

Alder & Line Signs

Discovery review

A clearer handoff from quote to operations

11 September 2026 · Revision 15.0

Review basis: the estimating workbook, exported operating data and supplied quote and operations workflow materials. Business amounts are CAD before tax.

How you work today

My understanding is that the workbook gives your office a shared starting point for work that varies from job to job. Owen and Priya take a request, work out the materials and labour, and prepare an estimate. Starting from a similar job is useful: the team can reuse what it knows, then adjust quantities, dimensions and installation needs.

Leah reviews the price when the size, margin or discount calls for it. The quote goes to the customer and may come back with changes. Once the customer accepts a particular revision, Priya checks any required purchase order (PO), Tessa identifies the approved artwork, and Marcus and Erin prepare the operations handoff.

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|------------------------|----------------------------|--------------------------|
| 1. Request | 2. Estimate & price review | 3. Issue or revise quote |
| 4. Customer acceptance | 5. Artwork & required PO | 6. Operations handoff |
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Your current path through the work. A change to the offer takes it back through revision and review.

The workbook holds the estimate and status, email carries decisions, and folders hold measurements and proofs. Printed packets and the physical board help the shop plan its work. Conversations fill the gaps, especially when someone is waiting to update the shared file.

That arrangement contains a lot of useful business knowledge. The difficult part is asking the next person to piece together which version is agreed, which decisions still apply, and what remains to be done.

What is making this harder than it needs to be

Approval can fall behind a revision

On Q-26012, revision 2 is the CAD 11,259.42 quote the customer accepted after a scope change, but the manager approval still belongs to revision 1. The job is already on **Hold**, which is good.

I would keep that safeguard and make the approval explicitly belong to the revision it covers. Leah's earlier decision stays as history; the changed offer needs its own decision before operations can rely on it.

A copied value can carry an old assumption forward

Q-26033 is still **Draft**. Its fabrication line allows 6.9 hours at CAD 42.00, but the copied cost is CAD 252.00. The comment says the quantity changed and the total carried over from the previous estimate block.

Those inputs give CAD 289.80. The later formulas still work from the copied value, so the final total can look reasonable even when one starting figure needs attention.

I would ask Owen to confirm the inputs and any intended override. If agreed, the quote changes from CAD 3,021.06 to CAD 3,085.32. Keep the original and the reason for changing it. This is a Draft correction to review, not evidence of money lost.

"Queued" is not the same as ready

J-26024 is Queued but also on **Hold**: the required PO and artwork approval are missing. No production start is recorded. The queue helps plan work; it does not give permission to start.

I would show both missing items beside the job, with a person responsible for each. Receiving the PO must not make the artwork requirement disappear. Customer acceptance of the price and approval of the artwork are separate decisions.

A useful old report can look current

The Weekly Summary is accurate for 4 September. It is a saved snapshot, while the register has moved on to 11 September.

I would keep it and its date, alongside a clearly labelled current view. Nobody should have to remember which figures were pasted last week.

How the new workflow would work

I would propose one shared record from estimate to authorized handoff, with each decision tied to the work it covers.

1. Owen or Priya prepares or revises the quote

Sales enters scope and estimate lines, checks calculated costs and prices, and records reasons for agreed overrides.

System records: current revision, owner, next action and estimate history.

2. Leah reviews this revision when required

Leah approves or rejects the exact revision, with reasons, when agreed price, margin or discount thresholds require review.

Result: Approved or Not required allows issue; Rejected blocks it.

When review is not needed, the system records Not required, without customer acceptance; changes re-evaluate eligibility.

3. Owen or Priya issues the quote and records the reply

Sales issues the exact eligible revision and records its customer response; older replies stay with older offers.

Next: the accepted current revision moves to release preparation.

4. Priya checks the required PO; Tessa records approved artwork

Priya records a PO only where required; Tessa identifies the approved artwork for the accepted scope.

Blocked by: missing required PO or artwork approval, each with an owner and next action.

A PO cannot clear artwork approval.

5. Marcus or Erin checks and releases the handoff

Operations checks the current accepted revision, internal decision, approved proof, required PO and blockers before release.

Result: one authorized handoff recording who released which revision.

Missing applicable requirements stay on Hold; repeated release creates no duplicate.

6. Everyone works from the current record

Sales follows replies, Leah decides exceptions, and operations sees ready work and blockers; reporting uses those same records.

