



PARKER LANDSCAPING SUPPLY

INVOICE MANAGEMENT SOFTWARE



CUSTOM SCOPE DEVELOPMENT
PREPARED BY

dorian 
solutions



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PURPOSE OF EVALUATION

As Parker Landscaping Supply continues to grow their business, they need a more robust method of recording, tracking and managing their invoicing process. Their current system does not work to their exact needs and is not web-based. Upon evaluating other software packages, Parker has decided a custom software solution will be the best fit for their organization. They will need a system to better manage this process which collects all parts of the process under one web app, and is as efficient as possible when addressing the numerous details and updates that occur throughout each project.

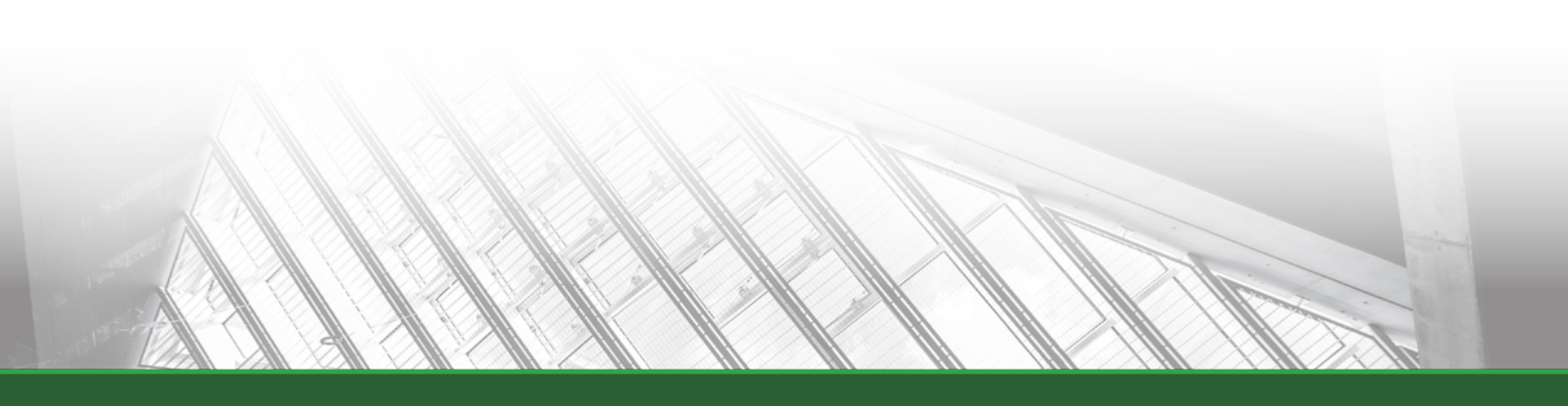
This evaluation is the result of multiple meetings between management and key stakeholders of Parker Landscaping Supply and Jace Steenbarger of Dorian Solutions. The evaluation lays out the needs that Parker Landscaping Supply has for this new system and defines what the technical solution may look like.

ABOUT DORIAN SOLUTIONS

Dorian Solutions is a software development firm located in Crystal Lake, IL.

Our mission is to empower you to create your technology vision by allowing us to become part of your strategic and operational team. Our team takes pride in each and every partnership we form and create raving fans out of every client. We put ourselves in your shoes and treat your brand as our own. We will bring the same critical eye to the numbers and, together, remain accountable. In doing so, you will see a growth and improvement across your organization.

Our expertise with web and mobile development along with the software development process allows us to rapidly provide value to our clients while acting on their behalf or within their current team structure. This expertise includes leadership and strategic, executive level roles as well as development roles to take care of the construction of your project. Beyond that, we love what we do. The success of our clients is what motivates us to over deliver and work hard to meet our mutual goals.





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GOALS OF SOLUTION

While there are a lot of moving parts and requirements for the system, the main goals of the system can be broken down into the following points. These points should be the guiding factors during the architecture and development process while prioritizing and implementing development items.

