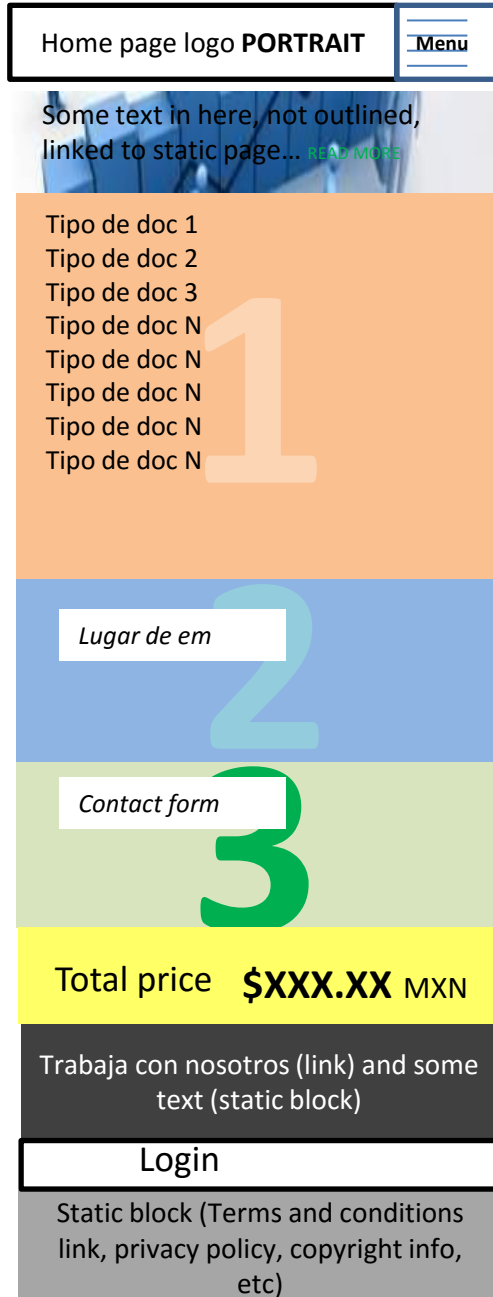
Trabaja con nosotros (link) and some text (static block)

Static block (Terms and conditions link, privacy policy, copyright info, etc)

Website should have a minimalistic design, the attention on main page should be attracted on the three blocks (1, 2 and 3) and must be responsive (next slide)



# 01-Front page looks like (Mobile and tablet)



## 02-Once the client completes step 3

### CLIENT home screen

Home page logo

Main menu

When client completes step 3, he is signing up our web site, being the email its login information and his password is the last 4 digits of phone number

This information is shown here and sent over email.  
web site must be able to keep client logged in.

This block shows the client some information about FURTHER  
INSTRUCTIONS (static info)

Comment threaded list between CLIENT and COLLABORATOR

Static block (Terms and conditions link, privacy policy, copyright info, etc)  
SAME BLOCK AS MAIN PAGE

Block with information  
about the task:

- TASK ID
- PRICE TAG (includes  
last update made from  
the COLLABORATOR)
  - TIPO DE DOC
  - LUGAR
- ADDITIONAL INFO
- COLLABORATOR  
NAME
- PAYMENT STATUS

## 03-Manager home screen

Home page logo

Main menu

List of pending tasks (not yet assigned to COLLABORATOR)  
CLIENT NAME, TIPO DE DOC (Step 1), LUGAR (Step 2), CLIENT EMAIL and  
PHONE NUMBER, ADDITIONAL COMMENTS  
For each listed item, Manager will be able to send the listed item to one  
COLLABORATOR listed on the dropdown list  
COLLABORATOR catalog must have all collaborator info and the  
dropdown selector must have COLLABORATOR name and work location  
from the catalog.

List of all TASK list (current and finished) Sortable list with filters, with  
information:

- TASK ID
- TIPO DE DOC
- LUGAR
- COLLABORATOR EXPENSES (\$0,000.00)
- PRICE TAG (updated by COLLABORATOR or if there is no update, PRICE TAG from TASK CATALOG) and a link to more information.
- TASK PAYMET CONFIRMATION status
- TASK STATUS (in progress or finished)
- DAYS elapsed from TASK begin to TASK PAYMENT CONFIRMATION
- DAYS elapsed from TASK begin to TASK finished date

Can access to each COLLABORATOR list and conversations between  
CLIENT and COLLABORATOR

Has access to COLLABORATOR profile from a link on his name.

Pending assignments ##  
TASK in progress ##

Can list the TASKs from a date  
selector (TASK ID, TIPO DE DOC,  
TASK STATUS and PRICE TAG)

## 04-COLLABORATOR screen

Home page logo

Main menu

List of all TASK list (current and finished) Sortable list with filters, with information:

- TASK ID
- TIPO DE DOC
- LUGAR
- COLLABORATOR EXPENSES (\$0,000.00)
- PRICE TAG (updated by COLLABORATOR or if there is no update, PRICE TAG from TASK CATALOG) and a link to more information.
- TASK PAYMENT STATUS confirmation
- TASK STATUS (in progress or finished)
- DAYS elapsed from TASK begin to TASK PAYMENT CONFIRMATION
- DAYS elapsed from TASK begin to TASK finished date
- NEW MESSAGES from the CLIENT and LINK to comment threaded list
- LINK to see attached images by the CLIENT

All client-collaborator communication will be through the site (threaded conversation list), and when a new message is available, an email should be sent to the counterpart.

TASK in progress ##

Static text block show only on this profile

Static block (Terms and conditions link, privacy policy, copyright info, etc)

## 04-Collaborator page –threaded comment list for each task

Home page logo

Main menu

Task list, small format, in bold those tasks still unfinished, listing TASK ID,  
CLIENT name, TIPO DE DOC

Comment threaded list with CLIENT

Static text block show only on this profile

Static block (Terms and conditions link, privacy policy, copyright info, etc)

Task details:

- TASK ID
- TIPO DE DOC
- LUGAR
- COLLABORATOR EXPENSES (\$0,000.00) (COLLABORATOR updates this value)
- PRICE TAG (updated by COLLABORATOR or if there is no update, PRICE TAG from TASK CATALOG) and a link to more information.
- TASK PAYMENT STATUS confirmation
- TASK STATUS (in progress or finished)
- DAYS elapsed from TASK begin to TASK PAYMENT CONFIRMATION
- DAYS elapsed from TASK begin to TASK finished date
- NEW MESSAGES from the CLIENT and LINK to comment threaded list
- LINK to see attached images by the CLIENT
- TASK finish notification button (when finished, COLLABORATOR must send last message to CLIENT and TASK STATUS is UPDATED)

- Web site should be developed on Localhost and then sent in compressed files via email, dropbox or wetransfer to me with the instructions to upload it on live site.
- Once the site is live, developer will have an admin user to made any necessary adjustment to get the site working
- Developer should provide passwords for each and all users he creates
- Once the site is finished, I should be able as Admin to maintain the site and to upload the content to it
- Please let me know if there is any doubt that does not allow to made a price estimate
- Thank you