System records: current work, outcomes, owners and next actions.

Reporting counts each quote once and retains dated history.

Marcus or Erin normally releases; confirm Leah as backup with a reason. All gates still apply.

What I would keep

Keep your quote numbers, familiar line items, calculation and rounding order, historical rates and accepted revisions. These explain how a price was reached. Updating the rate list must not reprice earlier work. Keep Hold, dated summaries and the distinction between a requested date and a confirmed installation booking.

The documented review rules stay: discounted pre-tax price over CAD 5,000, estimated gross margin below 35%, or discount over 10%. Any one triggers review; equality alone does not.

The first version I recommend

I recommend a focused quote-to-operations app. It answers three questions: what has been agreed, what is missing, and who acts next. Keep the first build to:

- **Estimate.** A minimal active-customer reference: name, contact and PO requirement. Quotes, revisions and estimate lines retain calculation inputs, saved rates, totals and reasons for agreed overrides.
- **Decide.** Conditional internal Approved, Rejected or Not required; issue and customer response against the exact revision, with actor, date and evidence reference.
- **Release.** Required PO and approved artwork references, owner, next action and independent Hold reasons. One authorized release creates an immutable handoff identifying the accepted revision, scope, decisions and references.
- **See current work.** Simple lists and counts, a printable exact-revision quote and released handoff, and a basic data export preserving IDs and relationships.

Calculate line cost as quantity $\times$ (1 + waste) $\times$ unit cost, rounded to cents; line selling amount as that cost $\times$ (1 + markup), rounded again. Sum selling amounts, apply the quote discount and round to cents. Gross margin uses that discounted price and estimated direct cost. Show inputs and totals for checking.

Customer → Quote → Revision → Estimate lines

Each revision keeps its rate snapshot, internal decision and customer response. PO/artwork references identify the scope they cover; owner and next action show responsibility. One accepted revision has one released handoff. Previous revisions remain readable in the same detail view, with a short actor/date/decision record. Keep historical rates; updating configured rates cannot reprice accepted work.

Leave out broader customer management, rich activity/history browsing, advanced reports, separate dashboards, elaborate exports and administration screens. A maintainer sets up users and authorized rate changes through configuration, with Leah's authorization and an agreed ongoing arrangement. No rate-management or migration-tooling interface is needed.

When work can move forward

Draft → Review if required → Ready to issue → Issued → Accepted / Declined / Expired

Not required is a recorded result; Rejected blocks issue. Changes to reviewed, issued or accepted scope, price or rates create a new revision and re-evaluate review. Earlier approval and acceptance cannot clear the new offer. Unsent Draft inputs can still be edited.

Release runs separately: On Hold → Ready for release → Released. Acceptance is not release: imported Q-26012/R2 can remain Accepted and on Hold for its stale approval. Release needs the current revision's eligible internal decision, customer acceptance, required PO, approved artwork and no other recorded blocker. Each missing item has an owner and next action. Queued is only a planning label. Even when ready, an authorized person must deliberately release; repeating the action creates no duplicate.

For v1, handle changes after release manually. Mark review and the next action on the released job; contact Leah and operations to pause affected work and agree revised instructions outside this app. Record their reference in the existing note/link. Preserve the original handoff; v1 cannot release replacement scope a second time. Agree this manual policy and who communicates the pause before use.

Who can act, and when

Permissions should protect the business without handcuffing it. Staff should change the parts they own; the manager/owner needs broader authority to resolve exceptions and cover absence. When that authority is used, record who acted and why.

Permissions for key actions

Everyone can view relevant workflow and records. Only key gated actions are shown.

✓ Usual owner ✓ Allowed ✗ Not allowed

Action	Sales Owen / Priya	Manager / Owner Leah	Artwork Tessa	Operations Marcus / Erin
Create / edit quote and pricing inputs	✓	✓	✗	✗
Decide a required price exception	✗	✓	✗	✗
Issue quote / record customer reply	✓	✓	✗	✗
Record PO requirement / reference	✓	✓	✗	✗
Record artwork approval	✗	✓	✓	✗
Release operations handoff	✗	✓	✗	✓
Directly edit an accepted price	✗	✗	✗	✗
Authorize user / rate changes	✗	✓	✗	✗

Manager / owner coverage

Confirm these backup defaults before use.

