

Background:
My parents have a windows and door business and are struggling to keep track of their customers. My dad was asking for a tool to visualize the data.

This is to be almost a CRM. It will be an internal tool (hence no sign up functionality, it will use the organizations IdP for SSO. But for the purposes of this project, I will have basic authentication setup).

Functionality:
Statuses/Filters can be CRUD, with images for each status.
Customers can be CRUD.
Image management for jobs/customers
Can filter by status.
Can also search by any field in customer.

Target audience:
Contractors and handymen

Goal:
Provide a simple application to manage their clients and jobs, as well as images of their work

Map View

Jobs

Statuses

Add icons to represent job progress
Location for waiting for quote
_ for waiting for install
WIP for work in progress
_ for rework
Checkmark for finished

Primary action - Waiting for quote #FEA800
Secondary action - Waiting for install - #006573
Tertiary action - WIP - #3D9B4F
4th - rework - #2F4858
Last - complete - #878B8C

Color Palette:
#FEA800
#99AA18
#3D9B4F
#008270
#006573
#2F4858
#878B8C

Oakville

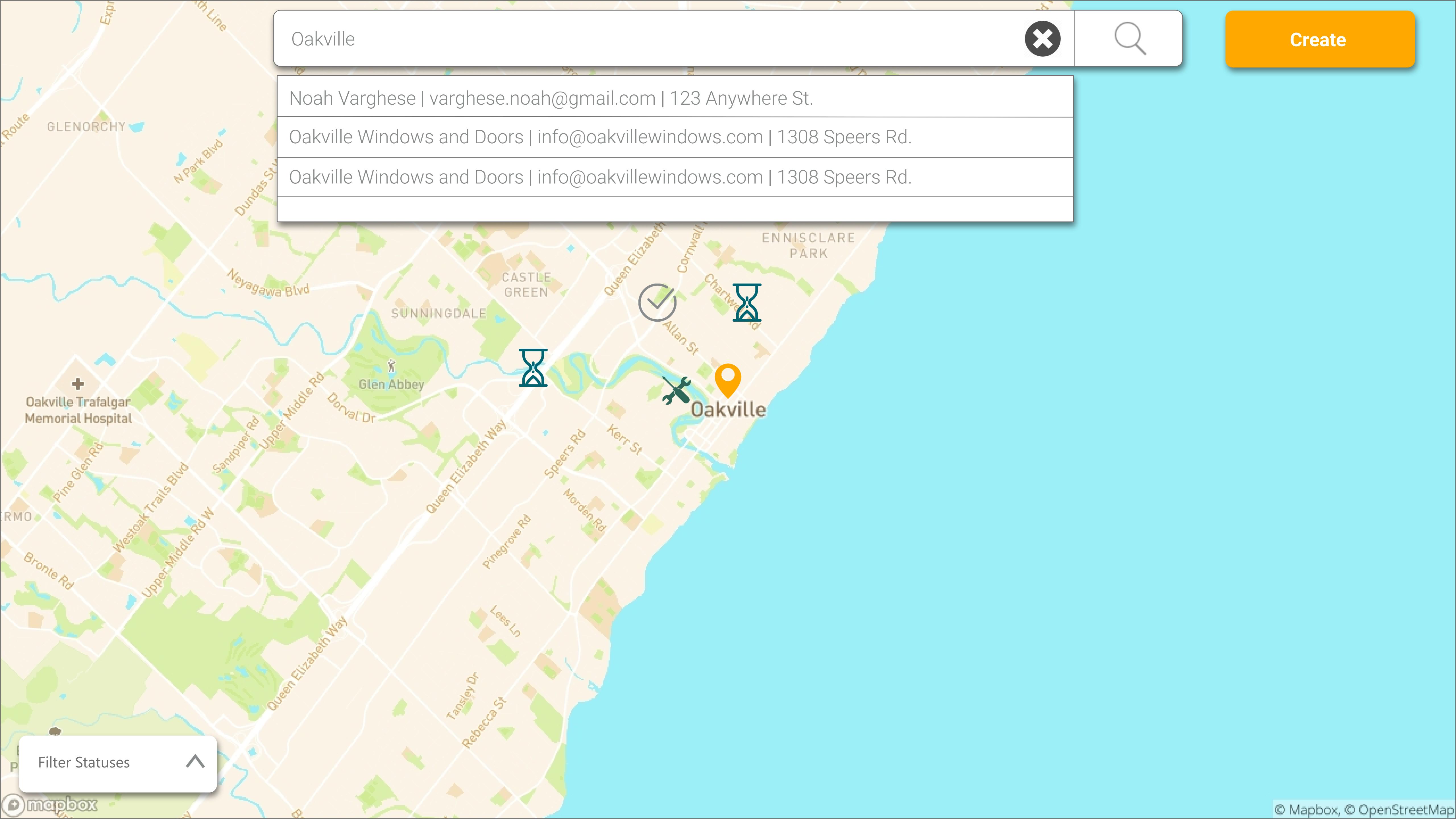


Create

Noah Varghese | varghese.noah@gmail.com | 123 Anywhere St.

Oakville Windows and Doors | info@oakvillewindows.com | 1308 Speers Rd.

Oakville Windows and Doors | info@oakvillewindows.com | 1308 Speers Rd.



