

CRM-AI Pro - Test Report for Ryan

Report Date: November 27, 2025

Version: Development Build

Prepared by: Development Team

Quick Start - Your Test Credentials

Primary Test Account (Owner Role)

Email: ryan@317plumber.com

Password: TestPassword123!

Role: Owner (full access - desktop + mobile)

All Test Users Available

Email	Role	Platform Access	Description
ryan@317plumber.com	Owner	Desktop + Mobile	Full system access, all features
admin@317plumber.com	Admin	Desktop Only	Settings, user management, reports
dispatch@317plumber.com	Dispatcher	Desktop Only	Job assignment, dispatch map, GPS tracking
marcus@317plumber.com	Tech	Mobile Only	Field technician workflow
jake@317plumber.com	Tech	Mobile Only	Field technician workflow
emily@317plumber.com	Sales	Mobile Only	Sales briefings, meeting transcription

All users use password: TestPassword123!

How to Access the Application

Desktop Dashboard

URL: <http://localhost:https://crm-ai-pro-production.up.railway.app/>

Login with any user above. Owner/Admin/Dispatcher roles work best on desktop.

Mobile Views

URL: <http://localhost:3000/m/tech/dashboard> (Tech mobile)

URL: <http://localhost:3000/m/sales/dashboard> (Sales mobile)

URL: <http://localhost:3000/m/owner/dashboard> (Owner mobile)

URL: <http://localhost:3000/m/office/dashboard> (Office mobile)

Or access from a mobile device/emulator.

Expected UI/UX by Role

Each role has a distinct user experience optimized for their daily workflow. Here's what to expect:

OWNER Role (ryan@317plumber.com)

Platform: Desktop + Mobile

Desktop Experience

Primary URL: /owner/dashboard

What You'll See:

- *Revenue Dashboard** - Today's revenue, weekly totals, monthly performance
- *Team Overview** - All technicians with current status (available, on job, en route)
- *Job Completion Progress** - Visual progress bar of daily job targets
- *Real-Time Alerts** - Critical issues requiring attention
- *Full Navigation** - Access to ALL system features via sidebar:

Inbox (conversations)

- Jobs (full job management)
- Contacts (customer database)
- Dispatch Map (live tech locations)
- Invoices (billing)
- Calendar (scheduling)
- Reports (analytics)
- Settings (system configuration)
- Marketing (campaigns, templates)

Key Actions:

- Monitor business health at a glance
- Drill into any area needing attention
- Override/approve escalations
- Access all reports and analytics

Mobile Experience

URL: /m/owner/dashboard

What You'll See:

- *Simplified Stats Cards** - Revenue (today/week/month) in large, readable format
- *Team Performance** - Active techs count, average rating
- *Job Progress Ring** - Visual completion indicator
- Team Status List** - Each tech with their current location/status
- Quick Action Links** - Reports, schedule

Design Philosophy: Quick health check while away from desk. Big numbers, minimal clutter. For checking "how's the business doing?" in 10 seconds.

ADMIN Role (admin@317plumber.com)

Platform: Desktop Only

Desktop Experience

Primary URL: /admin/settings

What You'll See:

- Settings Dashboard** with access to:
 - Company Settings (business info, branding)
 - User Management (add/edit team members)
 - LLM Configuration (AI provider settings)
 - Automation Rules (workflow triggers)
 - Integrations (external services)
 - Audit Logs (system activity history)

Key Actions:

- Configure system settings
- Manage user accounts and roles

- Set up automation rules
- Review audit trails
- Configure AI/LLM providers

What's Different from Owner:

- Cannot impersonate other users
- Cannot access certain financial reports
- Focused on system administration vs. business operations

DISPATCHER Role (dispatch@317plumber.com)

Platform: Desktop Only

Desktop Experience

Primary URL: /dispatch (map view)

What You'll See:

