

Elementor Form Order Sales Reporting

SOW Document

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Introduction

This Scope of Work outlines the objectives, deliverables, and expectations for generating a comprehensive sales report based on Elementor order submissions for **Carlos Aguirre**. This project is aimed at enhancing order tracking and reporting efficiency by consolidating key data from translation order submissions into structured reports.

The sales reports will be designed to capture all essential details from customer submissions, including:

- Language pair(source and targeted languages)
- Elementor encrypted document string reference.
- Word count.
- Rush order indicators.

By integrating and organizing this data, the project aims to provide actionable insights for sales and operational processes, ensuring a streamlined reporting mechanism that supports decision-making and improves overall business performance.

This document will serve as a guiding reference for the scope, deliverables, and responsibilities of both parties to ensure the successful completion of the project.

Overview of Required Features

1. Enhancements to Document Submission Field

Description: To enhance the order submission process, additional fields need to be implemented. These fields should be user-friendly, and dropdown options should be provided wherever multiple choices are applicable. The required fields include;

- Language Pair
 - Rush Order
 - Work requested translator or interpretation.
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2. Contract Manager Features

To streamline research and management tasks for the Contract Manager, the following functionalities need to be added:

- Download option: Provide a download feature to enable easy access to submission history and work records.
- Include filters for all fields in the submission history to allow targeted searches.
- Add specific filters for: Requester, Department, and File Number
- Add the ability to download records of completed work.
- Implement cross-referencing functionality to reconcile new orders with completed work.
- Add a “Final Count” field to the upload section to track completion metrics effectively.

3. Your Submission History

To improve usability and organization, the following enhancements should be implemented for submission history:

- Add filtering options similar to those provided for the Contract Manager.
- Include filters for; File number(#) to match the completed work.

4. Schedule Interpretation

To facilitate scheduling of interpretation services, the following enhancements should be made:

- Integrate a calendar with the Elementor form to allow users to request interpretation services or meetings directly.
- Once a user selects a time on the calendar and submits the form, an email should be automatically generated with the following fields:
 - Contract Reference Number(#)
 - Business Name
 - Department
 - Contact Name
 - Email Address
 - Phone number
 - Language Pair
 - Tentative Time
 - Simultaneous or Consecutive Interpretation

5. Comprehensive Report Generation

A new report generation feature is required to streamline the reconciliation of new and completed orders. This report will cross-reference new orders with completed ones by matching the file number(#).

Key Features:

- Cross-Referencing: Automatically match new orders with completed orders based on the File Number.
- Comprehensive Overview: Provide a detailed report that shows all relevant details for both new and completed orders.

6. Contract Manager Access to Work Order History

To enhance the Contract Manager's ability to monitor and manage work orders, the following access capabilities should be implemented:

- Global Work Order History: Allow the Contract Manager to view the complete, global work order history across all departments.
- Per Department Work Order History: Provide the ability for the Contract Manager to access work order history specific to individual departments for more granular tracking.

Project Cost Breakdown

Completing the add-ons and filters will take approximately 23-25 hours. At an hourly rate of \$15, the total project cost would be around \$345 - \$375.

Since this is our first project together and, to celebrate the festive season, I'm offering a discount on all services for new clients. For this project, I'm reducing my rate to \$12/hour, which brings the total cost to around \$275 - \$300.

Pending Decisions

I have a few queries that require your attention. Please take a look:

1. Form Customization:

- a) For dropdown fields like "language pair," do you have predefined options, or would you like us to create a dynamic system for managing these? *I only have a list of language pairs, a dynamic system seems it might be better.*
- b) Are there any additional fields you anticipate needing in the future? *We might, this is an ongoing project which requires scalability for future upgrades.*

2. Filters and Downloads:

- a) What file formats (e.g., CSV, Excel) should be supported for data downloads? PDF and Excel
- b) Can you provide examples of filters or reports that are critical for your operations? *We don't have any currently, that's what we are trying to implement.*

3. Cross-Referencing and Reconciliation:

- a) How should the cross-referencing feature handle discrepancies between new orders and completed work? *When there are discrepancies, it should generate flag report to address issues before they arise with clients.*
- b) Is there a specific reporting format or tool you currently use that we need to integrate? *None*

4. Calendar Integration:

- a) Should the calendar handle recurring events, or only one-time scheduling? *It should handle both*
- b) Are there any third-party calendar tools (e.g., Google Calendar) you would like us to integrate with? *Google Calender*

5. Role-based Access:

- a) How many roles or access levels should the system support initially? *Admin, Customer, Contract Manager and Dept manager.*
- b) Are there specific restrictions you'd like to apply to departmental access? *Everything is based on contract #. So, contract manager wil have contract global access, manager their specifi departments only.*

6. Spam Protection:

- a) Do you have a preferred spam protection method (e.g., reCAPTCHA, email domain blocking)? *We do have recatptcha but it still allows for new registrations from spammers*
- b) Have you noticed any specific patterns in spam registrations that we can target? *It appears they are real emails, fake names and never confirm emails.*

Looking forward to your feedback. Please let me know if you need any further clarification on the queries.

Next Step

- Discuss and the address above pending queries.
 - Finalize the project scope and deliverables.
 - Prepare a detailed project plan, including timelines and milestones.
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