

# Compliance & Work Order Management System

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*Developed by Execute Ventures Corp.*

## 1. Core Purpose

This app is a compliance and documentation platform for companies handling shipping, receiving, inspection, repair, and packaging workflows — especially in industrial service and manufacturing environments.

It automates how jobs, work orders, and supporting documentation (photos, waybills, reports, worksheets) are collected, organized, and stored in Microsoft SharePoint, ensuring every process is traceable, photo-documented, and compliant.

## 2. Core Value Proposition

Problem	How the App Solves It
Lost or incomplete paper documentation	Digital record-keeping tied to each job
Disorganized job photos	Automatic SharePoint folder creation and photo sorting
Delays in job tracking	Real-time job updates and automated reporting
Manual report creation	Auto-generated, standardized PDF reports
Inconsistent documentation	Structured workflow with digital forms and role-based access

## 3. Workflow Summary (Example)

Example Scenario: Piston and Rod Repair Job

### 1. Receiving Department

Shipment arrives.

User photographs the waybill.

App extracts the waybill number (OCR) and checks shipping status (Collect or Prepaid).

App uploads the data and photos to SharePoint → creates folder `Jobs/WO1234/Receiving/`.

### 2. Front Office / Coordinator

Creates a new Work Order (WO) using PO and waybill info.

Assigns job to a technician/team.

The app auto-generates a full folder structure in SharePoint:

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/Jobs/WO1234/

- |— Receiving/
- |— Photos/
- |— Worksheets/
- |— QC/
- |— Reports/

...

### **3. Shop / Technician**

Opens assigned job.

Selects component type (piston, rod, valve, etc.).

Takes photos by step:

Disassembly

Cleaning

Inspection

Assembly

Quality Control

Packaging

App automatically labels and sorts photos under proper folders.

Notes can be added per image.

### **4. Quality Control**

Reviews job steps and photos.

Completes digital worksheets (inspection and measurement forms).

Signs and submits for approval.

### **5. Completion**

App compiles all data into a Final Report PDF including:

Job details

Photos by stage

Worksheets and signatures

Final Report saved in `/Jobs/WO1234/Reports/FinalReport.pdf`.

Optionally emailed to the client or shared via SharePoint link.

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## 4. User Roles & Permissions

Role	Responsibilities	Access Level
Admin / Office Staff	Create jobs, assign users, generate reports, manage worksheets	Full access
Receiving / Shipping	Document incoming/outgoing shipments	Receiving & Shipping modules
Technician / Shop Staff	Capture job photos, fill out worksheets	Assigned jobs only
QC / Inspector	Review photos, fill inspection forms, approve/reject jobs	QC & worksheet access
Client (Optional)	Read-only access to completed jobs and reports	Shared view-only link

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## 5. App Modules

### 1. Receiving Module

Capture waybill photos  
Extract waybill numbers (OCR)  
Check shipping status (Collect/Prepaid)  
Save to SharePoint under Receiving folder  
Attach to existing or new Work Order

### 2. Work Order Module

Create and manage work orders  
Key fields:  
  
Work Order  
Client  
PO  
Waybill  
Assigned Technician  
Auto-create SharePoint folder  
Track job progress through defined statuses

### 3. Photo Documentation Module

Guided photo capture by process step  
Auto-sorting and labeling in SharePoint

Optional notes or comments per image  
Offline photo caching with background upload

#### **4. Digital Worksheets Module (Phase 2)**

Dynamic digital forms (Repair, Inspection, QC, Shipping)  
Supports:

- Text & numeric fields
- Dropdowns
- Signatures
- Auto timestamps

Generates PDF upon submission and uploads to SharePoint  
Admin can create and manage templates

#### **5. QC & Approval Module**

View submitted jobs and photos  
Review worksheets  
Approve or request revisions  
Lock finalized records (read-only)

#### **6. Report Generation Module**

Auto-generate final PDF with:

