

# CS495 Software Project Proposal: ClearView Process Manager and Window Design Tool

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## 1 Client Information

By sharing this client information and the rest of this document, you are stating that this client has provided this project as something they want (not something you created and asked if they wanted), and that they are interested in having you complete this project for your capstone.

1. Client name: Deirdre Hammaker
2. Client title: CEO of ClearView Doors & Windows
3. Client email address: deirdre@getclearview.com
4. Client employer: ClearView Doors & Windows
5. How you know the client: Friend of Chris'

## 2 Project Description

### 2.1 Overview

This project aims at creating an internal web app for ClearView. The app's main purpose is to help sales representatives and installation crews better manage the job process. The app will let the sales rep show customers previews of their house with newly designed windows based on the customer's selections. These selections include a choice of multiple customization options for windows. This will also let the sales rep show the customer an estimated quote based on their selections. From there the job will go through a series of stages in which the customer will receive email and or text message notifications (customer's choice) about their job updates. At any point, the customer can see the status of their job through the app or a link sent with the notifications.

### 2.2 Key Features

The app's first key feature is the ability for the sales rep to take a picture of the customer's house using their company iPad, to allow for previews of the windows. This will put a border around the window as well as a tab for the sales rep to select individual windows and edit them to the customer's wants. During this mock up process, the pictures will preview the modified windows and calculate the estimated cost for each window to be used in an estimated quote. Once the sales rep's job is done and the job is accepted, the installation crew will be able to see the job details.

The app will have a status bar for both the customer and the office managers to view. The statuses, or stages, are listed below:

1. Created
2. Viewed
3. Accepted
4. Final Measurements
5. Final Review
6. Order Placed
7. In Production
8. Order Received
9. Installation in Progress
10. Complete

Under each stage will be either the date started, if it is in progress, or the date completed. The customer will be able to cancel their order with no penalties for 72 hours following the acceptance of the project. This will be the limit of the customers view. The office managers will be able to view details of the project surrounding the status: ClearView's cost, sale price and manufacturing details.

The project will have a log-in feature with several access levels. The highest is Admin. Admin accounts will be for office managers. Admins have access to all quotes and projects regardless of who the sales rep was. They will be able to view and change the status of a project. The next level will be Sales Rep. Sales reps will be able to view the status of their active jobs. They will only be able to edit their jobs in the initial stages. These are Created, Viewed, and Accepted. The last company access level will be the installation crew. The installation crew does not have access to the status bar, and is instead told by the office manager what jobs are assigned to them. The installation crew can access the details of the job. This includes things like the name of the customer and sales rep, the details of each window, and the images the sales rep took so that they know which window is which. They will then be able to input measurements and final pricing into the app. Customers are limited to viewing the status of their order and can cancel within 72 hours of the project being accepted.

## **2.3 Why this Project is Interesting**

This project is interesting to us for a few reasons. The first reason is that this project is very practical. Many other companies in this field use apps similar to this. Another reason is that this project has some challenging aspects which intrigue both of us, including working with computer imaging and potentially LLMs. The last aspect that gets both of us excited to work on this project is the possibility that this app that we create could bring real value to the company.

## **2.4 Areas of CS required**

This project will require many areas of CS including; database managing, computer/digital graphics & vision, the example that our client showed us uses an LLM which we will explore using.

## **2.5 Potential Concerns and Questions**

Our potential concerns are mostly related to the feasibility of the project. This is the first time that my partner or I have worked on such a large and practical project. Although we are interested in working with an LLM, we are concerned that it might prove to be too difficult. One of the example sites that our client showed us says that it uses an LLM to do its imaging and mock-ups. Additionally, if we don't use an LLM, how will we accomplish the task of putting borders around windows for the sales reps.

### 3 Comparison to Draft

Fill out this section by answering the following questions in paragraph form (you can remove these instructions as you complete it):

- This project is the same as the one that **Chris** proposed in his draft.
- This project is not new although it is slightly altered.
- The client is not new.
- This project has changed in the usage of the app. Originally, it was designed for a customer to use. Now it's designed for internal staff of ClearView to use. Additionally, the focus is on windows instead of windows and doors.

