

Business Proposal Management Platform

Project Documentation & Feature Overview

1. Executive Summary

This platform is a complete proposal and client management solution built for service-based businesses. The application allows companies to manage clients, employees, terms & conditions, proposals, invoices, AI-powered knowledge management, and communication workflows from a single dashboard.

The system is designed with scalability, performance, and professional business operations in mind using modern technologies including Next.js, Supabase, OpenAI, PostgreSQL pgvector, and Vercel deployment.

2. Core Features

- **Authentication & Security:** Secure email/password authentication with protected application routes and user-isolated data access.
- **Analytics Dashboard:** Overview of total clients, employees, proposals, invoices, and monthly growth metrics. Includes quick access to latest proposals and invoices.
- **Client Management:** Create, edit, delete, and manage clients with notes, contact information, and statuses.
- **Employee Directory:** Manage employee records including role, contact details, and addresses.
- **Terms & Conditions Builder:** Reusable terms and conditions system with structured sections for proposal generation.
- **Proposal Management:** Create detailed proposals with services, pricing, summaries, terms, status tracking, downloadable PDFs, and email delivery.
- **Proposal Approval Workflow:** Clients can accept or decline proposals directly from email links. Proposal status updates automatically in the dashboard.
- **Invoice Tracking:** Track paid proposals and generate invoice-ready workflows.
- **AI Knowledge Base Agent:** Upload unlimited documents into a private RAG-based knowledge system powered by OpenAI and pgvector embeddings.
- **AI Chat History:** Persistent AI conversations with ability to manage and delete chat history.
- **Company Branding:** Customizable company profile including company name, website, phone, email, and address displayed across generated documents.
- **Global Search:** Quick search popup for fast application navigation.

3. Proposal Workflow

1. Business owner logs into the platform.
2. Client records are created or selected.
3. Terms & conditions are attached to the proposal.
4. Services, pricing, summaries, and project details are added.
5. Proposal preview updates dynamically during creation.
6. Proposal is saved as a persistent draft.
7. Proposal can be downloaded as a professional PDF document.
8. Proposal is sent directly to the client via email.
9. Client accepts or declines the proposal.
10. Proposal status automatically updates in the system.
11. Business owner receives notification emails regarding proposal actions.

4. Technology Stack

- Frontend: Next.js + TypeScript + Tailwind CSS
- Backend: Supabase
- Database: PostgreSQL + pgvector
- Authentication: Supabase Auth
- AI Integration: OpenAI
- Hosting: Vercel
- Storage: Supabase Storage
- PDF Generation: Dynamic proposal rendering
- Email Services: Gmail SMTP / transactional email workflows

