Communication to External Vendors

Vince Sonson

Target release	MMP
Epic	**SPOT-1** - Send content to external constituents **BACKLOG**
Document status	**DRAFT**
Designer	
Developers	
QA	

Goals

- PM can send information about a point and/or job to a vendor via email from their mobile device
- PM can send information about multiple points to vendor at once from a mobile device
- PM can do above from desktop view also
- Vendor can view all relevant information sent by PM within the body of the email (no need to open browser/link, login to 1Spot or otherwise, etc.)
- Information is arranged in the email in a way that is intuitive and easy to consume, regardless of the mobile device, operating system, or email client
- Vendor can see map and photographs related to the point/job in the email
- PM can add some "contextual" copy in freeform prior to sending the email that appears at the top (i.e. "Bill can you give a ballpark estimate on this?")
- Not part of MMP: Vendor can respond to the email using the email client and the data automatically populates the point/job object in 1Spot (2-way sharing is desired state and Andrew has it mocked up in the Reporting scenarios; it's two pieces of data that we need really - cost (estimate) and time (lead time)

Background and strategic fit

Currently, a person has to have an active 1Spot user account and be logged in to see data related to a point, job, etc. This presents a problem when a PM wants/needs to send information about a point to a vendor who does not have a 1Spot account and is resistant to using the app. Our research indicates there is a high-level of resistance by that persona to using apps for such a purpose. But our research also shows that vendors will respond to email at a rate of 80%+ (and text might be even slightly higher).

This aligns with business model (per property pricing) and facilitates adoption by meeting users on their terms and then converting them later.

Assumptions

- Vendors do not have to have 1Spot accounts to participate in these scenarios
- Information sharing has only been promised one-way; but two-way sharing is ideal (per last bullet above in goals)
- In one-way scenarios, all communication that happens after the initial email from 1Spot is outside of 1Spot and PM must transcribe data into 1Spot where needed
- Multiple incoming estimates from multiple vendors will be handled by the PM outside of 1Spot
- Vendor can be on any device (including desktop), using any major OS, any device, and any email client
- First iteration will be points only. Jobs will be emailed once points is validated
- The "Amount" field will be used to capture the estimate for each point

Not Doing

- not allowing customization of data sent in transmissions per vendor, client, etc. - same data for everyone in same format.

- Two way communications for MMP
- Jobs for MMP
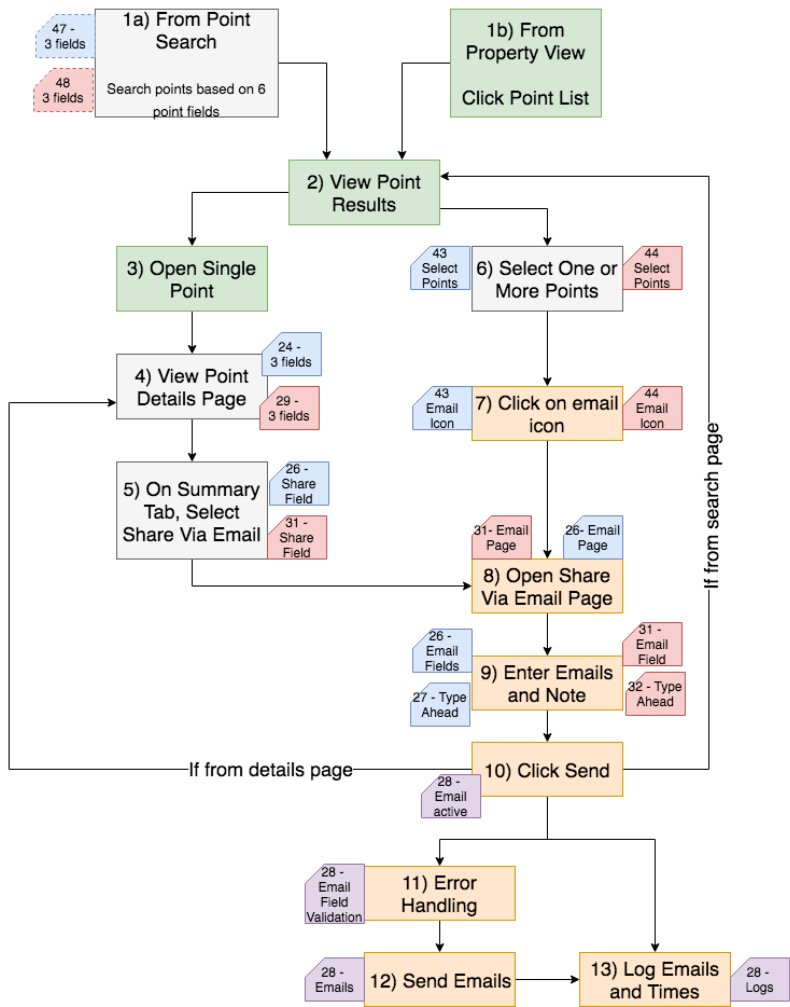
Requirements