- **Artwork.** Tessa is the usual owner; Leah covers absence with the same customer/third-party confirmation for the exact scope/proof. Customer artwork confirmation cannot be waived.
- **Release.** Marcus or Erin normally releases; Leah is backup with every existing gate satisfied.
- **Record the exception.** For Leah's coverage, record actor, date, reason and supporting evidence in history.
- **Administration.** Leah authorizes users/rates; a maintainer configures them. No administration screen in v1.

What people would open

Three conceptual screens are enough. These text outlines define the content and actions; all use the same records.

1. Quote and revision detail — shared by the team

Top: customer, quote/revision, scope, requested date, owner and next action.

Body: estimate lines, saved rates and totals; internal review, issue/customer response, PO/artwork references and Hold reasons. Previous revisions and brief decisions are readable here.

Actions: save Draft, revise, review, issue a printable eligible offer, record evidence, or explicitly release, according to role. Show why an action is blocked and the fixed handoff after release.

2. Sales and review worklist — Owen, Priya and Leah

Rows: current quote/revision, customer, value, margin, discount, stage, owner and next action; flag why Leah's review is needed.

Actions: filter Draft/review/awaiting reply, open detail and perform role actions there.

Counts: one current revision per quote, with issued values separate from accepted work and an as-of time. Export the current report; keep the old summary dated.

3. Operations queue — Marcus, Erin and Tessa

Rows: job, customer, accepted revision, requested date, Hold/ready/released, missing requirements and next owner.

Actions: filter readiness and open the same detail to check evidence or release. Show basic readiness counts here. Requested dates remain separate from confirmed installation bookings; this queue does not schedule capacity.

Choose the simplest suitable route

The lightweight configured-software comparison belongs in Discovery, with no second discovery fee. **No specific platform has been selected; this comparison remains conceptual.**

Before committing to custom development, compare a configurable platform against approvals for the exact revision, calculations, independent release gates, permissions and usable export, including setup and running costs. Use it if it meets these cleanly; the bounded custom plan in this review is the concrete fallback. Keeping the workbook and adopting these handoff rules is also a viable choice.

Two useful ways to build

Both choices deliver the same complete quote-to-operations workflow. The difference is how much refinement we include in the first build.

Discovery completed	\$500 USD	Separate fee; not credited against implementation.
Focused first build Implementation · USD \$1,250 Total including Discovery · USD \$1,750 Fixed price for stated scope/defaults. Best for: Standard forms and lists.	Recommended first build Implementation · USD \$1,750–\$2,000 Total including Discovery · USD \$2,250–\$2,500 Planning range; final proposal fixes price. Best for: Smoother daily use.	

Both builds include

Core workflow	Screens and reporting	Implementation and handoff
• Quotes, revisions, lines; checked calculations • Manager review when required; exact-revision customer response • PO/artwork links; owner, next action • Hold / Ready / Released; one authorized release	• Three screens: detail, sales/review, operations • Basic current reporting • Printable quote and handoff • Usable data export	• Named roles; readable prior revisions • One reviewed current import • Deployment and acceptance testing • Documentation and handoff

What the Recommended build adds

- Saved filters and column preferences
- Clearer inline guidance
- Tablet entry polish
- Second staff walkthrough
- One agreed usability pass

My recommendation

I would lean toward the Recommended first build. Both options deliver the same complete workflow; with several roles using it daily, the extra refinement gives us room to smooth how people enter, find and hand off work before launch.

Totals exclude applicable taxes and recurring operating costs. The final proposal shows these separately for approval before work.

What these prices assume

Business

One shop, six named users and agreed roles. A maintainer configures authorized user/rate changes.

Files

Existing folders with stable links and explicit proof/version references; no uploads or version storage.

Scope

Three screens, basic counts, print/export, standard deployment, acceptance, backup setup, runbook and handoff.

Workflow

Preserve calculations and exact-revision gates; confirm Leah's backup role with all gates intact and manual post-release review.

Move only reviewed current work

Review	Named staff confirm open quotes/jobs, customers, owners, rates and exceptions.
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Import	Import reviewed current work, preserving IDs, revisions, original values and agreed corrections. Missing release gates stay on Hold.
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Reconcile	Check counts, lines, totals and references against the workbook before use.
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Cutover	Use one authoritative system during the pilot. Freeze migrated workbook records and agree rollback that accounts for new pilot records.
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Closed history stays in the workbook unless it proves worth migrating later.