5. System Architecture

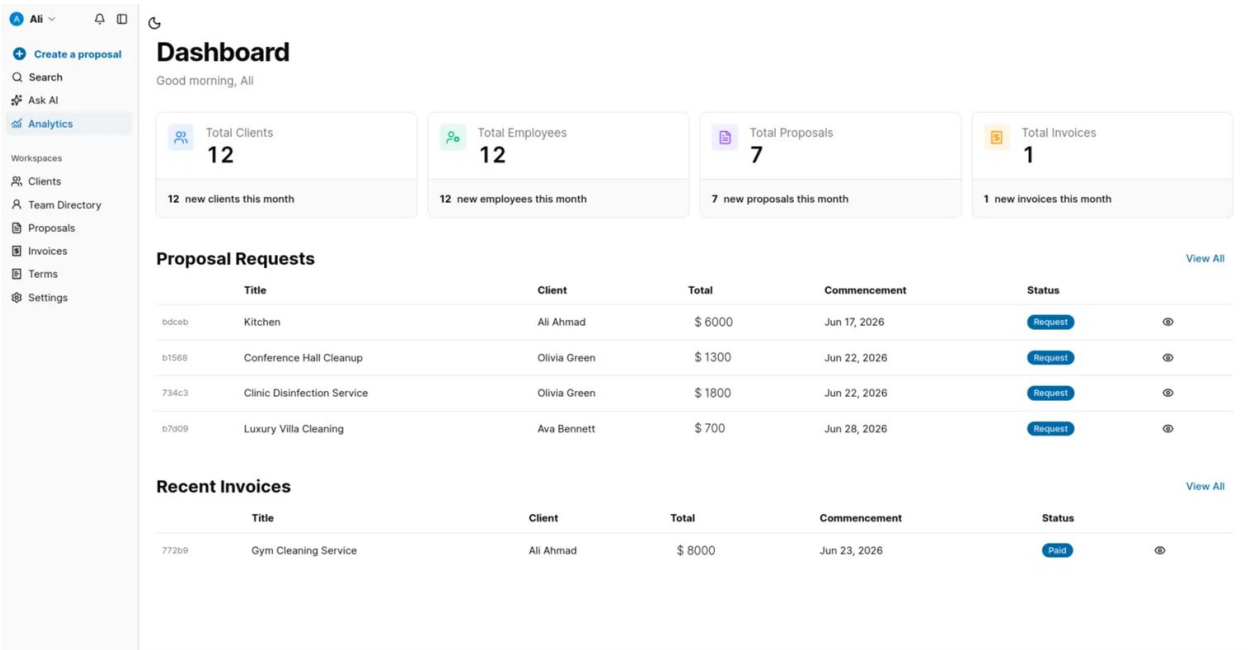
The application follows a modern cloud-first architecture where the frontend is deployed on Vercel while Supabase handles authentication, database, storage, and row-level security. AI functionality is powered through OpenAI APIs combined with vector embeddings for semantic document retrieval.

6. Future Enhancements

- Automatic lead generation from landing page forms
- Expanded AI assistant capabilities
- Advanced analytics and reporting
- Multi-user team collaboration
- Automated invoice generation
- Payment gateway integrations
- Advanced workflow automations
- Client portal access
- Mobile application support