Bring Multiple Elements Under One Solution

Currently Parker Landscaping Supply is using multiple software, spreadsheet and filing resources in their invoicing process. This solution will bring these separate elements together under one custom software solution that can be accessed by multiple users. This will eliminate the need to manage multiple files and versions that can lead to errors. This solution also offers the ability to associate several of these entities for a clearer overview of the invoicing and payment process which was not available previously.

Maximize Efficiency and Accuracy of Data

The solution is designed to maximize efficiency by reducing the number of times the same data needs to be entered. We will accomplish this through a combination of intelligent and intuitive interface design, and by cross-referencing data in multiple areas. This will allow the user to enter data once in a centralized interface and have that data automatically distributed to other appropriate locations within the system. This will result in less time spent on data entry for greater efficiency and a reduced chance of error due to multiple data entry points.

This will also increase the accuracy of data and tracking as it pertains to the overall contract values for a project. With fewer data entry points and cross-referencing, the values within a project can be more accurately shown with the additional benefit of tracking and reporting.

Accurately Managing Project Changes

At its core, the solution will center around a Customer's Account and accompanying Invoices. We acknowledge that a project will undergo several changes over its life. Associating other aspects of the project back to these main scope items will allow the user to more easily apply and monitor changes to the project.

Including Billing and Payment options into the software will further increase the accuracy and visibility. Associating payment activity with associated invoices and customer accounts will help ensure the user can easily see the results and more quickly identify any issues or inaccuracies. It will also assist in tracking the status of a customer's account while helping to ensure correct accounting for both the customer and Parker subcontractors.

