Premier Insulation – Comprehensive Implementation Plan v3

Updated Architecture, Workflow, Phasing & WBS for Phase 1A, Phase 1B and Phase 2

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1. Executive Summary

Premier Insulation requires a functional internal application that replaces legacy systems and provides a unified workflow covering assessments, enquiries, VA recommendations, quotes, jobs, inventory checks, and reporting.

This v3 plan updates the previous Implementation Plan v2 and integrates newly defined workflows, especially:
• Installer mobile-friendly free assessment
• Assessment → Enquiry → VA Recommendation → Premier Quote
• Simple calendar module
• Mobile installer job completion
• Basic inventory checks (moved to Phase 1A)
• Consolidation of 3-day MVP (Phase 1A), follow-up work (Phase 1B), and GHL integration (Phase 2)

Nothing from v2 is deleted — all prior content is retained but reclassified under the new phase structure.

2. Phase 1A – 3■Day MVP Delivery

Phase 1A is the accelerated implementation delivering a working application for Premier Insulation to test and approve.
The goal is to achieve an end■to■end functional workflow without authentication, emails, or advanced UI polish.

2.1 Objectives

• Deliver a functional working app that Premier can test
• Implement installer assessment workflow (mobile-first)
• Implement enquiry updates + VA recommendation flow
• Implement simple calendar
• Implement job assignment and mobile job completion
• Implement basic inventory checks during quoting
• Provide simple PDF output

2.2 Scope & Deliverables

✓ Installer Free Assessment
✓ Assessment Photos Upload (Supabase Storage)
✓ Enquiry update to attach assessment
✓ VA Workspace updates to read assessment
✓ Recommendation creation flow
✓ Quote refinement (direct quote already exists)
✓ Basic inventory visibility in quoting
✓ Simple calendar (week/month)
✓ Job assignment + crew + scheduled date
✓ Mobile job view for installers
✓ Simple PDF template
✓ Dashboard mock-up

2.3 Screens & Modules

• /assessments (list)
• /assessments/new (create + schedule)
• /assessments/complete/[id] (installer mobile view)
• /enquiries updated to attach assessments
• /va-workspace updated to show assigned enquiries
• /va-workspace/new?enquiry_id={id} recommendation form
• /calendar
• /jobs/assign/[id]

- /jobs/mobile/[id]
- /quotes/new refinements
- Dashboard mock-up page

2.4 WBS

Day 1
1A■01 DB migrations for assessments + new fields
1A■02 Assessment list/create
1A■03 Mobile assessment completion workflow
1A■04 Photo uploads to Supabase

Day 2
1A■05 Enquiry updates
1A■06 VA workspace rebuild (essential parts only)
1A■07 Recommendation form
1A■08 Simple calendar view

Day 3
1A■09 Job assignment page
1A■10 Mobile job workflow
1A■11 Basic inventory check logic
1A■12 Simple PDF generator
1A■13 Integration testing

2.5 Dependencies

- Assessments must exist before enquiries can attach them
- Enquiry must be created before VA can recommend
- Recommendation must exist before quote refinement
- Quote must exist before job assignment
- Job must exist before installer mobile job view
- Basic stock data must exist before stock warnings

3. Phase 1B – Post■MVP Enhancements

Phase 1B focuses on stabilizing the MVP and adding the remaining core features that require more time, testing, or polish.

Phase 1B includes:
• Full PDF templates (2 versions)
• Email notifications (Resend + Edge Functions)
• Authentication (Supabase Auth)
• RBAC for VA / Premier / Admin
• Inventory UI + stock movements
• Purchase orders & supplier management
• Job reconciliation (actual vs quoted)
• UI polish + loading states + error handling
• Settings pages
• Expanded dashboard widgets & analytics

4. Phase 2 – GHL Integration

Phase 2 embeds the application into Premier's CRM (GHL).
It will involve synchronisation workflows and optionally SSO.

Deliverables for Phase 2:
• GHL → Supabase contact sync (n8n)
• Supabase → GHL opportunity + pipeline sync
• Job completion → GHL automations
• Embedding the app via iframe
• GHL-hosted appointment booking → Assessment schedule integration
• Contact + enquiry trigger automations
• PDF delivery via email
• Optional SSO for unified login

5. Mockups / Wireframes (ASCII)

5.1 Assessment – Installer Mobile View

```
+------------------------------------+
| Free Assessment – Installer |
+------------------------------------+
| Client: John Smith |
| Address: 52 Lake Road |
| |
| [Site Access] (dropdown) |
| [Crawl Space Height: ___ cm] |
| [Existing Insulation: dropdown] |
| [Removal Required: Yes/No] |
| |
| Areas: |
| + Add Section |
| |
| Photos: |
| [Take Photo] [Upload] |
| |
| [Save Draft] [Mark Complete] |
+------------------------------------+
```

5.2 Calendar View

```
+------------------------------------+
| Calendar (Week) |
+------------------------------------+
| Mon | Tue | Wed | Thu | Fri | Sat |
| | A1 | | J2 | A3 | | |
| | | | | | | |
+------------------------------------+
Legend:
A = Assessment (Blue)
J = Job (Green)
```

5.3 Job – Installer Mobile Screen

```
+------------------------------------+
| Job #2025■014 – Mobile View |
+------------------------------------+
| Client: Jane Doe |
```

```
| Address: 7 Mountain Rise |
| Product: R2.4 Wall Insulation |
| Qty: 12 bales |
| |
| BEFORE PHOTOS: [Upload] |
| AFTER PHOTOS: [Upload] |
| |
| Actual Materials Used: __ bales |
| Notes: [_____] |
| |
| [Complete Job] |
+-----------------------------------+
```

6. Appendix – Development Notes

• GitHub Copilot will be used for generating React/Tailwind components
• SQL to be created during development (on-demand)
• All new tables must be fully documented in Supabase
• RLS not applied until Phase 1B
• Storage buckets: assessment-photos, job-photos