**MyWoosah Automation Requirements**

**USER STATUS**

1. As an admin user, I need to be able to see the status of a parent and CP user next to their profile and next to their name.
2. As an admin user, I need to be able to manually change the status of a user.
3. All statuses should update automatically based on user activity within the app except for: “Application Denied,” “Working Trial email sent,” “Blocked/denied.” which should be updated manually.
4. As an admin user, I need to view these users within each status from a drop-down menu.
5. Within the family side of the admin panel, there should be three (or more) columns that list the families matches, “CP 1, CP 2, CP 3, etc.”
   1. These columns should be independent of one another, and have a drop-down menu with statuses that automatically update based on family’s lifecycle stage with each CP. For example, with CP 1 (Jane Doe), the family can be in the Pending Interview stage, but be in the Working Trial Confirmation stage with CP 2.
6. As an admin user, I should be able to see a user’s ticket status under their profile and in a ticket tab in the admin panel. I should be able to manually update this status to, “New, Open, Answered, Resolved, and Postponed”
7. As an admin user, I should be able to view all tickets in the admin panel. I should be able to filter and sort tickets by ticket status, create/close date, Full Name, and user type (Parent/Care Professional)

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| **Family Life Cycle Statuses** | **CP Life Cycle Statuses** |
| Pending Matches | Pending Application Approval |
| Need More Matches | Denied/Pending Revision |
| Interview Scheduled | Denied |
| Interview Complete | Approved |
| Pending Service Schedule (?) | Pending Match |
| Working Trial Confirmation Email Sent |  |
| Working Trial Complete |  |
| Placed | Awaiting Documentation Submission (Code of Conduct, Background Check, & Evaluation) |
| Pending Reviews | Pending Interview |
| Interview Missed | Interview Complete |
| Review Complete | Working Trial Confirmation Email Sent |
| Pending Referral Request | Working Trial Complete |
| Request Completed | Working Trial Missed/NCNS |
| Marketing Materials | Placed |
| Blocked/Suspended | Blocked/Suspended |

**CONTACT**

1. As an admin user, I need to be able to email, message, and chat with Parent and CP users.
2. As an admin user, I need to be able to select all or multi-select to communicate with users via email, text message, and chat with Parent and CP users using a pre-made template within the admin panel.
3. Email should go to the user’s email address, the text message should go to the user’s phone number on file, and chat should go to the user’s app inbox.

**TEMPLATES**

1. As an admin user, I need to be able to create, edit, save, and delete email and text templates to communicate with Parent & CP users. As an admin user I need to be able to navigate to templates in a tab separate from the families and CPs where I can create, edit, save, copy/paste and delete templates.
2. As an admin user, I need to be able to select a template to contact Parent & CP users. As admin user I need to be able to select one, multi-select, or select all families or CPs to send a template to via email, text message, or chat.
   1. There should be a button that populates after selecting a family or CP that allows me to choose to email, text message, or chat.
   2. Templates should be available for selection in the text box.
3. As an admin user, I need to be able to review and/or customize the template before sending it to Parent & CP users.
4. All templates should have the personalization capabilities so that certain information can be auto-filled in the template, for example, first name, date, city, state, etc.
5. All emails and texts will only be outbound. Inbound communication through this channel should be blocked as we have a separate communication channel for inbound communication, i.e. chat, support number, support inbox.

**FILTERS**

1. As an admin user, I need to be able to use filters and sub filters to search through Parent and CP profiles
   1. We should be able to filter by requirements and by status
2. As an admin user, I need to see these filters in a drop-down menu to select from.
3. As an admin user, I need to be able to select all, multi-select, and select one filter
4. As an admin user, I need to be able to sort in a column in an ascending or descending order. The following columns of data should be capable of sorting:
   1. Name
   2. Location
   3. Create Date
   4. Etc.
5. The filters include requirements:
   1. MyWoosah Services
      1. Sub Filters: Care, Drive, Share, Learn
   2. Years of experience
      1. Sub Filters: 1-2 years of experience, 3-5 years of experience, 6-9 years of experience, 10+ years of experience
   3. Location
      1. Sub Filters: Within \_\_ mi radius of \_\_\_ zip code
   4. Age Group Experience
      1. Sub Filters: Infants (0–1-year-old), Toddlers (1-4 years old), Children (4-13 years old)
   5. Weekly Availability
      1. Sub Filters: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
   6. Shift Availability
      1. Sub Filters: Full-time, Part-time, On Demand
   7. Pet Comfortability

**NOTIFICATIONS**

1. As an admin user, I should be able to navigate to a notification tab that is separate from the families and CPs
2. As an admin user, I need to be notified via the admin panel and email of Parent & CP user activities.
   1. On the admin panel, these notifications should be annotated with a badge on the user’s profile
   2. These activities should include Life cycle stage changes,
3. As an admin user, I need to see a user’s last activity date in their profile.
4. As an admin user, I need to be able to filter a user by their last activity date in ranges.
   1. Last week, Last 30 days, Last 60 days, Last 90 days
5. The activities that need notification include:
   1. New User sign up
   2. Successful Matching
   3. User Interest (meaning when a user shows interest in another user)
   4. Interview Scheduled
   5. Interview Missed
   6. Interview Completed
   7. Service Scheduled
   8. Service Missed
   9. Chat Message Initiated (when a user chats with another user)
   10. User Contact Initiated (when a user calls another user)
   11. New tickets

Care Providers Stages & Status in the Admin Panel:

Statuses:

* Pending Application Approval
* Denied Pending Revision
* Denied
* Approved
* Pending Match
* Awaiting Documentation submission (Code of conduct, Background Check and Evaluation)
* Pending Interview
* Pending Post Interview/ Working Trial Email
* Post Interview/Working Trial Email Sent
* Working Trial Pending Post
* Working Trial Complete
* Working Trial Missed
* Placed
* Blocked/Suspended etc.
* Check In 1, 2, 3 etc. Is pending
* Check in 1, 2, 3 etc. is complete