Notes from Smarter Communities

Potentially easy fix:
- Have keyboard functionality on search rather than using the mouse (show screenshot)

Necessary:
- Have analytics that shows how far contractors are progressing their work into the system to monitor how to best encourage them to progress to the end.
- Create on boarding screens that show how to use it efficiently.
- Remove modal that appears in the contractor view when they click to finish a job

General:
- Sandbox has issues in training
- There are a mixture of users from 0 hours to 6 months on uptick
- Touch points is only used by one person, but checked by everyone
- Find way to make it clearer that once a committee member is signed up, they get a copy of the email
- Find way to add in smaller jobs not included into work order or quote request category
- Encourage people to use uptick and not check their emails. Find way to make notifications clearer as a result.
- Have help text that mentions to add in important info a contractor would need to know e.g. building has asbestos etc
- If possible, find a way to add previous jobs from a property that the contractor can see, without showing the names of contractors that worked on those jobs
- Find way to email committee invoice approval straight away (check)
- Make it clearer that the job contains the work orders and quote requests and different stages/additional stages of each can be contained/added within the job. Make it clear of the benefits of this, having everything centralised.
- Make it clearer that you can tag more than one person in create a job
- Make it clear to add notes if the creator of the job is away and someone else will be the interim point of contact.
- When adding in contractors, have a way to search by category as well as name.

Main pain points:
- Encouraging contractors and the contractor's managers that Uptick is beneficial for them too
- Have help text that reminds managers to know that contractors need to be

aware of their processes as this will encourage them to help by using Uptick. Also educate on the benefits the contractors manager will have by using uptick.

− Make it a point to explain that there will be more work with SC if they use Uptick
− Have reminders in the contractor view that lets them know to follow through with all stages of the process
− In the contractor screen, have an obvious link to the training guide.
− Make contractor view as east as possible.
− Make link for contractor in email extremely visible (maybe look like a button) so that the contractor will click on it (not have to copy and paste)
− Most contractors see the last stage as 'accepting'. Find way to visually educate them to follow through to the end, and to upload the invoice.
− Find way to have info available to contractors only if they click on uptick link and no where else to encourage them to use the system

Not always used:
− Authorised spend not always used. Keep but have help text for context. Only used when above approved budget (check this)

Focus areas:
− Contractor solution as mentioned above
− Committee members approving invoices