

PREMIER INSULATION - PHASE 1 ALIGNMENT SUMMARY

Document Date: December 5, 2025

Status:  READY FOR IMPLEMENTATION

WHAT THIS ADDRESSES

From v2 Implementation Plan

- Enquiry system (create, list, assign to VA)
- VA Workspace rebuild
- VA Recommendation creation
- Quote conversion from recommendation
- Basic inventory (add/subtract stock)
- Jobs page + job assignment
- PDF generation
- Dashboard

From v3 MVP Plan

- Installer Assessment workflow
- Mobile-first design
- Simple calendar view (assessments + jobs)
- 3-day MVP timeline
- No authentication in Phase 1A
- Time-slot scheduling

From Post-Discussion Clarifications

1. **Assessment attachment optional** - Not automatic, user chooses
2. **Notes + files in enquiry** - Premier adds context when sending to VA
3. **Enquiry status auto-update** - Changed to 'sent_to_va' when assigned
4. **Installer assignment for assessment** - Full workflow included

5. **Team table restructure** - Separate roles (Sales Rep, Installer, Receptionist, Admin)
 6. **Mock team data** - 3 installers, 3 Sales Reps, 1 Receptionist, 1 Admin (Percy Darbhana)
 7. **Calendar with time slots** - Week/Month view with date + time display
 8. **PDF checkboxes** - Line-item vs Bulk pricing options
 9. **Salesforce dashboard** - Metrics + quick actions
 10. **RBAC deferred to Phase 1B** - Everything has full access in Phase 1A
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ARCHITECTURAL DECISIONS MADE

1. Two-Table Assessment Assignment Model

```
assessments ← stores the assessment event  
assessment_assignments ← tracks who assigned when (history + reassignment support)
```

Why: Audit trail + Phase 1B reassignment capability + scalability

2. Team Table (unified roles)

```
sales_reps → team_members  
└── first_name, last_name, email, phone  
└── role (Sales Rep, Installer, Receptionist, Admin)  
└── status (active, on_leave, inactive)  
└── hire_date, available_dates
```

Why: Single source of truth for all staff, easier role-based filtering

3. Assessment - Optional Attachment

Assessment doesn't auto-attach to enquiry. Premier chooses:

- Attach existing assessment
 - Add notes + files manually
 - Both
 - Neither
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KEY WORKFLOWS IMPLEMENTED

1. **Assessment Scheduling** - Premier assigns installer to date/time
 2. **Assessment Completion** - Installer fills mobile form + uploads photos
 3. **Enquiry Creation** - Premier creates with optional assessment + notes + files
 4. **Enquiry to VA** - Premier sends enquiry (auto-changes status) + email to VA
 5. **VA Recommendation** - VA creates from enquiry with pre-populated client data
 6. **Quote Conversion** - Premier converts recommendation to quote with pricing
 7. **Job Assignment** - Premier creates job from quote, assigns installers, deducts stock
 8. **Calendar View** - Blue (assessments) + Green (jobs), time-slot display
 9. **PDF Generation** - Simple template with line-item vs bulk pricing checkboxes
 10. **Mobile Job View** - Installer sees job details on phone
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DELIVERABLES BY PHASE

PHASE 1A (3 Days):

- Assessment scheduling + completion (mobile)
- Enquiry creation with files + notes
- VA Workspace with assigned enquiries
- Recommendation creation from enquiry
- Quote creation with PDF options
- Job assignment from quote
- Calendar (assessments + jobs, color-coded, time slots)
- Basic inventory (add/subtract, show during quoting)
- Salesforce-style dashboard
- NO authentication, NO emails, NO RBAC

PHASE 1B (1 Week, Post-Testing):

- Authentication (Supabase Auth)
- RBAC (VA can't see pricing, restricted access)
- Email notifications (enquiry assigned, assessment scheduled, etc.)
- Installer availability checking
- Mobile job completion form (placeholder in Phase 1A)
- Advanced PDF templates
- Settings pages

PHASE 2 (After Approval):

- GHL Integration (appointment booking, sync)
 - Calendar drag-drop
 - Full automation
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DATABASE CHANGES REQUIRED

New Tables:

- `team_members` (replaces `sales_reps`)
- `assessments` (assessment events)
- `assessment_assignments` (assignment history)
- `assessment_photos` (uploaded photos)

Modified Tables:

- `enquiries` - Add: `premier_notes`, `attached_files` (JSONB), `assessment_id`, `sent_to_va`, `assigned_va_user_id`

No Changes:

- clients, products, quotes, jobs, stock_levels, regions, application_types
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PAGE STRUCTURE (9 Core Pages)

1. `/assessments` - List with create, view, detail
2. `/assessments/[id]/complete` - Mobile form (installers)
3. `/enquiries/new` - Create with optional assessment + files
4. `/va-workspace` - Show assigned enquiries
5. `/va-workspace/new?enquiry_id=XXX` - Create recommendation
6. `/quotes/new` - Updated with PDF checkboxes
7. `/calendar` - Week/month view, color-coded, time slots
8. `/jobs/new` or `/jobs/from-quote/[id]` - Create job

3-DAY TIMELINE BREAKDOWN

Day 1: Foundation (8 hours)

- Database migrations + mock data
- Assessment pages (create, list, detail)
- Mobile assessment form + photo upload
- Enquiry updates (notes, files, attachment)

Day 2: Workflow (8 hours)

- VA Workspace rebuild
- Recommendation creation form
- Calendar view (week/month, time slots)
- Integration testing

Day 3: Jobs & PDF (8 hours)

- Job assignment from quote
 - Mobile job view
 - PDF generation (line-item vs bulk)
 - Stock deduction + final testing
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MOCK TEAM DATA CREATED

Name	Role	Email
James Thompson	Installer	james.thompson@premier.co.nz
Mike Chen	Installer	mike.chen@premier.co.nz
Sarah Williams	Installer	sarah.williams@premier.co.nz
David Garcia	Sales Rep	david.garcia@premier.co.nz
Emma Johnson	Sales Rep	emma.johnson@premier.co.nz
Robert Sullivan	Sales Rep	robert.sullivan@premier.co.nz

Name	Role	Email
Lisa Anderson	Receptionist	lisa.anderson@premier.co.nz
Percy Darbhana	Admin	percy.darbhana@premier.co.nz

NEXT STEPS

1. **Review this plan** - Any changes needed?
 2. **Approve database changes** - Ready to create tables?
 3. **Start Day 1** - Begin with team_members migration + assessments table?
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Ready to begin implementation? 