

CRM - LITE

With this app, the **Users** can:

- + create new “**Projects**”
 - + fill out adhoc “**Forms**” about project detail
 - + generate a **PDF file** of said details
 - + take/upload **photos** to project folder
 - + **google calendar** API to book appointments
 - + **google drive** API to save project files/pictures
 - + **weather** API to local weather forecast [**on project address**]
 - + **google map** to project address
- [perhaps drivetime/weather/leave by/ etc.]

... Who knows where the limit is!😊

I propose that for this group project we will create a web application from scratch!

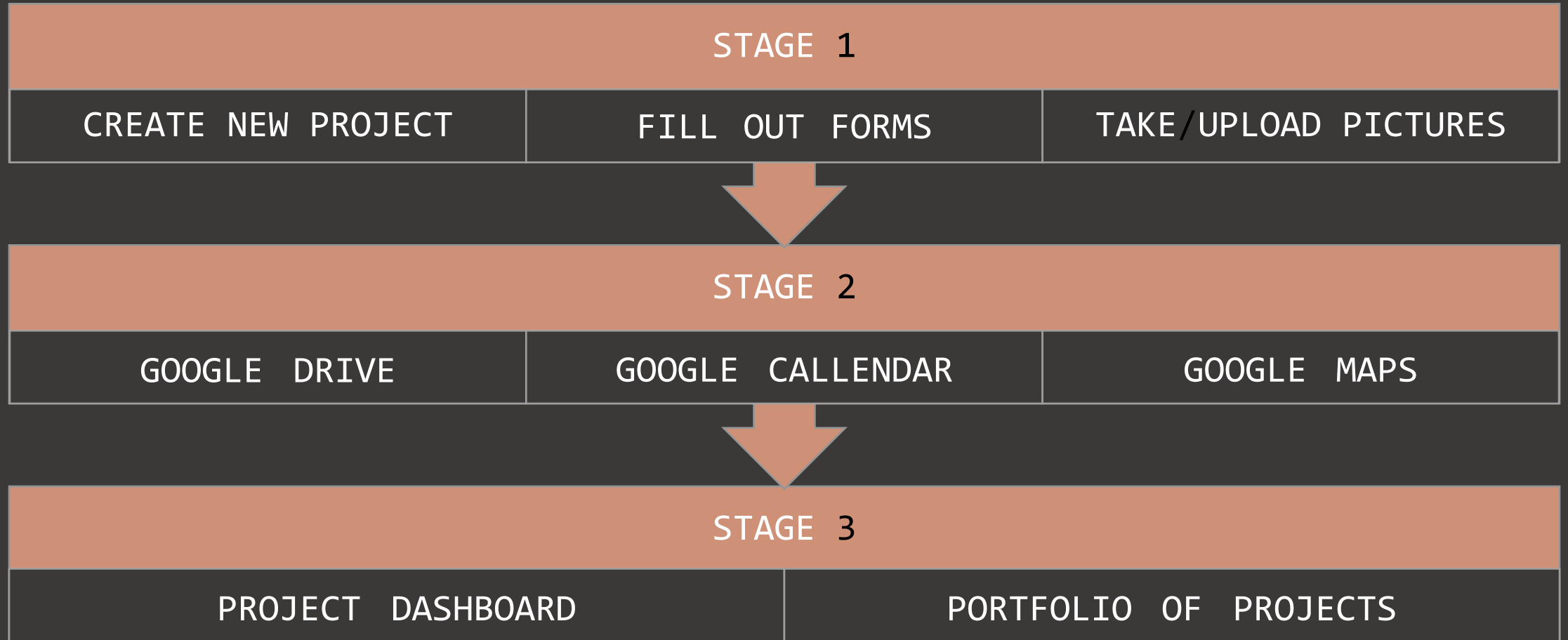
-

A CRM-lite for any ``<specific client>`` in any ``<specific industry>`` in order to automate and organize their project portfolios, create adhoc projects, fill out forms for project details, generate form results in pdf files, and take/upload pictures ``[to google drive perhaps]``.

-

This app uses 3rd party API's such as google drive, google calendar, google maps, as well as the weather forecast APIs.

It is modular, so we can pick and chose the buckets for MVP, then we have additional buckets to add as features for the next builds



USER STORY:

As a service-provider [lawn mowing service]

I WANT to be able to create new projects with customer information such as location [address] time-slot and date of appointment, as well as local weather forecast.

SO THAT I can have quick access to all projects organized in a manner to be delivered according to the date and time. And I can see the list of projects for today and go to my scheduled appointment on time and at the correct address!

ACCEPTANCE CRITERIA

GIVEN a CRM app with project management

WHEN I click new project button

THEN I am presented with the form elements on the right side of the page

WHEN I see the form elements

THEN I can interact with them and input the information for new project

WHEN I click submit button

THEN the project information is saved [local storage]

WHEN I click "SHOW ME", I see the list of all my project, in the order of [time and date]

WHEN I click on a project from the said list

THEN I am presented with the project details [such as address, date, time, etc.]

WHEN I am presented with the project details,

THEN I can also see the weather forecast for that project address.

ADDITIONAL FEATURES [wish list]

- Map optimization,
 - Routing and drive time
 - Drop down menu for more than one services
 - Handle payments and invoicing
 - Algorithm to optimize appointment time and suggest start time for the next appointment based on menu items and drive time.
 - Chat-box for customer service
-
- Look into MOCK API's to create static response to populate project information for the purpose of the APP generation, API fetch
 - "RETOOL" retool.com
 - How to distinguish the google map API, because it will go to the library and not serverside
-
- Look into other server-side API's

Issue List:

- Styling and CSS Framework
 - Choose CSS Framework
 - <https://tailwindcss.com/>
 - <https://bulma.io/>
- Refine the wireframe and make a plan
 - New Project Button
 - Calendar
- Pseudo Code as team
- Divide up who does what

Header elements will include ...



New project

Form elements for user input here
Such as:
Name, address, email, phone,
Date, timeslot

submit

footer

ORIGINAL WIREFRAME
High level concept only

DO NOT USE

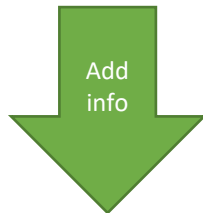
Main page With list of appointments



Show me all
Appointments

User input/interface

Add
New Appointment



Appointment # - name	Date	icon
----------------------	------	------

Appointment # - name		
----------------------	--	--

Appointment # - name		
----------------------	--	--

Appointment # - name		
----------------------	--	--

Display appint info

footer

Add new appointment page



User input/interface

Customer Full Name

email

Phone #

Date

time-slot

address

Postal Code: MUST

CANCEL

SAVE

footer

Display Appointment info page

PREV.

NEXT



Show me all
Appointments

User input/interface

Add
New Appointment

Customer Full Name

Date time-slot

email

Phone #

Postal Code

address

API #1 – Display

Weather info

API #2 – Display

MUST DECIDE?

footer