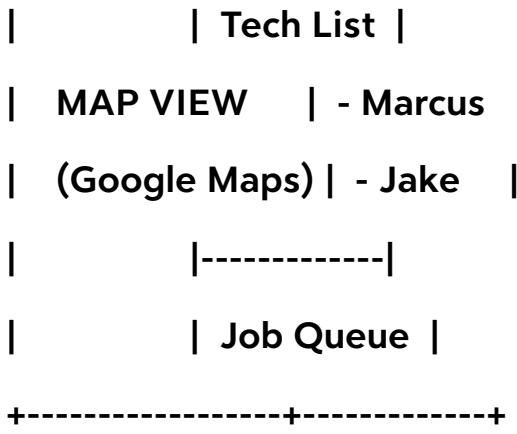
- *Full-Screen Dispatch Map** - Google Maps with:
 - Colored pins for each technician (color = status)
 - Job location markers
 - Real-time GPS updates
- *Tech Status Panel** - List of all techs with:
 - Current job
 - Status (available, en route, working)
 - Time on current job
- *Job Queue*** - Unassigned jobs needing dispatch
- *Escalation Alerts*** - Techs blocked by gate issues

Key Actions:

- Drag-and-drop job assignment
- Monitor tech locations in real-time
- Reassign jobs as needed
- Handle escalations from techs
- View job details and customer info

Visual Layout:





TECH Role (marcus@317plumber.com, jake@317plumber.com)

Platform: Mobile Only

Mobile Experience

URL: /m/tech/dashboard

What You'll See:

Dashboard Screen:

- *Current Job Card** (if on a job):
 - Customer name
 - Address (tappable for directions)
 - Phone number (tappable to call)
 - Job description
 - Status badge (in_progress, en_route, etc.)
- *Next Up*** (if no current job):
 - Next scheduled job preview
- *Today's Schedule*** - Scrollable list of all jobs for the day
 - Color-coded by status
 - Time slots
 - Customer names

Job Detail Screen (tap into a job):

The tech progresses through **mandatory gate stages**:

STAGE 1: ARRIVAL



| |
| GPS will be recorded |

+-----+

STAGE 2: BEFORE PHOTOS

+-----+

| TAKE BEFORE PHOTOS |

| [CAMERA BUTTON] |

| |

| Minimum 1 photo required |

| [Photo thumbnails here] |

| [CONTINUE] |

+-----+

STAGE 3: WORK IN PROGRESS

+-----+

| MARK WORK COMPLETE |

| [BIG BUTTON] |

| |

| Add materials used |

| Add notes |

+-----+

STAGE 4: AFTER PHOTOS

+-----+

| TAKE AFTER PHOTOS |

| [CAMERA BUTTON] |

Show completed work	
[Photo thumbnails here]	
[CONTINUE]	
-----+	

STAGE 5: CUSTOMER SATISFACTION

-----+	
CUSTOMER SATISFACTION	
How satisfied was the	
customer?	
[1] [2] [3] [4] [5]	
Poor ----- Excellent	
(1-3 triggers escalation)	
-----+	

STAGE 6: REVIEW REQUEST

-----+	
REQUEST REVIEW	
Would customer leave a	
Google review for 5% off?	

| [YES - 5% OFF] |

| [NO / SKIP] |

+-----+

STAGE 7: SIGNATURE

+-----+

| CUSTOMER SIGNATURE |

| |

| +-----+ |

| | | |

| | [Signature Pad] | |

| | | |

| +-----+ |

| | |

| [CLEAR] [COMPLETE JOB] |

+-----+

Design Philosophy:

- *BIG buttons** (60px+ height) - Works with gloves
- *Dark theme** - Readable in bright sunlight
- *Minimal text** - Quick glance understanding
- *One action per screen** - No confusion about what to do next
- *Offline capable** - Works without cell signal

SALES Role (emily@317plumber.com)

Platform: Mobile Only

Mobile Experience

URL: /m/sales/dashboard

What You'll See:

Dashboard Screen:

- *Greeting** - "Good Morning, Emily!" (time-based)
- *Next Meeting Card**:
 - Customer name
 - Location
 - Scheduled time
 - Quick action buttons: BRIEFING | START
- Action Buttons**:
 - NEW MEETING
 - VOICE NOTE
- *Today's Schedule** - List of all meetings

Briefing Screen (tap BRIEFING):

/m/sales/briefing/[contactId]

+-----+
| MIKE HENDERSON |

| Lifetime Value: \$2,450 |

| |

| [CALL] [EMAIL] |

+-----+

| OPEN ISSUES |

| ! Waiting on estimate |

+-----+

| PERSONAL NOTES |

| - Wife: Jennifer |

| - 2 kids, dog named Max |

| - Colts fan |

+-----+

| SUGGESTED TALKING POINTS |

| * Follow up on water |

| heater quote |

| * Ask about basement |

| renovation plans |

+-----+

| RECENT JOBS |

| - Faucet repair (\$450) |

| - Water heater svc (\$85) |

+-----+

| PREVIOUS MEETINGS |

| - Nov 15: Discussed... |

| Sentiment: Positive |

+-----+

Meeting Recording Screen (tap START):

