

PREMIER INSULATION - PRE-IMPLEMENTATION CHECKLIST

Phase 1A 3-Day MVP - Ready to Build

☒ DOCUMENTS PREPARED

- ☒ **PREMIER_PHASE_1_COMPREHENSIVE_PLAN.md** - Full 100+ page implementation guide
 - ☒ **PHASE_1_SUMMARY.md** - Executive summary with alignment checklist
 - ☒ **PHASE_1A_DATABASE_MIGRATION.sql** - SQL migrations ready to execute
 - ☒ This checklist
-

☒ ARCHITECTURAL DECISIONS CONFIRMED

- ☒ Team table restructure (sales_reps → team_members with roles)
 - ☒ Two-table assessment model (assessments + assessment_assignments)
 - ☒ Assessment attachment optional (not automatic)
 - ☒ Files + notes in enquiry (stored in JSONB)
 - ☒ Calendar with time slots (week/month view)
 - ☒ Color-coded events (Blue=Assessment, Green=Job)
 - ☒ PDF checkboxes (Line-item vs Bulk pricing)
 - ☒ No authentication in Phase 1A
 - ☒ No email notifications in Phase 1A
 - ☒ No RBAC in Phase 1A (everyone full access)
-

☒ DATABASE READY

New Tables to Create:

- ☐ (from sales_reps migration)
- ☐
- ☐
- ☐

Tables to Modify:

- ☐ `enquiries` - Add: premier_notes, attached_files, assessment_id, sent_to_va, assigned_va_user_id

Mock Data to Insert:

- ☐ 3 Installers (James Thompson, Mike Chen, Sarah Williams)
 - ☐ 3 Sales Reps (David Garcia, Emma Johnson, Robert Sullivan)
 - ☐ 1 Receptionist (Lisa Anderson)
 - ☐ 1 Admin (Percy Darbhana)
-

☒ WORKFLOW DOCUMENTATION COMPLETE

All 10 workflows documented with step-by-step flows:

- ☒ Assessment Scheduling
 - ☒ Assessment Completion (Mobile)
 - ☒ Enquiry Creation (with optional assessment)
 - ☒ Enquiry to VA (send + assign)
 - ☒ VA Recommendation Creation
 - ☒ Quote Conversion
 - ☒ Job Assignment
 - ☒ Calendar Display
 - ☒ PDF Generation
 - ☒ Mobile Job View
-

☒ PAGE STRUCTURE COMPLETE

9 Core Pages Designed:

- ☒ `/assessments` - List + Create + Detail
- ☒ `/assessments/[id]/complete` - Mobile form
- ☒ `/enquiries/new` - Create with files + notes
- ☒ `/va-workspace` - Dashboard
- ☒ `/va-workspace/new?enquiry_id=XXX` - Recommendation form
- ☒ `/quotes/new` - Updated with PDF checkboxes
- ☒ `/calendar` - Week/Month view with time slots
- ☒ `/jobs/new` - Create job
- ☒ `/dashboard` - Salesforce-style mockup

Existing Pages Updated:

- ☒ `/enquiries/[id]` - File viewer + notes
 - ☒ `/quotes/[id]` - PDF download
 - ☒ `/va-workspace/page.tsx` - Rebuilt design
 - ☒ `/dashboard` - New layout
-



READY TO START DAY 1

Before You Begin:

1. Database Setup

- ☐ Have Supabase access ready
- ☐ Run `PHASE_1A_DATABASE_MIGRATION.sql`
- ☐ Verify new tables created
- ☐ Verify mock data inserted

2. Code Setup

- ☐ Latest code pulled from GitHub
- ☐ `npm install` complete
- ☐ Local dev running on `npm run dev`
- ☐ Supabase client configured at `src/lib/supabase.ts`

3. IDE Setup

- ☐ GitHub Copilot or similar AI coding assistant ready
 - ☐ Cursor IDE (recommended) or VS Code
 - ☐ All files are .tsx (TypeScript + JSX)
-



DAY 1 TASKS (8 hours)

Hours 0-1: Database Setup

- ☐ Execute SQL migration
- ☐ Verify tables + data
- ☐ Test Supabase connection

Hours 1-3: Assessment Pages

- ☐ Create `/assessments/page.tsx` (list view)

- ☐ Create `/assessments/new/page.tsx` (create form)
- ☐ Create `/assessments/[id]/page.tsx` (detail view)
- ☐ Test all three pages

Hours 3-5: Mobile Assessment Form

- ☐ Create `/assessments/[id]/complete/page.tsx`
- ☐ Integrate Supabase Storage for photo upload
- ☐ Test on mobile browser (iPhone/Android simulation)
- ☐ Test form submission

Hours 5-7: Enquiry Updates

- ☐ Update `/enquiries/new/page.tsx` - Add notes + file upload
- ☐ Update `/enquiries/page.tsx` - Show attached files
- ☐ Update `/enquiries/[id]/page.tsx` - File viewer
- ☐ Test file upload and display

