

Module:

Process modifications/validations

Description:

Validations to fit the App with the process

	Estimated hours:	Cost per hour:	Total:	Finishing at (date):
Total:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Current functionality

- Currently you can enter to any step of the process but not all the steps should be available anytime.

What we need?

- Several changes to limit when you are able to do specific changes:
 1. Add “Create New Version” icon after the proposal was sent.
 2. Disable proposal modification after it was sent. Only accept create a new version, notes, set next contact date, and navigate between screens.
 3. When the project is declined, “Accept proposal” and “Create New Version” option/icon should send an alert to confirm before perform the action.
 4. When the new version of a declined proposal is created, it should be change the status to Lead.
 5. Accept proposal icon shouldn’t be able if the current version of the proposal has more than 1 shingle line and/or it include optionals upgrades or options.
 6. Validate if the prices have changes or not since the proposal was created.



Roof Inspection

Brad Lehto

Residential/Shingle/Tear off

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Brad Lehto

✓ ⋮

No contact date

Insection by: John Fidanza

v1
Last version
[Change version](#)

Select shingle brands to be estimated

Malarkeys Owens Corning CertainTeed

Validity of prices until 04/28/2024

[GO TO ESTIMATE](#)

Verified information

Hide Accept Proposal icon until current version has only 1 shingle line and only upgrades/optionals as built in or declined.

Hide Accept proposal icon if the proposal status is lower than 3 (Estimate sent).

123 id ↑ ↓	ABC project_status
1	Lead
2	pending of acceptance
3	Estimate sent
4	accepted
5	rejected

Hide Accept proposal icon if the proposal status is equal to 5 (Declined) and user Role is not equal to 1 or 2 (Sponsor, Customer service).

```
"user" ▶ Array (1)
  0 ▶ Object
    B can_send_email: false
    O contact: {id_contact: "7", first_name: "John", last_name: "Fidanza"}
    S id: "14"
    S id_contact: "7"
    S id_role: "3"
    S id_user: "14"
    O last_access_date: Mon Apr 08 2024 13:04:24 GMT-0600 (CST)
    S password: "12345678"
    O role: {id_role: "3", role: "Inspector"}
    S username: "john@ehroofing.com"
  ▶ Object Prototype
```

Grid	123 id_role ↑ ↓	ABC role
1	2	Customer service
2	3	Inspector
3	1	Sponsor
4	4	Project Manager

[Screenshot](#)



[Report Bug](#)





Roof Inspection

Brad Lehto

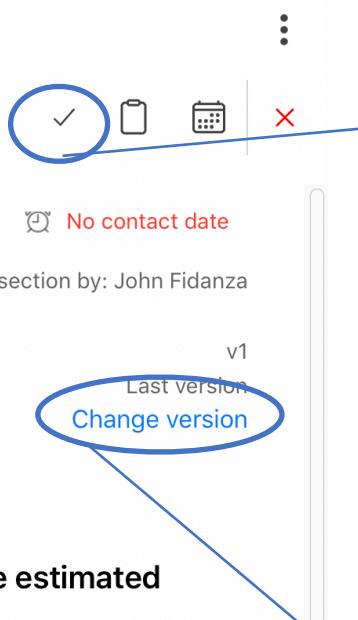
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When the proposal status is equal to 5 (declined) and the user clic “accept proposal” icon, the app should display a message:

***“Are you sure you want accept this proposal?
This proposal was marked as locker.”***

If the user clic continue, app show accept proposal window.

Select shingle brands to be estimated

Malarkeys Owens Corning CertainTeed

Validity of prices until 04/28/2024

GO TO ESTIMATE

Verified information

Screenshot Report Bug



When the proposal status is equal to 5 (declined) and the user clic “Create new version” icon (or the option in ChangeVersion menu), the app should display a message:

