

PREMIER INSULATION - PHASE 1A & 1B COMPREHENSIVE IMPLEMENTATION PLAN




Updated: December 5, 2025
Status: Ready for 3-Day MVP Implementation (Phase 1A) + 1-Week Enhancement (Phase 1B)
Owner: Sukumar + Claude AI
Scope Alignment: v2  + v3  + Post-Discussion Clarifications 

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EXECUTIVE SUMMARY

What This Plan Delivers:

Phase 1A (3 Days): Fully functional MVP with end-to-end workflow:

- Premier can schedule free assessments for customers
- Installers can complete assessments on mobile (photos + measurements)
- Premier can create enquiries (with optional assessment attachment + notes + files)
- Premier can assign enquiries to VAs
- VAs can create product recommendations from enquiries
- Premier can convert recommendations to quotes

- Basic calendar showing assessments + jobs (color-coded)
- One simple PDF quote generation (with line-item vs bulk pricing checkboxes)
- Basic inventory: Add/Subtract stock, stock visibility during quoting
- **NO authentication, NO emails, NO RBAC** (everything has full access)

Phase 1B (Following Week): User testing preparation:

- Authentication (Supabase Auth) + RBAC for VA vs Premier
- Email notifications (Resend)
- Installer availability checking
- Mobile job completion form template (placeholder)
- Advanced PDF templates
- Settings pages

Phase 2 (After Approval): GHL Integration:

- Calendar appointment booking
- Bidirectional sync (GHL ↔ Supabase)
- Full automation

Key Alignment Points:

- ✓ **From v2:** Core enquiry → VA recommendation → quote → job flow
 - ✓ **From v3:** Installer assessment workflow + calendar + mobile
 - ✓ **From Discussion:** Assessment optional (not automatic), files + notes in enquiry, team/installer separation
 - ✓ **NEW:** Assessment assignment tracking, calendar with time slots, separate Team table
-

ARCHITECTURAL DECISIONS

Decision 1: Team Table Restructure

Current State:

`sales_reps` table (only for sales representatives)

New State:

`team_members` table (unified for all roles)

Rationale:

- Single source of truth for all staff
- Scalable for future roles (Field Supervisor, Office Manager, etc.)
- Easy role-based filtering
- Supports multiple roles per person (future expansion)

Table Structure:

```
sql

CREATE TABLE team_members (
  id UUID PRIMARY KEY DEFAULT uuid_generate_v4(),

  -- Personal info
  first_name TEXT NOT NULL,
  last_name TEXT NOT NULL,
  email TEXT UNIQUE NOT NULL,
  phone TEXT,

  -- Role/Designation
  role TEXT NOT NULL, -- 'Sales Rep', 'Installer', 'Receptionist', 'Admin'
  status TEXT DEFAULT 'active', -- 'active', 'on_leave', 'inactive'

  -- Contact & Assignment
  preferred_contact TEXT, -- 'email', 'phone', 'sms'
  available_start_date DATE,
  available_end_date DATE (nullable),

  -- Metadata
  hire_date DATE,
  created_at TIMESTAMP DEFAULT NOW(),
  updated_at TIMESTAMP DEFAULT NOW()
);

-- MOCK DATA for Phase 1A Testing:
-- 3 Installers: James Thompson, Mike Chen, Sarah Williams
-- 3 Sales Reps: David Garcia, Emma Johnson, Robert Sullivan
-- 1 Receptionist: Lisa Anderson
-- 1 Master Admin: Percy Darbhana
```

Migration Path:

1. Rename `sales_reps` → `team_members`
 2. Add `role` column, populate with 'Sales Rep'
 3. Add new team members with appropriate roles
 4. Update all FK references from `sales_rep_id` → `team_member_id`
-

Decision 2: Assessment Assignment Structure

Data Model:

assessments (the assessment job/event)

- |
- ├─ enquiry_id (optional FK - links to enquiry if created from one)
- ├─ assigned_installer_id (FK to team_members WHERE role = 'Installer')
- ├─ scheduled_date
- ├─ scheduled_time (hh:mm format)
- ├─ status
- └─ photos (in separate assessment_photos table)

assessment_assignments (tracks assignment history)

- ├─ assessment_id (FK)
- ├─ assigned_installer_id (FK to team_members)
- ├─ assigned_date
- ├─ scheduled_date
- ├─ scheduled_time
- ├─ status (Scheduled, Completed, Cancelled)
- ├─ completed_at
- └─ notes

Why Two Tables?

- Tracks reassignment history (audit trail)
- Supports Phase 1B installer availability checking
- Single assessment can be reassigned without data loss
- Scales for future features (multi-inspector assessments, etc.)

Phase 1A Usage: Simple 1-to-1 assignment (one installer per assessment)

Phase 1B Usage: Can reassign, check availability before assigning

Decision 3: Calendar Data Model

Calendar shows both:

- **Assessments** (Blue) - scheduled assessments from `assessment_assignments`
- **Jobs** (Green) - scheduled jobs from `jobs` table

Fields needed:

assessments:

└─ scheduled_date DATE

└─ scheduled_time TIME

└─ assigned_installer_id

jobs:

└─ scheduled_date DATE

└─ scheduled_time TIME (nullable for now)

└─ assigned_installer_id (or crew_id)

Phase 1A: Display only, no drag-drop

Phase 2: Drag-drop to reschedule, GHL sync

PHASE 1A: 3-DAY MVP

OBJECTIVE:

Deliver a fully functional working application that Premier staff can test end-to-end, providing complete visibility into: Assessment scheduling → Customer enquiry → VA recommendation → Quote generation → Job assignment.