/m/sales/meeting/[id]

+-----+

| MEETING WITH |

| Mike Henderson |

| |

| [RED DOT] 03:45 |

| Recording... |

| |

| +-----+ |

| | Live transcript | |

| | appears here as | |

| | you speak... | |

| | | |

| +-----+ |
| |
| [PAUSE] [STOP & SAVE] |
+-----+

After Recording - AI Analysis:

+-----+
| MEETING SUMMARY |
| |
| Discussed water heater |
| replacement options. |
| Customer interested in |
| tankless. Will follow up |
| with quote by Friday. |
+-----+

| ACTION ITEMS |
| [] Send tankless quote |
| [] Email warranty info |
| [] Schedule follow-up |
+-----+

| SENTIMENT: Positive |

+-----+
| PERSONAL DETAILS SAVED |
| - Planning kitchen reno |
| - Budget: ~\$15k |
+-----+

Design Philosophy:

- *Pre-meeting prep** - Never walk in cold
- *Hands-free recording** - Phone captures everything
- *AI does the work** - Extracts action items automatically
- *Relationship building** - Personal details remembered

OFFICE Role (dispatch or admin with office access)

Platform: Desktop + Mobile

Mobile Experience

URL: /m/office/dashboard

What You'll See:

- *Escalation Queue** - Techs who are blocked and need help
 - Customer name
 - Issue (low satisfaction, signature refused, etc.)
 - Quick CALL button
 - Resolution notes input
 - MARK RESOLVED button
- *Job Stats** - Today's completion numbers
- *Team Rating** - Average customer satisfaction

Key Actions:

- Review escalated situations
- Call customers to resolve issues
- Clear gates so techs can proceed
- Monitor daily performance

Visual Design Summary

Role	Theme	Primary Focus
Owner Desktop	Light, data-rich	Business metrics, oversight
Owner Mobile	Dark, minimal	Quick stats check
Admin Desktop	Light, forms	System configuration

Dispatcher Desktop	Map-centric	Real-time coordination
Tech Mobile	Dark, big buttons	Step-by-step job completion
Sales Mobile	Dark, cards	Relationship intelligence
Office Mobile	Dark, queues	Exception handling

Test Data Loaded

The system has been seeded with realistic 317 Plumber data:

Data Type	Count	Description
Users	6	Full team with different roles
Contacts	15	Indianapolis-area customers
Jobs	12	Various statuses for testing workflows
Invoices	6	Draft, sent, paid, overdue examples
Parts Inventory	15	Plumbing supplies and equipment
Conversations	6	Email and SMS threads
Email Templates	5	Ready-to-use templates
Campaigns	2	Marketing campaigns with recipients
Calendar Events	8	Scheduled appointments
Notifications	10	System notifications
Contact Tags	8	Customer categorization

Sample Jobs Ready for Testing

Job	Status	Tech Assigned	Customer
Kitchen sink faucet replacement	Completed	Marcus	Mike Henderson
Water heater replacement	Completed	Jake	Robert Chen

Whole house re-pipe	In Progress	Jake	Thomas Garcia
Emergency - no hot water	En Route	Marcus	Nancy Anderson
Sewer line inspection	Scheduled	Jake	James Wilson
Toilet replacement	Scheduled	Unassigned	David Mitchell
Tankless consultation	Scheduled	Unassigned	Sandra Brown

Features Currently Working

1. Authentication & Role-Based Access

- Login/logout functionality
- Role-specific dashboards
- Permission-based feature visibility
- Session management

2. Contact Management

- Create, view, edit contacts
- Contact tagging system
- Contact search
- Contact profiles with history
- Lifetime value tracking

3. Job Management

- Create new jobs
- Job status workflow (lead → scheduled → en_route → in_progress → completed → invoiced → paid)
- Assign technicians to jobs
- Job scheduling with calendar
- Job notes and details

