CFOP — Client-Facing Operations Platform

Tagline: A shared workspace between service providers and clients—built for transparency, approvals, and recurring operations.

1) One-liner

CFOP is a **contractor/facilities operations platform** where a service provider can manage multiple clients (with multiple branches/sites), and give clients a secure portal to **request work, approve quotations, track statuses, view checklists/reports, track payments, and monitor contract renewal**—all in one place.

2) Who it's for

Primary Users

- **Service Providers / Contractors** (fire protection, facilities maintenance, HVAC, IT managed services, pest control, janitorial, etc.)
- **Clients / Business Establishments** (single site or multi-branch)

Core Need

Clients want **visibility + proof of work**. Contractors want **organized workflows + fewer follow-up calls + faster approvals + renewals**.

---

3) Core CFOP Concepts (the engine)

3.1 Multi-Client, Multi-Branch Structure (Non-negotiable)

- A Contractor account can have **many Clients**

- Each Client can have **many Branches/Sites**
- Each Branch is a **workspace** (this is the key)

Hierarchy

- Contractor (You)
    - Client A
        - Branch 1 (Workspace)
        - Branch 2 (Workspace)
    - Client B
        - Branch 1 (Workspace)

3.2 Branch Context (How clients don't get confused)

When a client logs in:

- One login for the company
- They choose a **Branch** via a branch switcher (dropdown)
- Everything they see is filtered by that branch:
    - Requests
    - Quotes
    - Checklists/Reports
    - Payments
    - Contract

3.3 "Core Modules" + "Templates"

CFOP has:

1. **Core Modules** (always exist)
2. **Templates** (what differs per niche/client/branch)

3.4 The best unlock: Service Program

A **Service Program** is a packaged configuration assigned to a branch, containing:

- which modules are enabled
- which templates to use
- recurring schedule (quarterly/monthly)
- SLA rules (optional)
- notification rules

Example:

Service Program: Fire Protection Annual (Quarterly)

- Checklist Templates: Quarterly Fire Inspection, Extinguisher Checklist
- Requests module: enabled
- Quotation approval: enabled
- Contract expiration reminders: enabled

---

4) Roles & Permissions (simple but complete)

Contractor Side

- **Contractor Admin**: full access (clients/branches/users/templates/settings)
- **Contractor Staff/Tech**: assigned branches only, can update job statuses, upload reports

Client Side

- **Client Admin**: sees all branches, can create branch users, can approve quotations
- **Branch User**: sees only assigned branch, can submit requests, view reports
- **Viewer/Auditor (optional)**: read-only access to reports/checklists for compliance

---

5) Core Modules — CFOP Standard Set

These modules should be present across all CFOP accounts.

5.1 Clients Module

Contractor-only

- Add clients
- Add branches
- Set branch address, contacts, site notes
- Assign service programs per branch

5.2 Appointments Module

Contractor + optional client view

- Schedule site visit / inspection / quarterly maintenance
- Assign technician
- Calendar + upcoming visits
- appointment linked to:
  - request #
  - checklist
  - report
  - quotation

5.3 Submit Request for Repairs (Work Orders / Tickets)

Client + contractor

- Submit request via form
- Dropdown categories (“common problems”) + “Others”
- Attach photos/videos/files
- Auto request ID

- Priority (low/med/high)
- Optional: approval required before scheduling

5.4 Tracking Repair Status (Status Timeline)

Client + contractor

Default statuses:

- Submitted
- Scheduled
- Inspected
- Quotation Sent
- Approved
- In Progress
- Completed
- Closed

Each status update supports:

- timestamp
- internal note (contractor only)
- client-visible note
- attachments

5.5 Quotation Approval (Approve / Decline / Revise)

Client + contractor

- Send quote inside portal
- Client can:
    - Approve
    - Decline
    - Request revision (with comments)

- Quote versioning:
  - v1, v2, v3 with change history
- Optional “approval rules”:
  - require Client Admin approval
  - require PO number field

5.6 Payment Tracking (Paid / Unpaid)

Client + contractor

- Invoice linked to quotation + request
- statuses:
  - Unpaid / Partial / Paid
- upload proof (receipt, OR, bank transfer screenshot)
- due date & reminders

5.7 Contract Expiration + Notifications

Client + contractor

- Contract start/end
- Renewal status:
  - Active / Expiring / Expired / Renewed
- reminders:
  - 30/15/7 days before expiry
- service coverage notes (what’s included/excluded)
- branch-level contract (common in facilities)

---

6) Template System (how CFOP adapts per niche)

6.1 Why Templates exist

Not every client/niche has the same:

- checklist
- inspection form
- fields to collect
- compliance requirements
- report format

So CFOP needs a **Builder**.

6.2 Template Types (recommended)

A) Checklist Templates (Inspection / PM)

Field types:

- pass/fail
- dropdown
- number (reading)
- text notes
- photo required
- signature
- file upload

Features:

- sections (grouping)
- required items
- scoring (optional)
- auto PDF export (optional)

B) Request Form Templates (for client tickets)

- category dropdown config
- required photos toggle
- optional “asset selection” (choose equipment)

C) Quotation Templates

- standard line item table
- parts vs labor separation
- terms & conditions
- revision notes

D) Report Templates (Completion / Findings)

- before/after photos
- corrective actions
- recommendations
- technician signature
- client acknowledgement signature (optional)

E) Contract Templates

- coverage summary
- schedule
- billing terms
- exclusions

6.3 Template Assignment

Templates can be assigned at:

- Service Program level (recommended)
- Branch level (override)
- Client level (rare)

---

7) The “Portal Experience” (what users actually see)

7.1 Contractor Portal (You)

Global Dashboard

- Clients count
- Requests needing attention
- Quotes pending approval
- Overdue payments
- Contracts expiring soon
- Today’s appointments

Client Page

- Client profile
- Branch list
- users & permissions
- program assignments

Branch Workspace Tabs

- Requests
- Quotes
- Checklists/Reports
- Appointments
- Payments
- Contract
- Messages/Files

7.2 Client Portal (Your clients)

Branch Switcher

- Dropdown: Branch 1 / Branch 2
- optional default branch

Branch Dashboard Tiles (core + optional)

- Submit Request
- Track Requests
- Quotations (approve/revise)
- Checklists/Reports (view/download)
- Payments
- Contract & Renewal
- Messages/Files

---

8) Communication (make it clean, not chaotic)

8.1 Branch Inbox (recommended)

- One thread per branch workspace
- Messages can be linked to:
  - Request #
  - Quote #
  - Report/Checklist
  - Invoice

8.2 Announcements

- Contractor can broadcast:
  - schedule changes
  - safety notices
  - policy updates
  - renewal reminders

---

9) End-to-End Workflows (CFOP Playbooks)

Workflow A: Repair Request → Quote → Job → Payment

1. Client submits Request (Branch 2)
2. Contractor schedules inspection (appointment)
3. Contractor uploads inspection report + sends quotation
4. Client approves or requests revision
5. Contractor executes work, uploads completion report
6. Invoice/payment tracked as paid/unpaid
7. Request closed

Workflow B: Quarterly Preventive Maintenance

1. System creates quarterly appointment (or contractor schedules)
2. Technician completes checklist template on-site
3. Checklist generates report
4. Report visible in client portal timeline
5. Any findings can auto-create a “recommended repair” ticket

Workflow C: Contract Renewal

1. 30-day reminder triggers
2. Contractor sends renewal quote or contract draft
3. Client confirms
4. Contract renewed + new schedule generated