# Log Book

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date | Task Achieved | Difficulties and Solutions | Ideas and Thoughts | Reflection | References |
| 4/05 | Created all the models that would be in my PWA | Some difficulties with field types and learning curve | Once the models are created, I can start making views and forms to interact with them | The models are a central part of the project so making sure their right is important. | <https://docs.djangoproject.com/en/5.2/topics/db/models/> |
| 5/05 | Created the dashboard which shows the active firms leads, quotes, invoices and companies | Difficulties with CSS styling and trying to understand how bootstrap works | An idea would be to remove companies from the dashboard to free up more space | I will come back to it later and make it look better but its working which is the main part |  |
| 6/05 | Set the login and signup to the dashboard, filter the everything so only objects with the same firm as the user will be shown and added some fields to the models. | Difficulties setting up Django All Auth but was easy once I understood it. | I will come back to the login and signup views to make them look better later. | Adding users allows me to think about and build security while making all the views. | <https://docs.allauth.org/en/latest/> |
| 16/05 | Added company view | No difficulties just reused my dashboard code and filtered for company on all items | If an item is created from a company view the company should be auto selected | Was reasonably easy to add a company view. |  |
| 18/05 | Created the generic view for all leads, quotes, invoices, companies and contacts | Difficulties making the views look good. | An idea if I have time could be a filter | Very helpful views to see all the items related to the user’s firm |  |
| 18/05 | Finished the leads Create Read Update and Delete views. | Some difficulties and a learning curve understanding Django forms and how to have data prefilled. | An idea would be making the lead details view more readable and better to look at. | Doing CRUD is very boring and effected my motivation for the project. |  |
| 20/05 | Messing around with signup pages | Difficulties understanding how Django allauth works and how it relates to a template. | The view is still very generic so making it look better would help. | Little learning curve trying to understand allauth but after reading the docs I understand. | <https://docs.allauth.org/en/latest/account/forms.html> |
| 23/05 | Finished quote Create Read Update and Delete views (no quote items yet) | No issues, using Django model forms is as easy as setting a model it will generate fields for you. | Creating the items for the quote will in a separate form to keep everything organised. | Was easy enough to complete but the items will be a lot trickier. |  |
| 26/05 | Finished invoice Create Read Update and Delete views (no invoice items yet) and changed some field attributes in the models | No issues, I just refactored the quote code and added some fields to the models like last contacted. | Maybe changing the form styling will help make the form easier to use. | Was basically copy and paste. Making have a generic template could have stopped some code repetition. |  |
| 27/05 | Finished contacts Create Read Update and Delete views | This was straight forward, I have done many other model forms and contacts was the easiest to create. | An idea could be for a company to have a primary contact | This was easy and quick to add. |  |
| 28/05 | Added the ability to create companies | Had no issues since I had already made a form for this in the beginning, I just needed to link it to a view and a template. | I should have done this earlier on in the project considering companies are a central part. | The choice of only doing this now in the project was not the smartest. |  |
| 3/06 | Changed up the dashboard layout and looks. | I had difficulties fighting with CSS to make the page both look good while also being dynamic | My solution was going through the bootstrap docs to understand how everything works and why it does | I now know a lot more about bootstrap and how to properly layout a page. | <https://getbootstrap.com/docs/5.3/layout/containers/>  <https://getbootstrap.com/docs/5.3/layout/columns/> |
| 6/06 | Started working on formsets for quote and invoice items | This was the most challenging part of the project. Dynamically creating forms and linking them to the fromset was tricky at first. | The solution was to fully understand how formset works so I can understand what to give it. | This was incredibly but was a learning curve at first because I had never used formsets before. | <https://docs.djangoproject.com/en/5.2/topics/forms/formsets/> |
| 7/06 | Formsets are now saving (no option to dynamically create items) | I knew how formset worked so it was straight forward on making them save to the database from the form. | I just need to have the option to dynamically create another item. | This was the easy part of formsets and was self-explanatory. | <https://docs.djangoproject.com/en/5.2/topics/forms/formsets/> |
| 8/06 | Added the ability to create items and delete dynamically for quote. | This was difficult to do considering you had to not only put another form in the template using JavaScript, but you also must update the form managers form count, so it is recognised. | The way I achieved this had a view that would return a empty form and in JavaScript I would add a div with the form to the page. I also had to update the form manager count which was as simple as finding the element and updating its value. | This was a great learning experience and I enjoyed adding this helpful feature. | <https://stackoverflow.com/questions/501719/dynamically-adding-a-form-to-a-django-formset>  <https://www.geeksforgeeks.org/python/add-forms-dynamically-in-django-using-formset-and-javascript/> |
| 9/06 | Added the quote formset code to invoice and refactored it. | No difficulties I just used the quote items code and refactored it. | Using JavaScript and idea could be to see the total value of all the items | This was easy considering I did could just reuse the quotes items code. |  |
| 10/06 | Added the quote and invoice items to their detailed views and fixed up styling | This was simple and had no difficulties, I have a method on both invoice and quotes that returns all their items which made it easy to just call in the template. | The detail’s view is looking very plain so maybe styling it will improve the readability | Didn’t take long was just a simple add. |  |
| 16/06 | Added the ability to create PDFs of invoices and quotes | This was fun to add, the only difficulties were making the pdf look good. | Making the pdf look good was by using bootstrap rows and columns and their tables. | Great learning experience and was a lot easier than I initially expected | <https://doc.courtbouillon.org/weasyprint/stable/first_steps.html> |
| 17/06 | Created a landing page, custom login and sign up pages and setup password reset and user logout options | Difficulties understanding how to link the templates to the allauth views. | Solution was reading the docs and overriding there built in ones through urls. | Was easy enough once you understand how it works and why it does what it does. |  |
| 18/06 | Added the ability for the CRM to be a PWA, security check for all views and fixing up minor styling issues | Adding the ability for the app to be a PWA was quite easy, and the security checks were straight forward just checking that the items firm is the same as the user’s firm | To make less code repetition I could have created a decorated to put on all the views. | Simple features but both are needed for the project to be safe and to become a PWA. |  |
| 19/06  20/06 | Deep testing of all views, forms and all outcomes. | No difficulties just testing every url and putting unusual data in the forms to try and create an error or find a bug. | There are tools that do this for you which I could have used. This would have saved me time. | This was a good reflection on all the work I put into the project and ensuring that everything works as intended. |  |