

Ivan Guglietta

Apollotek App: User Experience Improvements

1. Auto-Link for Account Numbers (Order Fulfillment & Tech Requests)

It would be great if, when creating a new Order Fulfillment or Tech Request, the account number automatically turned into a blue clickable link once entered. By clicking it, we should be able to go directly to the customer's profile to view their address, phone number, ZIP code, and all previous office notes. Additionally, it would be very helpful if we could leave our own comments directly from that same view.

2. ZIP Code in Tech Requests

Ramón is always asking us to include the ZIP code in the address section, so we should make sure there is a way to include it directly within the address field or by adding a dedicated space for it. It is a small detail, but currently missing, and having it there would save a lot of back-and-forth when setting up routes. KF: TODAY, our current portal does not display the zip code, I don't know why

3. Smart Data Population (Portal Integration)

If the Apollotek Portal is going to serve as the database for this app, it would be ideal if, once the account number is entered, all fields such as address and phone numbers automatically populate. Of course, the system should still allow manual editing in case the customer has moved or changed their phone number (KF: PERMISSION SETTING ONLY TO CHANGE A PHONE NUMBER/ADDRESS IN THE SYSTEM)

4. Freeze Header Row on Scroll

When scrolling down, the top row containing the column names (Phone, Product Description, Tech vs Manual, Gift, etc.) should remain fixed at the top. Right now, it disappears while scrolling, so it would be much better to always keep those labels visible in order to clearly identify the information being viewed without needing to scroll back up.

5. Internal Notes Field

We should add a "Notes" column between Paid Amount and Receipt/Payment ID. This would be very important for leaving specific comments, such as noting whether an order was authorized by a supervisor or including any other details that Ramón or the shipping department should know.

6. Customer Email Field

We should add a field for the customer's email address right after the phone number. This would help keep all customer contact information together in one place.

Nestor Villalobos

I would like to share my suggestions:

1. Optimization of "Tech Request"

In the Account # column, enable a hyperlink that displays the Office Comments when clicked. Alternatively, add an "Actions" column identical to the one in the Account tab to improve navigation.

2. Interface Cleanup
Remove the "1st Attempt" column. Since the protocol requires immediate communication when registering the service, this field usually remains empty and only creates visual clutter. KF: Besides we are adding notes so is this necessary?
3. Centralized Evidence
Enable file uploads within the details of each service order. This would allow reports and technician photo evidence to be attached, keeping all supporting documentation centralized in one place.
4. Field Cleanup
Remove the fields shown in the image, as they do not provide operational usefulness or informational value.

The image shows a service order form with the following fields and their status:

- ESTIMATED DURATION: Marked with a red 'X'.
- ESTIMATED COST (PARTS AND LABOR): Marked with a red 'X'.
- RESOLUTION: Marked with a red 'X'.
- DISCOUNT: Marked with a red 'X'.
- TAX: Marked with a red 'X'.
- A large red 'X' is placed over a circular diagram in the center of the form.
- Other fields: PRIORITY (Low), SERVICE DATE (06/05/2026), ASSIGNED TO (asdfsdfda asdfsdfsd), SERVICE TIME (09:00 a.m.), FINAL CUSTOMER BILL (\$ 373.24), and FORM OF PAYMENT (Cash).

Christian Machado

After reviewing the new portal, I would like to share some feedback and suggestions

1. When reviewing account details, the date shown in the office comments section is currently too light and difficult to read. Making the date text darker or more visible would help users quickly identify when comments were added and improve overall readability.
2. Is there another font option that can be used throughout the portal? The current font makes certain fields, especially the address section, difficult to read. The font used in the current portal is much easier on the eyes and allows information to be reviewed more comfortably during daily operations.
3. Will this portal be used by both the corporate office and ACS members? If so, it would be very helpful to separate order fulfillment requests for daily maintenance items such as filters or replacement parts from brand-new equipment sales orders. If

both types of orders must remain together in the same system, it would still help significantly to clearly identify whether the order belongs to a brand-new customer or to an existing customer purchasing maintenance products or replacement parts.

4. Under the “Customer History” section, will customers only be searchable by name, or can they also be searched by account number? Searching by account number would be much more efficient, especially because many customers may share the same first and last name, which can create confusion and increase the chance of opening the wrong account.
5. Regarding the “Service Opportunities” section, will future service recommendations be based on the customer’s service history and previous work completed with us? It would be extremely useful if the portal could estimate when a customer is actually due for service based on prior maintenance records. Additionally, it would help to separately identify non-standard services such as leak repairs, water softener piston replacements, UV light replacements, and similar repair work. Including the amount the customer paid for those services, as well as indicating whether the repair was completed under warranty, would help keep all important service information organized instead of relying only on office comments.