Primary User Operations

| #	Title	Status	Notes
1	Sharing a new point (not created) on Mobile		• Scenario 1
2	Sharing a single existing point on Mobile	In Progress	• Scenario 3 step 4
3	Sharing multiple existing points on Mobile		• Scenario 3
4	Sharing a single existing point on Web		• Scenario 5
5	Sharing multiple existing points on Web		• Scenario

Workflow and Story Map

Used to map the user stories to the operational workflow. Reference the corresponding wireframes for additional details, look & feel, etc.

Blue - IOS Stories. Red - Web Stories, Purple - Both
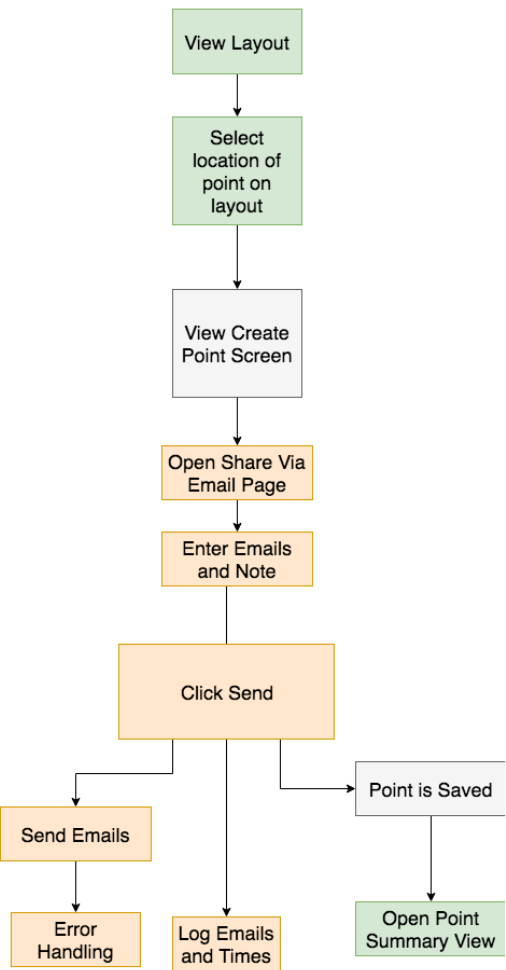
Existing Points Workflow Steps

White - Global Steps, Yellow - Single Point Details View Only, Red - Single / Multiple Point

| Step	Step Name	Screen	Status	Requirements
1a	Search Point	Point Search	Modify	• Search based on 6 point fields (three new ones)
1b	Click Point List	Property View	No Change	
2	View Point Results	Point Results	No Change	
3	Open Single Point	Point Results	No Change	
4	View / Edit Point Details	Point Details	Modify	• Thee new fields to view and edit
5	Select Share via Email	Summary Tab on Point Details	Modify	• New Share via Email Option
6	Select One or More Points	Point Results	Modify	• Able to select one or more points (i.e. radial buttons)
7	Select Email to Directly Send Email	Point Results	Modify	• Email button added to top of page • Clicking button goes directly yo share via email page
8	View Share via Email Page	Share via Email	New	• New Page
9	Enter Emails and Notes	Share via Email	New	• Able to enter 1 or more emails • Type ahead • Able to enter note
10	Select Send Email	Share via Email	New	• Send Email Button
11	Error Handling	Share via Emails	New	• Field validation on emails
12	Send Email	Email Template	New	• Email sent to all emails • Note appended to top of email • All point information in the body of email
12	Log Emails and Time	Share vial Emails	New	• Recipients and times are logged on the point

User interaction and design

IOS Wireframes and Details

# Flow 1: Send Email Of a Single Existing Point from a Search Result
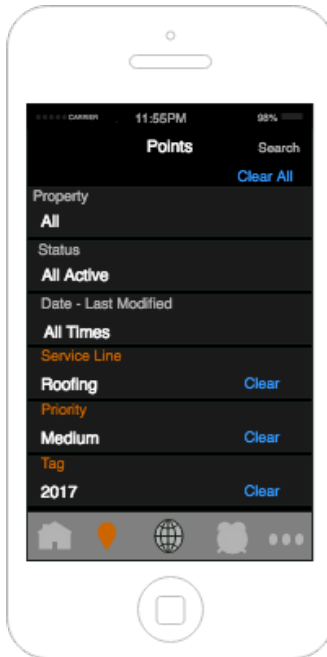
Point Search