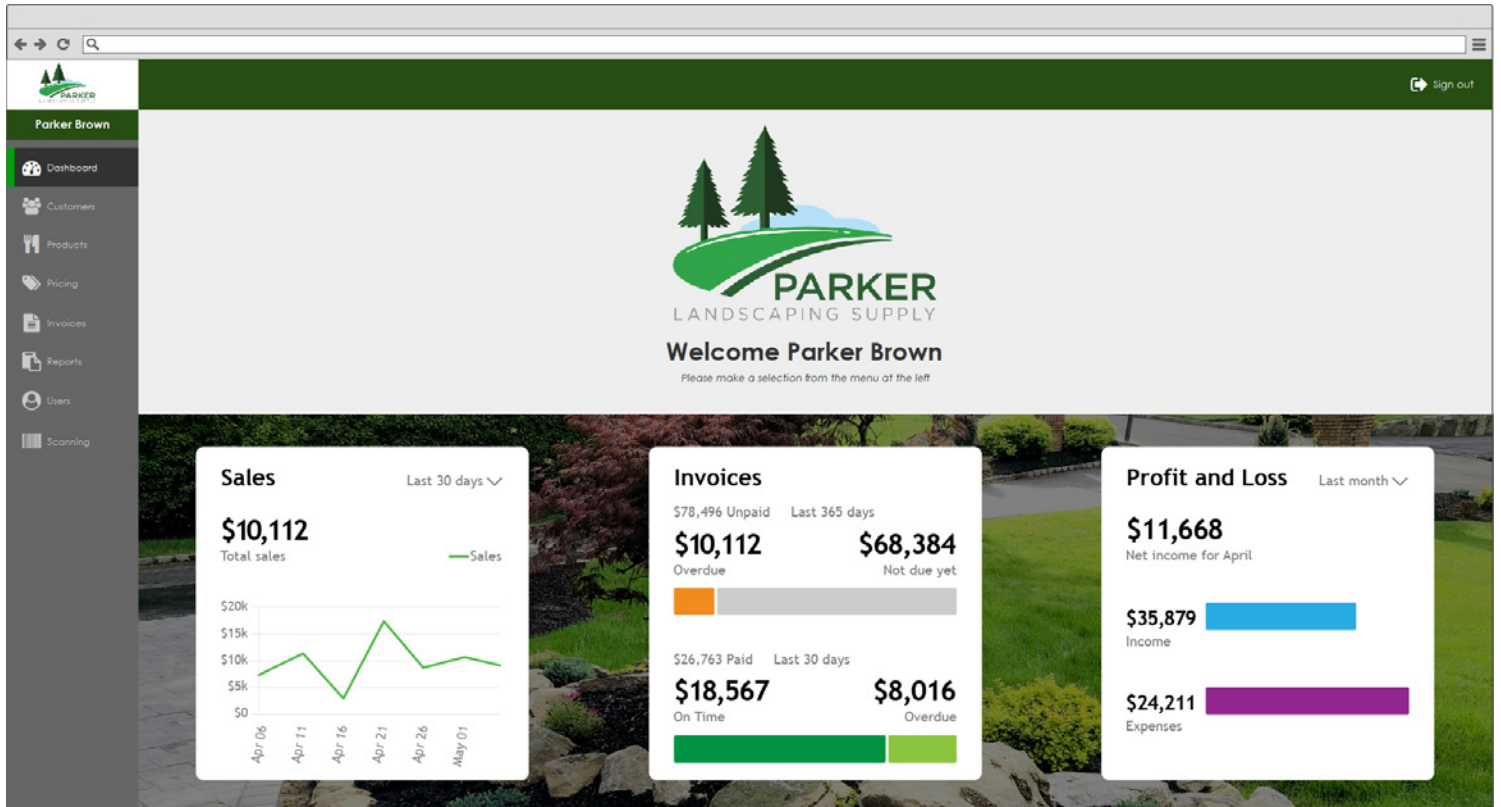


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DASHBOARD

Standard dashboard welcome page with a static image and logo. This is the first page the user sees when logging in.

System should recognize the logged in user and with their name in the main screen as well as above the left navigation. Clicking on a navigation option will take the user to the first screen of that section. This screen provides the option for customized widgets.



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The screenshot displays the 'Pending Invoices (45)' screen. The interface includes a sidebar with navigation options: Dashboard, Customers, Products, Pricing, Invoices (selected), Reports, Users, and Scanning. The main content area shows a list of invoices with columns for Select, Invoice #, Customer, Status, Total, Created on, and Deliver. A calendar pop-up is visible over the 'Status' column, showing dates from June 1st to June 19th, 2021. The list shows 15 entries, with the first few having invoice numbers 11854 and 11855. The status of these invoices varies between 'Open', 'Loaded', and 'Delivered'. The total amount for each invoice is \$345.82. The 'Created on' date is 8-12-20, and the 'Deliver' date is 8-15-20.

Select	Invoice #	Customer	Status	Total	Created on	Deliver
<input type="checkbox"/>	11854	Phoenix Lawnservices	Open	\$345.82	8-12-20	8-15-20
<input type="checkbox"/>	11855	Barone Lawn Services	Open	\$248.82	8-13-20	8-16-20
<input type="checkbox"/>	11856	Halpin Stonescapes	Open	\$322.54	8-14-20	8-21-20
<input type="checkbox"/>	11854	Halpin Stonescapes	Open	\$345.82	8-12-20	8-21-20
<input type="checkbox"/>	11854	Halpin Stonescapes	Open	\$345.82	8-12-20	8-21-20
<input type="checkbox"/>	11854	Phoenix Lawnservices	Loaded	\$345.82	8-12-20	8-24-20
<input type="checkbox"/>	11854	Phoenix Lawnservices	Open	\$345.82	8-12-20	8-24-20
<input type="checkbox"/>	11854	Barone Lawn Services	Loaded	\$345.82	8-12-20	8-24-20
<input type="checkbox"/>	11854	Barone Lawn Services	Open	\$345.82	8-12-20	8-24-20
<input type="checkbox"/>	11854	Barone Lawn Services	Open	\$345.82	8-12-20	8-24-20
<input type="checkbox"/>	11854	Barone Lawn Services	Open	\$345.82	8-12-20	8-24-20
<input type="checkbox"/>	11854	Phoenix Lawnservices	Loaded	\$345.82	8-12-20	8-25-20
<input type="checkbox"/>	11854	Phoenix Lawnservices	Loaded	\$345.82	8-12-20	8-25-20
<input type="checkbox"/>	11854	Phoenix Lawnservices	Open	\$345.82	8-12-20	8-25-20
<input type="checkbox"/>	11854	Barone Lawn Services	Open	\$345.82	8-12-20	8-25-20
<input type="checkbox"/>	11854	Barone Lawn Services	Open	\$345.82	8-12-20	8-26-20

PENDING INVOICES - LIST

An overview of the invoices in the system with the ability to view, manage, create and delete invoices. This is the first screen in the Invoices section. Any time the Invoices button is clicked, the user will return to this page.

