

App Overview & Capabilities Guide

The Internal Operations Hub is our mobile-first system for running the full lifecycle of a flagpole job — from the first lead, through quoting, installation, service, and the long-term customer relationship. It connects directly to Shopify, which stays our system of record for customers, quotes and orders, while the Hub runs the day-to-day operational, sales, marketing and planning work on top of it. After signing in you land on the Home screen and can move between the Home, Ops, Sales and Management workspaces from the bar at the top of every page. The app remembers the workspace and page you were last on, so a refresh or a fresh login puts you back where you left off.

OPS WORKSPACE

Running the job, start to finish.

- **Board** — Open items at a glance — RFQs in motion, jobs coming up, and anything needing attention, like a weather hold. Tiles are four across with optional labels so nothing scrolls off on a phone, and each tile carries the local forecast for the crew's service area.
- **Service Calls** — Intake for customer service requests: contact info, issue, requested service, estimated cost and date. Converts into a scheduled Job.
- **Jobs** — Scheduling and tracking for every install or service job — status, assigned tech, site map with Street View imagery, field notes, and route order when a tech has multiple stops in a day.
- **Closeouts** — The checklist a tech completes to finish a job: camera-first photo capture, supplies used, 1–10 condition scoring on the flag, halyard and truck with optional photos, NFC tag entry, and a customer signature. Unchecked items require a short note explaining why.
- **Mileage** — Per-trip logging using GPS start/end points and real road-distance calculation (not straight-line), auto-linked to job start and end, with a manual override that requires an explanation — built to hold up as an IRS-compliant record.
- **Alerts** — Storm and half-staff notices pulled from national weather and flag-status sources down to the neighborhood level, used to proactively message customers, generate prospecting tasks, and flag risky install windows.
- **Worn Components** — Every pole with a flag, halyard, or truck currently scoring low, with trend charts, a filterable wear-photo gallery, CSV export, and automatic escalation when a component drops three points inside 90 days.
- **Vendors & Purchase Orders** — Vendor records with performance scorecards, linked POs and status workflow, archiving, and a full audit history on every vendor.
- **Receiving** — Poles checked in against their PO by NFC scan or manual entry, with automatic notification to the assigned tech.
- **Inventory** — On-hand pole stock — series, halyard type, and location — carried over from the historical tracker.
- **Margins** — Job-level profitability combining Shopify pricing and cost data with mileage and tracked costs, with drill-downs, vendor filters, comparison mode, sortable tables, print preview, and branded CSV/PDF export.

SALES WORKSPACE

Finding, quoting, and winning the next job.

- **Board** — A snapshot of open leads, won deals, quotes in flight, and general contractor relationships.
- **Needs Attention** — One unified inbox of everything waiting on the office — stalled RFQs, quote follow-ups, overdue nudges, closeouts needing review. Clicking a follow-up opens the related quote or RFQ and lets you mark it complete in place.
- **Leads (Pin-Drop CRM)** — Drop a pin on a map for any flagless pole, torn flag, or damaged hardware spotted in the field. Draggable markers with reverse geocoding, Street View preview, follow-up dates, lead-source and referral tracking, and a pin audit trail.
- **RFQs** — Quote requests with pole specs, timeline, and pricing — including maintenance plan tiers. An RFQ can hand its customer, site and product details straight to the quote builder, and moves to “quoted” automatically once a quote is saved against it.
- **Quotes** — The full quote pipeline — see the Quote Generator section below.
- **GC Contacts** — A relationship tracker for general contractors, with automatic nudges when a relationship goes quiet for 60 days.
- **Sourced Opportunities / Bids** — Opportunities surfaced automatically by the bid scanner, which both crawls known bid sites and runs targeted web searches, tagging each find as Site Scan or Web Search, de-duplicating results, and tracking scan cost.
- **Flagpole Prospecting** — The Grand Rapids pilot: Google Places lookup plus AI vision assessment of street imagery to spot poles and visible damage, held in a review queue with per-scan cost tracking.
- **Flagpole Preview** — An AR-style tool that overlays a flagpole and flag onto a photo of a customer's site, used during quoting.

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QUOTE GENERATOR

From prospect details to a branded PDF the customer can pay from.

