**CONTRACTORS PORTAL**

The main purpose of this portal is to establish an Estimate Management Marketplace **and** give contractors basic project management capabilities.

**Definitions**

**Approved Estimates**. These are estimates that have been approved by homeowners and are ready to be presented to contractors that would like to do the work.

**Estimate Marketplace.** Place where contractors can few new Approved Estimates from the geographical area where the work in.

**Escrow Inspections.** Inspections of renovation work that we will perform before renovation payments to contractors are issued.

**Punch List.** List of outstanding renovation issues before the last payment is released to contractors.

**Main Functionalities**

This page will be accessible in My Account. It should have the following main features:

1. To form a small Estimate Marketplace where all approved estimates will be presented to contractors and where contractors can view, accept or deny proposals. **(Estimate Management Section).**
2. To allow easy upload of photos that will show issues found on the **Escrow Inspections, Issues Raised by Homeowners,** and **Punch List (Project Management Section).**

1. To process payments for proposals **(Payments Section).**
2. To keep a record of contractor information and documents (**Contractor Information Section**).

**MAIN SECTIONS AND FUNCTIONALITIES**

**Estimates Management Section**

This section should offer contractors a page **(Estimates Marketplace)** where they can review, accept or deny new proposals that have just been reviewed and approved by homeowners.

Contractors will be notified about new proposals in 5 ways:

* Via email
* Banner notification on their computer screen
* Push notification on a mobile device
* Text message
* Notification in My Account

They should be able to choose the notification type at Sign Up and edit them in settings.

Part of the Contractor Sign Up process will be questions of what State, County, City, or zip code the contractors would like to receive proposals from. Contractors will be matched only with properties in areas they have selected.

Proposals should be visible in 2 ways:

* As cards (tabs) on a whiteboard. (default)
* List View

Every card should provide the following information about the proposal:

* City and state (no address or customer contact info visible before purchase)
* Total renovation amount
* Itemized description of the work

The contractor should have 2 options for each card: **Add to Cart** or **Hide**.

If added to the shopping cart, the contractors will be prompted to make a payment to purchase that estimate (or use 1 credit) or continue reviewing other available estimates. After the payment is processed, the property address and owner’s contact info will become visible for the contractor.

Contractors should be able to add multiple proposals in My Cart and make a payment for multiple proposals.

Contractors can also purchase 5 credits with 10% discount, 10 credits with 15% discount, 20 credits with 30%, and 100 credits with 50% discount.

The price for estimates will be as follows: $25 (1 credit) for estimates accessible to 3 contractors, $50 (2 credits) for proposals accessible to 2 contractors; $75 (3 credits) for proposals accessible to only one contractor (each credit will cost $25).

[Before customers approve an estimate to be listed on the Estimate Marketplace, they will be asked by how many contractors they want to be contacted -- 1,2, or 3 contractors. If they answer 1, then only one contractor can purchase that estimate. If a customer states 2, then 2 contractors can purchase that estimate, and so on.]

**Project Management section.**

This section should allow contractors to view all important information about the project.

This section should have a few subsections.

1. **Project Info subsection.**

* Project Address
* Mailing address
* Customer name
* Customer phone
* Customer email
* Full project cost
* Payment schedule
* Payments made
* Balance Due
* Approved change orders (link for “View signed change order documents”)
* Contract Documents page (where all signed contracts for the project will be available).

1. **Inspections subsection.**

**Escrow Inspections link**

* Escrow inspection schedule (How many inspections and the estimated date for each inspection).
* Indicator completed inspections.
* Outstanding Issues with photos for each completed inspection.
* Approved inspection escrows.

**Issues Raised by Homeowners link**

* These are issues that have been raised by homeowners to us, and we have approved in Admin to be visible to the contractor.

**Punch List link**

* Should list all issues (with photos) found on the final walk-thru, after the contractor sends completion confirmation and request for the last escrow draw.

**3. Payment Info subsection**

* **Edit Accounts.** Contractors should be able to edit the accounts the purchase credits with and edit the accounts that we will send money to for their renovation work. We will not store account numbers. Everything needs to be done through Stripe’s API.
* **Purchase and Payment History.** This page should show all credit purchases made by the contractor. It should also show all payments that have been submitted to the contractor for the renovation work. Transactions should be searchable by project name and time period.

Items 2,3 and 4 above should have photo of the issue and text box for 2-3 sentences explanation below each photo. There should be a way to mark those photos if they are pending or completed. If they are marked as completed or deleted, they should still be saved in the database.

The administrator should be able to overwrite the info present in the sections above in the Admin Panel and all changes should be saved in the database.

**Contractor Settings and Documents**

This section will allow contractors to change the initial settings. It should have:

* Coverage area – State, county, city contractor works in.
* Contractor license and insurance documents upload page.
* Notification settings.

**Buy Credits section**

(This section will appear on the top of the main page)

Here contractors will have a brief explanation of how credits work, and they will be able to buy the following packages:

1 credit

5 credits with 10% discount

10 credits with 20% discount

20 credits with 30% discount

100 credits with 50% discount

**.**

**Technical Specifications**

1. Frontend written in HTML/CSS/Javascript. Backend written in Python or PHP.
2. Plugins and packages will be allowed for use with previous approval by the owner.
3. The payment management should meet the PCI Security Standards.

Homeowner approves estimate

Estimate is saved in the database

Notification is sent to all contractors that work in that county.

If contacted contractor doesn’t purchase estimate in 12 hours, the estimate is sent to the 4th contractor, and so on…

After contractor pays for full estimate information, contact info and photos are released and he/she contacts the homeowner.

Flowchart 1