- Job details
- Photos in order
- Worksheets and signatures

Upload final report to SharePoint  
Optionally email or share link with client

#### **7. Shipping Module**

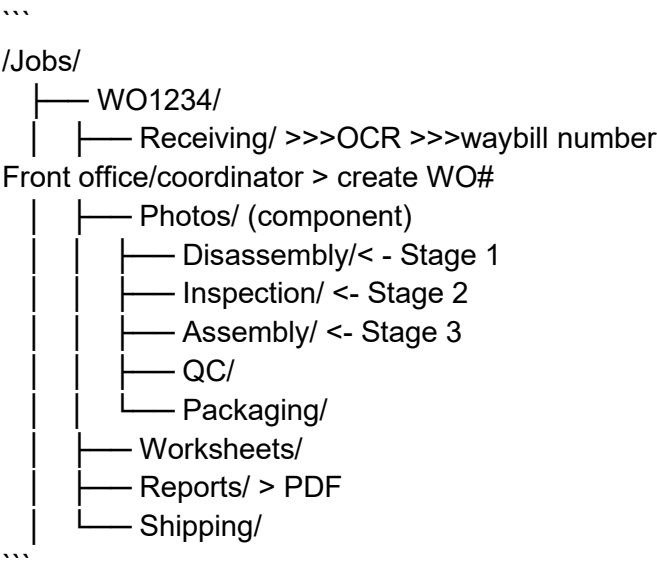
Document outbound shipments  
Capture package photos and final waybill  
Update job status to "Shipped"

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#### **6. SharePoint Integration**

Powered by Microsoft Graph API

Folder Structure Example



Integration Logic

Auth via Microsoft Graph (OAuth 2.0)  
Each upload includes metadata:

- Job ID
- Work Order
- Process Stage
- Uploaded By
- Timestamp

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7. Technology Stack

Layer	Tool / Platform	Purpose
Frontend	FlutterFlow (Flutter)	Cross-platform app (Android, iOS, Web)
Authentication	Firebase Auth / Microsoft SSO	User login
Database	Firebase Firestore	Store jobs, users, metadata
File Storage	Microsoft SharePoint (Graph API)	Centralized document storage
Backend	Node.js / Firebase Cloud Functions	OCR, PDF generation, SharePoint automation
OCR	Google Vision API / Azure Cognitive Services	Waybill recognition

PDF Engine	Server-side or FlutterFlow backend	Generate reports and worksheets
Notifications	Firebase Cloud Messaging	Job status updates

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8. Monetization Strategy

Model	Description	
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SaaS Subscription	Monthly or per-user pricing	
Tiered Plans	Free (limited jobs) → Pro → Enterprise	
Add-on Modules	Worksheet Builder, OCR add-on, Client Portal	
White-Label Options	Custom branding and SharePoint integration for enterprise clients	

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9. Step-by-Step Workflow Summary

Step	User	Action	Result	
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1	Receiver	Photograph waybill	OCR extracts metadata	
2	Receiver	Attach to job	Folder created in SharePoint	
3	Office	Create work order	Technician assigned	
4	Technician	Capture disassembly photos	Uploaded to Photos/Disassembly	
5	Technician	Fill repair worksheet	Saved to Worksheets/Repair.pdf	
6	QC	Approve inspection	QC sheet saved	
7	App	Generate report	Reports/FinalReport.pdf created	
8	Shipping	Upload final waybill	Shipping folder updated	
9	Client	Review	Access via shared link	

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10. Roadmap

Phase	Feature	Goal	
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Phase 1	Shipment → Work Orders → Photos → Reports	Core functionality	
Phase 2	Digital Worksheets + Signatures	Paperless compliance	
Phase 3	Client Portal + Power BI Dashboard	Analytics & external visibility	
Phase 4	AI Auto-Tagging + OCR Indexing	Smart search & automation	
Phase 5	SharePoint Lists + Power Automate	Full Microsoft workflow integration	

Shipment - picture - waybill (shipment #) - Coordinators front will create WO - APP will then change the folder name to WO# -

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## 11. Developer Deliverables

Deliverable	Description
FlutterFlow UI Wireframes	Full navigation and screen map
Firestore Schema	Users, Jobs, WorkOrders, Photos, Worksheets, Reports
Microsoft Graph Integration	Folder and file upload automation
Backend Functions	OCR, report generation, PDF export
SharePoint Folder Management	Automatic structure creation per job
Worksheet Builder Module	JSON-based dynamic forms
Admin Dashboard	Template management and job control

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Graphic designer note: Logo design is a sprout