TIMELINE:

Day 1: Assessment & Enquiry Foundation (8 hours)

- Database migrations (team_members, assessments, assessment_assignments, assessment_photos)
- Assessment list page (`/assessments`)
- Assessment create page (`/assessments/new`)
- Mobile assessment form (`/assessments/[id]/complete`)
- Photo upload to Supabase Storage

- Enquiry list page (updated)
- Enquiry create/detail pages (updated with notes + file attachment)

Day 2: VA Workspace & Calendar (8 hours)

- VA Workspace rebuild (`/va-workspace`)
- Enquiry assignment to VA functionality
- VA Recommendation form (`/va-workspace/new`)
- Simple calendar view (`/calendar`) with assessments + jobs
- Link assessment → enquiry → recommendation flow

Day 3: Jobs, Stock, & PDF (8 hours)

- Job assignment from quote (`/jobs/assign/[id]`)
 - Mobile job view (`/jobs/mobile/[id]`)
 - Stock deduction on job assignment
 - Simple quote PDF generator
 - Line-item vs Bulk pricing checkboxes on quote page
 - Integration testing + bug fixes
-

PHASE 1B: POST-MVP ENHANCEMENTS

Timeline: Following Week (5 days, not continuous)

Features:

1. Authentication (Supabase Auth)

- Login page
- Session management
- Password reset flow

2. RBAC (Role-Based Access Control)

- VA: Can only access VA Workspace, cannot see pricing
- Premier: Full access except settings
- Admin: Everything including settings

- Receptionist: Customers, assessments, calendar (read-only)

3. Email Notifications

- Enquiry assigned to VA → Send email
- Assessment scheduled → Send email to installer
- Assessment completed → Send email to Premier
- Quote ready → Send email to customer

4. Installer Availability Checking

- When assigning assessment or job to installer
- Query: Is installer already assigned on that date/time?
- Show warning if conflict exists (allow override)

5. Mobile Job Completion

- Installer template form (/jobs/mobile/[id]/complete)
- Photo upload
- Material tracking (actual vs quoted)
- Mark job complete
- Status updates in main system

6. Advanced PDF Templates

- Template A: Detailed line-item pricing
- Template B: Summary bulk pricing
- Both on one PDF
- Company branding/logo

7. Settings Pages

- Application types management
 - Pricing tiers configuration
 - Quote templates
 - System settings (GST, waste %, default labour rate)
-

DATABASE SCHEMA CHANGES

NEW TABLES (Phase 1A):

1. team_members (replaces sales_reps)

sql

```
CREATE TABLE team_members (  
  id UUID PRIMARY KEY DEFAULT uuid_generate_v4(),  
  
  -- Personal info  
  first_name TEXT NOT NULL,  
  last_name TEXT NOT NULL,  
  email TEXT UNIQUE NOT NULL,  
  phone TEXT,  
  
  -- Role/Designation  
  role TEXT NOT NULL DEFAULT 'Sales Rep',  
  -- Values: 'Sales Rep', 'Installer', 'Receptionist', 'Admin', 'Manager'  
  
  -- Status  
  status TEXT DEFAULT 'active',  
  -- Values: 'active', 'on_leave', 'inactive'  
  
  -- Contact preference  
  preferred_contact TEXT DEFAULT 'email',  
  -- Values: 'email', 'phone', 'sms'  
  
  -- Availability dates  
  available_start_date DATE,  
  available_end_date DATE,  
  
  -- Employment dates  
  hire_date DATE,  
  
  -- Metadata  
  created_at TIMESTAMP DEFAULT NOW(),  
  updated_at TIMESTAMP DEFAULT NOW()  
);  
  
CREATE INDEX idx_team_members_role ON team_members(role);  
CREATE INDEX idx_team_members_email ON team_members(email);  
CREATE INDEX idx_team_members_status ON team_members(status);
```

MOCK DATA:

```
sql

-- Installers
INSERT INTO team_members (first_name, last_name, email, phone, role, hire_date)
VALUES
  ('James', 'Thompson', 'james.thompson@premier.co.nz', '021-555-0101', 'Installer', '2023-01-15'),
  ('Mike', 'Chen', 'mike.chen@premier.co.nz', '021-555-0102', 'Installer', '2023-03-20'),
  ('Sarah', 'Williams', 'sarah.williams@premier.co.nz', '021-555-0103', 'Installer', '2024-06-10');

-- Sales Reps
INSERT INTO team_members (first_name, last_name, email, phone, role, hire_date)
VALUES
  ('David', 'Garcia', 'david.garcia@premier.co.nz', '021-555-0201', 'Sales Rep', '2022-08-01'),
  ('Emma', 'Johnson', 'emma.johnson@premier.co.nz', '021-555-0202', 'Sales Rep', '2023-05-12'),
  ('Robert', 'Sullivan', 'robert.sullivan@premier.co.nz', '021-555-0203', 'Sales Rep', '2024-01-09');

-- Receptionist
INSERT INTO team_members (first_name, last_name, email, phone, role, hire_date)
VALUES
  ('Lisa', 'Anderson', 'lisa.anderson@premier.co.nz', '021-555-0301', 'Receptionist', '2023-09-01');

-- Master Admin
INSERT INTO team_members (first_name, last_name, email, phone, role, hire_date)
VALUES
  ('Percy', 'Darbhana', 'percy.darbhana@premier.co.nz', '021-555-0401', 'Admin', '2020-01-01');
```