- New Point Search screen per the wireframes for sending multiple points - see that tab (next scenario) for more details of the changes.
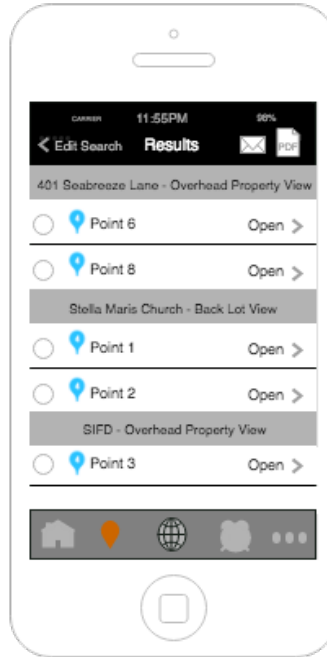
Point Results

- From this search results screen, user selects "Open >" on Point 6 in this example to get to the next point detail screen.
- For a description of the changes to the search results screen see the next tab.
- To your point Joe, an alternate path here would be for the user to select one point from the list (tap the circle) and hit the print icon to go right to screen 5.
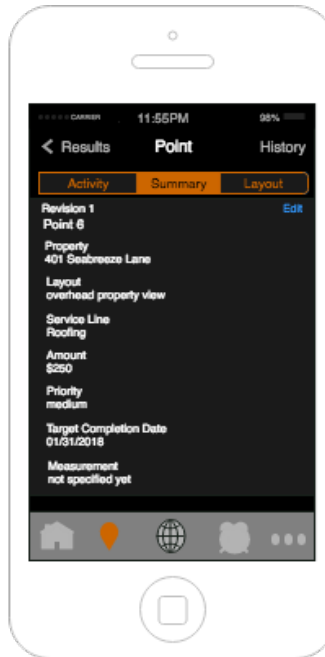
Point Details

- New fields on this screen: Service Line (finite list of options - HVAC, landscape, plumbing, etc.), Priority (low, medium, high), Target Completion Date (date)
- User selects "Edit" to modify any of these fields
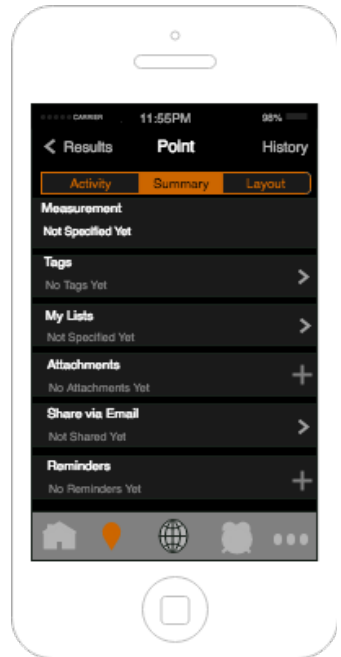
Point Details

- Bottom (scroll) of same screen
- New field: Share via Email
- User selects "Share via Email" to get to email edit screen

Share via Email

- New screen altogether
- User types email address(s)
- Type ahead feature pops over email addresses associated with that property that match typing
- If email entered does not match any existing, user can still enter manually AND that email address should then be associated with that property for future use (optional for MMP)
- User can enter multiple addresses
- Able to edit or delete added emails to the list

Share via Email

- New screen altogether
- User has option to type message to be appended to top of email body - not required
- If user is ready to send, they select "Send"; if they want to cancel, they select "Cancel" - this action deletes all content in the fields
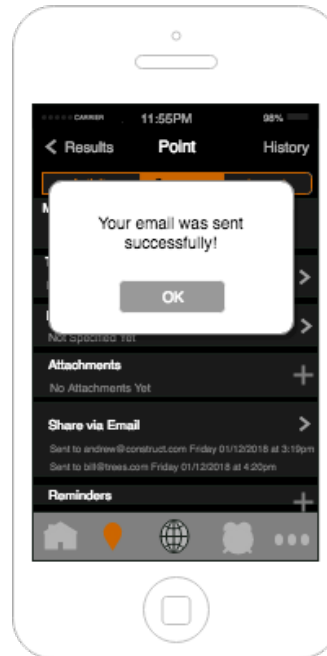
Point Details

- If user selected "Send," they are directed back to this screen and the "Share via Email" section displays the information shown that reflects the sent message
- This list grows for every time an email transaction occurs - it is NOT interactive
- Able to hit Share via Email to add additional emails - new emails and messages go to the NEW emails ONLY
- Added the popover confirmation since I included it in the multi-email send.