4. Dispatch Map

- Real-time technician locations
- Job pins on map
- Tech status indicators

- GPS tracking infrastructure

5. Invoicing

- Create invoices from jobs
- Invoice status tracking (draft, sent, paid, overdue)
- Payment recording
- Invoice listing and filtering

6. Parts Inventory

- Parts catalog
- Stock tracking
- Add parts to jobs
- SKU and pricing

7. Conversations/Inbox

- Email conversations
- SMS conversations
- Conversation threading
- Reply functionality

8. Calendar & Scheduling

- Job scheduling
- Calendar views
- Meeting management

9. Email Marketing

- Email templates
- Campaign creation
- Campaign recipients
- Send campaigns

10. Notifications

- In-app notifications
- Notification center
- Read/unread status

11. Mobile Tech Interface

- Mobile-optimized dashboard
- Current job display
- Today's schedule
- Job details view
- GPS arrival logging
- Before/after photo capture
- Customer satisfaction rating
- Signature capture
- Voice notes

12. Mobile Sales Interface

- Sales dashboard with next meeting
- Pre-meeting briefing with AI suggestions
- Contact quick actions (call, email)
- Meeting recording with live transcription
- AI analysis of meetings (summary, action items, sentiment)

13. AI Features

- LLM integration (Claude/OpenAI)
- Meeting transcription and analysis
- AI-generated talking points for sales
- Voice command infrastructure

Features In Progress (Coming This Week)

1. Field Tech Gate Enforcement

Current State: UI workflow exists, server enforcement incomplete

What's Being Added:

- Server-side validation that ALL gates must complete before job closes
- Gate status persistence across sessions
- Configurable gate requirements per job type
- Manager mobile interface for escalation clearing
- Real-time escalation notifications

2. Review Request Flow

Current State: UI button exists, no backend integration

What's Being Added:

- Google review link generation
- Review completion tracking
- Discount code generation for review incentive
- Review verification system

3. Estimates System

Current State: Database migration pending

What's Being Added:

- Create estimates with line items
- Send estimates to customers
- Customer accept/reject flow
- Convert estimate to job

4. Enhanced Notifications

What's Being Added:

- Push notifications
- Escalation alerts for managers
- Gate blocked notifications for techs
- Customer follow-up reminders

Known Limitations

1. *Estimates Table:** Not yet created in database - estimates features will show errors
2. Review Integration:** Google/Facebook review APIs not connected
3. Gate Enforcement:** Currently UI-only, server validation coming
4. Manager Mobile:** Escalation clearing only works on desktop currently
5. Offline Sync:** Works but may have edge cases with gate data

Testing Checklist for Ryan

Desktop Testing (Login as ryan@317plumber.com)

- Dashboard:** View owner dashboard with revenue stats
- Jobs:** View all jobs, filter by status
- Dispatch Map:** See tech locations and job pins
- Contacts:** Browse contacts, view profiles
- Invoices:** View invoice list, check statuses
- Inbox:** Check conversation threads
- Calendar:** View scheduled jobs
- Settings:** Access admin settings

Mobile Tech Testing (Login as [marcus@317plumber.com](#))

- Dashboard:** View current job and schedule
- Job Workflow:** Tap into a job, go through stages
- GPS:** Allow location access, verify arrival logging
- Photos:** Take before/after photos
- Satisfaction:** Rate customer satisfaction
- Signature:** Capture customer signature

Mobile Sales Testing (Login as [emily@317plumber.com](#))

- Dashboard:** View next meeting
- Briefing:** Tap into a contact briefing
- Meeting Recording:** Start a recording, speak, see transcription
- AI Analysis:** Save recording, view generated summary

Job Assignment Testing (Login as [dispatch@317plumber.com](#))

- Unassigned Jobs:** Find "Toilet replacement" job
- Assign Tech:** Assign Marcus or Jake to the job
- Verify:** Check job now shows assigned tech

Feedback Channels

Please document any issues or feedback including:

1. *What you were trying to do**
2. *What happened instead**
3. *Screenshots if possible**
4. *Browser/device used**

Technical Notes

To Reset Test Data

If you need fresh test data, the development team can run:

npm run seed

This resets all 317 Plumber data to the default state.