2. assessments

```
sql
```

```

CREATE TABLE assessments (
  id UUID PRIMARY KEY DEFAULT uuid_generate_v4(),

  -- Reference
  reference_number TEXT UNIQUE NOT NULL,
  -- Format: "ASS-2025-001"

  -- Enquiry link (optional)
  enquiry_id UUID REFERENCES enquiries(id) ON DELETE SET NULL,

  -- Customer info
  customer_name TEXT NOT NULL,
  customer_email TEXT,
  customer_phone TEXT,

  -- Location
  site_address TEXT NOT NULL,
  city TEXT,
  region_id UUID REFERENCES regions(id),
  postcode TEXT,

  -- Scheduling
  scheduled_date DATE NOT NULL,
  scheduled_time TIME NOT NULL,
  -- Format: "14:00" (2pm)

  -- Assignment
  assigned_installer_id UUID REFERENCES team_members(id),
  -- Only team_members WHERE role = 'Installer'

  -- Metadata
  status TEXT DEFAULT 'Scheduled',
  -- Values: 'Scheduled', 'In Progress', 'Completed', 'Cancelled'

  notes TEXT,
  -- Premier notes when scheduling

  created_by_premier_user_id UUID,
  created_at TIMESTAMP DEFAULT NOW(),
  completed_at TIMESTAMP,

  updated_at TIMESTAMP DEFAULT NOW()
);

```

```
CREATE INDEX idx_assessments_reference ON assessments(reference_number);  
CREATE INDEX idx_assessments_enquiry ON assessments(enquiry_id);  
CREATE INDEX idx_assessments_assigned_installer ON assessments(assigned_installer_id);  
CREATE INDEX idx_assessments_status ON assessments(status);  
CREATE INDEX idx_assessments_scheduled_date ON assessments(scheduled_date);
```

3. assessment_assignments (tracks reassignment history)

sql

```

CREATE TABLE assessment_assignments (
  id UUID PRIMARY KEY DEFAULT uuid_generate_v4(),

  -- Link to assessment
  assessment_id UUID REFERENCES assessments(id) ON DELETE CASCADE NOT NULL,

  -- Who assigned it
  assigned_by_user_id UUID,

  -- Who it's assigned to
  assigned_installer_id UUID REFERENCES team_members(id),

  -- When assigned
  assigned_date TIMESTAMP DEFAULT NOW(),

  -- Scheduled for when
  scheduled_date DATE NOT NULL,
  scheduled_time TIME NOT NULL,

  -- Status of this assignment
  status TEXT DEFAULT 'Scheduled',
  -- Values: 'Scheduled', 'Completed', 'Cancelled', 'Reassigned'

  -- When completed
  completed_at TIMESTAMP,

  notes TEXT,

  created_at TIMESTAMP DEFAULT NOW()
);

CREATE INDEX idx_assessment_assignments_assessment ON assessment_assignments(assessment_id);
CREATE INDEX idx_assessment_assignments_installer ON assessment_assignments(assigned_installer_id);
CREATE INDEX idx_assessment_assignments_scheduled_date ON assessment_assignments(scheduled_date);

```

4. assessment_photos

```
sql
```

```
CREATE TABLE assessment_photos (  
  id UUID PRIMARY KEY DEFAULT uuid_generate_v4(),  
  
  assessment_id UUID REFERENCES assessments(id) ON DELETE CASCADE NOT NULL,  
  
  -- Storage location  
  photo_url TEXT NOT NULL,  
  -- URL from Supabase Storage  
  
  photo_key TEXT NOT NULL,  
  -- Reference for deletion: "assessments/ASS-2025-001/photo1.jpg"  
  
  -- Photo metadata  
  photo_type TEXT,  
  -- Values: 'Before', 'After', 'Detail', 'Overall', 'Issue', etc.  
  
  description TEXT,  
  
  uploaded_by TEXT,  
  -- Installer name or user ID  
  
  uploaded_at TIMESTAMP DEFAULT NOW()  
);  
  
CREATE INDEX idx_assessment_photos_assessment ON assessment_photos(assessment_id);
```

MODIFIED TABLES (Phase 1A):

1. enquiries - Add Fields

```
sql
```

ALTER TABLE enquiries **ADD COLUMN IF NOT EXISTS:**

-- Notes from Premier when creating enquiry

premier_notes **TEXT**,

-- File attachments (building plans, assessment reports, etc.)

attached_files **JSONB**,

-- Format: [{"filename": "floor_plan.pdf", "url": "storage_url", "key": "storage_key"}]