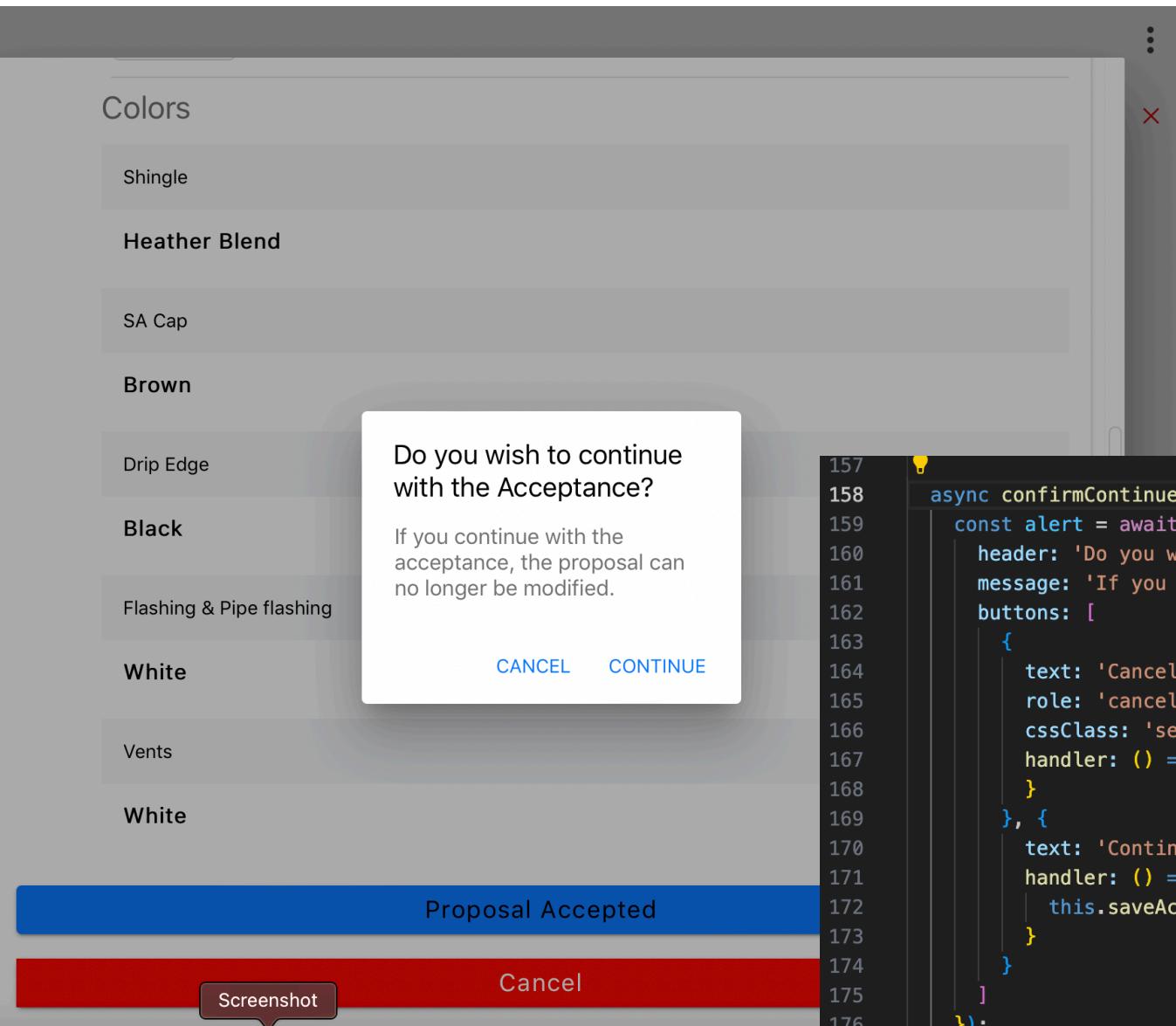
***“Are you sure you want create a new version?
This proposal was marked as locker.”***

If the user clic continue, app create the new version and change id_proposal_status = 1 (Lead/Draft).

It is a example of the Confirmation alert.