Environment

- Framework: Next.js 14
- Database: Supabase (PostgreSQL)
- Authentication: Supabase Auth
- AI: Claude/OpenAI via LLM Router
- Maps: Google Maps API

Summary

CRM-AI Pro is approximately **75% feature complete** for the core workflows. The primary gaps are:

1. *Gate enforcement** - UI works, server validation coming
2. *Estimates** - Database migration needed
3. *Review tracking** - External API integration pending

All major CRM functions (contacts, jobs, invoices, dispatch, calendar, messaging) are operational and ready for testing.

Next update expected: End of this week with gate enforcement and estimates.

Testing Plan & Success Criteria

Use this structured testing plan to systematically verify features. Document your results in the feedback template at the bottom.

Phase 1: Basic Access & Navigation (Start Here)

Goal: Verify you can log in and navigate as different roles.

Test 1.1: Owner Login

Step	Action	Success Criteria
1	Go to app URL	Login page loads
2	Enter ryan@317plumber.com / TestPassword123!	No errors
3	Click Login	Redirected to dashboard
4	Check sidebar	See: Inbox, Jobs, Contacts, Dispatch, Invoices, Calendar, Settings
5	Click each sidebar item	Each page loads without error

Pass/Fail: _____ Notes: _____

Test 1.2: Tech Mobile Login

Step	Action	Success Criteria
1	Go to /m/tech/dashboard (or use mobile device)	Mobile login page loads
2	Enter marcus@317plumber.com / TestPassword123!	No errors
3	Click Login	See tech dashboard with dark theme
4	Verify "Today's Schedule"	Shows list of jobs
5	Tap a job	Job detail screen opens

Pass/Fail: _____ Notes: _____

Test 1.3: Sales Mobile Login

Step	Action	Success Criteria
1	Go to /m/sales/dashboard	Mobile login loads
2	Enter emily@317plumber.com / TestPassword123!	No errors
3	Click Login	See sales dashboard with greeting

4	Check for "Next Meeting" card	Card displays (may say "No meetings")
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Pass/Fail: _____ **Notes:** _____

Phase 2: Core CRM Functions (Desktop)

Goal: Verify basic CRM operations work.

Test 2.1: View Contacts

Step	Action	Success Criteria
1	Login as Owner	Dashboard loads
2	Click "Contacts" in sidebar	Contact list appears
3	Verify test contacts	See names like "Mike Henderson", "Jennifer Walsh"
4	Click a contact name	Contact detail panel opens
5	Check contact info	See phone, email, address, tags

Pass/Fail: _____ **Notes:** _____

Test 2.2: View Jobs

Step	Action	Success Criteria
1	Click "Jobs" in sidebar	Job list appears
2	Check job statuses	See mix: Completed, In Progress, Scheduled
3	Click a job	Job detail panel opens
4	Verify job info	See customer name, description, assigned tech
5	Check for unassigned job	"Toilet replacement" should show no tech

Pass/Fail: _____ **Notes:** _____

Test 2.3: Dispatch Map

Step	Action	Success Criteria
1	Click "Dispatch" in sidebar	Map loads
2	Wait for map to render	Google Maps appears

3	Look for tech markers	Should see colored pins for Marcus/Jake
4	Look for job markers	Should see job location pins
5	Click a tech marker	Tech info popup appears

Pass/Fail: _____ Notes: _____

Test 2.4: View Invoices

Step	Action	Success Criteria
1	Click "Invoices" in sidebar	Invoice list appears
2	Check invoice statuses	See mix: Draft, Sent, Paid, Overdue
3	Click an invoice	Invoice detail opens
4	Verify amounts	Dollar amounts display correctly

Pass/Fail: _____ Notes: _____

Phase 3: Job Assignment (Dispatcher Function)

Goal: Verify jobs can be assigned to technicians.

Test 3.1: Assign a Tech to Unassigned Job

Step	Action	Success Criteria
1	Login as dispatch@317plumber.com	Dashboard loads
2	Go to Jobs	Find "Toilet replacement" (unassigned)
3	Click the job	Detail panel opens
4	Look for "Assign Tech" option	Dropdown or button visible
5	Select "Marcus Johnson"	Tech assigned
6	Refresh page	Job still shows Marcus assigned

Pass/Fail: _____ Notes: _____

Phase 4: Tech Mobile Workflow (Critical Path)

Goal: Walk through a complete job as a field tech.

