Quotes

Introduction

The quote module streamlines how sales and service teams build, share, and track customer proposals. This guide explains how to create proposals, manage their content, control customer visibility, and administer quote templates and settings.

Overview

- **Proposals** bundle scopes of work, pricing, and supporting artifacts for a customer/location.
- **Scopes** break the work into selectable packages with line items and materials.
- **Artifacts** archive generated PDFs and uploaded files.
- **Settings** control default copy, closure reasons, and template availability.

All proposal activity happens inside the customer workspace and automatically stays linked to the originating concern and location.

Prerequisites

- Your user account must have access to the customer workspace and quote settings.
- Customer, location, and concern records must exist (proposals must reference them).
- Optional: ensure at least one active quote template is available through Settings → Proposals.

Accessing Proposals

1. Open the **Customer Dashboard** and select the desired location.
2. In the Overview tab, review the **Proposals Spotlight** card to find draft or recently updated proposals.

3. Use **Quotes → Proposals** in the location navigation (or the spotlight card link) to view the full proposals list at:
   - `customer/{account}/location/{locationId}/proposals`
4. Select a proposal to open its detail view at:
   - `customer/{account}/location/{locationId}/proposals/{proposalId}`

Creating a Proposal from a Concern

1. From the dashboard or concerns table, choose **Create Proposal** (available on open concerns).
2. Confirm the concern, customer, and location context—these are auto-populated and locked.
3. Provide a proposal title, summary, and default template (optional if a template is pre-selected).
4. Save to create a draft proposal. You are redirected to the new proposal detail page for further editing.

Editing Proposal Details

While viewing a proposal:

- Update header fields: title, summary, status, template assignment, and internal metadata.
- Toggle **customer visibility** via the `visibleAt` control:
  - Set to the current time to immediately show the proposal in customer-facing portals.
  - Clear the value (set to `null`) to hide the proposal until you are ready.
- Close proposals using predefined closure reasons when the opportunity is won/lost.

Changes save immediately and draft status remains until manually transitioned to *Sent* or *Closed*.

Managing Scopes, Items, and Materials

Each proposal may include multiple scopes of work:

1. **Add Scope** – define scope title, pricing, optional flag, and descriptive notes.

2. **Add Items** – populate line items with quantity, unit price, and rich descriptions.
3. **Add Materials** – attach catalog parts with captured price snapshots and quantities.
4. Reorder scopes or items using the drag handles to control presentation order.
5. Mark scopes as optional to highlight upsell opportunities during customer selection.

Totals recalculate automatically based on scope pricing and options. Total Scope price Still must be manually entered to ensure you are able to adjust the price as you see fit.

Artifacts & Emailing PDFs

- The **Artifacts** section lists generated PDFs and any uploaded supporting files. Each artifact records its version, type, and creation time.
- The **Email Proposal PDF** action triggers an optimistic toast notifying the team that the PDF will be emailed (final delivery is handled by downstream automation).

Proposal Status Flow

1. **Draft** – initial editing state. Proposal is internal-only unless `visibleAt` is set.
2. **Sent** – indicates the offer has been shared with the customer (email action or manual confirmation).
3. **Signed** – future integration point for signature uploads (external portal handles signatures).
4. **Closed** – use a closure reason to record wins/losses and lock the proposal from further edits.

Converting Scopes to Projects

When a proposal is accepted:

1. Select **Convert to Projects** from the proposal detail page.
2. Pick approved scopes for conversion.
3. Confirm to create linked projects and line items. The conversion writes the originating proposal ID into the project record for traceability.

Proposal Settings & Templates

Administrators manage quote configuration under **Settings → Proposals**:

- **Templates** – upload new Handlebars sources (and optional preview PDFs), track versions, and mark the active revision.
- **Defaults** – update intro copy, terms, and distribution lists referenced when emailing proposals.
- **Closure Reasons** – curate the list shown when closing proposals.

Changes apply globally immediately after saving.

Best Practices

- Keep proposal titles customer friendly and reference the core solution offered.
- Use scopes to separate base work from optional upgrades for clarity.
- Generate and upload PDF artifacts before marking proposals as Sent to ensure a complete audit trail.
- Toggle `visibleAt` only when the proposal should appear in customer-facing portals.
- After emailing, revisit the proposal to confirm status and follow up activity in the concern/project record.

Troubleshooting

- **Proposal hidden** – verify `visibleAt` is set and status is not *Closed*.
- **Missing template fields** – confirm the active template includes the latest placeholders or upload a new revision.
- **Scope errors** – the API performs validation; correct highlighted items (e.g., duplicate materials) and retry.
- **Artifacts missing** – check permissions and ensure the PDF generator job completed; re-upload manually if needed.

For additional help, contact the platform operations team or submit a ticket with the proposal ID and customer details.

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