This message is displayed on:
`/src/app/shared/modals/modal-acceptance/modal-acceptance.component.html`

Use the same component (`alertController`) to create the new alert modal.



```
157
158     async confirmContinue() {    Yunuel Ramirez, 2 months ago • Acceptance Proposal modal was validated
159         const alert = await this.alertController.create({
160             header: 'Do you wish to continue with the Acceptance?',
161             message: 'If you continue with the acceptance, the proposal can no longer be modified.',
162             buttons: [
163                 {
164                     text: 'Cancel',
165                     role: 'cancel',
166                     cssClass: 'secondary',
167                     handler: () => {
168                         ...
169                     },
170                 },
171                 {
172                     text: 'Continue',
173                     handler: () => {
174                         this.saveAcceptance();
175                     }
176                 }
177             ],
178         });
179         await alert.present();
180     }
```



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No contact date

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v1
Last version
Change version

When this icon is hidden (accept proposal), add the + icon to create a new version (check code in "New version" option in "Change version" menu)

It is a example of the "Change Version" menu

Select shingle brands to be estimated

Malarkeys Owens Corning CertainTeed

ionic.io/ionicons

ionicons 7.1.0

Search icons... Icons Usage GitHub Designer pack

Outline Filled Sharp

App icons

WEB COMPONENT CODE

<ion-icon name="duplicate-outline"></ion-icon>

USAGE

duplicate-outline

SVG

Roof Inspection

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v1
Last version
Change version

New version

v1

Select shingle brands

Malarkeys Owens Corning CertainTeed

Validity of prices until 04/28/2024

GO TO ESTIMATE

Verified information

Screenshot Report Bug

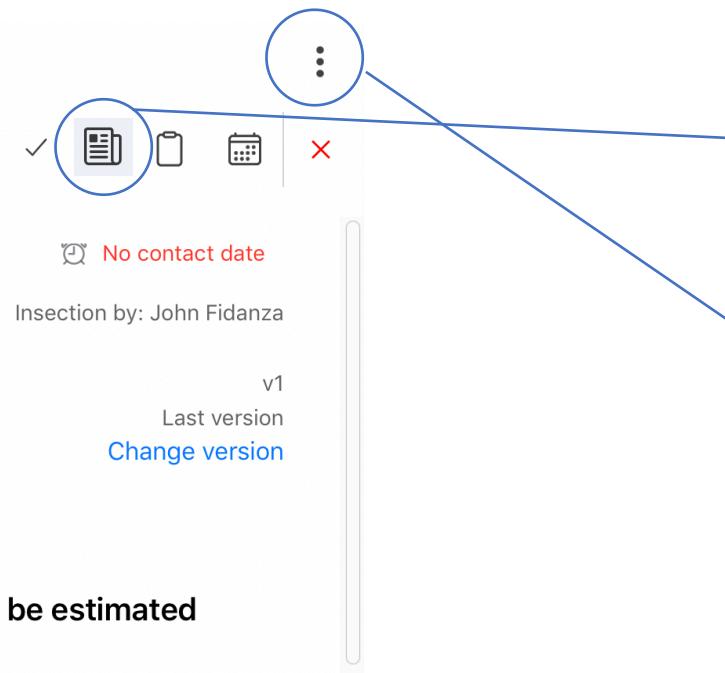


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Add an icon to see proposal when the estatus ≥ 3 .
User can view and send the proposal from this option. It's same action as Proposal Preview from lateral menu

Select shingle brands to be estimated

Malarkeys Owens Corning CertainTeed

Validity of prices until 04/28/2024

The screenshot shows the ionicons website with the 'newspaper-outline' icon highlighted in a green box. The icon is also shown in its outline, filled, and sharp variations below the list of app icons. The browser address bar shows 'ionic.io/ionicons'.

WEB COMPONENT CODE

```
<ion-icon name="newspaper-outline"></ion-icon>
```

The screenshot shows the Project Main Page with a lateral menu on the right. The 'Proposal Preview' option is circled in blue.

