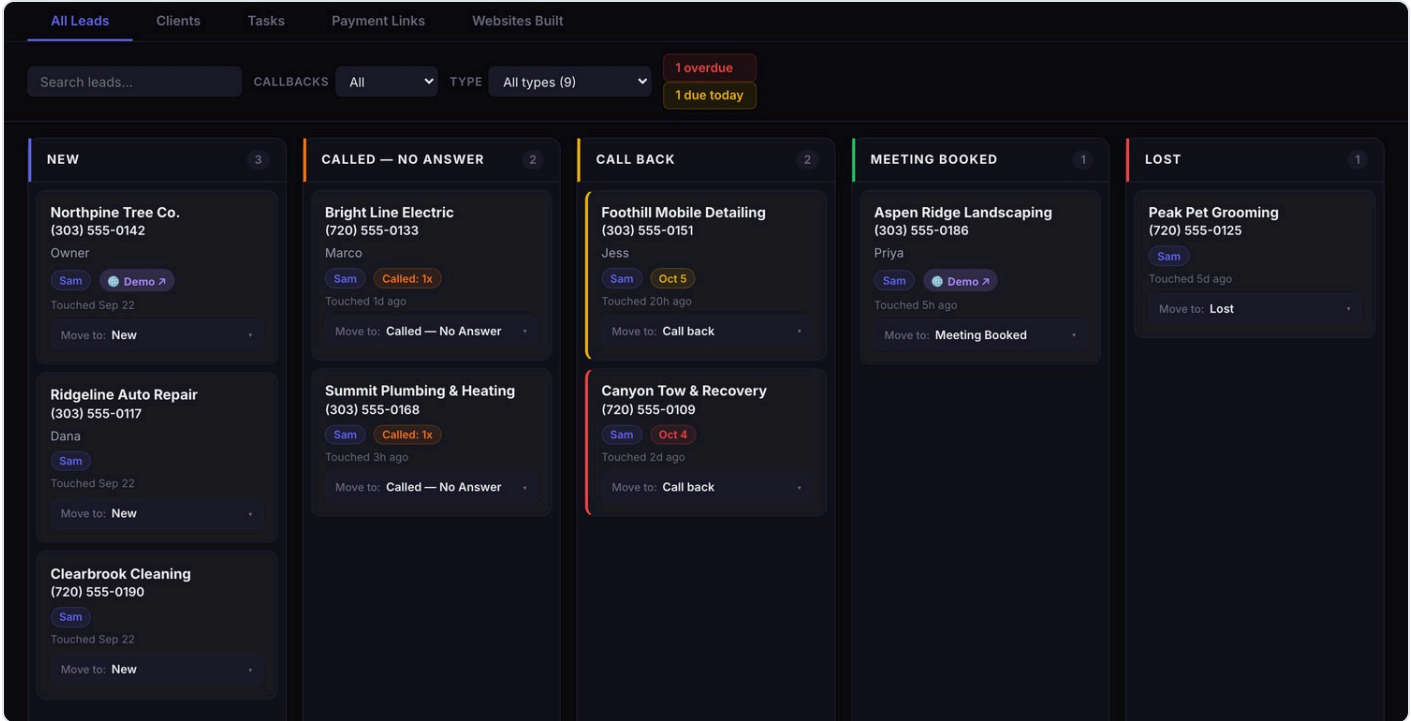


CASE STUDY · CUSTOM SOFTWARE

A sales CRM where every rep sees only their own leads.

A lead board built for a small sales team. Each rep signs in and sees their own pipeline — calls, call-backs, demo links — and nothing else. **Leads arrive by themselves** from imports, website forms and postcard scans, already assigned to the right person.



SAMPLE Rep "Sam" signed in: nine leads across five stages, with one overdue and one due-today call-back flagged at the top. The real CRM page, run on made-up leads.

THE SLOW WAY

Leads live in a spreadsheet, a shared inbox and someone's text messages. Two reps call the same shop, a call-back promised for Tuesday is forgotten, and nobody can say who is working what.

WHAT CHANGES

Every lead has one owner, one stage and one next step. Reps move cards as they call, overdue call-backs rise to the top, and **the owner sees the whole team while each rep sees only their own.**

HOW LEADS GET IN

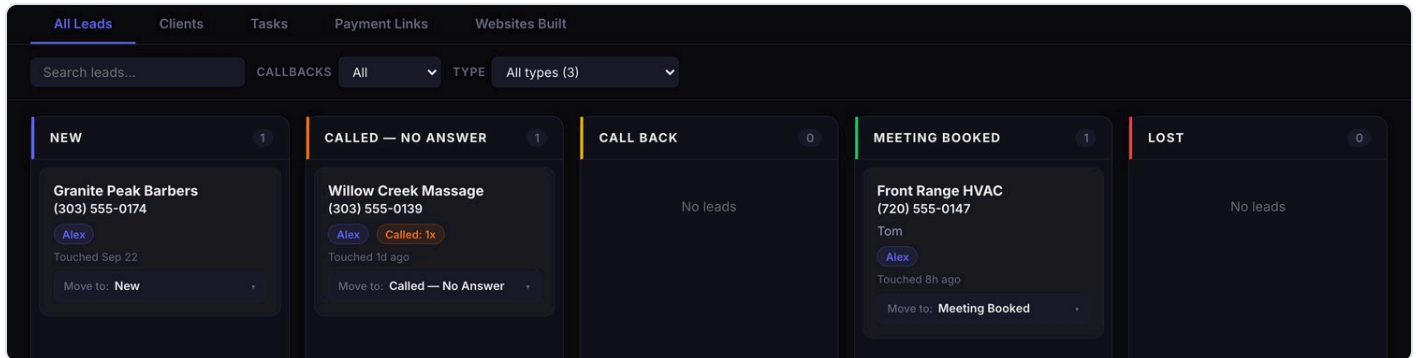
Imports
Lists are checked against every existing lead first, so a business is never added twice.

Website forms
A form submission lands as a lead with where it came from.

Postcard scans
A QR scan puts the business on the right rep's board.

Ads
Ad leads arrive tagged with the ad and city that brought them.

SAME CRM, ANOTHER SIGN-IN



SAMPLE Rep "Alex" signed in: three leads, and none of Sam's. The filtering happens on the server, so a rep's phone never even receives another rep's leads — they aren't just hidden on screen.

WHAT KEEPS IT RIGHT

**Access enforced on the server**

Three levels: the owner sees everything, a manager sees their own team, a rep sees only their own leads. A rep can't open someone else's lead by its address either.

**Signed sign-ins**

Each sign-in is a signed pass that expires after 30 days. A pass that's been tampered with or has expired is refused everywhere.

**Works in a dead zone**

A rep on the road who loses signal keeps their board instead of being logged out. Changes made offline are saved and sent when signal comes back.

BY THE NUMBERS

7

people signing in, at three access levels

9

board layouts — route visits, postcard scans, agencies and more

5

stages on a rep's board, from new to meeting booked

700+

leads in the system (September 2026)

WHERE THE SAME IDEA FITS

Small sales teams

One board per person, one view of the whole team for the owner.

Field service

Visit order by day and stop, and a board that keeps working without signal.

Agencies

Separate pipelines per account manager or per client, on one system.

Built with plain HTML and JavaScript (no framework) · Netlify Functions and Blobs on the server · signed session passes · an offline cache on the device · import scripts with duplicate checks.

Outgrown the spreadsheet, but not ready for a big CRM?

I build lead boards and internal tools that fit how your team actually works.

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