Test 4.1: Complete Job Gate Workflow

Step	Action	Success Criteria
1	Login as marcus@317plumber.com on mobile	Tech dashboard loads
2	Find a "Scheduled" job	Tap to open
3	Tap "LOG ARRIVAL"	GPS prompt appears (allow it)
4	Confirm arrival logged	Screen advances to photos
5	Tap camera, take a photo	Photo thumbnail appears
6	Tap "CONTINUE"	Advances to work stage
7	Tap "MARK WORK COMPLETE"	Advances to after photos
8	Take after photo	Photo thumbnail appears
9	Tap "CONTINUE"	Advances to satisfaction
10	Tap rating (1-5 stars)	Rating recorded
11	Complete review request	YES or NO
12	Capture signature	Draw on pad
13	Tap "COMPLETE JOB"	Job marked complete
14	Return to dashboard	Job no longer in schedule (or shows completed)

Pass/Fail: _____ Notes: _____

Test 4.2: Low Satisfaction Escalation

Step	Action	Success Criteria
1	Start another job as tech	Get to satisfaction stage
2	Tap "2" (low rating)	Warning or escalation message appears
3	Login as dispatcher on desktop	Check for escalation notification
4	Find escalation queue	See the blocked job

Pass/Fail: _____ **Notes:** _____

Phase 5: Sales Mobile Features

Goal: Test sales briefing and meeting recording.

Test 5.1: Contact Briefing

Step	Action	Success Criteria
1	Login as emily@317plumber.com	Sales dashboard loads
2	Tap "BRIEFING" on a contact	Briefing screen loads
3	Check contact profile	Name, lifetime value displayed
4	Check "Suggested Talking Points"	AI suggestions appear
5	Tap "CALL" button	Phone dialer opens
6	Tap "EMAIL" button	Email compose opens

Pass/Fail: _____ **Notes:** _____

Test 5.2: Meeting Recording & Transcription

Step	Action	Success Criteria
1	From sales dashboard, tap "START" on a meeting	Recording screen loads
2	Allow microphone access	Recording indicator appears (red dot)
3	Speak a few sentences	Live transcript appears
4	Tap "PAUSE"	Recording pauses, timer stops
5	Tap "RESUME"	Recording continues
6	Tap "STOP & SAVE"	Processing indicator
7	Wait for AI analysis	Summary, action items, sentiment appear

Pass/Fail: _____ **Notes:** _____

Phase 6: Communication Features

Goal: Test inbox and messaging.

Test 6.1: View Conversations

Step	Action	Success Criteria
1	Login as Owner	Dashboard loads
2	Click "Inbox"	Conversation list appears
3	Click a conversation	Message thread opens
4	Verify messages display	See back-and-forth messages
5	Check reply box	Text input available

Pass/Fail: _____ Notes: _____

Feedback Catalog Template

Use this template to document issues and feedback:

Issue #____

Field	Your Input
Date/Time	
Your Login	
Device/Browser	(e.g., iPhone 14 Safari, Chrome on Windows)
Page/Feature	
What You Tried	
What Happened	
What You Expected	
Screenshot?	(attach if possible)
Severity	[] Blocker [] Major [] Minor [] Cosmetic

Feedback Log

#	Date	Feature	Issue Summary	Severity	Status
1					Open
2					Open
3					Open
4					Open
5					Open
6					Open
7					Open
8					Open
9					Open
10					Open

Priority Testing Order

If time is limited, test in this order:

1. *Owner login & navigation** - Confirms basic access works
2. *View contacts & jobs** - Core CRM data displays
3. *Tech mobile job workflow** - Critical business path
4. *Dispatch map** - Visual verification of GPS/mapping
5. *Sales briefing** - AI feature showcase
6. *Meeting recording** - Transcription verification

Quick Reference Card

LOGINS (all use password: TestPassword123!)

ryan@317plumber.com Owner Desktop+Mobile

admin@317plumber.com Admin Desktop

dispatch@317plumber.com Dispatch Desktop

marcus@317plumber.com Tech Mobile

jake@317plumber.com Tech Mobile

emily@317plumber.com Sales Mobile

MOBILE URLs

/m/tech/dashboard Tech view

/m/sales/dashboard Sales view

/m/owner/dashboard Owner view

/m/office/dashboard Office view

KEY TEST DATA

Unassigned job: "Toilet replacement"

In Progress job: "Whole house re-pipe"

Completed job: "Kitchen sink faucet replacement"

Test contact: Mike Henderson