

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)

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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](/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]` → 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]` → 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- John 45 Smith St 2025- 2:00pm	
001 Smith 12-15	
✓ Comp Mark And [View][Reassign][Delete]	
ASS- Sarah 120 Main Ave 2025- 3:30pm	
002 Jones 12-16	
⏳ 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](/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 44x44px)
- 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	
<input type="radio"/> From existing assessment (dropdown)	
<input type="radio"/> 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)	
<input type="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- | John | 45 Smith St | 2025- | Draft

001 | Smith | | | | | |

.01 | | | | | | | |

| | | | | [Edit] | |

| | | | | [View] | |

R- | Sarah | 120 Main | 2025- | Subm

002 | Jones | Ave | 12-09 | itted

.01 | | | | | | | |

| | | | | [View] | |

| | | | | [Conve]

| | | | | rt→] | |

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: 8.81m² | | |

| | | |

| | | [Search product + add...] | | |

| | | |

| | | [+ Add Product] | | |

| | | |

| | | |

| └ 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] ----- [JOB-005]

| John ----- Sarah -----

| Smith ----- Jones -----

| Mark ----- James/Crew -----

| Anderson ----- ----- -----

| 3pm ----- [ASS-002] ----- -----

| ----- Lisa ----- -----

| ----- Brown ----- -----

| ----- Mike Chen ----- -----

| 4pm ----- ----- ----- -----

| 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:

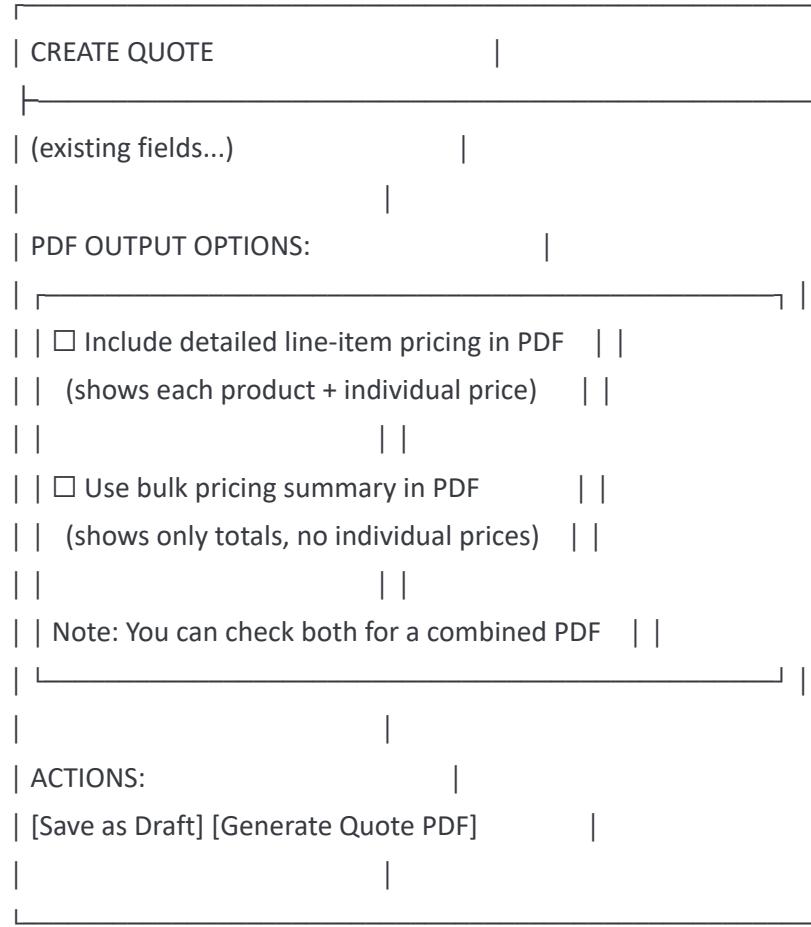
- Blue: Assessments
 - Green: Jobs
 - Red border: Time conflicts (Phase 1B warning)
-

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):



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:

DASHBOARD

[Refresh]

QUICK ACTIONS (Top Row):

[+ Schedule Assessment] [+ Create Enquiry] [+ Quote]

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

KEY METRICS (4 Columns):

Pending This Month Pipeline Comp

Enquiries Revenue Value Jobs

12 \$45,230 \$156,000 8

(blue bg) (green bg) (orange bg) (grn)

[View] [View] [View] [View]

RECENT ACTIVITY (Left 60%):

RECENT ASSESSMENTS

[See All]

ASS-001 | John Smith | Mark Anderson | ✓ Comp

ASS-002 | Sarah Jones | Mike Chen | ⏳ Scheduled

ASS-003 | Tom Brown | James Thompson | ⏳ Sch

RECENT QUOTES

[See All]

Q-2025-001 | Smith Residence | \$12,450 | Sent

Q-2025-002 | Jones Office | \$8,900 | Draft

PENDING VA WORK

3 enquiries awaiting recommendation

• Enquiry #001 - John Smith (assigned 2 days)

• Enquiry #002 - Sarah Jones (assigned 5 hours)

UPCOMING JOBS (Right 40%):

NEXT 7 DAYS

15 Dec | 2pm

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