### 4 Requirements

#### 4.1 Functional Requirements - (82pts)

ID	Name	Points	As a	Functionality	Related NFRs
S1	Upload Picture	3	Sales rep	I want to upload a picture of a side of a house so that I can start to edit the windows on that side	1 5 6
S2	Select Window	5	Sales rep / Installation Crew	I want to select a specific window on the picture so that I can customize the window or view details about that window	1 5 6
S3	Customize Window	8	Sales rep	I want to customize the window so that I can preview the finished window on the house	1 2 5 6
S4	Edit Border	2	Sales rep	I want to edit the border of a window so that I can adjust the border of the window as needed	5 6
S5	Manual Add	5	Sales rep	I want to manually add a new window to the preview so that I can add a window the software might have missed	5 6
S6	Remove Window	2	Sales rep	I want to remove a window so that the window's border is no longer on the preview	5 6
S7	Save Window	2	Sales rep / Installation Crew	I want to save an individual window so that the details are saved for later	3 6
S8	Save Project	2	Sales rep	I want to save the entire set of windows so that the entire set of windows are saved for the project	3 6
S9	CRUD Client	8	Sales rep / Admin	I want all CRUD functionality for client information so that I have all CRUD functionality for client information	3 6
S10	CRUD Project	8	Sales rep / Admin	I want all CRUD functionality for projects so that I have all CRUD functionality for projects	3 6
S11	CRUD Project Details	8	Sales rep / Admin	I want all CRUD functionality for project details so that I have all CRUD functionality for project details	3 6
S12	CRUD Account	8	Admin	I want all CRUD functionality for employee accounts so that I have all CRUD functionality for employee accounts	3 6
S13	Search Projects	2	Admin	I want to search for a specific project so that I can see information related to that project	3 6
S14	Compact View	3	Admin	I want a compact view of some of the project's details so that I can get a succinct view of the project's details	1 5
S15	Detailed View	3	Admin	I want a detailed view of all the project's details so that I can see all the project's details	1 5
S16	Assign Project	3	Admin	I want to assign a project to an Installation crew (member) so that project has a crew assigned to it for completion	3 5 6
S17	View Assigned Projects	2	Installation Crew	I want to view all projects assigned to me / my crew so I can see which projects are assigned to me / my crew	1 3 5
S18	Select Project	2	Installation Crew	I want to select a project that has been assigned to me / my crew so that I can select which project my team is going to work on	1 3 5
S19	Input Final Window Measurements	3	Installation Crew	I want to input the final measurements for the windows in the project so that the project has accurate measurements	1 5 6
S20	View Project Status	3	Customer	I want to view my project's status bar given the link (email / text) so I can track the progress of my project	1 3 4 5 6

## 4.2 Non-Functional Requirements

ID	The	Shall Have	With this Feature
NFR1	UI	Colors	that match the company's colors (white & blue)
NFR2	Window Designer	Automated	That will generate a rough estimate of the dimensions of the window
NFR3	System	A database	That uses PostgreSQL
NFR4	CRM	Notifications	That tell the customer when their project's status has updated
NFR5	System	Front end logic	Written in HTML, JavaScript, CSS and React
NFR6	System	Back end logic	Written in Python

## 4.3 Iteration Planning

- Sprint 1 - (11pts)
  - S1: Upload Picture
  - S9: CRUD Client
- Sprint 2 - (21pts)
  - S2: Select Window
  - S10: CRUD Project
  - S11: CRUD Project Detail
- Sprint 3 - (21pts)
  - S3: Customize Window
  - S4: Edit Border
  - S5: Manual Add
  - S6: Remove Window
  - S7: Save Window
  - S8: Save Project
- Sprint 4 - (17pts)
  - S12: CRUD Account
  - S13: Search Projects
  - S16: Assign Project
  - S17: View Assigned Projects
  - S18: Select Project
- Sprint 5 - (12pts)
  - S14: Compact View
  - S15: Detailed View
  - S19: Input Final Window Measurements
  - S20: View Project Status

## 5 Design & UI

### 5.1 Architecture

Our project will use a 3-layered design. Here is a simple UML class diagram for our project.