Web Wireframes and Details

Share Single Exiting Piont

Properties

Show Archived   Add Propoerty

🔍

401 Seabreeze Lane

| Overview | Jobs | Bid Requests | ⓘ |

Mall of America

| Overview | Jobs | Bid Requests | ⓘ |
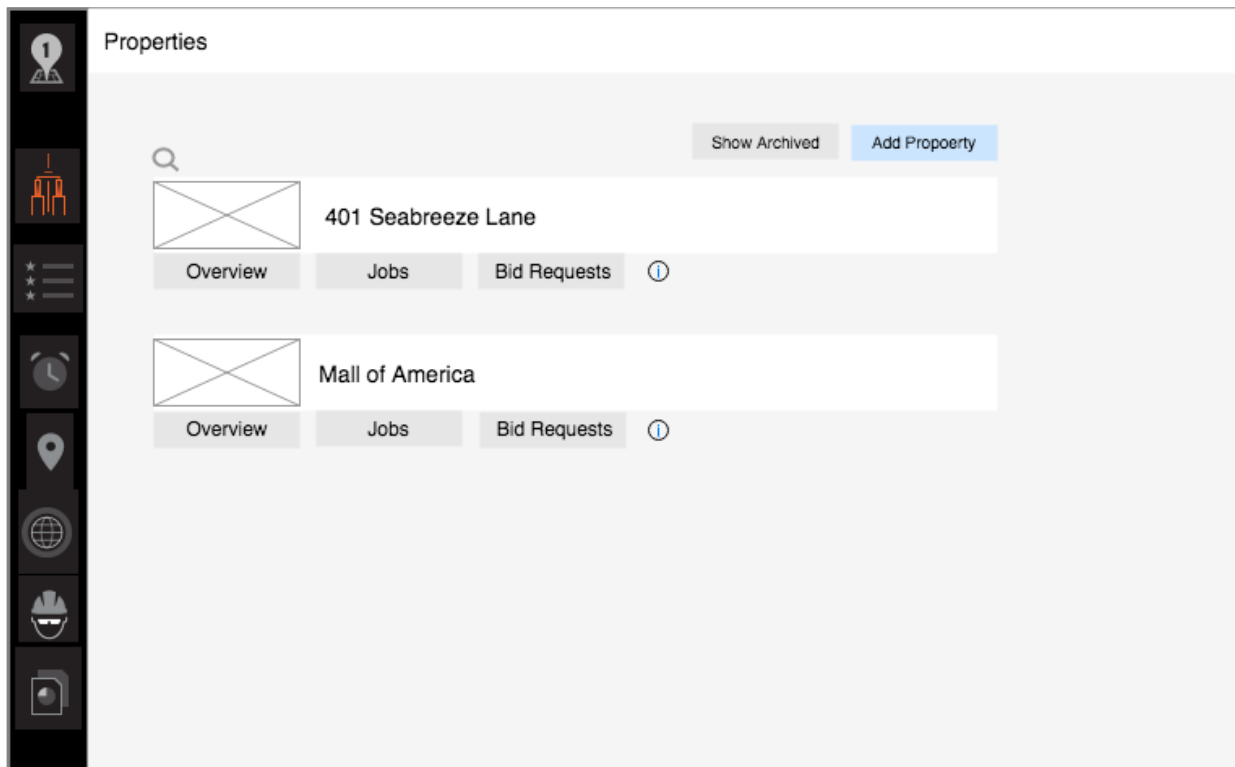
Property View

When a user logs in to the web app the first screen they see is this one.
The path to a point shown here is by the user clicking on the Property Name and then selecting the point from the point list on the right.

< Properties **401 Seabreeze Lane** Property | Overview | Jobs | Bid Requests | ⓘ |