- **New quote** — Capture prospect details (B2B or residential), pick products and quantities straight from Shopify collections, set a discount and an installation estimate, and preview the PDF before anything is sent. A quote can also be started in one tap from an RFQ, lead, opportunity or M&A target, and stays linked back to that record's history.
- **Shopify first** — Every quote creates a Shopify draft order before the PDF is rendered, so pricing, taxes and the customer record match the store exactly. The finished PDF carries a checkout link and a scannable QR code that takes the customer straight to payment.
- **Pole comparison** — Select several poles and compare them side by side with sticky spec columns, a “differences only” toggle, and filters for wind rating, price and material. Quantities are editable directly in the table and flow into the quote total. Your selections, filters and quantities are saved as a draft so you can pick the quote back up later.
- **Drift warnings** — If an RFQ's prefilled products, quantities or site-type install preset no longer match the current Shopify catalog or presets, the builder says so inline before you send.
- **Quotes list** — Every quote with customer, date, reference number, total and status. Search, sort and filter by any of those; download or email a quote in one tap; select several to download as separate PDFs or a single ZIP; export the filtered list to CSV.
- **Quote detail** — The full quote contents and line items alongside a complete activity history — created, previewed, downloaded, emailed and viewed — with the originating RFQ one click away.
- **Send Quote** — Emails the customer the PDF, the checkout link and the QR code from our own sending domain, and stamps the send time into the quote history.

MARKETING

Ideas and events, from suggestion to scheduled.

- **Ideas** — Anyone can submit a marketing idea. Reviewers and submitters discuss it in a comment thread and request changes before it moves to Approved or In Progress, with a safety gate so an idea with an open change request can't quietly advance.
- **Status history** — Every status change is recorded — who, when, old value and new value — and can be reverted by anyone with permission.
- **Events** — Scheduled marketing events with owners and dates, pushed to the shared calendar.
- **Search & filters** — Both ideas and events filter by status, date range, submitter and keyword, and share the same role-based access rules.
- **Sync status** — A single panel shows the last successful push, any pending failures with their error detail, and a one-click “Resync all” for Office and Super Admin.

MANAGEMENT WORKSPACE

Leadership planning tools — Super Admin only.

- **Capital Expense Wish List** — Requested purchases with cost, priority, and named approvals, a purchased/no-longer-needed workflow, YTD spend, and a full approval history drawer.
- **M&A Target Matrix** — Acquisition targets scored across weighted criteria with automatic totals and ranking. Sub-score cells validate and auto-format as you type, warning inline when a value is clamped or rounded. Column widths, scroll position and the sticky header keep the grid readable on long lists.
- **Matrix filters** — A sticky filter toolbar stays visible while you scroll — full-width on desktop, a compact horizontally-scrolling panel with apply/reset controls on mobile. Every filter, sort and view setting lives in the URL, so a refresh or a shared link reproduces exactly what you were looking at. A confirmation prompt guards Reset filters, and keyboard shortcuts cover search, apply and reset.
- **Saved views** — Name and save any filter and sort setup, then re-apply it later. Presets can be duplicated to spin off a variant or renamed in place.
- **Exports** — Download the current matrix view — respecting every active filter and sort — as CSV or Excel, with Rank and Company always included.
- **Deal support** — Per-target document rooms for LOIs, NDAs, term sheets and diligence files; stage-change and key-date alerts with a configurable lead time; trend analytics comparing implied multiples against the benchmark range with outliers called out; and a risk

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board that rolls the toggleable risk flags into one sortable score and explains which flags drive it.

- **Investor Brief** — A one-click PDF per target summarizing valuation, deal structure, diligence progress, timeline milestones, risk flags, and a one-page recommendation.
- **Growth Vectors** — Longer-range growth initiatives with owner, stage, and target dates.
- **Shared behavior** — Every cell in the planning modules is inline-editable with keyboard grid navigation, undo, bulk field edits, duplicate detection on add, link and document attachments with a cross-module finder, and a per-cell audit trail.

FLAGWATCH PROGRAM

One configurable plan per pole.

- **Enrollment** — Started from a won RFQ or maintenance-plan quote, or added later to any existing customer pole.
- **Three independent settings** — Replacement frequency, fulfillment method, and trigger mechanism — set per pole, not per customer.
- **Automation** — A daily sweep processes due replacements and raises the Shopify order, with clear status badges everywhere a pole appears.

CUSTOMER PORTAL

What the customer sees.