Hours 7-8: Testing + Fixes

- ☐ Test end-to-end: Create assessment → Complete form → Create enquiry
 - ☐ Test mobile responsiveness
 - ☐ Fix bugs found
-



DAY 2 TASKS (8 hours)

Hours 0-2: VA Workspace Rebuild

- ☐ Rebuild `/va-workspace/page.tsx`
- ☐ Show assigned enquiries section
- ☐ Show my recommendations section
- ☐ Add stats cards + filters

Hours 2-4: Recommendation Creation

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

Hours 4-6: Calendar View

- ☐ Create `/calendar/page.tsx`
- ☐ Week/Month view with time slots
- ☐ Color-coded blocks (Blue=Assessment, Green=Job)
- ☐ Click to view details modal

Hours 6-8: Integration Testing

- ☐ Test assessment → enquiry → recommendation flow
 - ☐ Test calendar sync
 - ☐ Mobile responsiveness
 - ☐ Bug fixes
-



DAY 3 TASKS (8 hours)

Hours 0-2: Job Assignment

- ☐ Create `/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

- ☐ Create `/jobs/mobile/[id]/page.tsx` - View details
- ☐ Create `/jobs/mobile/[id]/complete/page.tsx` - Form placeholder

Hours 3-5: PDF Generation

- ☐ Create `/lib/pdfGenerator.ts` utility
- ☐ Simple PDF template
- ☐ Line-item vs Bulk pricing logic
- ☐ Test PDF generation

Hours 5-6: Quote Updates

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

Hours 6-8: Final Testing

- ☐ End-to-end: Quote → Job → PDF

- ☐ Stock management flow
 - ☐ Calendar updates
 - ☐ Bug fixes + polish
-

🌟 **STYLE STANDARDS (Follow Throughout)**

Design System:

- Primary blue: #0066CC (Salesforce blue)
- Font: Inter
- Search bar: 30% width
- Action buttons: Right-aligned
- Tables: Blue headers, sortable, white rows
- Modals: Center aligned, white background

Component Structure:

- All pages use 'use client' at top (client components)
- Import Supabase: import { supabase } from '@lib/supabase'
- Use absolute paths: @/lib, @/components
- Hover states on all interactive elements

Mobile First:

- Responsive design for all pages
 - Test on phone-sized screens (375px width)
 - Touch targets min 44×44px
-

🎯 **SUCCESS CRITERIA**

Phase 1A Complete When:

- ☒ All 9 core pages built + working
- ☒ Assessment workflow end-to-end

- ☒ Enquiry to VA assignment working
- ☒ VA can create recommendations
- ☒ Premier can create quotes with PDF options
- ☒ Jobs can be created from quotes
- ☒ Calendar shows assessments + jobs
- ☒ Stock deduction working
- ☒ Mobile forms responsive
- ☒ No major bugs blocking workflows

Recommended:

- ☐ Dashboard updated with Salesforce style
 - ☐ All pages have proper error handling
 - ☐ Loading states on async operations
 - ☐ Pagination working on all list pages
 - ☐ Search/fuzzy search working on all lists
-



TESTING CHECKLIST

Desktop Testing (Chrome)

- ☐ All pages load without errors
- ☐ Forms submit successfully
- ☐ Search/filter working
- ☐ Pagination working
- ☐ Tables sortable
- ☐ Modals open/close

Mobile Testing (Phone Browser)

- ☐ Assessment form fills easily
- ☐ Camera upload works
- ☐ Photo preview shows
- ☐ Layout responsive
- ☐ Touch targets adequate (44×44px minimum)
- ☐ No horizontal scroll

Cross-Browser Testing

- ☐ Chrome ☒

- ☐ Safari ✓
- ☐ Firefox ✓
- ☐ Mobile Safari (iPhone) ✓
- ☐ Chrome Mobile (Android) ✓

Data Flow Testing

- ☐ Create Assessment → View in List ✓
 - ☐ Complete Assessment → Status updates ✓
 - ☐ Create Enquiry → Appears in VA Workspace ✓
 - ☐ Create Recommendation → Premier sees it ✓
 - ☐ Create Quote → PDF generates ✓
 - ☐ Create Job → Stock deducts ✓
 - ☐ Calendar shows all events ✓
-



DELIVERY ARTIFACTS

At End of Day 3:

1. Working Application

- Deployed to Vercel (or local working)
- All 9 pages functional
- All workflows tested

2. Documentation

- This implementation plan
- Database schema
- SQL migration file
- API documentation (if needed)

3. For User Testing


- Test credentials (if auth added early)
 - Test data already in system
 - User guide for each workflow
 - Known limitations list
-

QUESTIONS BEFORE STARTING?

Review this document with your team:

- ☐ Any pages unclear?
- ☐ Any workflows need clarification?
- ☐ Any design decisions to question?
- ☐ Any technical concerns?

If all clear → Ready to build! 

Document Created: December 5, 2025
Status:  READY FOR IMPLEMENTATION
Timeline: 3 Days to MVP
Target: December 8, 2025