Filter Statuses

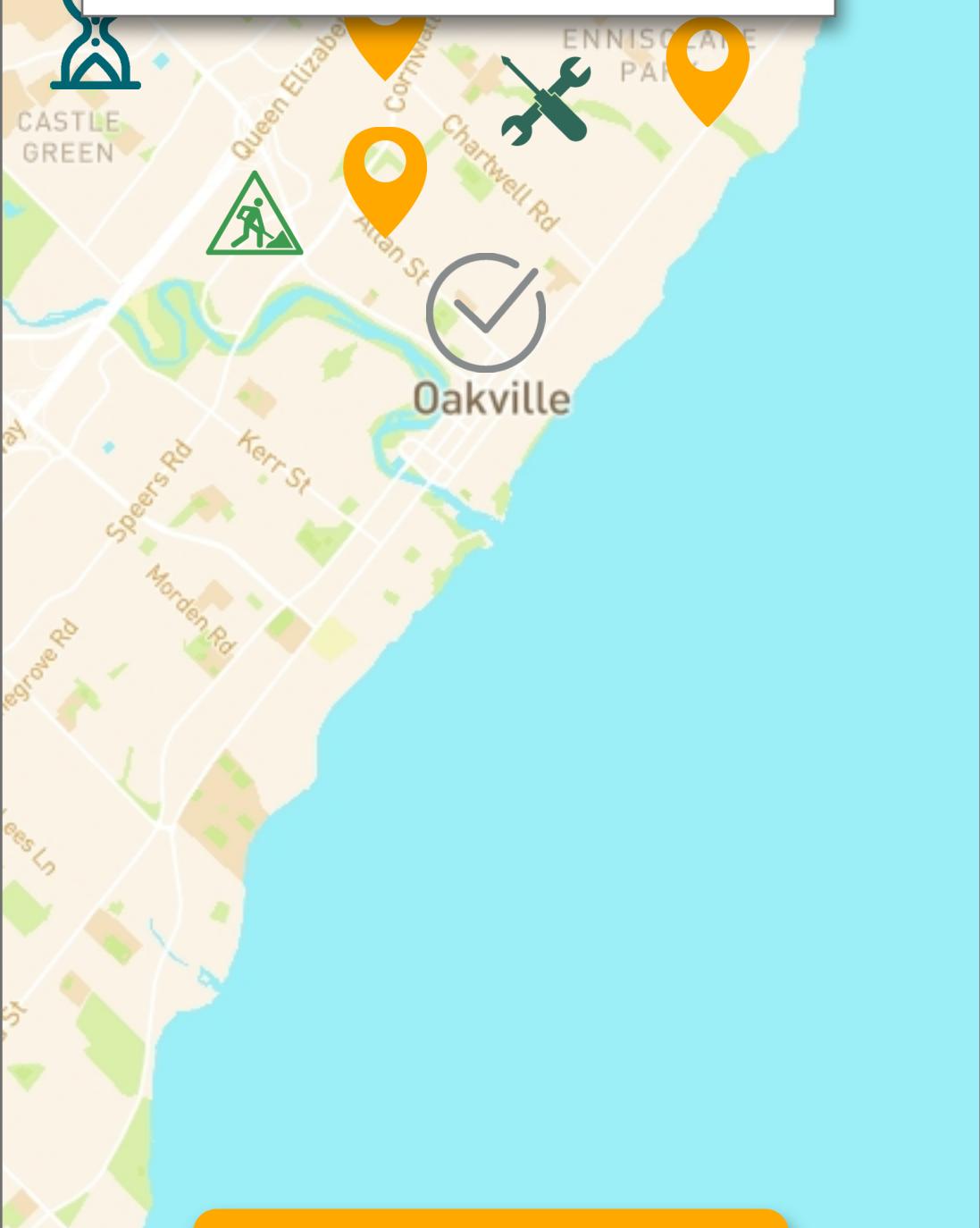
Oakville



Noah Varghese ...

Oakville Windows ...

Oakville Windows ...