-- Optional assessment link

assessment_id **UUID REFERENCES** assessments(id) **ON DELETE SET NULL**,

-- Track if sent to VA

sent_to_va **BOOLEAN DEFAULT FALSE**,

sent_to_va_date **TIMESTAMP**,

-- Assigned VA

assigned_va_user_id **UUID**,

-- Status values updated to include more states

-- OLD: 'submitted', 'with_va', 'va_completed', 'quote_generated', 'archived'

-- NEW: Add 'sent_to_va' state auto-triggered when sent

2. assessments - Update References

sql

-- Any foreign keys to sales_reps should be updated to team_members

-- Example: quotes.sales_rep_id → team_members.id

-- Example: jobs.assigned_installer_id → team_members.id

EXISTING TABLES - No Changes Needed:

- **clients** - Use as-is
- **products** - Use as-is
- **quotes** - Already supports pricing tiers + PDF options
- **jobs** - Already has structure, may add scheduled_time

- `stock_levels` - Use as-is
 - `regions` - Use as-is
 - `application_types` - Use as-is
-

COMPLETE WORKFLOW

Workflow 1: Assessment Scheduling

1. Premier User → Clicks "Schedule Assessment" (new button in Sidebar)
↓
2. Premier fills form:
 - Customer name, email, phone
 - Site address, region
 - Preferred date & time
 - Notes (optional)
 - Select installer from dropdown (only role='Installer')↓
3. System creates:
 - assessments record
 - assessment_assignments record↓
4. Assessment appears in Calendar (Blue block)
↓
5. Installer gets notification (Phase 1B)

Pages involved:

- `/assessments/new` → Create form
 - `/calendar` → View scheduled
-

Workflow 2: Assessment Completion (Mobile)

1. Installer → Accesses app on mobile (responsive Vercel site)
↓
2. Installer clicks "My Assessments"
↓
3. Sees list of assigned assessments (filtered by installer_id)



4. Clicks assessment → Opens mobile form at `/assessments/[id]/complete`



5. Fills structured form:

- Site access details (dropdowns)
- Existing insulation (checkboxes)
- Area measurements (number inputs, multiple sections)
- Photos (camera + upload)
- Notes (textarea)
- Special requirements



6. Clicks "Mark Complete"



7. System:

- Uploads photos to Supabase Storage
- Creates assessment_photos records
- Updates assessments.status → 'Completed'
- Updates assessment_assignments.status → 'Completed'
- Sets assessment_assignments.completed_at



8. Premier sees assessment marked "Completed"

Pages involved:

- `/assessments` → List (installers view)
- `/assessments/[id]/complete` → Mobile form

Workflow 3: Enquiry Creation (with Optional Assessment)

1. Premier User → Clicks "Create Enquiry"



2. Premier fills form:

OPTION A: From existing assessment

- Select completed assessment from dropdown
- System pre-fills: Customer, address, region
- Premier adds: Notes, additional files

OPTION B: New enquiry without assessment

- Manually enter: Customer, address, region
- Premier adds: Notes, files



3. Premier can upload files:

- Building plans
- Photos
- Assessment reports
- Any other supporting documents



4. Premier selects: Assign to VA (dropdown of role='VA' users)



5. Premier clicks "Create & Assign to VA"



6. System:

- Creates enquiries record
- Sets sent_to_va = TRUE
- Sets assigned_va_user_id
- Sets status = 'with_va'
- Sends email to VA (Phase 1B)



7. VA sees enquiry in their workspace

Pages involved:

- </enquiries/new> → Create form (updated)
- </enquiries> → List
- [/enquiries/\[id\]](/enquiries/[id]) → Detail with file viewer

Workflow 4: VA Creates Recommendation

1. VA logs in → Sees "My Assigned Enquiries"



2. VA clicks enquiry → Pre-populated with:

- Customer info (readonly)
- Assessment data (if attached)
- Notes from Premier
- Attached files



3. VA creates recommendation:

- Adds sections (application types)
- Searches products (fuzzy search)
- Inputs areas

- Auto-calculates packs
- Adds notes per section
- NO PRICING VISIBLE



4. VA clicks "Submit for Review"



5. Premier sees submitted recommendation



6. Premier can:

- View recommendation
- Convert to quote (with pricing)
- Send back to VA for changes

Pages involved:

- `/va-workspace` → List of assigned enquiries
- `/va-workspace/[id]` → View recommendation
- `/va-workspace/new?enquiry_id=XXX` → Create recommendation

Workflow 5: Quote Creation & PDF

1. Premier → Clicks "Create Quote from Recommendation" (or direct quote)



2. Form pre-filled with:

- Customer details
- Sections & products from recommendation
- Areas & quantities



3. Premier adds:

- Pricing tier (Retail/Trade/VIP/Custom)
- Labour rate (\$/m²)
- Custom pricing per line
- Discount



4. System calculates:

- Unit prices × qty = line totals
- Labour costs
- Subtotal, GST 15%, Total
- Margins %



5. Premier sees checkboxes:

- ☐ Include line-item pricing in PDF
- ☐ Use bulk pricing summary

(can check both for single combined PDF)