Values displayed are pulled from the Details screen of each record. Clicking anywhere on a record (other than the select box) will take the user to the Details page for that record.

Columns are sortable ascending and descending. User may enter search data to filter this list to view only records with matching data. User controls are provided to select the number of entries viewed per screen as well as page navigation when multiple pages of results exist.



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INVOICE - DETAILS

The 'Subtotal' value will be automatically calculated by the system as the sum of the values listed in the table above. Tax may be added using the dropdown at the upper right and will then display the amount of tax and a Grand Total at the bottom.



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Customer Details
[Back to Customer Management](#)

Parker Landscaping
Account Balance: \$251.89
Account Status: Current

[Create Invoice](#) [Update Customer](#) [Export Price List](#) [Delete Customer](#)

[You have unsaved changes](#)

Customer Information **Account History** **Payment Options**

* - Required

Customer Name*
Parker Landscaping

Pricing Tier*
Premium: +20%

Consumer Choice %
2%

Address Line 1*
1250 E Higgins Rd

Address Line 2

City*
Schaumburg

State*
Illinois

Zip*
60173

Phone 1
847-995-0100

Phone 2

Main Contact Name*
Bob Schrantz

Main Contact Phone
224-551-4456

Main Contact Email
bschranz@parkerlandscaping.com

Billing Contact Name
Janet Tolbeck

Billing Contact Phone
847-554-6654

Billing Contact Email
jtolbeck@parkerlandscaping.com

Notes

Product Catalog

Search

Item

- Earthen Bounty Mulch - Red
- Earthen Bounty Mulch - Brown
- Earthen Bounty Mulch - Tan
- Earthen Bounty Enriched Mulch
- Weeds R Gone - Case (12)
- Nature's Gift - Tulips
- Nature's Gift - Daffodils
- Nature's Gift - Roses
- Nature's Gift - Variety pack
- Fertilizer Pellets
- 18" Hedging Bush
- 24" Hedging Bush
- Landscaping Stones - Small
- Landscaping Stones - Medium
- Earthen Bounty Mulch - Red
- Earthen Bounty Mulch - Brown
- Earthen Bounty Mulch - Tan
- Earthen Bounty Enriched Mulch
- Weeds R Gone - Case (12)
- Nature's Gift - Tulips
- Nature's Gift - Daffodils
- Nature's Gift - Roses
- Nature's Gift - Variety pack

Favorite Items

Item

- Earthen Bounty Mulch - Red
- Earthen Bounty Mulch - Brown
- Earthen Bounty Mulch - Tan
- Earthen Bounty Enriched Mulch
- Weeds R Gone - Case (12)
- Nature's Gift - Tulips
- Nature's Gift - Daffodils
- Nature's Gift - Roses
- Nature's Gift - Variety pack
- Fertilizer Pellets
- 18" Hedging Bush
- 24" Hedging Bush
- Landscaping Stones - Small
- Landscaping Stones - Medium

CUSTOMER ACCOUNT - DETAILS

A page so the Admin user can view and edit the profile details for a specific customer. This screen displays when a customer's name is clicked on in the Customers List screen. Multiple tabs appear at the top of the page to access the Customer Information, Account History, and Payment Options sections.

The initial tab selected upon entry is the Customer Information tab. This displays the account and contact information for the customer. It may be edited by all users. A markup Pricing Tier is also applied at this screen which will apply to all invoices created for this customer.

On the right side of the screen is a full Product Catalog list and a Favorite Items list. The Product Catalog list can be filtered by typing in the search field. Any number of products in the Product Catalog list can be selected, then moved into the customer's Favorite Items list using the right arrow button. Items may be removed from the Favorite Items list by selecting them and clicking the left arrow button. The products in this Favorite Items list will appear when creating a new invoice.