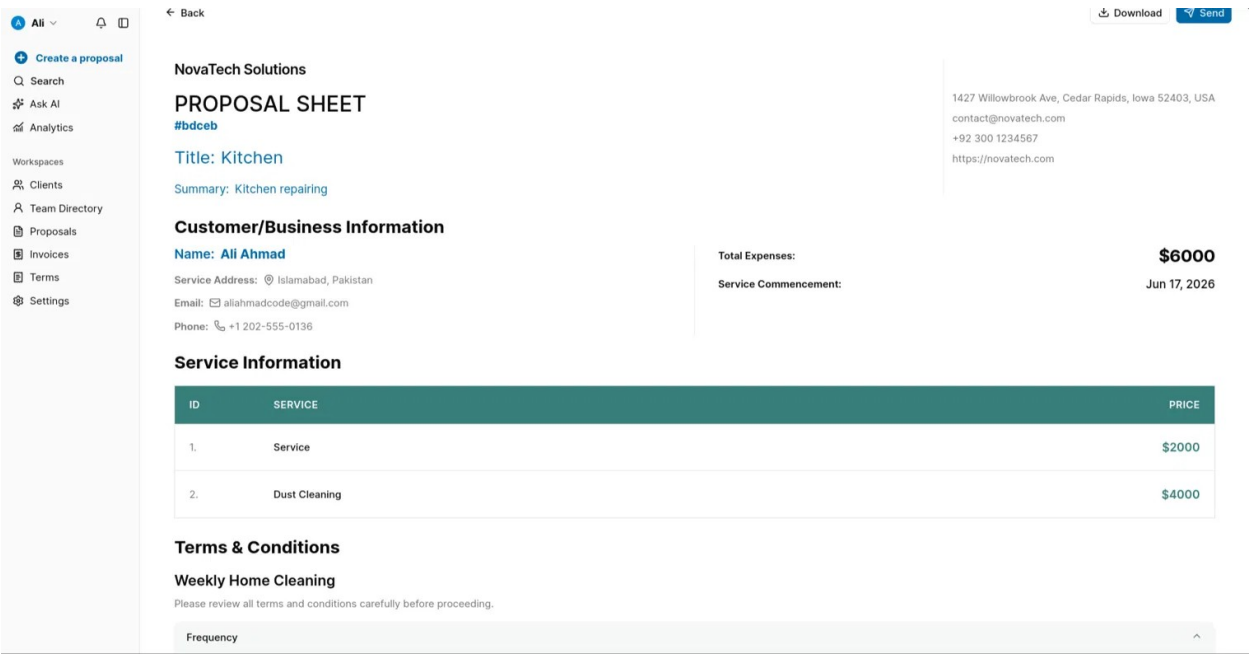
7. Platform Screenshots

Analytics Dashboard



Analytics Dashboard

Proposal Details & PDF Layout



Proposal Details & PDF Layout

All

▼

Create a proposal

Search

Ask AI

Analytics

Workspaces

Clients

Team Directory

Proposals

Invoices

Terms

Settings

Proposals

View, track, and manage all proposals across your workspace, and keep every submission organized as your pipeline grows.

Create Proposal

Filter by title...

Columns

	Title	Client	Service Commencement	Estimate Budget	Service Address	Status		
bdceb	Kitchen	Alli Ahmad	Jun 17, 2026	\$ 6000	Islamabad, Pakistan	Request	▼	...
772b9	Gym Cleaning Service	Alli Ahmad	Jun 23, 2026	\$ 8000	Islamabad, Pakistan	Paid	▼	...
b1568	Conference Hall Cleanup	Olivia Green	Jun 22, 2026	\$ 1300	200 Expo Center	Request	▼	...
bc1a9	Post Construction Cleanup	Olivia Green	Jun 22, 2026	\$ 3500	61 Bulider Street	Accepted	▼	...
e2c5f	School Building Cleaning	William Scott	Jun 16, 2026	\$ 2700	102 Learning Road	Accepted	▼	...
734c3	Clinic Disinfection Service	Olivia Green	Jun 22, 2026	\$ 1800	33 Health Avenue	Request	▼	...
b7d09	Luxury Villa Cleaning	Ava Bennett	Jun 28, 2026	\$ 700	7 Palm Residency	Request	▼	...

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Create Proposal

Create and organize a new proposal with pricing, scope, and client details ready to share and track from one place.

← Back

InformationServicesPreview

Title

Kitchen Renovation

Title is the project title for which the proposal is written.

Summary

Short project summary

Summary describes the overall scope and intent of the project.

Service Address

Street address

Service address is where our team will visit to perform the work.

Service Start Date

Pick a date

Service start date defines when the project work will begin.

Client

Select client

Select the client for whom this proposal is being created.

Term

Select term

Terms define the agreement conditions for this proposal.

Next

Ali

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Invoices

Create, manage, and track invoices across your workspace, and keep every payment request organized as your billing grows.

Create Invoices

Filter by title...

Title	Summary	Client	Service Commencement	Total Expenses	Status		
772b9	Gym Cleaning Service	Gym database management	Ali Ahmad	Jun 23, 2026	\$ 8000	Paid	...

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Proposal Details, Invoices & PDF Layout

Client Directory Management

Ali

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Client Directory

View and manage all your clients in one place, keep their details updated, and maintain a clean overview of your relationships as your network grows.

Add Client

Filter by email...

Name	Email	Personal Note	Phone	Status	
4cb12Ali Ahmad	aliahmadcode@gmail.com	Interested in a long-term partnership and working together.	+1 202-555-0136	Active	...
3091cHenry Cooper	henry@example.com	Interested in a long-term partnership and working together.	+1 202-555-0148	Active	...
55601Lucas Hall	lucas@example.com	Interested in a long-term partnership and working together.	+1 202-555-0199	Lead	...
58815Ava Bennett	ava@example.com	Interested in a long-term partnership and working together.	+1 202-555-0172	Active	...
87c5bWilliam Scott	william@example.com	Interested in a long-term partnership and working together.	+1 202-555-0150	Inactive	...
b440fSophia Turner	sophia@example.com	Interested in a long-term partnership and working together.	+1 202-555-0105	Lead	...
73865James Parker	james@example.com	Interested in a long-term partnership and working together.	+1 202-555-0183	Active	...
b6cf0Olivia Green	olivia@example.com	Interested in a long-term partnership and working together.	+1 202-555-0114	Blocked	...
7fe59Emma Wilson	emma@example.com	Interested in a long-term partnership and working together.	+1 202-555-0128	Active	...
4567fDaniel Brooks	daniel@example.com	Interested in a long-term partnership and working together.	+1 202-555-0167	Inactive	...