6. Premier clicks "Generate Quote PDF"



7. PDF generated:

- If line-item checked: Shows each product + price
- If bulk checked: Shows summary totals only
- Company header/footer
- T&Cs at bottom



8. Premier can download or email (Phase 1B)

Pages involved:

- </quotes/new> → Create quote (updated with checkboxes)
- [/quotes/from-recommendation/\[id\]](/quotes/from-recommendation/[id]) → Convert recommendation
- [/quotes/\[id\]](/quotes/[id]) → View + download PDF

Workflow 6: Job Assignment

1. Quote accepted by customer



2. Premier clicks "Create Job from Quote"



3. Form shows:

- Quote details (pre-filled)
- Customer info
- Products & quantities
- Estimated costs



4. Premier fills:

- Scheduled date & time
- Assign lead installer
- Assign crew (up to 4 total)
- Notes



5. Premier can check stock:

- Current stock shown for each product
- Warnings if low (Phase 1B: can't proceed)
- For Phase 1A: Just show, warn, allow override



6. Premier clicks "Confirm Job"



7. System:

- Creates jobs record
- Deducts stock from stock_levels
- Adds to Calendar (Green block)
- Sends notification to installers (Phase 1B)



8. Job appears in Calendar

Pages involved:

- </jobs/new> OR [/jobs/from-quote/\[id\]](/jobs/from-quote/[id]) → Create job
- </calendar> → View scheduled job

Workflow 7: Installer Completes Job (Mobile)

1. Installer → Clicks "My Jobs" on mobile



2. Sees assigned jobs with details:

- What to install (products)
- Where (sections)
- How much (bales required)



3. Installer clicks job → Opens `/jobs/mobile/[id]/complete``



4. On-site form includes:

- Before photos
- Section checklist
- Actual materials used (vs quoted)
- After photos
- Notes



5. Marks job complete



6. System:

- Updates job.status → 'Completed'

- Adjusts stock based on actual usage
- Preps for invoicing

Pages involved:

- `/jobs/mobile/[id]` → View job details
 - `/jobs/mobile/[id]/complete` → Completion form (Phase 1B template)
-

Workflow 8: Calendar View

System queries both tables:

- assessments + assessment_assignments
- jobs

Displays unified calendar:

- Blue blocks: Assessment (date + time + installer name)
- Green blocks: Job (date + time + installer/crew)

Timeline: Month/Week view with time slots

Click event → View/edit details modal (Phase 1A: view only)

Pages involved:

- `/calendar` → Calendar view
-

PAGE STRUCTURE & SPECS

PAGE 1: Assessments List

Location: `/assessments/page.tsx`

Purpose: Premier sees all assessments, can create new, view details, mark complete

Layout:

FREE ASSESSMENTS						
[+ New] [Calendar]						
[Search: fuzzy on ref#, customer, address...] (30%)						
Ref#	Customer	Address	Date	Time		
Status	Installer	Actions				
ASS-001	John Smith	45 Smith St	2025-12-15	2:00pm		
✓ Comp	Mark And	[View][Reassign][Delete]				
ASS-002	Sarah Jones	120 Main Ave	2025-12-16	3:30pm		
🕒 Sched	James Tho	[View][Edit][Delete]				
< Previous [1] [2] [3] Next >						

Columns: Ref#, Customer, Site Address, Scheduled Date, Time, Assigned Installer, Status, Actions
Status Colors: Blue (Scheduled), Orange (In Progress), Green (Completed), Red (Cancelled)

PAGE 2: Create Assessment

Location: /assessments/new/page.tsx

Purpose: Premier schedules free assessment

Form Sections:

SECTION 1: CUSTOMER DETAILS

- └ Customer Name (text input) *
- └ Email (email input)
- └ Phone (tel input)
- └ Site Address (text input) *
- └ City (text input)
- └ Region (dropdown from regions table) *
- └ Postcode (text input)

SECTION 2: ASSESSMENT SCHEDULING

- └ Preferred Date (date picker) *
- └ Preferred Time (time picker: hh:mm format) *
- └ Assign Installer (dropdown - only role='Installer') *
- └ Notes (textarea - optional)

ACTIONS:

[Save as Draft] [Schedule Assessment]

PAGE 3: Mobile Assessment Form

Location: `/assessments/[id]/complete/page.tsx`

Purpose: Installer completes assessment on mobile

Mobile-Optimized Form:

HEADER

- └─ Assessment: ASS-2025-001
- └─ Customer: John Smith
- └─ Address: 45 Smith St, Auckland
- └─ Scheduled: 15 Dec 2025, 2:00 PM

SECTION 1: SITE ACCESS

- └─ Site Access Type (dropdown)
 - | Options: Easy, Moderate, Difficult, Extremely Difficult
- └─ Crawl Space Height (number input, cm)
- └─ Access Notes (textarea)

SECTION 2: EXISTING INSULATION

- └─ Existing Insulation? (checkboxes)
 - | ☐ None
 - | ☐ Bulk Insulation (wool/polyester)
 - | ☐ Foil/Reflective
 - | ☐ Spray Foam
 - | ☐ Mixed
- └─ Condition (dropdown)
 - | Options: Excellent, Good, Fair, Poor, Damaged
- └─ Removal Required? (radio: Yes/No)
- └─ Estimated removal area (m²)