Kitchen Stove Area
Layout

📍 Point List

📍 **Exhaust Fan Location**
Point

< Point >

Activity   Summary   History

Point 4 in Revision 1
exhaust fan location

Open   Update

💬   📷
                August 15, 2017 at 2:32 PM

VS **You**

📍 **Opened** the point.
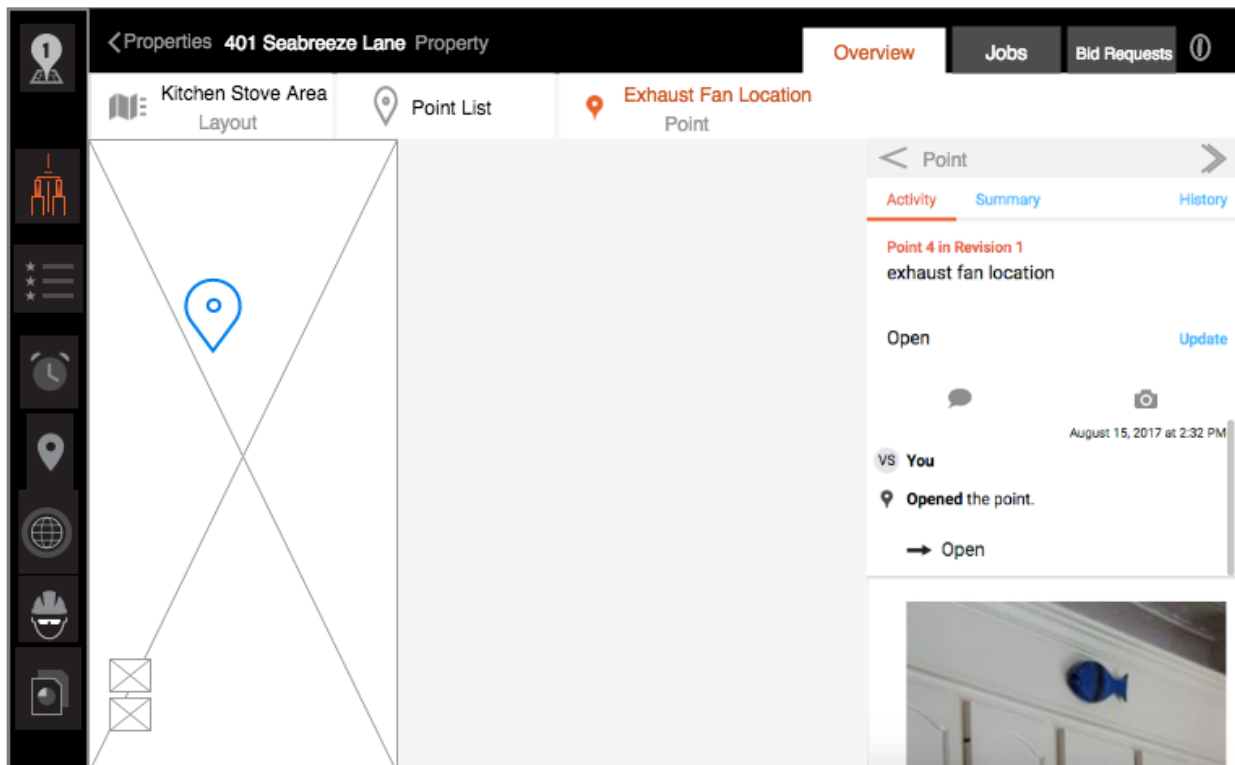
➔ Open

Point Details

When the point is opened the Activity stream is the default view.
In order to get to the screen to send an email, the user clicks on the Summary tab.

			Overview	Jobs	Bid Requests	①

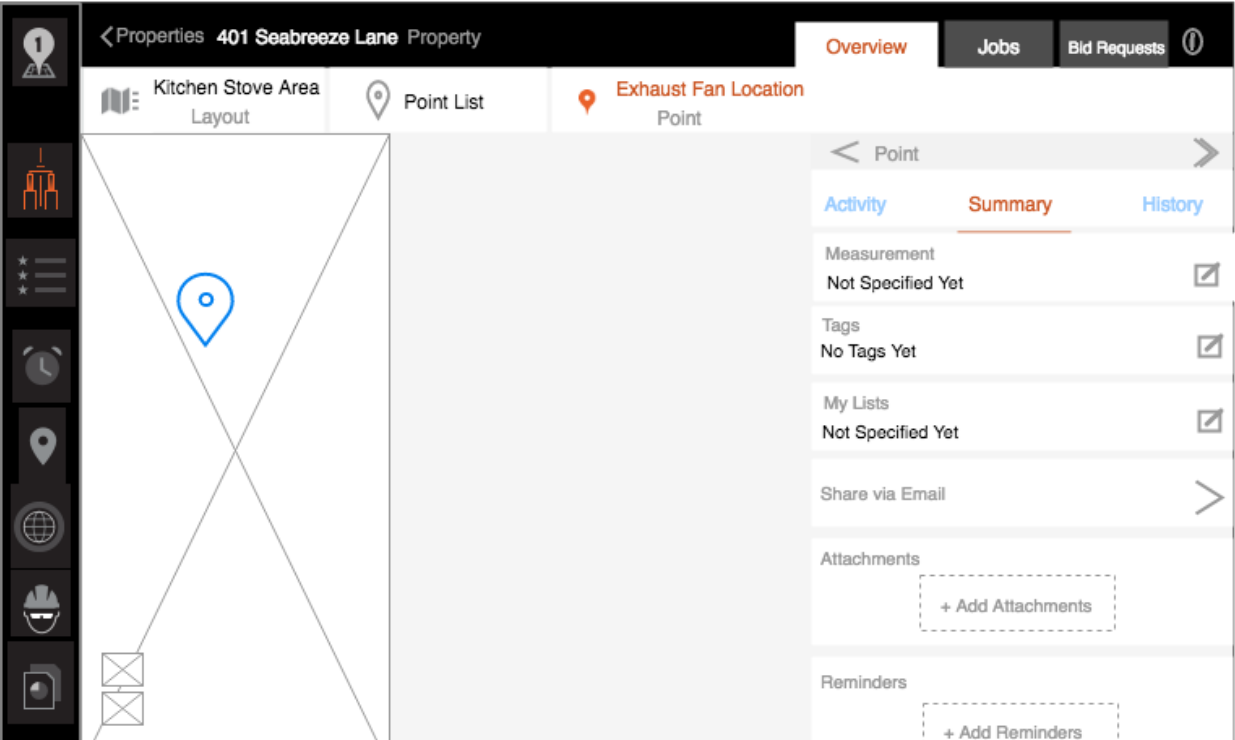‹ Properties **401 Seabreeze Lane** Property

