

## Feature: Visibility on Agent order Phase 2

### Job Flow and Status across CRM and Trade Portal V4

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**Prototype:** [Figma Link](#)

### Overview

A new job status called **Agent Quote** has been introduced in the quoting process to support jobs created by agents across Desktop and Online Portal.

**Agent Quote** should be included in **automation workflow**.

Settings

<p><b>Company settings</b></p> <ul style="list-style-type: none"> <li>Application setup</li> <li>Company profile</li> <li>Financial information</li> <li>Country</li> <li>Currency conversion</li> <li>Payment configuration</li> <li>Language setup</li> <li>Social media links</li> <li>Terms &amp; Conditions</li> </ul>	<p><b>System settings</b></p> <ul style="list-style-type: none"> <li>User &amp; Roles</li> <li>Invoice &amp; TAX</li> <li>Price setup</li> <li>Delivery setup</li> <li>Restore</li> <li>Log history</li> </ul>	<p><b>Calendar settings</b></p> <ul style="list-style-type: none"> <li>Calendar setup</li> <li>Appointment types</li> <li>Checklist</li> </ul>	<p><b>Status</b></p> <ul style="list-style-type: none"> <li>Job status</li> <li>Order status</li> </ul>	<p><b>Product configuration</b></p> <ul style="list-style-type: none"> <li>Products</li> <li>Options &amp; Materials</li> <li>Pricing groups</li> <li>Field types</li> <li>Pricing types &amp; Unit types</li> <li>Suppliers</li> </ul>	<p><b>Workroom setup</b></p> <ul style="list-style-type: none"> <li>Product workflow</li> <li>Stations &amp; Barcodes</li> <li>Optimization setup</li> <li>User allocation</li> <li>Production storage configuration</li> </ul>
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>Email</li> <li>Text message</li> </ul>	<p><b>Report setup</b></p> <ul style="list-style-type: none"> <li>Reports &amp; Templates</li> </ul>	<p><b>Automation</b></p> <ul style="list-style-type: none"> <li>Automation rules</li> </ul>	<p><b>Customization forms</b></p> <ul style="list-style-type: none"> <li>Modules</li> <li>Field settings</li> </ul>	<p><b>Online ordering setup</b></p> <ul style="list-style-type: none"> <li>Online ordering settings</li> <li>Trade user setup</li> </ul>	<p><b>Version setup</b></p> <ul style="list-style-type: none"> <li>Version setup</li> </ul>

Settings > Statuses > Job status + Add new status

Menu

- Statuses
- Job status
- Order status
- Manual notes type

**Quote process** Color ref: Apply to cell

Job status	Set as default	Color code		
Quote	<input type="checkbox"/>	<span style="background-color: #4CAF50; width: 20px; height: 10px;"></span>	:	::
lead	<input type="checkbox"/>	<span style="background-color: #E91E63; width: 20px; height: 10px;"></span>	:	::
Agent quote	<input checked="" type="checkbox"/>	<span style="background-color: #8D6E63; width: 20px; height: 10px;"></span>	:	::

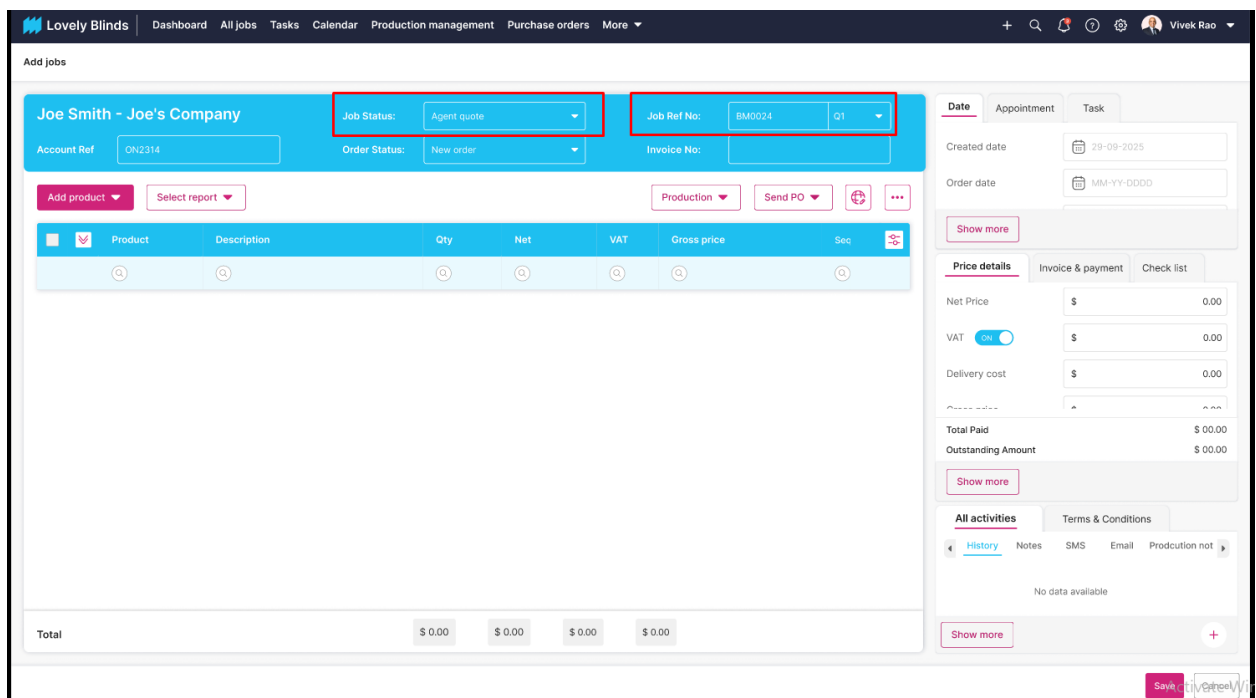
**Order process** Generate invoice number form: Invoice