- **Access** — Customers reach the portal through our Shopify storefront — no separate login to remember.
- **My questions** — Message threads with the office, showing each status change and reply in a clear timeline, an unread badge and timestamp when Office replies, plus attachments and search.
- **Service history** — Past jobs, closeout photos, and the replacement schedule for every pole on the account.

ADMIN & SANDBOX

- **Admin** — Super Admin only: users and roles, invite flow for new technicians, employment type (W-2 or 1099) and contractor invoice review, account enable/disable, login and data-access audit logs, permissions and RLS matrix, notification and alert settings, email deliverability dashboard and template preview, sync runs, import review, PDF branding, service areas, drill-down usage, QA mode, and the Shopify connection.
- **Roles** — Three roles: Tech, Office, and Super Admin, with branch-level access on top.
- **Home layout** — The Super Admin home is an icon-led bento grid of quick actions that can be reordered by drag and drop, previewed live, undone, and reset — saved per account.
- **View As** — Super Admins can view the app exactly as another role sees it, with a persistent banner while active.
- **Backups & restore** — Manual and scheduled snapshot exports, a diff report between snapshots, and a restore wizard that previews exactly which rows would change before anything is written.
- **Sandbox Mode** — A fully isolated training environment with seeded practice data. No real customer data, Shopify writes, calendar events, or messages are ever touched while sandboxed, and a locked demo login can be shared freely.

AUTOMATION & ONGOING UPKEEP

Runs quietly in the background.

- **Flag replacement subscriptions** — Wear-index triggers (90/180/365-day, configurable per pole) prompt the customer or dispatch a recurring shipment through Shopify.
- **Catalog sync** — The Shopify product catalog syncs on a schedule so quote pricing and margins never run on stale numbers.
- **Google Calendar sync** — Scheduled jobs push to the shared master calendar, and each user's own calendar stays synced both ways.
- **Notifications** — Email from our own sending domain, web push, and an in-app bell — new leads, quote follow-ups, closeouts needing review, storm alerts, @-mentions, and failed syncs, each configurable, with unsubscribe handling and a delivery audit log.
- **Resilience** — Failed webhooks retry automatically with exponential backoff and a cap, and every scan or sync run is visible on the Sync Runs page.
- **Offline & install** — The Hub installs as an app on phones and tablets, warns when the connection drops, and supports pull-to-refresh.

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WHAT CHANGED MOST RECENTLY

- **Quote Generator** — a full quote pipeline: prospect capture, Shopify-collection product picker, install estimates and discounts, live PDF preview, and a Shopify draft order created before every PDF so pricing and the checkout QR always match the store.
- **Quotes list & detail** — search, sort and filter by customer, date, status and reference number; one-tap download and email; bulk PDF or ZIP downloads; CSV export; and a per-quote page with line items and full send/download history.
- **RFQ-to-Quote handoff** — quotes prefill from an RFQ, warn when prefilled products or install presets have drifted from the catalog, advance the RFQ to “quoted” on save, and can be emailed straight from the RFQ’s quote panel.
- **Pole comparison** — side-by-side spec comparison with sticky columns, differences-only view, wind rating / price / material filters, inline quantity editing, and saved drafts that survive a refresh.
- **M&A matrix** — sticky filter toolbars on desktop and mobile, URL-backed filter state, saved views with duplicate and rename, keyboard shortcuts, guarded reset, inline sub-score validation, persisted column widths, and CSV/Excel export of the filtered view.
- **M&A deal support** — document rooms, stage and key-date alerts, implied-multiple trend analytics, a weighted risk board, and the one-click Investor Brief PDF.
- **Marketing** — idea comment threads with a change-request gate, a full status audit trail with revert, shared search and filters, and an events sync panel with one-click Resync all.

HOW IT ALL CONNECTS

A lead spotted in the field becomes a quote, which becomes a Shopify draft order the customer can pay from a QR code, which becomes a job. A scheduled job appears on the shared team calendar and, once complete, a Closeout captures photos, condition scores, and an NFC tag ID tied to that customer’s pole. From there the NFC keychain fob lets the customer reorder flags through Shopify with one tap, FlagWatch keeps the replacement schedule running on its own, and wear tracking helps us reach out before a flag or pole fails — before the customer has to ask.

For step-by-step help on any specific screen, use the “?” help icon on that screen. This document is a high-level reference — the in-app help and the “What’s New” page linked in the app footer stay current with the latest version of each module.