If the user tries to leave the page while it has unsaved changes, a confirmation popup will display asking if the user wants to 'Save' or 'Discard' the changes.



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Parker Brown
* - Required

User Role* ☒ Admin ☐ Manager

[Reset password](#)

Username*
pbrown

First Name*
Parker

Last Name*
Brown

Email*
pbrown@parkerlandscaping.com

Phone 1
555-555-1234

Notes

[Update user](#) [Delete User](#)

USER - DETAILS

A page so the Admin user can view and edit the profile details for a specific user. This screen displays when a user's first or last name is clicked on in the Users List screen. This page will share its structure with the Create New User page.

A User may not edit their own User Role - it should display as text only. An Admin user may edit other user details and roles. The Limited Admin may only edit their own user details. To the Limited Admin, all other user details pages should not be editable and display as text only.

Clicking Reset password link sends an email to the user allowing them to reset their password.

Admin - This user role will have access to all the functions of the system.

Limited Admin - This user will have access to the functions of the system, but will not be able to add / edit Payment Methods, or add/edit/delete other users.

If the user tries to leave the page while it has unsaved changes, a confirmation popup will display asking if the user wants to 'Save' or 'Discard' the changes.



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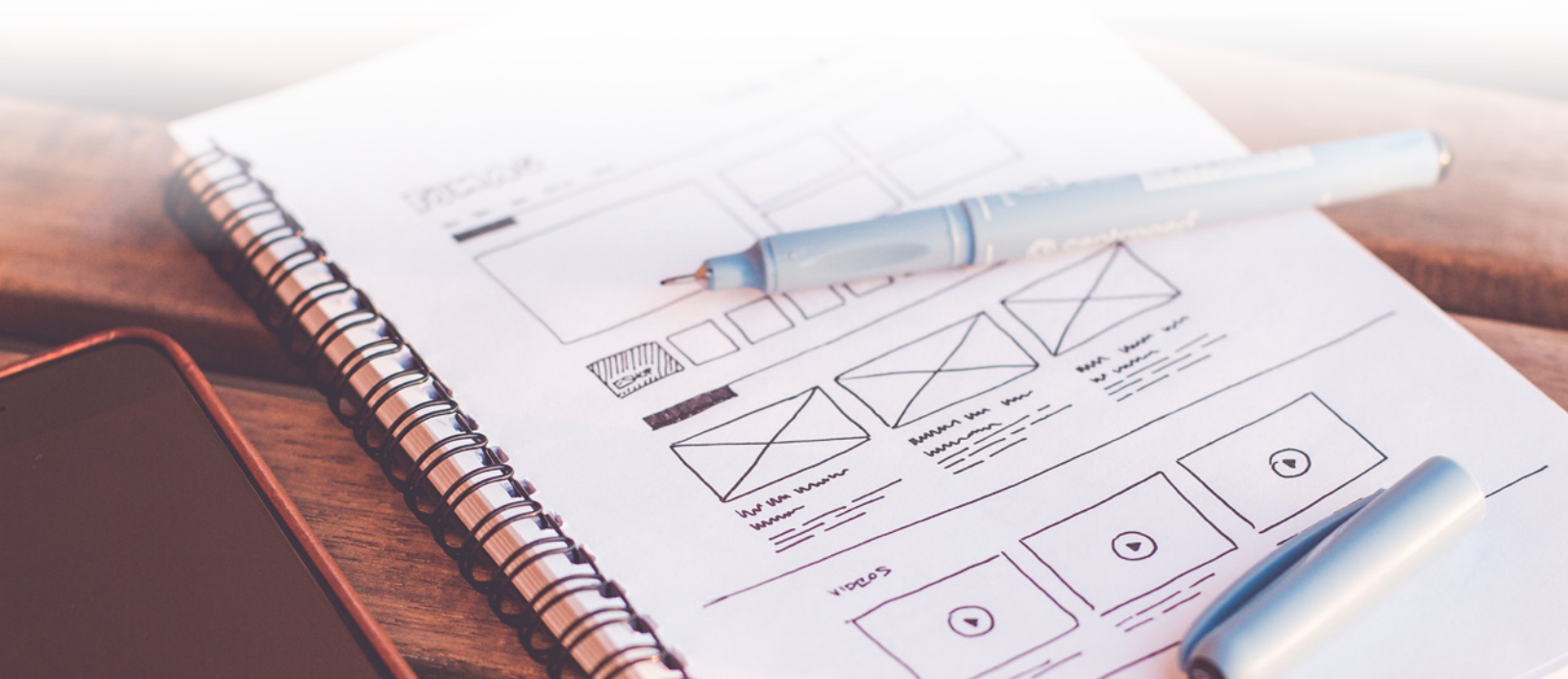
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SOFTWARE METHODOLOGY