Access

Managed online browser access on desktop/tablet; sign-in, shared relational data and server-enforced permissions. No offline editing.

Migration

One reviewed import of current/open work and supporting customers/rates. Closed history stays archived; no historical cleanup.

Separate systems

Accounting stays separate; no automated email, portal, inventory, purchasing, detailed scheduling or machine integration.

Start focused. Add only what earns its place.

Both quoted builds are complete under the stated assumptions and solve the quote-to-operations workflow. They do not need to solve every surrounding problem. Include an optional capability now or later only when it meets a real need.

Optional addition	When it may be worth adding
Store and version files in the app	If folders make approved files hard to identify, retrieve or control. Otherwise, keep existing folder links.
Offline use	If staff need to edit without internet access. Otherwise, an online browser keeps things simpler.
Historical migration	If older jobs need to be searchable in the app. Otherwise, keep the workbook as an archive.
Accounting connection	If re-entering accepted information becomes enough of a burden to justify a connection.
Automated email	If a specific notification, reminder or follow-up is repetitive enough to automate confidently.
Self-hosting or custom infrastructure	If the business has an infrastructure, compliance or ownership requirement that managed hosting cannot meet.
More complex permissions	If the agreed roles do not meet actual approval or access needs.
Additional workflows	If friction in another process justifies extending beyond the quote and operations workflow.

Start with the smallest version that solves the workflow well. Add capabilities when they solve a demonstrated problem rather than building them speculatively.

We will scope, price and agree any addition before work begins. Starting without it does not prevent us from adding it later.

Payments, payroll, artwork creation and more detailed costing remain outside this build.

Ownership and care after launch

Both options preserve transferable ownership. The difference is who takes responsibility for operating the application.

Client-managed handoff

You receive

- App and agreed source; usable data export
 - Deployment runbook
 - Appropriate accounts and credentials
 - Backup and restore instructions
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You manage through staff or a vendor

- Hosting/server and database
 - Backups and restore checks
 - Deployments and updates
 - Monitoring and support
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Featherply support

Hourly help when needed; work and rate agreed first. Provider and maintainer charges are separate.

Featherply-managed

Featherply operates

- Hosting/server and database
 - Backups and restore checks
 - Deployments and updates
 - Monitoring and agreed support
 - Email infrastructure if later added
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You retain

- Your data and agreed source
 - Handover and usable export
 - Transfer to another maintainer
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Monthly fee

Quoted separately for the chosen infrastructure and support responsibilities.

Management can change later; ownership remains transferable.

Build cost and operating cost

Build cost and operating cost are separate. The final proposal will show recurring hosting, services, subscriptions, maintenance and support costs alongside the implementation price so you can see the full commitment before approval.

My recommendation and next step

Before calling the first version done

Calculations

Q-26002/R2 matches expected totals and rounding. Q-26033 keeps its original; correct only after inputs/override and the correction are agreed.

Revision decisions

Q-26012/R1 approval cannot clear R2: each new revision needs its own eligible internal decision and exact customer response.

Independent release gates

J-26024 stays on Hold after the PO arrives if artwork is missing. Queued never bypasses a gate.

Permissions and coverage

Sales cannot self-approve an exception; nobody can directly edit an accepted price. Tessa stays artwork owner; manager cover records actor, date, reason and evidence, preserving all gates.

Current reporting

Count one current revision per quote; normalize sent-stage variants, separate issued from accepted work and keep dated history. Export preserves usable relationships.

Import and handoff

Reconcile IDs, revisions, counts and totals. Repeat release creates one handoff; post-release changes follow manual pause/review and preserve the original.

My recommendation

Recommended first build	\$1,750–\$2,000 USD implementation \$2,250–\$2,500 USD total including Discovery
Focused first build	\$1,250 USD implementation \$1,750 USD total including Discovery

Both builds are complete. I lean toward Recommended for a smoother launch; optional capabilities can wait. Totals exclude applicable taxes and recurring costs.

Next step

Confirm Marcus/Erin release and Leah’s backup with all gates intact; linked files; managed online access; one reviewed current-work import; and the operating model.

The selected option becomes a fixed proposal. Implementation starts only after scope, price and operating costs are approved. Keeping the workbook remains a valid choice.