Project Description

San Francisco have described a need for a web based application that can control the Enterprise Zone credit application process. The process is a process that will be housed entirely within a drupal site, using AchieveForms for the request forms and process control.

Process Description – Full Review

This section describes the process the Enterprise Zone Tax Credit Application form. Each step represents a different user role and their actions to complete each step.

1. Application
   a. User logs in and see list of active applications and past inactive applications
   b. User can choose to submit a new application
      i. In each application, user can list a number of employees for credit
      ii. For each employee added to the application, an application fee is added to total payable
      iii. On submission of form, user is taken to a payment screen to pay for all charges via credit card

2. EZHTC Admin Review
   a. EZHTC Admin logs in and sees list of applications requiring review
   b. EZHTC Admin can review each application and choose to approve or reject each employee
      i. If rejected, the EZHTC Admin enters a reason
      ii. If Approved, a voucher is generated as a pdf
      iii. On submission, User is notified of all approvals and rejections
      iv. On Submission, all vouchers are emailed to User

Screen Description

This section gives a rough description of what each user will see. Once the project starts, San Francisco will have an opportunity to review and request changes to the screens.

1. User
   a. Create new applications
   b. My active applications (list all)
   c. My completed applications (list all)
   d. My Vouchers

2. All other roles
   a. My tasks (list all)
   b. Reports Link
   c. Find Application
   d. Find Voucher

Reports
Below is a list of reports that will be configured as part of the application build.

- List details of all active applications
- List details of all approved applications for user selected start and end date
- List details of all dis-approved applications for user selected start and end date
- List details of all applications for user selected User
- List active, approved, dis-approved counts
- Export all request to CSV format for excel viewing

Assumptions
- A user can submit as many employees as they wish in each form
- User must pay for applications via online credit card payment
- Each stage is a single action (open, complete required and optional fields, submit)
- Process is a simple 2 stage process. Apply and review only.
- Applications are marked as approved or rejected only. No edit option required.

Cost Estimate

Services
- Process Building - 2 days
- Site Configuration - 2 days
- Report Building - 3 days
- Voucher Generation – 1 day
- Site Theming - 1 day
- Handover and Training - 1 day
- Total estimate: 10 days @ $1,600 (US) per day - Discounted to $0

Licence
- AchieveForms Licence - $11,520 per annum
  - Up to 1500 submissions per month
  - Usage will be monitored and if usage exceeds limits, San Francisco will be contacted to discuss usage levels. If appropriate, licence will be increase to 3000 per month at a cost of $16,000 per annum (prorated for remaining contract)
- AchieveForms Payment Integration - $3,000
- AchieveForms Payment Integration Support and Maintenance - $1,000 per annum