

# PREMIER INSULATION - PHASE 1 ALIGNMENT SUMMARY

**Document Date:** December 5, 2025

**Status:**  READY FOR IMPLEMENTATION

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## WHAT THIS ADDRESSES

### From v2 Implementation Plan

- Enquiry system (create, list, assign to VA)
- VA Workspace rebuild
- VA Recommendation creation
- Quote conversion from recommendation
- Basic inventory (add/subtract stock)
- Jobs page + job assignment
- PDF generation
- Dashboard

### From v3 MVP Plan

- Installer Assessment workflow
- Mobile-first design
- Simple calendar view (assessments + jobs)
- 3-day MVP timeline
- No authentication in Phase 1A
- Time-slot scheduling

### From Post-Discussion Clarifications

1. **Assessment attachment optional** - Not automatic, user chooses
2. **Notes + files in enquiry** - Premier adds context when sending to VA
3. **Enquiry status auto-update** - Changed to 'sent\_to\_va' when assigned
4. **Installer assignment for assessment** - Full workflow included

- 5. **Team table restructure** - Separate roles (Sales Rep, Installer, Receptionist, Admin)
  - 6. **Mock team data** - 3 installers, 3 Sales Reps, 1 Receptionist, 1 Admin (Percy Darbhana)
  - 7. **Calendar with time slots** - Week/Month view with date + time display
  - 8. **PDF checkboxes** - Line-item vs Bulk pricing options
  - 9. **Salesforce dashboard** - Metrics + quick actions
  - 10. **RBAC deferred to Phase 1B** - Everything has full access in Phase 1A
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## ARCHITECTURAL DECISIONS MADE

### 1. Two-Table Assessment Assignment Model

assessments ← stores the assessment event

assessment\_assignments ← tracks who assigned when (history + reassignment support)

**Why:** Audit trail + Phase 1B reassignment capability + scalability

### 2. Team Table (unified roles)

sales\_reps → team\_members

- └─ first\_name, last\_name, email, phone
- └─ role (Sales Rep, Installer, Receptionist, Admin)
- └─ status (active, on\_leave, inactive)
- └─ hire\_date, available\_dates

**Why:** Single source of truth for all staff, easier role-based filtering

### 3. Assessment - Optional Attachment

Assessment doesn't auto-attach to enquiry. Premier chooses:

- Attach existing assessment
  - Add notes + files manually
  - Both
  - Neither
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## KEY WORKFLOWS IMPLEMENTED

1. **Assessment Scheduling** - Premier assigns installer to date/time
  2. **Assessment Completion** - Installer fills mobile form + uploads photos
  3. **Enquiry Creation** - Premier creates with optional assessment + notes + files
  4. **Enquiry to VA** - Premier sends enquiry (auto-changes status) + email to VA
  5. **VA Recommendation** - VA creates from enquiry with pre-populated client data
  6. **Quote Conversion** - Premier converts recommendation to quote with pricing
  7. **Job Assignment** - Premier creates job from quote, assigns installers, deducts stock
  8. **Calendar View** - Blue (assessments) + Green (jobs), time-slot display
  9. **PDF Generation** - Simple template with line-item vs bulk pricing checkboxes
  10. **Mobile Job View** - Installer sees job details on phone
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## DELIVERABLES BY PHASE

### PHASE 1A (3 Days):

- ✓ Assessment scheduling + completion (mobile)
- ✓ Enquiry creation with files + notes
- ✓ VA Workspace with assigned enquiries
- ✓ Recommendation creation from enquiry
- ✓ Quote creation with PDF options
- ✓ Job assignment from quote
- ✓ Calendar (assessments + jobs, color-coded, time slots)
- ✓ Basic inventory (add/subtract, show during quoting)
- ✓ Salesforce-style dashboard
- ✓ NO authentication, NO emails, NO RBAC

### PHASE 1B (1 Week, Post-Testing):

- ✓ Authentication (Supabase Auth)
- ✓ RBAC (VA can't see pricing, restricted access)
- ✓ Email notifications (enquiry assigned, assessment scheduled, etc.)
- ✓ Installer availability checking
- ✓ Mobile job completion form (placeholder in Phase 1A)
- ✓ Advanced PDF templates
- ✓ Settings pages

## PHASE 2 (After Approval):

- ✓ GHIL Integration (appointment booking, sync)
  - ✓ Calendar drag-drop
  - ✓ Full automation
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## DATABASE CHANGES REQUIRED

### New Tables:

- `team_members` (replaces sales\_reps)
- `assessments` (assessment events)
- `assessment_assignments` (assignment history)
- `assessment_photos` (uploaded photos)

### Modified Tables:

- `enquiries` - Add: premier\_notes, attached\_files (JSONB), assessment\_id, sent\_to\_va, assigned\_va\_user\_id

### No Changes:

- clients, products, quotes, jobs, stock\_levels, regions, application\_types
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## PAGE STRUCTURE (9 Core Pages)

1. `/assessments` - List with create, view, detail
2. `/assessments/[id]/complete` - Mobile form (installers)
3. `/enquiries/new` - Create with optional assessment + files
4. `/va-workspace` - Show assigned enquiries
5. `/va-workspace/new?enquiry_id=XXX` - Create recommendation
6. `/quotes/new` - Updated with PDF checkboxes
7. `/calendar` - Week/month view, color-coded, time slots
8. `/jobs/new` or `/jobs/from-quote/[id]` - Create job

### 3-DAY TIMELINE BREAKDOWN

**Day 1: Foundation (8 hours)**

- Database migrations + mock data
- Assessment pages (create, list, detail)
- Mobile assessment form + photo upload
- Enquiry updates (notes, files, attachment)

**Day 2: Workflow (8 hours)**

- VA Workspace rebuild
- Recommendation creation form
- Calendar view (week/month, time slots)
- Integration testing

**Day 3: Jobs & PDF (8 hours)**

- Job assignment from quote
  - Mobile job view
  - PDF generation (line-item vs bulk)
  - Stock deduction + final testing
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### MOCK TEAM DATA CREATED

Name	Role	Email
James Thompson	Installer	<a href="mailto:james.thompson@premier.co.nz">james.thompson@premier.co.nz</a>
Mike Chen	Installer	<a href="mailto:mike.chen@premier.co.nz">mike.chen@premier.co.nz</a>
Sarah Williams	Installer	<a href="mailto:sarah.williams@premier.co.nz">sarah.williams@premier.co.nz</a>
David Garcia	Sales Rep	<a href="mailto:david.garcia@premier.co.nz">david.garcia@premier.co.nz</a>
Emma Johnson	Sales Rep	<a href="mailto:emma.johnson@premier.co.nz">emma.johnson@premier.co.nz</a>
Robert Sullivan	Sales Rep	<a href="mailto:robert.sullivan@premier.co.nz">robert.sullivan@premier.co.nz</a>

Name	Role	Email
Lisa Anderson	Receptionist	<a href="mailto:lisa.anderson@premier.co.nz">lisa.anderson@premier.co.nz</a>
Percy Darbhana	Admin	<a href="mailto:percy.darbhana@premier.co.nz">percy.darbhana@premier.co.nz</a>

## NEXT STEPS

1. ☒ **Review this plan** - Any changes needed?
2. ☒ **Approve database changes** - Ready to create tables?
3. ☒ **Start Day 1** - Begin with team\_members migration + assessments table?

Ready to begin implementation? 🚀