SECTION 3: AREAS & MEASUREMENTS

- └─ [+ Add Area]
 - |
 - └─ Area 1: External Walls
 - | └─ Width (m): [_____]
 - | └─ Height (m): [_____]
 - | └─ Total m²: [calculate]
 - | └─ Notes: [_____]
 - | └─ [Remove]
 - |
 - └─ Area 2: Roof/Ceiling
 - | └─ Length (m): [_____]
 - | └─ Width (m): [_____]
 - | └─ Total m²: [calculate]
 - | └─ [Remove]
 - |
 - └─ [+ Add Another Area]

SECTION 4: PHOTOS

- └─ Overall site photo (camera/upload)
- └─ Existing insulation photo (camera/upload)
- └─ Any issues/hazards photo (camera/upload)
- └─ [+ Add More Photos]

SECTION 5: SPECIAL REQUIREMENTS

- └─ Special requirements (textarea)
- └─ Safety hazards (textarea)
- └─ Access restrictions (textarea)

SECTION 6: TIME ESTIMATE

- └─ Estimated installation time (hours)

ACTIONS:

[Save Draft] [Mark Complete]

Mobile Considerations:

- Large touch targets (min 44×44px)
- Auto-upload photos (not wait for form submission)
- Progress indicator
- Works offline (cache photo, submit when online)

PAGE 4: Enquiry Create/Edit

Location: `/enquiries/new/page.tsx` (updated)

Purpose: Premier creates enquiry from assessment or standalone

Form Structure:

CREATE ENQUIRY

STEP 1: SELECT SOURCE

From existing assessment (dropdown)

Manual entry (new enquiry)

STEP 2: CUSTOMER DETAILS

Customer Name (text) *

Email (email)

Phone (tel)

Site Address (text) *

City (text)

Region (dropdown) *

Postcode (text)

STEP 3: ENQUIRY DETAILS

Premier Notes (textarea - optional)

"Job requires asbestos removal, client requested eco-friendly materials"

Attach Assessment (checkbox)

☐ Link completed assessment ASS-2025-001

(only shows if Step 1 = From assessment)

Supporting Files (upload)

[+ Add File] → Building plans, photos, reports

Files attached:

floor_plan.pdf (2.3 MB) [View] [Delete]

assessment_report.pdf (1.1 MB) [View] [Delete]

site_photo.jpg (3.8 MB) [View] [Delete]

Due Date (date picker - optional)

STEP 4: ASSIGN TO VA

Assign VA (dropdown) *

[Select VA...]

ACTIONS:

[Save as Draft] [Create & Send to VA]

Files handling:

- Upload to Supabase Storage
- Store metadata in enquiries.attached_files (JSONB array)
- Display in enquiry detail for VA to view

On Submit:

- Set `sent_to_va = TRUE`
 - Set `assigned_va_user_id`
 - Set `status = 'with_va'`
 - Trigger email to VA (Phase 1B)
-

PAGE 5: VA Workspace

Location: `/va-workspace/page.tsx` (rebuilt)

Purpose: VA sees assigned enquiries, creates recommendations

Layout:

PRODUCT RECOMMENDATIONS

[+ New]

[Search...] (30%)

STATS CARDS:

Total: 15

Draft: 3

Submitted: 8

(blue left bar)

(gray bar)

(blue bar)

FILTER BUTTONS (not dropdowns):

[All] [Draft] [Submitted] [Awaiting Review]

SECTION 1: MY ASSIGNED ENQUIRIES

From Premier - waiting for recommendation

Enquiry #001 | John Smith | 45 Smith St |

Assigned: 3 days ago | Due: 5 days ago

[CREATE RECOMMENDATION →]

Enquiry #002 | Sarah Jones | 120 Main Ave |

Assigned: 1 day ago | Due: 7 days from now

[CREATE RECOMMENDATION →]

SECTION 2: MY RECOMMENDATIONS

Rec#	Client	Address	Created	Status
R- 001	John Smith	45 Smith St	2025-12-10 .01	Draft
			[Edit]	
			[View]	
R- 002	Sarah Jones	120 Main Ave	2025-12-09	Submitted
			[View]	
			[Convert]	
			rt→]	

[< Previous](#)
[\[1\]](#)
[\[2\]](#)
[\[3\]](#)
[\[Next >\]](#)

Columns: Rec #, Client, Address, Created Date, Status, Actions

Status: Draft (yellow), Submitted (blue), Converted (green)

Actions: Edit (Draft only), View, [Convert →] (Submitted only)

PAGE 6: Create Recommendation

Location: /va-workspace/new/page.tsx?enquiry_id=XXX

Purpose: VA creates product recommendation from enquiry

Pre-populated from Enquiry:

- Customer name, email, phone (readonly)
- Site address, region (readonly)
- Assessment data (if attached)
- Premier's notes
- Attached files (downloadable)

Form Structure:

CREATE RECOMMENDATION: R-2025-001

CUSTOMER DETAILS (READ-ONLY)

Customer: John Smith

Address: 45 Smith St, Auckland 1010

[View Assessment] [View Attached Files]

Premier's Notes: "Job requires asbestos removal..."