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Employee Management

All

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Team Directory

View and manage everyone across your organization, update roles, and keep your workspace structured as your team grows.

Filter by email...

	Name	Role	Email	Phone	Address	
34083	Ella Baker	Owner	ella@company.com	+1 303-555-0170	101 Hill Street	...
b0d81	Alexander Hill	Supervisor	alexander@company.com	+1 303-555-0124	58 Sunset Blvd	...
f9b8f	Harper Allen	Technician	harper@company.com	+1 303-555-0161	29 Forest Road	...
16fd5	Logan Wright	Helper/apprentice	logan@company.com	+1 303-555-0184	37 Walnut Street	...
f2832	Amelia White	Sales	amelia@company.com	+1 303-555-0117	63 Lake Avenue	...
b7c15	Benjamin King	Administrator	benjamin@company.com	+1 303-555-0108	12 River Street	...
70a71	Charlotte Young	Sales	charlotte@company.com	+1 303-555-0152	90 Maple Drive	...
cea39	Ethan Walker	Supervisor	ethan@company.com	+1 303-555-0190	77 Birch Lane	...
81b8f	Grace Lee	Engineer	grace@company.com	+1 303-555-0178	51 Oak Street	...

Add Member

Team Directory

View and manage everyone across your organization, update roles, and keep your workspace structured as your team grows.

Filter by email...

	Name	Role	Email	Phone	Address	
34083	Ella Baker	Owner	ella@company.com	+1 303-555-0170	101 Hill Street	...
b0d81	Alexander Hill	Supervisor	alexander@company.com	+1 303-555-0124	58 Sunset Blvd	...
f9b8f	Harper Allen	Technician	harper@company.com	+1 303-555-0161	29 Forest Road	...
16fd5	Logan Wright	Helper/apprentice	logan@company.com	+1 303-555-0184	37 Walnut Street	...
f2832	Amelia White	Sales	amelia@company.com	+1 303-555-0117	63 Lake Avenue	...
b7c15	Benjamin King	Administrator	benjamin@company.com	+1 303-555-0108	12 River Street	...
70a71	Charlotte Young	Sales	charlotte@company.com	+1 303-555-0152	90 Maple Drive	...
cea39	Ethan Walker	Supervisor	ethan@company.com	+1 303-555-0190	77 Birch Lane	...
81b8f	Grace Lee	Engineer	grace@company.com	+1 303-555-0178	51 Oak Street	...

Add Member

Add New User

Create a user for your team so they can be added to a project later.

