

Draft of user flow and data tracking

Index of each job stage

Ground work

Request/inquiry

- Request form
 - Contact Name
 - (Company?)
 - Phone Number
 - Email
 - Address of works
 - Description of requested works
 - Time restrictions? deadlines?
- Send information to foreman request site booking

To be visited

- Request form info
 - *Contact Name*
 - *(Company?)*
 - *Phone Number*
 - *Email*
 - *Address of works*
 - *Description of requested works*
 - *Time restrictions? Deadlines?*
 - Customer Brief - description of what the customer wants, themes?, material preferences, purpose
 - Pictures
 - Measurements
- Date completed

Quote in progress

- Site Visit info
- Drawing (not required)
- Quote => Quoting Template
- Quote To Client completed
- Formal quote sent
- Follow up call- scheduled

Quoted

- Customer Contact Record
- Follow up date
- Notes

1/ Requote => In Progress Stage

2/ Declined- archived

3/Accepted

Initial Documentation

- Welcome package (letter, contract, invoice)- sent
- Site file draft docs (uploaded) (contract, site brief

Pre-commencement meetings

- Customer walkthrough scheduled
- Customer walk through (includes confirmation of materials)- completed
- Foreman walkthrough scheduled
- Foreman walkthrough (Site safety checklist) - completed
- Confirmation of commencement date- calendar booking

Final Documentation

- Site file- description/instructions, schedule, materials list, safety, log book

Implementation

Ready

- Commencement Date
- Site File

In progress

1. Item Completed
 - a. Progress Bar
 - b. Billables Completed
 - c. Photos
 - d. All items completed? => Handover
2. Billable Items
 - a. Item
 - b. Bill Sent
 - c. Bill Paid
 - d. Delete
 - e. All items completed/billed/paid
3. Handover
 - a. Handover appointment booked
 - b. Handover appointment completed => (to what stage?)
 - c. Feedback survey - sent

Finalised

- Feedback survey - completed