**General UI Feedback**

• **Sidebar Color & Logo**

• Sidebar color is incorrect. Please use the **green or blue** from our logo file.

• Logo is **squished** and distorted. Please maintain aspect ratio.

• Let me know if you need the **CMYK color codes**.

• **Dashboard**

• Current data is not relevant or useful.

• Clicking on “Leads” or “Picklo Homes” does not navigate to the associated pages. Expected these to be **clickable** for navigation.

**📚 Sidebar Navigation**

• Clicking “Leads” should **go directly to the Manage Leads page**. No dropdown is necessary.

• Remove the following items:

• “Add New” under Leads

• “List” under Leads

• “Follow Ups” (This will be restructured)

• “Manage Pre Task”

• **Rename “Projects” to “Clients”**

• **Reorder Sidebar Navigation**:

1. Leads

2. Follow Ups

3. Clients

4. File Manager

• Move “Users” and “Roles” under **Settings** or a similar category (we’re unsure of their future use).

**🧍 Manage Leads Page**

• Page should be titled **“Lead Page”** (not “Manage Client”).

• All labels should refer to **“Leads”**, not “Clients”.

• Add a button: **“Add New Lead”**

• Clicking on a Lead should open the **Lead Detail Page**.

• **Remove**:

• Action column

• Architect column

• **Add**:

• Status column

• Project Type column

**🗂️ Lead Detail Page (currently called Client Detail Page)**

• Page should be titled **“Lead Detail”**

• Current format looks like **editable form fields** – should be **read-only** with an **Edit button** to modify details.

• **Remove fields**:

• Engineer

• Architect

• Landscaper

• Access Code

• Spec Sheet

• Plan Files

• **Add fields**:

• Project Type (Home, Pool, Remodel, Addition)

• Notes

• Add button: **“Edit”** – to allow editing of lead information.

• Add button: **“Schedule a Follow Up”** – should open the follow-up scheduling page.

**🔁 Follow Up Page**

• Current “View” format appears editable – should be **read-only**.

• On the **Edit screen**, capitalize:

• “Cancelled”

• “Completed”

• On the **View screen**, display **Lead’s email and phone number** for quick contact.

• **Remove the “Today” tab** – should only include:

• Upcoming

• Overdue

• Completed

**👥 Client Page (currently labeled “Projects Page”)**

• Page should be titled **“Client Page”**

• Sidebar should follow same structure as Leads (no “List” or “Add New”)

• Clicking a Client should open a **Client Detail Page** with an **“Add New”** button

• Once a Lead is approved, all info should **transfer to Client Page** automatically

• **Fields on Client Page**:

• Engineer

• Architect

• Landscaper

• Access Code

• Spec Sheet

• Plan Files

• Include an **Edit button** (same as Lead Detail layout)

• Add button: **“Add Project”** – each client may have multiple projects

• Display list of projects under each client with option to **“Manage Project”**

• Clicking “Manage Project” should go to the **Project Detail Page**

**🛠️ Project Detail Page**

**Overall Structure**

• The **Project Detail Page** should function like a **digital notebook**, broken down by **Phases** (currently labeled “Pre Category”) and **Tasks** (currently labeled “Pre Task”).

• Selecting a **Phase** should open a nested view showing all associated **Tasks**.

• Within an open Phase, users should be able to:

• **Add new tasks**

• **Edit existing tasks**

• **Check off completed tasks**

**Timeline Integration**

• Each Phase should be tied to a **calendar timeline**, allowing us to create a **Gantt-style chart**.

• When a Phase’s timeline is adjusted, all subsequent Phase timelines should **automatically shift accordingly** to maintain project continuity.

**✅ Phases & Tasks**

Below is the structured breakdown of all Phases and their respective Tasks:

**1. Pre-Construction**

• Permits

• Order brick

• Order windows

• Order garage doors

• Order front door

• Order appliances

• Soil test

• Engineering

• Water tap

• Gas tap - LP tank

• T-pole install

• Temporary ES ID #

• Temporary electric account #

• Temporary electric meter installed

• Porta Can

• Dumpster

**2. Site Prep and Foundation**

• Culverts

• Driveway rock

• Lot stake

• Clear lot

• Build pad

• Set forms

• Fill forms

• Dirt knock down

• Ground plumbing

• Sleeve for water line through foundation

• Water line in island

• Dig beams

• Pre-treat for termite

• Slab make ready

• Slab electrical

• Pre-pour inspection

• Order walls, headers, and beams

• Pour

• Anchor bolts

• Vibrate beams

• Brush finish on porch

• Ufer rod

• Wreck forms

• Grade foundation perimeter

**3. Framing**

• Framer

• Base plate wall flashing per details

• Slope window sills towards exterior

• No cripples in the middle of windows

• Zip stretch tape along bottom and sides of window frame

• Caulk top and sides of windows before install

• Tape windows (sides first, then top, not bottom)

• Flashing behind horizontal butt joints

• Well

• Stress cables

• Cable inspection

• Cut and grout cables

• Order joist material

• Order sheathing

• Order windows

• Shingle selection

• Order exterior, pocket, and front doors

• Order cornice

• Order decking

• Order fireplace

• Plumbing fixture selections

• Order roofing materials

• Roofer

• Counter flashing

• Water and ice shield in valleys

• Synthetic underlayment

• Kick-out flashing check

• Caulk nail heads

• Stone/stucco selection

• Schedule insulation

• Schedule sheetrock

• Frame punch

• Flashing – kick-out, base, wall, etc.

• Tape – roll for adhesion

• Liquid flash nails and penetrations

• Beam and supports

• Fire blocking

• Strapping

• Blocking (curtain rods, swings, TVs, etc.)