Job status	Set as default	Color code	Account Transfer		
Agend order	<input type="checkbox"/>	<span style="background-color: #E91E63; width: 20px; height: 10px;"></span>	-	:	::
Order	<input type="checkbox"/>	<span style="background-color: #FFC107; width: 20px; height: 10px;"></span>	-	:	::
Backorder	<input type="checkbox"/>	<span style="background-color: #2196F3; width: 20px; height: 10px;"></span>	-	:	::
Invoiced	<input type="checkbox"/>	<span style="background-color: #ADD8E6; width: 20px; height: 10px;"></span>	-	:	::
Completed	-	<span style="background-color: #4CAF50; width: 20px; height: 10px;"></span>	<input type="checkbox"/>	:	::

## Job Creation – Desktop - Add Job in navigation bar

When a job is created on the Desktop by selecting **+Add Job** in quoting status,

- A **Job Reference Number** is generated.
- The job appears in the **Unsubmitted Jobs** section of the **Online Portal** with the **job reference number**.
- The job is also listed under the **Account** section within **Unsubmitted Jobs**, along with the **job reference number**.
- If a job does not have any products, the **Submit** button on the online portal will be **disabled and greyed out**. The button will become **active only when at least one product is added to the job**.



**Joe Smith - Joe's Company**

Account Ref: DN2314

Job Status: Agent quote

Job Ref No: BM0024 Q1

Order Status: New order

Invoice No:

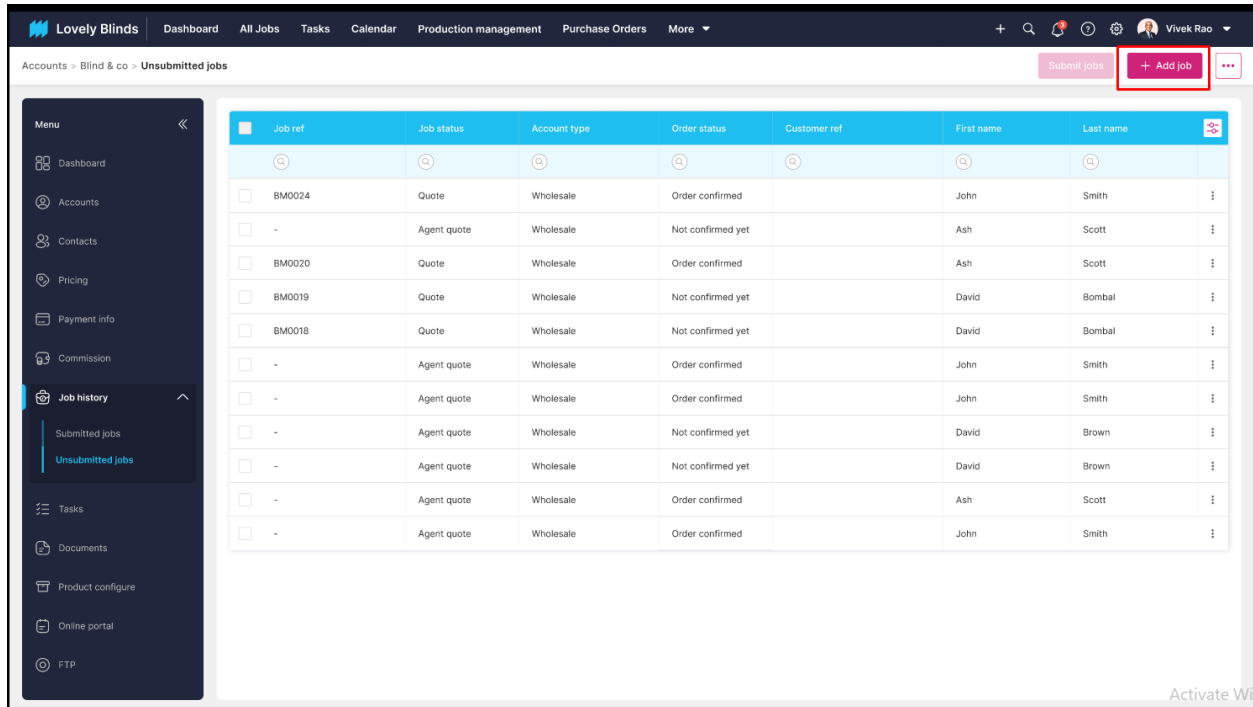
Product	Description	Qty	Net	VAT	Gross price	Sec