Kitchen Stove Area Layout	Point List	Exhaust Fan Location Point

‹ Point ›

Activity **Summary** **History**

Point 4 in Revision1 • • •
exhaust fan location

Layout
kitchen stove area

Property
401 Seabreeze Lane

Service Line
Roofing

Amount
$500

Priority
High

Target Completion Date
01/31/2018
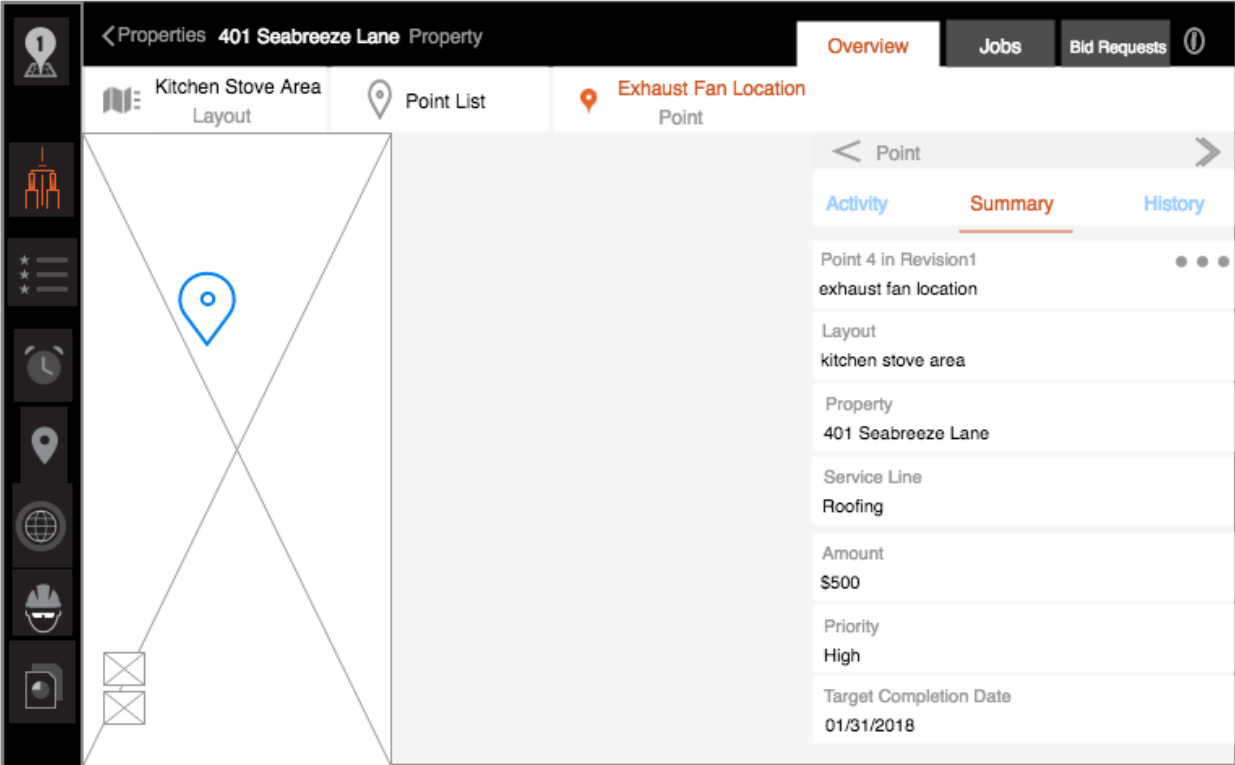
Point Details

This is the first screen that shows proposed changes:

