

Accomplishment Report

August 12, 2024 – August 30, 2024

Internal Chat System Enhancement and Buildhub

Internal Chat System Enhancement Project

Objective:

- Resolved scrolling and conversation switching issues to improve chat functionality and user experience.

Tasks Completed:

- **Scrolling Bug Fix:** Resolved an issue where the chat window did not scroll correctly, ensuring smooth navigation through messages.
- **Conversation Switching:** Fixed a problem where switching conversations did not update the chat content properly, allowing for accurate message display when selecting different conversations.

Buildhub

Objective:

- Enhanced BuildCredit functionality, improved seller shipping options, supported administrative tasks, and refined system details.

Tasks Completed:

1. BuildCredit Payment and Balance Management

- Payment Status Update:
 - Adjusted the BuildCredit payment status to accurately reflect as "PDC Received" instead of "Pending" after payments were completed.
- **BuildCredit Limit and Balance Review:**
 - Conducted a comprehensive review to ensure BuildCredit balances do not exceed the approved credit limit.
 - Verified the BuildCredit Balance query functionality to ensure it aligns with the View History balance on the admin side.
- **Credit Terms Statement of Account (SOA):**
 - Developed a Statement of Account (SOA) feature that displays critical credit terms, including:
 - Credit Terms
 - Credit Limit Approved
 - Credit Remaining Balance
 - Used Credit Limit
 - Available Credit Limit + PDC
 - Credit Limit Used - PDC
- **Payments and History Enhancements:**
 - Added PDC Payments History to track and manage payments more effectively.
 - Implemented a Manual Add Interest option in the payments section to handle interest adjustments manually.

- Ensured completed payments no longer display in the payments section on the admin side to avoid duplication.
 - **Admin Side Optimization:**
 - Optimized BuildCredit payment processes in the admin panel for improved efficiency.
 - Added additional balance and relevant information fields in the admin interface.
 - Removed redundant balance and information fields for a cleaner admin view.
 - Rearranged fields in the admin panel to streamline user experience.
 - Highlighted Company Name in the BuildCredit Customers List for better visibility.
 - Added a sticky header for column names to enhance usability.
 - **Payments and Orders Enhancements:**
 - Added functionality to include EOS Orders with Amount, Reference Number, and Date Ordered.
 - Introduced an option to record Bounced Check Payments.
 - Updated the credit limit display in the admin panel to include the Pesos sign for clarity.
2. **Seller Shipping Improvements**
- **Shipping Option Toggle:**
 - Added a toggle option in the Seller Side to enable or disable the seller shipping option on the Buyer Side.
 - **Shipping Process Review:**
 - Conducted a thorough review of the seller shipping process to identify and address potential issues or improvements.
3. **Administrative and Support Tasks**
- **Support for Accounting Requests:**
 - Addressed and supported various requests from the accounting department to ensure smooth financial operations.
 - **Importing Stores and Products:**
 - Facilitated the import of new stores and products into the BuildHub system to keep the inventory up-to-date.
 - **Text for BuildCredit Due Dates:**
 - Initiated the process for incorporating due date text for BuildCredit, pending template updates.
4. **Other Tasks and Finetuning**
- **BuildCredit Balances:**
 - Made final adjustments and fine-tuned BuildCredit balances to ensure accuracy and reliability.