Full Name

John Doe

Email

john@company.com

Phone

+1 (415) 555-2671

Address

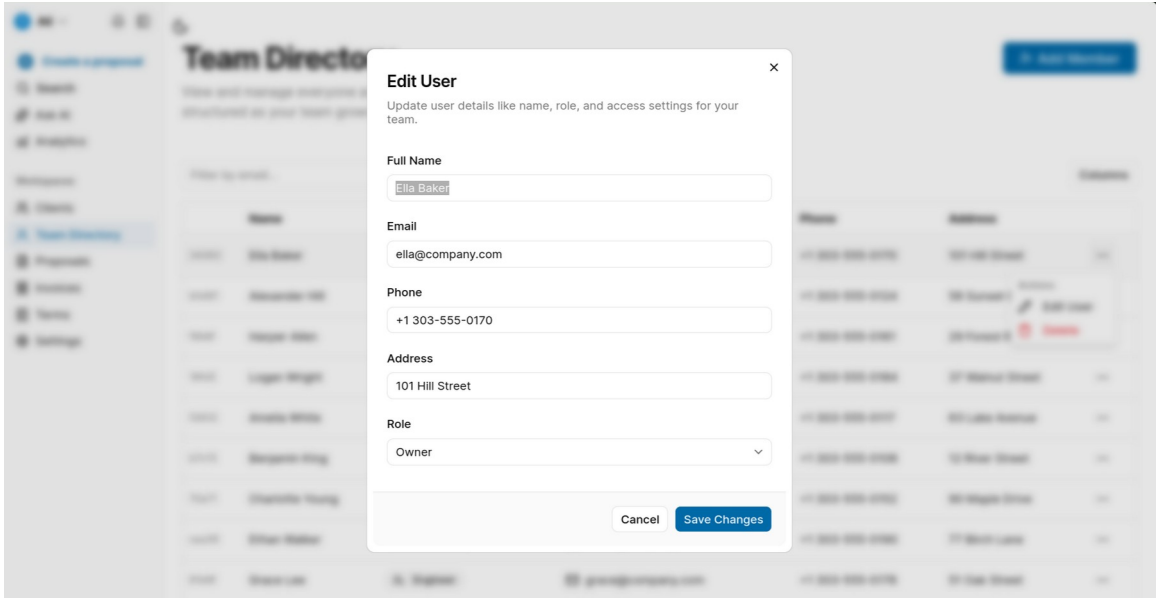
742 Evergreen Terrace, Springfield, IL 62704, USA

Role

Select employee role

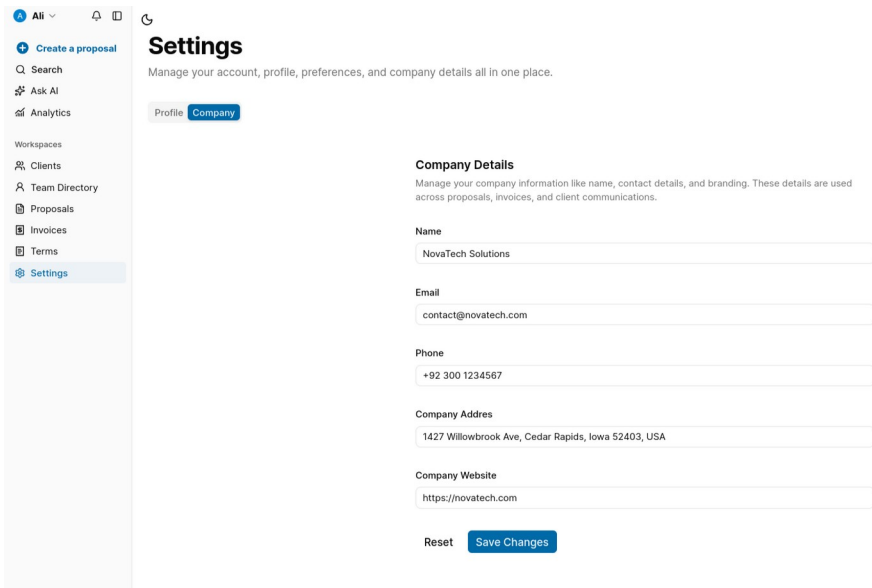
Cancel

Create



Team Directory Management

Company Details Management for Proposals



Settings Page

Terms & Conditions Management

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Policies & Terms

Create, view, and manage all policy documents in one place. Keep terms structured, updated, and easy to track as your system evolves.

Filter by term_title...

Columns

	Title	Total Policies	Preview	Created At
ef077	Event Venue Cleanup	2	Timing Cleanup starts immediately after event See less Trash Removal Dumpster access required	Jun 9, 2026
56eb8	Luxury Apartment Care	2	Damages Reported within 24 hours See less Access Cards Building cards provided by client	Jun 9, 2026
0b771	Weekly Home Cleaning	2	Frequency Service every Tuesday morning See more (+1)	Jun 9, 2026
f2d93	Industrial Sanitation Terms	2	Safety Protective equipment mandatory See more (+1)	Jun 9, 2026

...