- Priority is a new field with values low, medium, high.
- Target Completion Date is a new field with date field formatting.
- To edit these fields the user would click the three dots nav button at the top of the section.
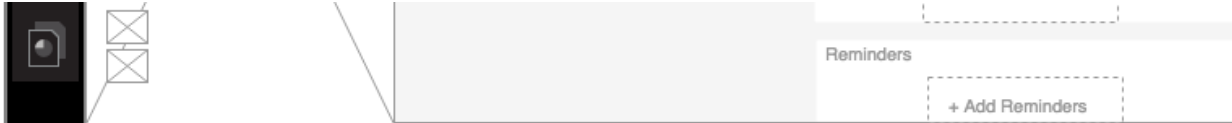
‹ Properties **401 Seabreeze Lane** Property   Overview | Jobs | Bid Requests | ①

Kitchen Stove Area Layout	Point List	Exhaust Fan Location Point

‹ Point ›

Activity **Summary** **History**

Measurement
Not Specified Yet   ▱

Tags
No Tags Yet   ▱

My Lists
Not Specified Yet   ▱

Share via Email   ›

Attachments
+ Add Attachments

Reminders
+ Add Reminders

Point Details

- This is a continuation of the scrolling window on the right panel of the screen from the previous wireframe.
- The "Share via Email" field is new. In order to get to the entry screen, the user clicks the right facing arrow nav button.
- CHANGED THE ORDER OF FIELDS - MOVED "SHARE VIA EMAIL" ABOVE "ATTACHMENTS"

< Properties **401 Seabreeze Lane** Property   Overview | Jobs | Bid Requests ⓘ

Kitchen Stove Area ● Point List   ● **Exhaust Fan Location**
Layout   Point

Send via Email   Cancel   **Send**

Enter Email Address(es)

andrew@cons...

separate   andrew@consult.com

andrew@construct.com

Enter Message (optional)

andrew@consol.com

andrew@constant.com

Share via Email

- This is a brand new screen, specifically for entering email address and message info, and sending.
- Uses the type-ahead feature to match to existing emails stored in database.
- User can also enter a new email manually, and that email should be stored for future use (per previous bullet) (storing is optional in MVP).
- User can enter multiple email addresses.
- Email addresses should be separated by a comma.
- The message text is optional and will appear at the top of the recipient's email message if entered.
- Upon clicking Send the email is sent and the user is directed "forward" to the previous screen (below).
- If user selects Cancel, all entered data is deleted and the user is sent "back" to the previous screen.

< Properties **401 Seabreeze Lane** Property   Overview | Jobs | Bid Requests ⓘ

Kitchen Stove Area ● Point List   ● **Exhaust Fan Location**
Layout   Point

< Point >

Activity   **Summary**   History

Tags
No Tags Yet   🖉

My Lists
Not Specified Yet   🖉

Share via Email   >

sent to andrew@consult.com Monday 01/15/2018 at 4:07pm ET

sent to bill@trees.com Wednesday 01/17/2018 at 1:17pm ET

Attachments

+ Add Attachments

Your Email Was Sent Successfully!

OK

Reminders

+ Add Reminders

Point Details

- Upon successfully sending the email, the "log" under the "Share via Email" section is increased by one to reflect that send. The log is not interactive and for auditing purposes by the user.
- CHANGED THE ORDER OF FIELDS - MOVED "SHARE VIA EMAIL" ABOVE "ATTACHMENTS"
- ADDED POPUP CONFIRMATION OF SEND DIALOGUE BOX