SECTIONS & PRODUCTS

SECTION 1: EXTERNAL WALLS

External Walls ▼

[Remove Section]

Area: 89 m² (from assessment)

Products:

Product	Qty	Stock	Actions
R2.4 90mm	10	✓ OK	[Remove]
(fuzzy search)			
Waste: 10%, Bale: 8.81m ²			
<div>[Search product + add...]</div>			
<div></div>			
<div>[+ Add Product]</div>			

SECTION 2: ROOF

Roof (Custom) ▼

[Remove Section]

Custom section name: "Pitched Roof Area"

(Color code:

Orange

)

Area: m²

Products: (empty - add below)

[+ Add Product]

[+ Add Section]

ACTIONS:

[Save as Draft] [Submit for Review]

Product Search Features:

- Fuzzy search: "R2.4" or "90mm" or "Glasswool"
- Shows: SKU, Description, R-value, Bale size, Current stock
- Auto-calculates: Packs required = $\text{CEIL}((\text{area} \times (1 + \text{waste\%})) / \text{bale_size})$
- Stock status: ✓ In Stock, ⚠ Low Stock, ✖ Out of Stock

NO PRICING VISIBLE

PAGE 7: Calendar View

Location: `/calendar/page.tsx`

Purpose: Visual calendar of assessments + jobs

Layout:

CALENDAR

[Week ▼] [Month ▼]

Legend: ● Assessment | ● Job | ⚠ Conflict

WEEK VIEW:

MON 12/15

TUE 12/16

WED 12/17

THU 12/18

9am

10am

11am

12pm

2pm [ASS-001]

3pm

4pm

John Smith

Sarah Jones

Mark Anderson

James/Crew

[ASS-002]

Lisa Brown

Mike Chen

MONTH VIEW: (similar layout, full month grid)

FILTERS:

[All] [My Jobs] [My Assessments] [James] [Mike]...

Click assessment block → Modal with:

— ASS-001 | John Smith | 45 Smith St

— Date: Mon, 15 Dec 2025 | Time: 2:00 PM - 2:30 PM

— Assigned: Mark Anderson

— Status: Scheduled ✓ Complete

— [View Details] [Reassign] (Phase 1B)

— [Close]

Click job block → Modal with:

└─ JOB-005 | Sarah Jones | 120 Main Ave
└─ Date: Wed, 17 Dec 2025 | Time: 9:00 AM
└─ Quote: Q-2025-001
└─ Crew: James Thompson, Mike Chen
└─ Status: Scheduled
└─ [View Details] [Reschedule] (Phase 2)
└─ [Close]

Library: react-big-calendar

Views: Week/Month toggle

Colors:

- Blue: Assessments
- Green: Jobs
- Red border: Time conflicts (Phase 1B warning)

PAGE 8: Create Quote (Updated)

Location: `/quotes/new/page.tsx` (updated with checkboxes)

Purpose: Premier creates quote with pricing options

Additional Fields (added to existing form):

CREATE QUOTE

(existing fields...)

PDF OUTPUT OPTIONS:

☐ Include detailed line-item pricing in PDF

(shows each product + individual price)

☐ Use bulk pricing summary in PDF

(shows only totals, no individual prices)

Note: You can check both for a combined PDF

ACTIONS:

[Save as Draft] [Generate Quote PDF]

PDF Generation:

- Simple template (not fancy)
- Company header
- Client info
- Line items (with or without pricing based on checkboxes)
- Totals + GST
- T&Cs
- Signature line

PAGE 9: Dashboard (Salesforce-Style Mockup)

Location: /dashboard/page.tsx

Purpose: Overview of key metrics and quick actions

Layout:

[Refresh]

[Refresh]

[+ Create Job] [View Calendar] [Inventory]

[\[See All\]](#) | |


[\[See All\]](#) | |

[\[See All\]](#)

[\[See All\]](#)

| ASS-001 (Assessment)

		45 Smith St			
		Mark Anderson			
		17 Dec 9am			
		JOB-005 (Installation)			
		120 Main Ave			
		James Thompson + crew			
		[View Calendar]			

Colors: Salesforce blue ( #0066CC) for headers, consistent with brand

FILE STRUCTURE

New Files to Create (Phase 1A):