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f2d93	Industrial Sanitation Terms	2	Safety Protective equipment mandatory See more (+1)	Jun 9, 2026

Create Term

Add a new policy/term document with structured sections.

Title

Privacy Policy

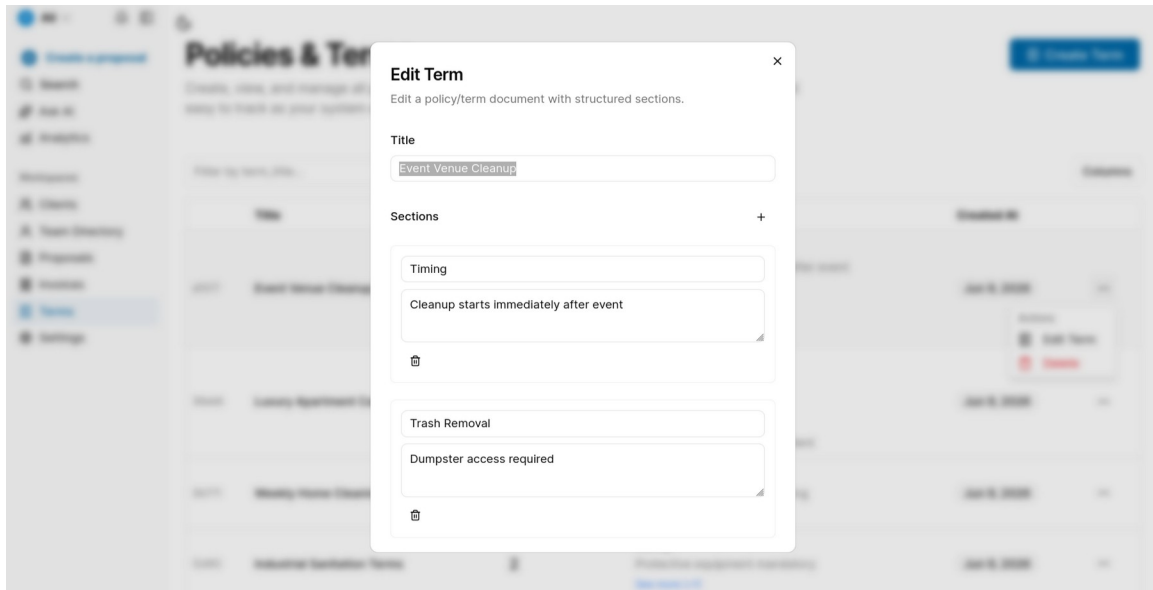
Sections

Section name

Description

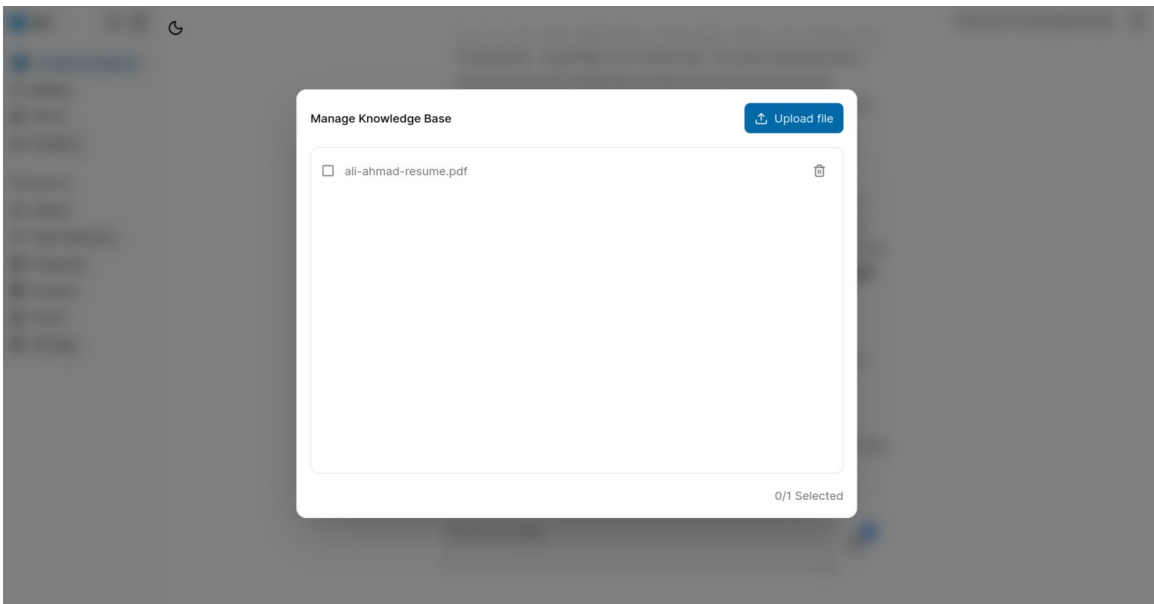
Cancel

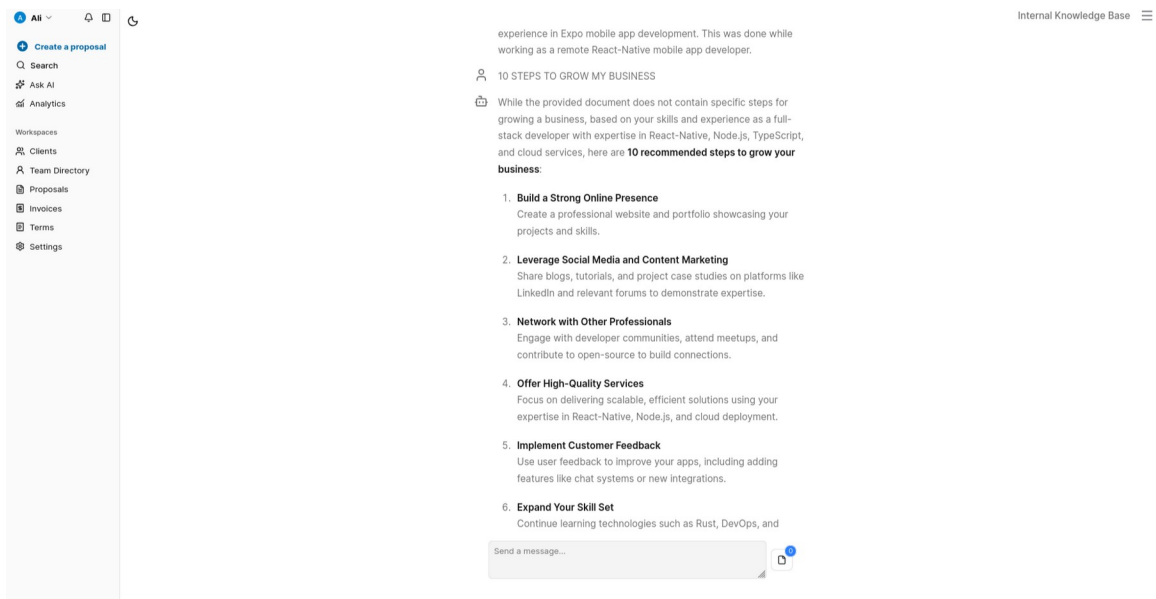
Create



Terms & Condition Management

Personal Knowledge Based AI Agent





8. Business Benefits

- Centralized business operations
- Reduced manual proposal handling
- Professional client communication
- Improved workflow automation
- Secure document management
- Scalable AI-powered knowledge retrieval
- Faster client onboarding and response times

9. Conclusion

This platform delivers a professional, scalable, and AI-enhanced business management solution focused on proposal generation, client management, document intelligence, and operational efficiency. The architecture allows future growth while maintaining strong security, usability, and performance.