Email

Email to External Party (External Communications) from Point

Comments: Plywood is damaged in upper right corner.
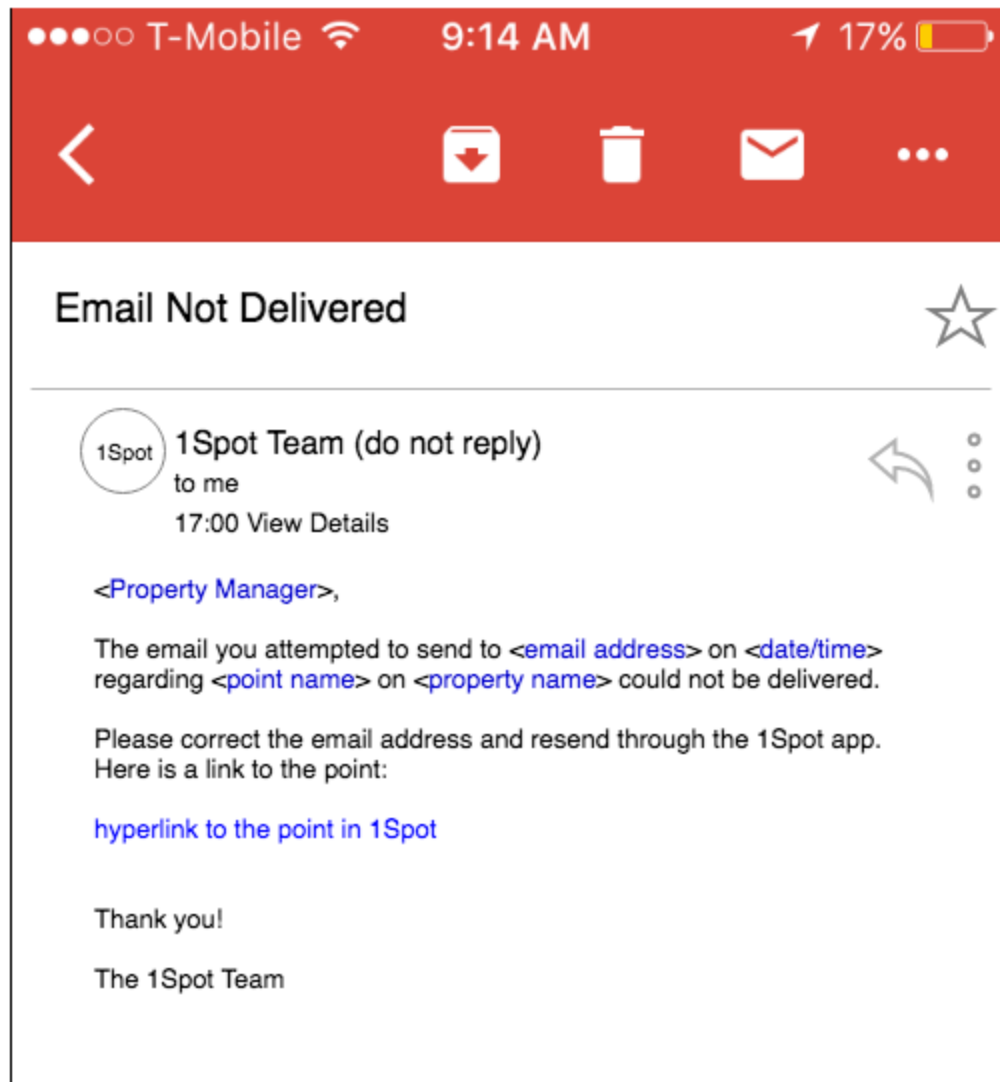
Service Line: Roofing

Measurements: 3" x 4"

Priority: High

**Target Completion Date:** 01/31/2018

Amount:

Sent Using 1Spot Property Management Software

Email to Property Manager Upon Failed Email Send to Vendor

●●●○○ T-Mobile 📶   9:14 AM   🔋 17% ▭

Email Not Delivered   ☆

(1Spot) **1Spot Team (do not reply)**
to me
17:00 View Details

<Property Manager>,

The email you attempted to send to <email address> on <date/time>
regarding <point name> on <property name> could not be delivered.

Please correct the email address and resend through the 1Spot app.
Here is a link to the point:

hyperlink to the point in 1Spot

Thank you!

The 1Spot Team

Attachments

File	Modified
Revised Scenario Screen Flows.zip	Jan 08, 2018 by Vince Sonson
Scenario 5 Revised.pdf	Jan 09, 2018 by Joe Turco
Scenario 4 Revised.pdf	Jan 09, 2018 by Joe Turco
Scenario 2 Revised.pdf	Jan 09, 2018 by Joe Turco
Scenario 3 Revised.pdf	Jan 09, 2018 by Joe Turco
Scenario 1 Revised.pdf	Jan 09, 2018 by Joe Turco

potential estimate	Jan 09, 2018 by Joe Turco
potential estimate.png	Jan 09, 2018 by Joe Turco
Reporting Scenario 1.pdf	Jan 09, 2018 by Vince Sonson
Reporting Scenario 2.pdf	Jan 09, 2018 by Vince Sonson
Reporting Scenario 3.pdf	Jan 09, 2018 by Vince Sonson
Vendor Comms Workflows draw.io diagram	Feb 23, 2018 by Joe Turco
Vendor Comms Workflows.png	Feb 23, 2018 by Joe Turco
Reporting draw.io diagram	Mar 01, 2018 by Vince Sonson
Reporting.png draw.io preview	Mar 01, 2018 by Vince Sonson
Web draw.io diagram	Mar 05, 2018 by Vince Sonson
Web.png draw.io preview	Mar 05, 2018 by Vince Sonson
Test1 draw.io diagram	Mar 06, 2018 by Vince Sonson
Test1.png draw.io preview	Mar 06, 2018 by Vince Sonson
Single Point Email draw.io diagram	Mar 21, 2018 by Vince Sonson
Single Point Email.png draw.io preview	Mar 21, 2018 by Vince Sonson
Untitled Diagram.xml draw.io diagram	Apr 01, 2018 by Vince Sonson
Untitled Diagram.xml.png draw.io preview	Apr 01, 2018 by Vince Sonson

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