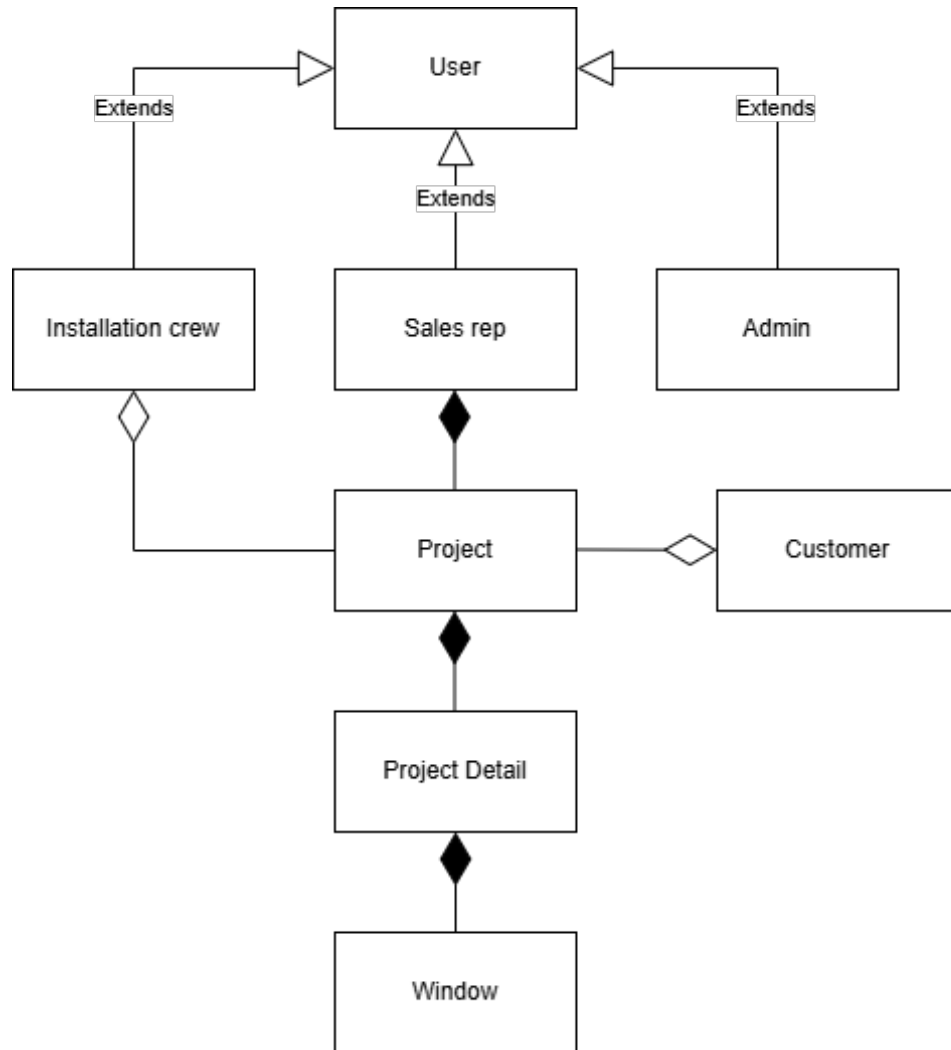


Figure 1: Simple UMLD

### 5.2 Technology

Here are the languages, libraries and modules we either plan on using or think might be useful.

- Python - Backend
- HTML, JavaScript, CSS, React - Frontend
- Opencv - computer vision, image analyzing
- Matlib
- Django, Flask or Web2py - Web Development

- Psycopg - PostgreSQL
- SMTP Library - text/email
- requests, Pillow - upload image
- pytest
- Jest

### **5.3 Data**

Here is an ER diagram for our database structure.