src/	
└─ app/	
├─ assessments/	
│ └─ page.tsx	← Assessment list
│ └─ new/	
│ │ └─ page.tsx	← Create assessment
│ │ └─ [id]/	
│ │ │ └─ page.tsx	← Assessment detail
│ │ └─ complete/	
│ │ │ └─ page.tsx	← Mobile form
└─ calendar/	
│ └─ page.tsx	← Calendar view
└─ enquiries/	
│ └─ page.tsx	← List (updated)
│ └─ new/	
│ │ └─ page.tsx	← Create/edit (updated)
│ │ └─ [id]/	
│ │ │ └─ page.tsx	← Detail (updated)
└─ va-workspace/	
│ └─ page.tsx	← VA dashboard (rebuilt)
│ └─ new/	
│ │ └─ page.tsx	← Create recommendation (rebuilt)

```
| | └─ [id]/
| |   └─ page.tsx      ← View recommendation (updated)
| | └─ quotes/
| |   └─ new/page.tsx  ← Updated with PDF checkboxes
| |   └─ from-recommendation/
| |     └─ [id]/
| |       └─ page.tsx  ← Convert recommendation
| |   └─ [id]/page.tsx ← Quote detail (add PDF download)
| | └─ jobs/
| |   └─ new/page.tsx  ← Create job
| |   └─ from-quote/
| |     └─ [id]/
| |       └─ page.tsx  ← Create job from quote
| |   └─ [id]/page.tsx ← Job detail
| |   └─ mobile/
| |     └─ [id]/
| |       └─ page.tsx  ← Mobile view
| |     └─ complete/
| |       └─ page.tsx  ← Mobile job form (Phase 1B placeholder)
| |   └─ assign/
| |     └─ [id]/
| |       └─ page.tsx  ← Job assignment page
| | └─ dashboard/
| |   └─ page.tsx      ← Dashboard (updated with new layout)
| |
| | └─ components/
| |   └─ AssessmentForm.tsx
| |   └─ QuoteCheckboxes.tsx
| |   └─ CalendarView.tsx
| |   └─ FileUploader.tsx
| |   └─ PdfGenerator.tsx
| |   └─ (existing components stay)
| |
| | └─ lib/
| |   └─ supabase.ts    ← Existing
| |   └─ pdfGenerator.ts ← New: PDF generation logic
| |   └─ calendar.ts    ← New: Calendar utilities
| |   └─ assessmentUtils.ts ← New: Assessment calculations
```

IMPLEMENTATION TIMELINE

DAY 1: FOUNDATION (8 hours)

Hours 0-1: Database Setup

- Create team_members table (migrate from sales_reps)
- Create assessments table
- Create assessment_assignments table
- Create assessment_photos table
- Update enquiries table (add notes, files, assessment_id, sent_to_va fields)
- Insert mock data

Hours 1-3: Assessment Pages

- `/assessments/page.tsx` - List with search, sort, pagination
- `/assessments/new/page.tsx` - Create form
- `/assessments/[id]/page.tsx` - Detail view

Hours 3-5: Mobile Assessment Form

- `/assessments/[id]/complete/page.tsx` - Mobile form with photo upload
- Supabase Storage integration for photos
- Test on mobile browser

Hours 5-7: Enquiry Updates

- Update `/enquiries/new/page.tsx` - Add notes, file upload, assessment link
- Update `/enquiries/page.tsx` - Show attached files
- Update `/enquiries/[id]/page.tsx` - File viewer + notes display

Hours 7-8: Testing & Bug Fixes

- Assessment creation → completion flow
 - File uploads working
 - Mobile responsive design
-

DAY 2: WORKFLOW (8 hours)

Hours 0-2: VA Workspace Rebuild

- `/va-workspace/page.tsx` - Show assigned enquiries + my recommendations
- Stats cards, filters, pagination
- Link assessment data

Hours 2-4: Recommendation Creation

- `/va-workspace/new/page.tsx?enquiry_id=XXX` - Create form
- Pre-populate client data from enquiry
- Product search + pack calculation
- Show assessment data

Hours 4-6: Calendar View

- `/calendar/page.tsx` - Week/Month view
- Color-coded assessments (blue) + jobs (green)
- Time slots display
- Click to view details

Hours 6-8: Integration Testing

- Assessment → Enquiry → Recommendation flow
 - Calendar sync
 - Mobile responsiveness
 - Bug fixes
-

DAY 3: JOBS & PDF (8 hours)

Hours 0-2: Job Assignment

- `/jobs/new/page.tsx` OR `/jobs/from-quote/[id]/page.tsx`
- Form with date/time, installer selection
- Stock deduction logic

- Add to calendar

Hours 2-3: Mobile Job View

- `/jobs/mobile/[id]/page.tsx` - View job details
- `/jobs/mobile/[id]/complete/page.tsx` - Form placeholder (Phase 1B feature)

Hours 3-5: PDF Generation

- Create `/lib/pdfGenerator.ts` utility
- Simple PDF template (company header, client, line items, totals, GST, T&Cs)
- Line-item vs Bulk pricing logic
- Download functionality

Hours 5-6: Quote Updates

- Update `/quotes/new/page.tsx` - Add PDF checkboxes
- Update `/quotes/[id]/page.tsx` - Add PDF download button

Hours 6-8: Integration & Testing

- End-to-end: Quote → Job → PDF
- Stock management
- Calendar updates
- Final bug fixes + polish

SUMMARY

This comprehensive plan provides:

- ✓ **Clear architectural decisions** (Team table, Assessment assignment structure, Calendar)
- ✓ **Complete workflow documentation** (9 distinct workflows mapped)
- ✓ **Database schema** ready to implement
- ✓ **8 core pages + updates** to existing pages
- ✓ **3-day task breakdown** with hourly estimates
- ✓ **Phase 1B features** identified but not built
- ✓ **Mobile-first design** for installers

✓ **No authentication required** for Phase 1A

✓ **Salesforce-style dashboard** mockup

Ready to proceed with development.

Document Created: 2025-12-05

Next Step: Begin Day 1 implementation or confirm any changes needed