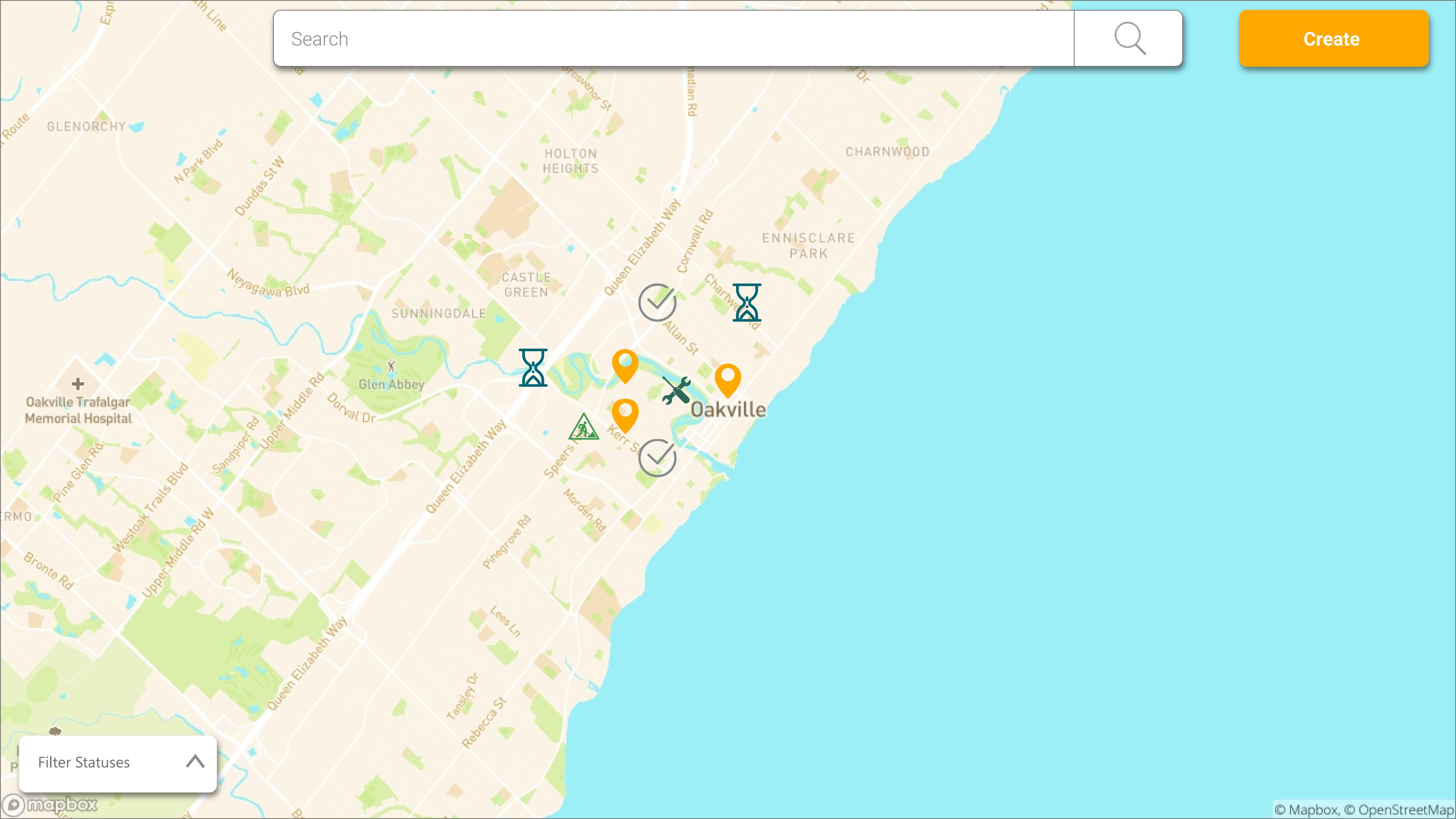


Create

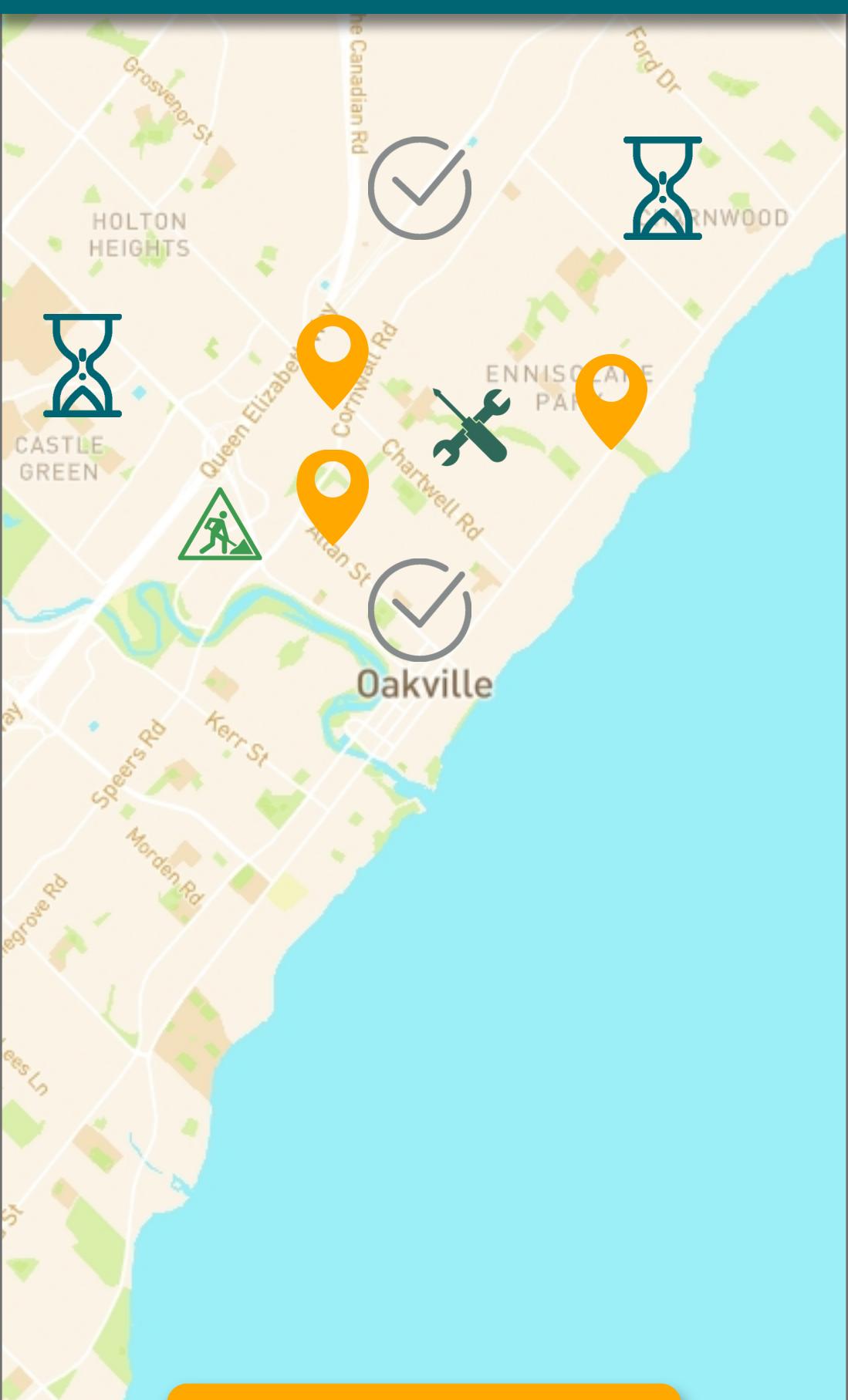
Search



Create



Search



Create

Search



Create

Filter Statuses ▾

Add / Edit

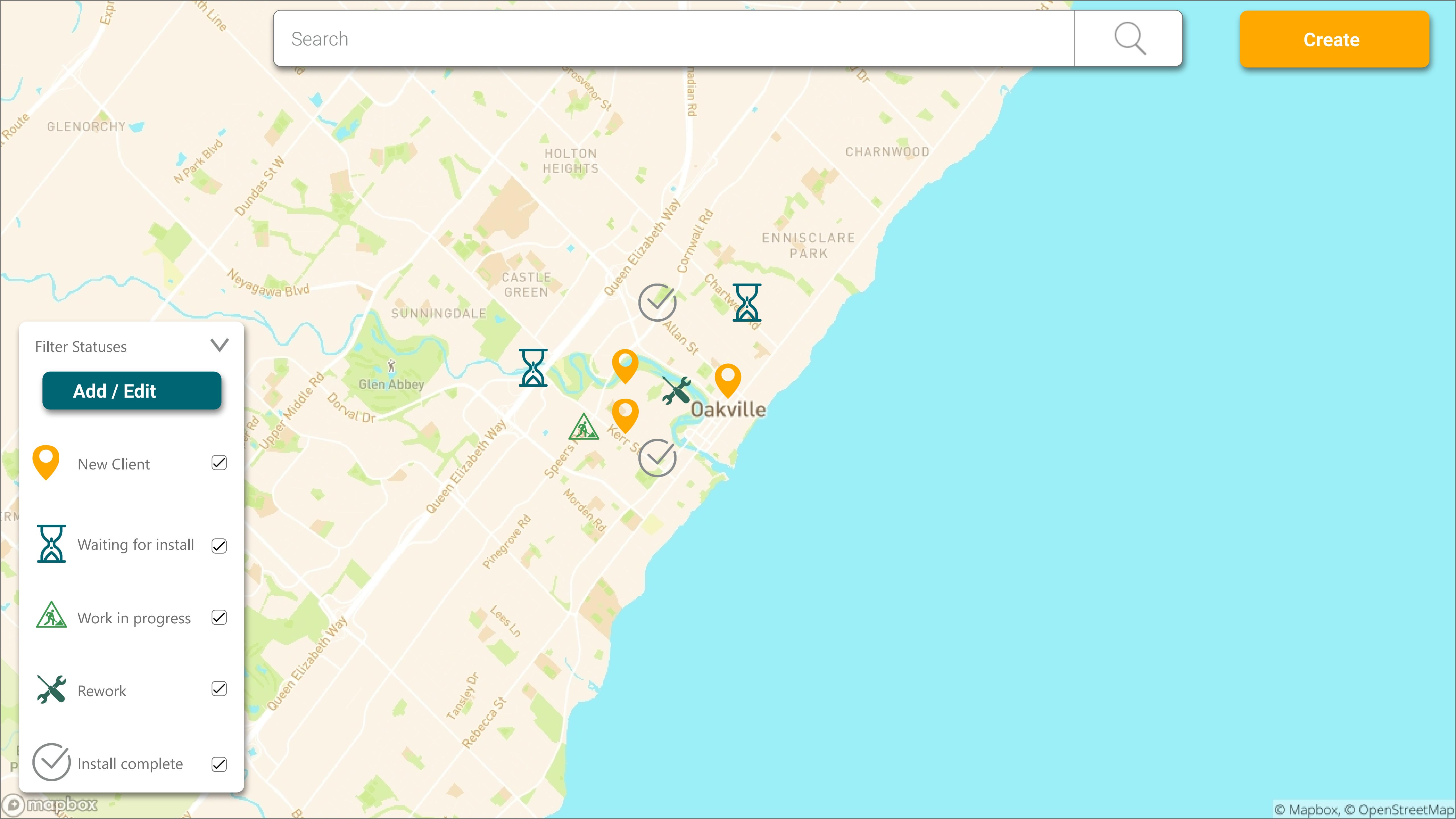
New Client

Waiting for install

Work in progress

Rework

Install complete



Search



Filter Statuses



Add / Edit



New Client



Waiting for install



Work in progress



Rework



Install complete



< Back



Customer



Noah Varghese

varghese.noah@gmail.com

+1 234 567 8901

123 Anywhere St. Oakville, ON



New Customer



Camera



Images

Create

Customer Name

Noah Varghese

Email

Address

City

Phone

Status



Cancel

Create

< Back

Create

Customer Name

Noah Varghese

Email

Address

City

Phone

Status



Create

Statuses



New Client



Waiting for install



Work in progress



Rework



Install complete

Cancel

Create