Project Main Page

Test Beto tear off only Mulanix

2086954128
smulanix@aol.com|
115 S Chestnut St, Nampa Idaho
Test Beto tear off only Mulanix
Residential/Shingle/Tear off +1 building

Menu

- Roof inspection
- Estimates
- Scope of work
- Proposal Preview



Project Main Page

Test Alberto Zarate

2771100409

|
Conocido, X Idaho

Test Alberto Zarate

Residential/Shingle/Tear off

Select shingle manufacturer

Malarkeys

Owens Corning

Price list valid until 05/05/2024

Expected acceptance date

GO TO ESTIMATE

Verified information

Screenshot

Menu

< Roof inspection

< Estimates

< Scope of work

< Proposal Preview

Enable Proposal Preview in lateral menu when the estatus >= 3.

Project Main Page

Test Beto tear off only Mulanix

⌚ 03/04/2024

Insection by: John Fidanza

After you select a register in LeadList (first page after login) you can see in Local storage the idProject of the selected project.

After that you can search it in Local db, in Projects object and select the version where isCurrent = true, and search in all buildings of current version.

Projects : Array

Versions: Array

Buildings: Array

psb_measures: Object

psb_updates

psb_options

Screenshot of the Chrome DevTools Elements tab showing the structure of the 'projects' array in the '_ionickv' indexed database.

Primary Key	Value
"material_units"	► [Object, Object] (2)
"materials"	► [Object, Object, Object, Object, Object, Object, Object, Object] (8)
"price-list"	► [Object, Object, Object, Object, Object, Object, Object, Object, Object] (9)
"projects"	▼ Array (143) 0 ▼ Object ► O contact_address: {id_contact: "362", address: "6838 Fairfield"} ► N createdAt: null ► N end_date: null ► S id: "16" ► S id_contact_address: "321" ► N id_job_priority: null ► N id_project_status: 14 ► S id_prospecting_type: "1" ► N id_reject_reason: null ► S id_user_saleman: "14" ► N id_user_updated: null ► N next_contact_date: null ► S project_name: "Jeff & Makayla Fealko" ► O project_notes: [Object] (1) ► O project_status: {id: 14, project_status: "Paid & Closed"} ► N prospecting_start_date: null ► O prospecting_type: {id: "1", prospecting_type: "Residential"} ► N reject_reason: null ► S st_address: "6838 Fairfield Ave, Boise Idaho" ► S st_email: "" ► S st_job_type: "Repair " ► S st_name: "Jeff & Makayla Fealko " ► S st_phone: "2088705568" ► S st_project_status: "Paid & Closed" ► S st_prospecting_material_type: "Shingle " ► S st_prospecting_type: "Residential" ► N start_date: null ► N updatedAt: null ► O user_saleman: {id_user: "14", id_contact: "7", username: "j..."} ► O versions: [Object] (1) ► Object Prototype

Proposal status = projects[n].id_project_status and
projects[n].project_status

(In local db and state). You can read odd_project_status to validate, but when you update it you should remember update both.

Possible values of id_project_status

123 id ↑ ↓	RBC project_status ↓
1	Lead
2	pending of acceptance
3	Estimate sent
4	accepted
5	rejected

```
ecting.page.ts 9+      TS dropbox-api.service.spec.ts      TS dropbox-api.service.ts
src > app > shared > modals > modal-acceptance > TS modal-acceptance.component.ts
27  export class ModalAcceptanceComponent implements OnInit {
182    async saveAcceptance() {
209
210      this.project.project_files = filesUploaded.map(item => {
211        return {
212          id_project: this.project.id,
213          url: item.result.path_display,
214          size: item.result.size,
215          id_resource: 22
216        };
217      });
218
219      const versions = this.project.versions.map(x => {
220        if (x.id === this.version.id) {
221          return { ...this.version, isModified: true };
222        } else {
223          return { ...x };
224        }
225      });
226
227      const projectUpdated: Project = {
228        ...this.project,
229        isModified: true,
230        versions: versions
231      };
232
233      this.projectService.update(this.project.id, projectUpdated);
234      loading.dismiss();
235      await this.presentToastOk();
236      this.modalCtrl.dismiss({
237        redirect: true,
238        saveDb: true
239      });
240    }
241  }

```

When you update `id_project_status` and `project_status` you should be sure of:
update state, update local db,
mark it to be sync (`isModified: true`)
and execute the sync process
(`projectService.update`).

