

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
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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)
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DATABASE READY

New Tables to Create:

- team_members** (from sales_reps migration)
- assessments**
- assessment_assignments**
- assessment_photos**

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)
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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
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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
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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)
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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
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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
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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
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✨ 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 44x44px
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🎯 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
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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 (44x44px 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 ✓
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🔗 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