Proposal System Enhancements - Stripe Integration & Edit Capability

Overview

Enhanced the proposal system with direct Stripe integration, total column display, and comprehensive edit functionality. These changes streamline the proposal workflow and ensure payment links are automatically generated.

Changes Implemented

1. Total Column in Proposals List

- Added a "Total" column to the proposals list table
- Displays formatted dollar amounts (e.g., $1,234.56)
- Bold styling for clear visibility
- Helps quickly assess proposal values at a glance

File Modified: `/app/dashboard/proposals/page.tsx`

2. Direct Stripe Integration

Automatic Payment Link Generation on Creation

- Stripe payment links are now automatically generated when creating proposals
- Creates Stripe product, price, and payment link in one workflow
- Payment links are stored with the proposal for easy access
- Falls back gracefully if Stripe API is unavailable

File Modified: `/app/api/proposals/route.ts`
- Added Stripe SDK initialization
- Enhanced POST method to automatically create payment links
- Includes proper error handling

Automatic Payment Link Regeneration on Edit

- When editing a proposal with a changed total amount:
- Old payment link is deactivated
- New Stripe product and price are created
- Fresh payment link is generated automatically
- If total remains unchanged, existing payment link is preserved

File Modified: `/app/api/proposals/[id]/route.ts`
- Added Stripe SDK initialization
- Enhanced PATCH method to detect total changes
- Automatic payment link regeneration logic

3. Proposal Edit Page

New Edit Functionality

- Created dedicated edit page at `/dashboard/proposals/[id]/edit`

- Full editing capability for:
- Client information
- Proposal details
- Line items (add, remove, modify)
- Pricing and discounts
- Terms and notes
- Dates

Features

- Pre-populated form with existing proposal data
- Real-time total calculations
- Service selection from pricing tiers
- Custom item creation
- Tax and discount management
- Editable descriptions for all items
- Visual feedback for changes

New File: `/app/dashboard/proposals/[id]/edit/page.tsx`

Edit Button Integration

- Added "Edit" button to proposal detail page
- Only visible for draft proposals
- Direct navigation to edit page
- Seamless workflow integration

File Modified: `/app/dashboard/proposals/[id]/page.tsx`

Key Benefits

1. Streamlined Workflow

- Payment links generated automatically - no extra steps
- Edit proposals before sending to clients
- Total column provides quick financial overview

2. Stripe Integration

- Non-optional - always enabled
- Automatic creation and regeneration
- Proper invoice creation with metadata
- Custom redirect URLs for payment success

3. Flexibility

- Edit proposals at any time before sending
- Modify pricing, items, and terms
- Payment links stay synchronized with totals

4. Professional Experience

- Clients receive ready-to-pay proposals
- Automatic Stripe invoicing

- Clean payment flow with success redirects

Usage Examples

Creating a Proposal

1. Navigate to `/dashboard/proposals/new`
2. Fill in client information and proposal details
3. Add services or custom items
4. Set tax and discount (optional)
5. Click "Create Proposal"
6. **Stripe payment link automatically generated**
7. Proposal created with payment URL ready

Editing a Proposal

1. Open a draft proposal
2. Click "Edit" button in header
3. Modify any fields as needed
4. Change items, quantities, or pricing
5. Click "Save Changes"
6. **If total changed, new payment link automatically created**
7. Proposal updated and ready to send

Viewing Proposals List

- New "Total" column shows proposal amounts
- Easily sort and compare proposal values
- Quick financial overview of all proposals

Technical Details

Stripe Integration Points

Proposal Creation (POST /api/proposals)

```
1. Calculate proposal totals
2. Create Stripe product with metadata
3. Create Stripe price for total amount
4. Generate payment link with invoice creation
5. Save payment link URL and ID with proposal
```

Proposal Update (PATCH /api/proposals/[id])

```
1. Check if total amount changed
2. If changed:
   - Deactivate old payment link
   - Create new product and price
   - Generate new payment link
   - Update proposal with new link
3. If unchanged:
   - Keep existing payment link
```

Payment Link Configuration

- Currency: USD
- Invoice creation: Enabled
- Custom fields: Proposal Number
- Metadata: Proposal details
- After completion: Redirect to success page

Files Modified

1. `/app/dashboard/proposals/page.tsx` - Added Total column
2. `/app/dashboard/proposals/[id]/page.tsx` - Added Edit button
3. `/app/api/proposals/route.ts` - Auto-generate payment links on create
4. `/app/api/proposals/[id]/route.ts` - Auto-regenerate payment links on edit

Files Created

1. `/app/dashboard/proposals/[id]/edit/page.tsx` - Complete edit interface

Database Schema

No schema changes required - using existing fields:
- `stripePaymentUrl` - Public payment URL
- `stripePaymentLinkId` - Stripe link ID for management
- `total` - Proposal total amount

Testing Recommendations

1. **Create New Proposal**
   - Verify payment link is generated
   - Check Stripe dashboard for product/price creation
   - Test payment link functionality

2. **Edit Proposal**
   - Edit without changing total (verify link preserved)
   - Edit with total change (verify new link generated)
   - Test all form fields are editable

3. **Proposals List**
   - Verify Total column displays correctly
   - Check sorting and filtering still work
   - Confirm formatting is consistent

4. **Payment Flow**
   - Click payment link
   - Complete test payment
   - Verify redirect to success page
   - Check invoice generation in Stripe

Next Steps

Consider implementing:
1. **Payment status tracking** - Webhook to update proposal status when paid
2. **Payment reminders** - Automated emails for unpaid proposals
3. **Multi-currency support** - International payment options
4. **Payment plans** - Split payments over time
5. **Deposit payments** - Partial payment options

Conclusion

The proposal system now features:
✅ Direct Stripe integration (automatic payment links)
✅ Total column in proposals list
✅ Complete edit functionality before sending
✅ Automatic payment link regeneration on changes
✅ Professional, streamlined workflow

These enhancements significantly improve the proposal creation and management process, making it easier to send professional proposals with integrated payment options.