You can see a example in:
`src/app/shared/modals/modal-acceptance/modal-acceptance.component.ts`

general <ehroofing 2> Script <ehroofing> Script <ehroofing 2> Limp... <ehroofing 2> Script <ehroofing 2> Script psb_options

Properties Data ER Diagram ehroofing 2 Databases postgres Schemas projects Tables psb_options

psb_options | Enter a SQL expression to filter results (use Ctrl+Space)

Grid	123 id	123 id_psb_measure	RBC option	123 cost	123 qty_hours	<input checked="" type="checkbox"/> is_built_in	<input checked="" type="checkbox"/> in_final_proposal	deletedAt	creat	Panels
1	1	14	limpiar gutters	30	1	[]	[NULL]	[NULL]	2024-01-01	
2	2	20	quitar gutters	30	2	[v]	[NULL]	[NULL]	2024-01-01	
3	3	63	option	370	54	[]	[NULL]	[NULL]	2024-01-01	
4	4	137	podar un arbol	10	5	[]	[NULL]	[NULL]	2024-02-01	

To show accept proposal icon, you should validate in
projects[n].version[current].buildings.forEach(x=>
x.psb_measures):

psb_options should have only records with
is_built_in = true in order to show accept icon. Only
consider records with deleted_at = null.

Properties Data ER Diagram ehroofing 2 Databases postgres Schemas projects Tables psb_upgrades

psb_upgrades | Enter a SQL expression to filter results (use Ctrl+Space)

Grid	123 id_upgrade	123 id	123 id_psb_measure	123 id_cost_integration	123 id_related	Panels
1	1	1	2	3	[NULL]	
2	2	2	2	3	[NULL]	
3	1	3	1	3	[NULL]	
4	3	5	1	3	[NULL]	
5	7	34	10	3	[NULL]	
6	5	88	22	1	[NULL]	
7	2	92	23	3	[NULL]	
8	3	93	23	3	[NULL]	
9	5	6	1	2	[NULL]	

Refresh Save Cancel Export data 200

200 row(s) fetched - 0.091s (0.001s fetch), on 2024-04-08 at 09:50:15

cost_integrations X Properties Data ER Diagram ehroofing 2 Databases postgres Schemas

cost_integrations | Enter a SQL expression to filter results (use Ctrl+Space)

Grid	123 id	RBC cost_integration	Panels
1	1	Built in	
2	2	Upgrade	
3	3	Declined	

Refresh Save Cancel

psb_upgrades should have no records with
id_cost_integration = 2 in order to show accept icon.

All Storage Application Cache

Indexed Databases > __roofingdb > _ionickv

Primary Key	Value
	<pre>▶ O project_status: true: 4, project_status: "accepted" ▶ N prospecting_start_date: null ▶ O prospecting_type: {id: "1", prospecting_type: "Residential"} ▶ S reject_reason: "" ▶ S st_address: "115 S Chestnut St, Nampa Idaho" ▶ S st_email: "smulanix@aol.com" ▶ S st_job_type: "Tear off Tear off" ▶ S st_name: "Test Beto tear off only Mulanix" ▶ S st_phone: "2086954128" ▶ S st_project_status: "accepted" ▶ S st_prospecting_material_type: "Shingle Shingle " ▶ S st_prospecting_type: "Residential" ▶ S start_date: "2024-04-08T10:39:00.000Z" ▶ S updatedAt: "2024-04-08T16:01:51.828Z" ▶ O user_salesman: {id_user: "14", id_contact: "7", username: "john@ehroofing.com", p ▶ O versions: Array (1) 0 ▶ Object B active: true ▶ O buildings: [Object, Object] (2) N expected_acceptance_date: null S id: "163" N id_cost_type: 1 S id_project: "147" B is_current_version: true B is_verified: true N price_lists_date: null S project_version: "v1" ▶ O pv_colors: [Object, Object, Object, Object, Object] (5) ▶ O pv_material_colors: [Object] (1) ▶ O pv_trademarks: [Object, Object, Object] (3) ▶ O shingle_lines: Array (4) 0 ▶ Object S createdAt: "2024-03-12T05:54:57.279Z" N deletedAt: null S id: "183" N id_material_type: 10 S id_version: "163" B in_final_proposal: false B is_selected: false S updatedAt: "2024-03-12T05:54:57.279Z" ▶ Object Prototype Screenshot 1 ▶ {id: "182", id_version: "163", id_material_type: 9, is_selected: false}</pre>

To show accept proposal icon, you also should validate:
Only 1 record in
projects[n].version[current].shingle_lines array is not deleted and is_selected = true.