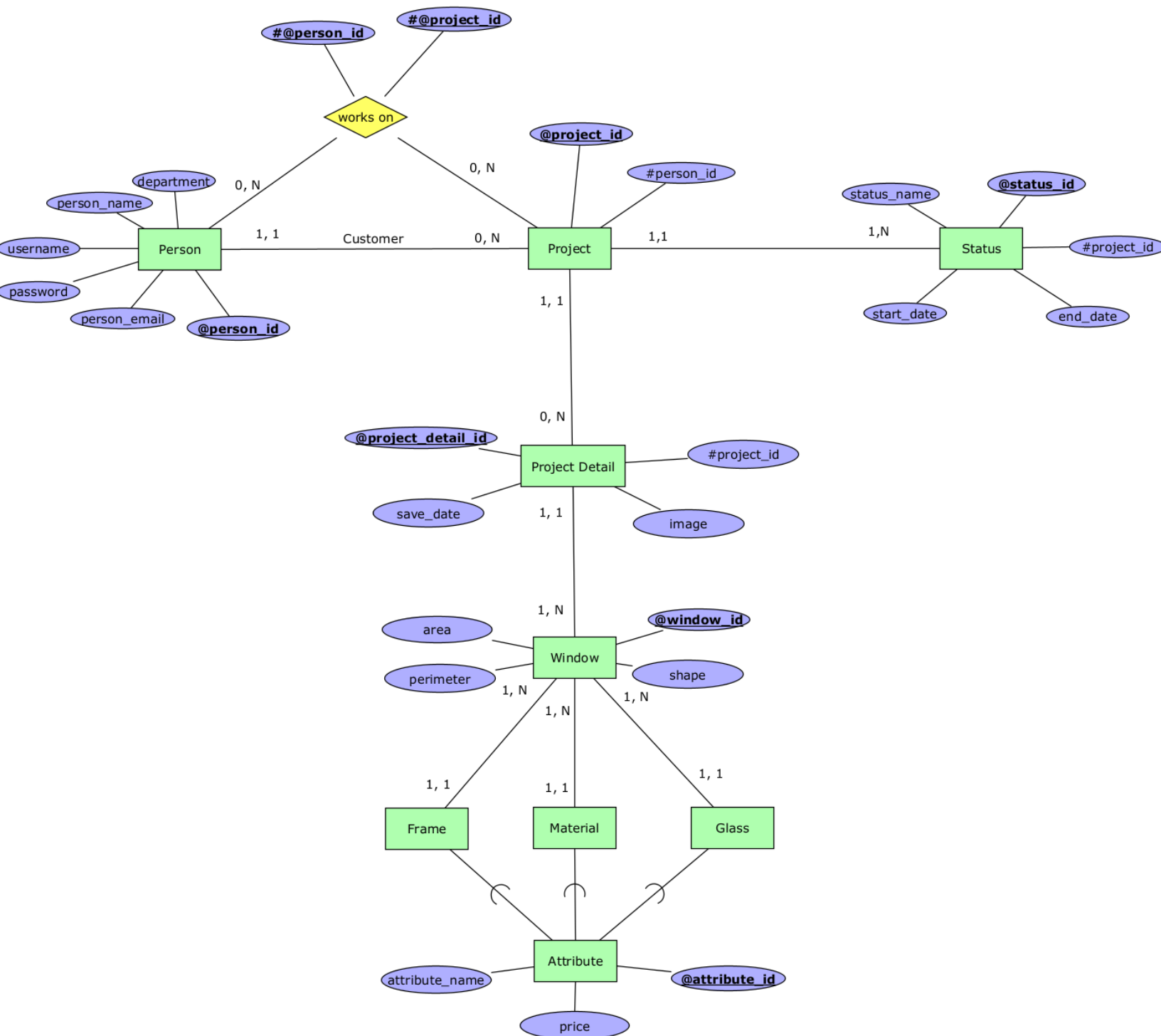


Figure 2: ER Diagram



## 5.4 Coding Standards

For our project we have chosen to abide by the following standards:

- For Python code, variables and functions will use snake\_case while classes will use capitals
- For JavaScript, HTML and CSS code, variables, functions and classes will use camelCase
- Our database will use a lowercase, singular naming convention for the SQL tables and snake\_case for both the tables and attributes
- For testing we have agreed on a 70% coverage required for backend code (python) and at least 50% for front end code (HTML, CSS, React)

## 5.5 UI

Here are some UI mock-ups for a few of the key pages in our project:

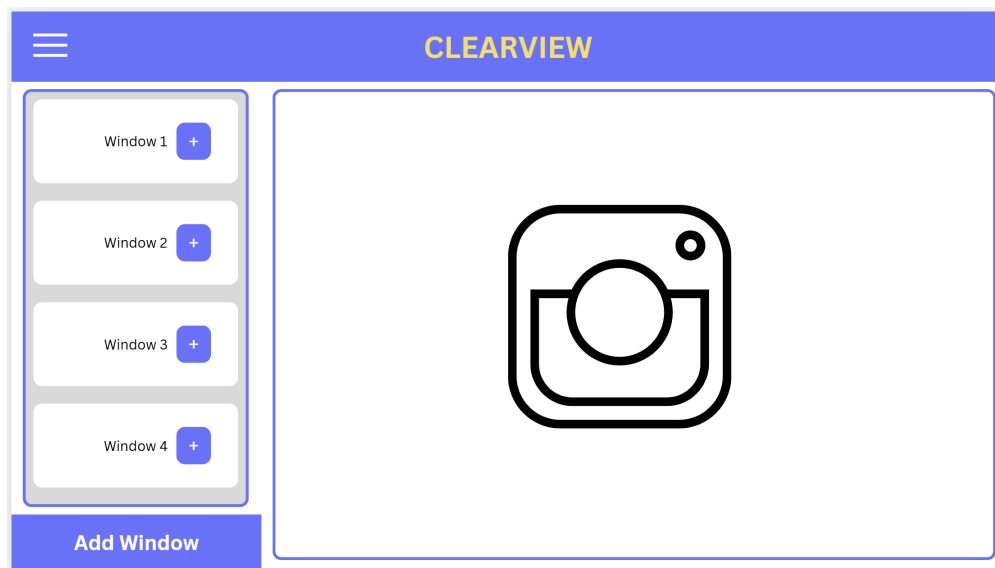


Figure 3: This is the window designer that customizes windows and allows for a preview

ClearView			
ID: 0001	Formato, Jack	In Production	>
ID: 0002	Plowman, Chris	Accepted	>
ID: 0003	Formato, Jack	Final Measurements	>
ID: 0004	Plowman, Chris	Completed	>
ID: 0005	Formato, Jack	Created	>

Figure 4: This is the list of all the jobs in the system which only an admin can see

ClearView

ID: 0003

Assign Crew

Created

Viewed

Accepted

Final Measures

Final Review

Order Placed

Production

Order Recieved

Install

Completed

1/26

1/27

1/28


Project Details

Window 1

Frame

Color

Dimensions




Window 2

Frame

Color

Dimensions



Details & Notes

Info

Info

Info

Figure 5: This is the detailed view of a particular job which only an admin can see