MERN Project:
A simple CRM for Vivify

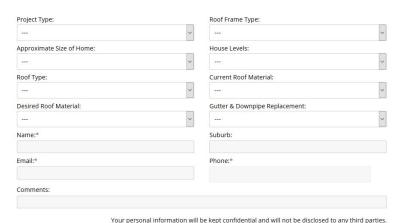Jing Claire, Mark Butcher, and Andrew Sims

The business problem

- Small roof restoration business, put a lot of money into digital marketing and receive a lot of sales leads.

- Allocate their leads to sales staff on an ad-hoc basis: this has resulted in miscommunications and loss of revenue.

- Need to centralise the information about their sales leads and standardise the sales process.
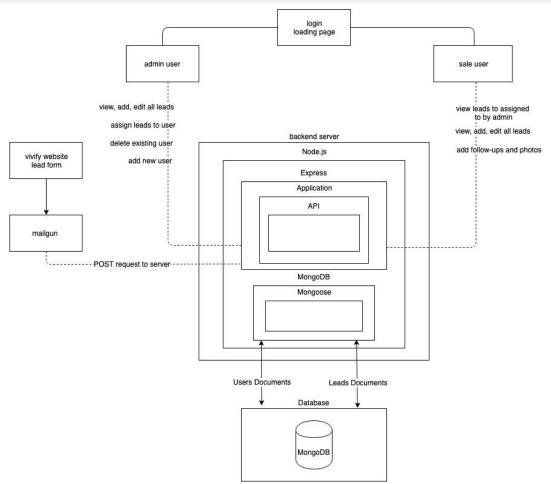
VIVIFY
More than roofing

Application Live Walkthrough

With
Jing **as an admin** &
Mark **as a salesperson**

Design process and decision-making

Project Type:
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```

Approximate Size of Home:
```
---
```

Roof Type:
```
---
```

Desired Roof Material:
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---
```

Name:*

Email:*

Comments:

Roof Frame Type:
```
---
```

House Levels:
```
---
```

Current Roof Material:
```
---
```

Gutter & Downpipe Replacement:
```
---
```

Suburb:

Phone:*

Your personal information will be kept confidential and will not be disclosed to any third parties.

SUBMIT

login
loading page

admin user

sale user

view, add, edit all leads

assign leads to user

delete existing user

add new user

view leads to assigned
to by admin

view, add, edit all leads

add follow-ups and photos

vivify website
lead form

mailgun

POST request to server

backend server

Node.js

Express

Application

API

MongoDB

Mongoose

Users Documents

Leads Documents

Database

MongoDB

Challenges, ethical issues, favourite parts

- **Challenges:**
  - Automating data flow from their marketing website to the database (mailgun and regex!)
  - Dealing with the "back" button on the browser and Android
  - Authentication, getting it all to work reliably through changes
- **Ethical Issues:**
  - Private information of potential customers
- **Favourite Parts:**
  - CSS from scratch, no frameworks. Often frustrating, but also fun
  - Automation, was a novel problem and a nice challenge

Questions?