▶ Array Prototype

▼ O psb_measure: Object

- N eves_rakes_if_flat_roof: 0
- N eves_starters_if_low_slope: 100
- N eves_starters_if_stEEP_slope: 10
- N flash_end_wall_metal_3_5_10_if: 0
- N flash_pipe_2_in_1_pc: 0
- N flash_pipe_3_in_1_pc: 0
- N flash_retrofit_pipe_pc: 0
- S flash_rolled_metal_20_50_if: "0"
- N flash_step_4_4_8_if: null
- N flash_step_4_4_12_if: null
- N hips_if: 15
- S id: "139"
- N id_cost_int_windw: 3
- S id_inwshield_rows: "4"
- N id_metal_eves_rakes_flat_roof: null
- N id_metal_eves_starters_low_slope: 2
- N id_metal_lss_starters_if: null
- N id_metal_rakes_low_stEEP_slope: 2
- N id_price_list: null
- S id_project_building: "234"
- N id_project_warranty_option: 1
- S misc_contingency_fund_dll: "0"
- S misc_miscellaneous_dll: "0"
- S misc_permit_dll: "0"
- S misc_poor_access_dll: "0"
- N misc_roof_caulking_pc: 0
- N misc_spary_paint_pc: 0
- N out_additional_fuel_dll: null
- N out_estimated_days_days: null
- N out_estimated_roofers_qty: null
- N out_id_loding_type: 0
- N out_loding_rate_dll: null
- N out_travel_time_hrs: null

► O psb_chimneys: [] (0)

► O psb_crickets: [] (0)

► O psb_layers: [Object] (1)

▼ O psb_material_calculations: Array (14)

- 0 ▼ Object
 - S cost: "17"
 - B from_original_proposal: true
 - S id: "1685"
 - S id_concept: "120"
 - N id_concept_type: 104
 - S id_material_price_list: "232"
 - S id_material_shingle: "4"
 - S id_psb_measure: "139"
 - B is_updated: false
 - S quantity: "10"

► Object Prototype

► Screenshot

1 ► {id: "1683", id_concept: "4", ...}

2 ► {id: "1684", id_concept: "9", ...}

Validate if prices hadn't change before accept a proposal.

Validate for each element in:
 projects[n].version[current].buildings.forEach(
 x =>{x.psb_measures.psb_material_calculation})

If id_material_price_list is marked as is_current = true in price-list array.

"materials" ► [Object, Object, Object, Object, Object, Object, Object, Object, Object, Object, ...] (93)

"price-list" ▼ Array (10)

- 0 ▼ Object
 - S id: "8"
 - N id_supplier: 1
 - B is_current: false
 - S start_date: "2022-03-03"

► Object Prototype

- 1 ▼ Object
 - S id: "9"
 - N id_supplier: 2
 - B is_current: false
 - S start_date: "2022-03-03"

► Object Prototype

- 2 ► {id: "10", start_date: "2022-03-03", is_current: false, id_supplier: 3}
- 3 ► {id: "11", start_date: "2022-03-03", is_current: false, id_supplier: 4}
- 4 ► {id: "12", start_date: "2022-03-03", is_current: false, id_supplier: 5}
- 5 ► {id: "2", start_date: "2023-06-06", is_current: true, id_supplier: 2}
- 6 ► {id: "5", start_date: "2023-06-06", is_current: true, id_supplier: 3}
- 7 ► {id: "7", start_date: "2023-06-06", is_current: true, id_supplier: 5}
- 8 ► {id: "6", start_date: "2023-06-06", is_current: true, id_supplier: 4}
- 9 ► {id: "1", start_date: "2023-06-06", is_current: true, id_supplier: 1}