**Simple NDT Service CRM Requirements (On-Site Use)**

**Purpose**

A simple, easy-to-use CRM for NDT services that I can use directly at the inspection site. It should allow me to quickly enter job details, upload files, track progress, and manage reports/payments from my phone or tablet.

**Basic Workflow**

**1. New Job / Enquiry**

* Enter client details (name, contact, address)
* Add job info: site location, NDT method, scope
* Upload client documents (PO, drawings, specs)

**2. Planning**

* Assign technicians and equipment
* Check calibration dates and technician certificates
* Add mobilisation date and site access info

**3. Onsite Work**

* View assigned jobs on mobile
* Fill in inspection details (method, component, parameters)
* Take photos and upload instantly
* Record GPS location automatically
* Add client witness sign-off on mobile
* Mark job status (In Progress / Completed / Rework)

**4. QA & Reporting**

* Upload raw data and have QA verify remotely
* Create and send reports from the CRM (interim/final)

**5. Payment & Closeout**

* Generate invoices with reports attached
* Track payment status (Pending / Paid)
* Close job when payment is complete
* Save all documents for future reference

**6. Inventory Status (Daily Update)**

* **Technicians onsite can log daily inventory usage and stock levels**
* **Upload photos of consumables and equipment condition**
* **Mark items as Low Stock, Out of Stock, or OK**
* **Track incoming and outgoing materials from the site**

**7.Technician Consensus & Notes**

* **Technicians can add comments or concerns about the job, safety, equipment, or site conditions**
* **Supervisors can review and respond to technician inputs**
* **Record agreements or approvals from the technician team regarding changes in work scope or plan**

**Must-Have Features**

* Mobile and tablet friendly
* Offline entry with auto-sync when online
* Quick file/photo upload
* GPS location capture
* Digital signatures for client witness
* Simple dashboards: jobs, certificates, calibrations, payments