Software projects can be challenging particularly because the exact requirements and needs of a system can rarely be fully defined before development begins. While it's hopeful to believe that all requirements of the system can be known upfront this almost never happens in reality. Instead, the best pieces of software begin with an understanding of the challenges that need to be solved and the experience to know that the best solutions can be discovered based on the resources available within a company. With this mentality, the development team can begin on the highest priority items while the rest of the team continues to explore the best way to solve the "next" highest priority item. If this process continues over many iterations, the resulting software yields the most efficient system that solves challenges that weren't known or understood at the beginning of the project.

This does not mean that a system cannot be planned for in advance, it just means that you should encourage the designers and development team to continue to scope out the individual pieces of the system even after development has started. Then, in the next iteration, the requirements will be mapped out based on the most recent view of the needs of the system, instead of relying on outdated requirements, built months in advance. In this document, we map out the high-level needs of the system. We will refine the smaller details of these high-level requirements, and if we decide that our original path was not exactly as expected, we will celebrate this as we've found a better way of solving our challenges and delivering a better service to Parker Landscaping Supply.

In doing so, it's important that we do continue to stay within a plan so the Parker Landscaping Supply team can prepare for when the system will be ready for use. To do this, we will put deadlines and budgets around each piece of functionality and keep those in mind as development progresses. This deadline and budget (and the items mentioned above in "Goals of Solutions") will drive our implementation decisions to ensure we build the best system within budget.





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RESOURCES ESTIMATE AND TIMELINE

Based on the requirements outlined in this document, we recommend building the web application with an API architecture. This architecture allows for the application to be built in a way that allows it to be easily scaled and allows room for future development on other platforms, such as an iOS or Android mobile application. While this is not an immediate need, this architecture will allow the best ability for Parker Landscaping Supply to continue to add on to this application in the future. Based on our estimates, we believe the following effort will be needed for this phase:

Front End Development: xxxx - xxxx hours

Back End Development: xxxx - xxxx hours

Testing: xxxx hours

Project Management and Meetings: xxx hours

TOTAL: xxxx Hours – xxxx Hours

Assuming a team consisting of a Project Manager, Front-End Developer, and Back-End Developer this project can likely be finished in a xx - xx month time period.

Ongoing, the solution will require a reliable server that is backed up regularly. Additionally, having a developer for ongoing support and routine maintenance, such as security patches and bug fixes is suggested.

In order to reduce costs and effort, it's highly recommended to build this project inside a library with some of this pre-existing functionality in order to limit upfront cost. For instance, Dorian's Prism Framework already includes 80% of the backend work, bringing down the overall cost and time to market.





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PARKING LOT

The following items were mentioned during discussions but were suggested to be implemented later and not in the first iteration of this project:

- Tie the software into the existing accounting system
- Develop a section to track and manage Material purchasing
- Create a to do list for outstanding items which can be assigned to individual users, and display on that user's Dashboard.
- Create a mobile app connected to the system which allows invoices to be generated in the field and submitted directly into the software.

FINAL THOUGHTS

Parker –

It was great getting to know your business and learning about the system you'd like to build for your workflow needs. We can definitely help to streamline your process and start saving you time and money. I appreciate the time and effort you have put into working together to shape your vision for this software. We're very excited to get started making it a reality. I would personally lead the project and Jason Ziolo will direct the development team. We're all looking forward to the next steps, and continuing to build a partnership that will invest in your future growth and success.

Thank you from all of us at Dorian Solutions!

Jace Steenbarger

myteam@doriansolutions.com