• Build plywood cover for sliding door tracks

• Light fixture selections

**4. Mechanicals**

• Plumbing rough

• Copper elbows

• Accessible water/gas shutoffs

• In-wall gas shutoff boxes

• Quickflash on all exterior penetrations

• Loop water spigots

• Sleeve for main water line with garage shutoff

• Irrigation box over sewer cleanout

• Water heater drain pans

• Verify sink/body spray/p-trap locations

• Cover tubs with foam board and plywood

• HVAC rough

• Line up supplies with lights/cans

• Electrical rough

• Box and can walk

• Proper plug placement in cabinets

• Raco Vapor Barrier boxes on exterior

• Quickflash on penetrations

• HVAC breaker requirements

• No jamb lights – use occupancy switches

• Counter plug height – 46”

• Cabinet plugs – 12”

• Switches – 6” from jamb

• Center plugs under windows

• Low voltage rough

• Central vacuum rough

• Frame and mechanical inspection

• Interior frame clean

**5. Exterior Finishes**

• Brick/stone/stucco

• Gas line

• Electrical service build

• Electrical underground

• Garage doors

• Paint selections

• Hardware selections

• Gutters

• Front door

• Window screens

**6. Insulation & Sheetrock**

• Insulation install

• Insulation inspection

• Trash removal before sheetrock

• Sheetrock stocked

• Sheetrock install

• Mark for niches/access doors

• Order trim

• Schedule trim walk

• Tape, float, sand, texture

• Order hardware

• Appliance cutouts

**7. Millwork & Paint**

• Paint exterior

• Tile/flooring selections

• Granite selections

• Septic

• Gas meter

• Permanent ES ID #

• Permanent electric account #

• Permanent meter install

• Trim delivered

• Trim carpenter

• Tub orders

• Interior paint

• Caulk penetrations

• Clean windows

• Window screens

**8. Interior Finishes**

• Granite install

• Tile install

• Shower glass/mirror takeoff

• Deliver fixtures (light/plumbing)

• Wallpaper

• Flatwork

• Wood floor install

• Carpet

**9. Final**

• Electrical trim

• Surge protector

• Straighten plates

• Plumbing trim

• HVAC trim

• Level exterior escutcheons

• Metal 4” vent covers

• Low voltage trim

• Central vacuum trim

• Garage door openers

• Shower glass/mirror install

• Hardware install

• Fireplace trim

• First clean

• Final grade

• Fence

• Landscaping

• Blower door test

• Final inspection

• Second clean

• Paint touch-up

• Final clean

**10. Final Punch**

• All Rooms

Open every door, window, cabinet door and drawers

Check for sticking or rubbing when you open and close doors

Close and lock all doors

Check for missing trim behind doors

Fully open, close and lock all windows

Window screens free from tears

Windows are caulked

Window scratches or cracks

Put weight on open shelves

Turn on all switches: lights, celling fans, and exhaust fans

Drywall nail pops, cracks, and sloppy/missing texture

Signs of pests such as ants, roaches, or rodents

Wiggle all light fixture to see if they are loose

Carpet stains

Carpet seams are not visible

Carpeted corners don’t have gaps

Uneven floors

Scratches or gaps in the flooring

No hollow sounding tile

Paint and caulking blemishes

Trim ends missing paint

Paint overspray

No missing closet rod (clothes hanger)

Test both heat and A/C

Kitchen

Run the range above the stove

Turn on each burner

Turn on microwave

Turn on the oven

Run hot water to test water heater

Filter in the hood fan

Trim under cabinets

Countertop blemishes

Countertop level

Wiggle plumbing fixtures

Check under sinks to look for leaks

Turn on disposal

Cabinet door alignment

Open and close all cabinet shelves and doors

Paint overspray on cabinets

Any missing cabinet shelving

Level or loose cabinet knobs/handles

Backsplash tile cracks

Backsplash missing grout

Backsplash caulked where it meets countertop

Bathrooms

Turn on faucets and let run for 5 minutes, check pipes under the sink for leaks, leaks around faucet, slow draining or clogged drains.

Sink stopper working and holding water

Wiggle all plumbing fixtures

Vanity level

Sit on toilet for a wobble check

Flush toilets with toilet paper

Any leaks around toilet base

Ensure all shower and sink drains close properly

Wiggle towel rod and toilet paper holders

Hollow sounding tile

Missing grout

Turn water on in at least three locations and flush the toilet to check for water pressure

Run the shower/faucets for drainage and water pressure, and leaks. Do they shut off completely?

Mold growth in bathrooms

Test hot water

Attic

Rotten wood flooring in attic

Insulation around water pipes

No gaps in ceiling insulation

Sealed attic door

Bathroom fans vent to exterior and not into the attic

Exterior

Open Garage Doors, check seal. No grinding during operation

Open garage door with remote and wall button

Open and close the garage door

Test doorbell

Exterior door, top and bottom are sealed or painted.

Exterior doors have weather stripping, no light shining through.

Test circuit breakers for proper labeling

Visit the house during rain and look for pooling water, especially near the foundation

Check for any loose brickwork

Meter box not loose

Check for any cracks in the concrete work that are more than 1/4” wide or deep.

Look for big divots in the driveway and sidewalks

Check for paint on all the soffits and cornice boards

Outdoor hose bib working properly

Check exterior light fixtures for caulking, especially where they are subject to rain/water

Exterior lights are functional

Exterior lights are not loose

Check exterior trim for caulking

Check for roof flashing

Gaps around the exterior penetrations (Hose bibs, A/C lines, internet cable, and power conduit)

Porch nails/screws not protruding

Porch rails are sturdy

Porch ceiling free of damage

Porch posts/columns free of damage

Gutters: no gaps or loose connections

Siding is properly caulked, painted, and installed. No damage