< Back

Statuses



New Client



Waiting for install



Work in progress



Rework



Install complete



Create

Delete

Are you sure you want to
delete customer:

Noah Varghese

Cancel

Delete

< Back

Delete

Are you sure you want to delete customer:

Noah Varghese

Delete

Update

Customer Name

Noah Varghese

Email

varghese.noah@gmail.com

Phone

+1 234 567 8901

Address

123 Anywhere St

City

Oakville

Status

in

New Client (Pre quote)

Waiting for install

Need to go back (post
install)

Install complete

date

< Back

Update

Customer Name

Noah Varghese

Email

varghese.noah@gmail.com

New Client (Pre quote)

Waiting for install

Need to go back (post
install)

Install complete

Status

in



Delete

Create

Customer Name

Noah Varghese

Email

Address

City

Phone

Status

New Client (Pre quote)

Waiting for install

Need to go back (post
install)

Install complete

Create

< Back

Create

Customer Name

Noah Varghese

Email

New Client (Pre quote)

Waiting for install

Need to go back (post
install)

Install complete

Status



Create

Customer

< Back

Noah Varghese

varghese.noah@gmail.com

+1 234 567 8901

123 Anywhere St. Oakville, ON



New Customer



Before - Kitchen



After - Kitchen



Drag and Drop here

or

[Browse Files](#)

< Back

Customer

Noah Varghese

varghese.noah@gmail.com

+1 234 567 8901

123 Anywhere St. Oakville, ON



New Customer



Camera



Drag and Drop here

or

Browse Files



Statuses



New Client



Waiting for install

Delete

Update



Work in progress



Rework



Install complete

Cancel

Create

< Back

Statuses



New Client



Waiting for install



Work in progress



Rework



Install complete



Create

Update

Status Text

New Client (Pre quote)

Image



Drag and Drop here
or
Browse Files

Cancel

Update

< Back

Update

Status Text

New Client (Pre quote)

Image



Drag and Drop here

or

[Browse Files](#)

Update

Create

Status Text

Image



Drag and Drop here
or
[Browse Files](#)

Cancel

Create

< Back

Create

Status Text

Image



Drag and Drop here

or

[Browse Files](#)

Create

Delete

Are you sure you want to
delete:



New Client (Pre quote)

Cancel

Delete

< Back

Delete

Are you sure you want to
delete:



New Client (Pre quote)

Delete

Customer

< Back

Noah Varghese

varghese.noah@gmail.com

+1 234 567 8901

123 Anywhere St. Oakville, ON

 New Customer



Delete

Label
Before - Kitchen

Edit

< Back

Image

Label

Before - Kitchen



Delete

Update

Delete

Are you sure you want to
delete this image?

Cancel

Delete

< Back

Delete

Are you sure you want to
delete this image?



Before - Kitchen

Delete