Total: \$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00

## Job Creation – Desktop – From Account (Unsubmitted Jobs)

- The job status is set to **Agent Quote**.
- A **Job Reference Number** is not generated.
- The job appears in the **Unsubmitted Jobs** section of the Online Portal **without** a job reference number.
- The job is also listed under the **Account** section within **Unsubmitted Jobs**, **without** a job reference number, and it can be submitted by the portal user by clicking the submit button.

- If a job does not have any products, the **Submit** button on the online portal will be **disabled and greyed out**. The button will become **active only when at least one product is added to the job**.



Accounts > Blind & co > Unsubmitted jobs

Submit jobs **+ Add job**

Job ref	Job status	Account type	Order status	Customer ref	First name	Last name
<input type="checkbox"/> BM0024	Quote	Wholesale	Order confirmed		John	Smith
<input type="checkbox"/> -	Agent quote	Wholesale	Not confirmed yet		Ash	Scott
<input type="checkbox"/> BM0020	Quote	Wholesale	Order confirmed		Ash	Scott
<input type="checkbox"/> BM0019	Quote	Wholesale	Not confirmed yet		David	Bombal
<input type="checkbox"/> BM0018	Quote	Wholesale	Not confirmed yet		David	Bombal
<input type="checkbox"/> -	Agent quote	Wholesale	Order confirmed		John	Smith
<input type="checkbox"/> -	Agent quote	Wholesale	Order confirmed		John	Smith
<input type="checkbox"/> -	Agent quote	Wholesale	Not confirmed yet		David	Brown
<input type="checkbox"/> -	Agent quote	Wholesale	Not confirmed yet		David	Brown
<input type="checkbox"/> -	Agent quote	Wholesale	Order confirmed		Ash	Scott
<input type="checkbox"/> -	Agent quote	Wholesale	Order confirmed		John	Smith

Activate Wi-Fi

1. When the customer submits this unsubmitted job from the **Online Portal**:
  - a. The job status will change to **an Agent Order** in the Desktop system.
  - b. This follows the **existing Agent Order functionality**.
2. The submitted job will also be visible under **Submitted Jobs** within the **Accounts** section.

Lovely Blinds Dashboard All Jobs Tasks Calendar Production management Purchase Orders More

Accounts > Blind & co > Submitted jobs

Job ref	Job status	Account type	Order status	Customer ref	First name	Last name
<input type="checkbox"/> ON2853	Agent order	Wholesale	Order received		John	Smith
<input type="checkbox"/> ON2850	Agent order	Wholesale	Order received		Ash	Scott
<input type="checkbox"/> ON2848	Agent order	Wholesale	Order received		Ash	Scott
<input type="checkbox"/> ON2846	Invoiced	Wholesale	Shipped		David	Bombal
<input type="checkbox"/> ON2814	Invoiced	Wholesale	Shipped		David	Bombal
<input type="checkbox"/> ON2451	Agent order	Wholesale	Order received		John	Smith
<input type="checkbox"/> ON2324	Invoiced	Wholesale	Shipped		John	Smith
<input type="checkbox"/> ON2132	Order	Wholesale	Ready		David	Brown
<input type="checkbox"/> ON2130	Order	Wholesale	Ready		David	Brown
<input type="checkbox"/> ON2290	Order	Wholesale	Ready		Ash	Scott
<input type="checkbox"/> ON2285	Agent order	Wholesale	Order received		John	Smith

Activate Wi

## Job Creation – Online Portal

1. When a **trade user** creates a job from the **Online Portal**:
  - a. The job will be created under the **Unsubmitted Jobs** section.
  - b. No **Job Reference Number** will be generated at this stage.

Lovely Blinds Dashboard All Jobs + Vivek Rao

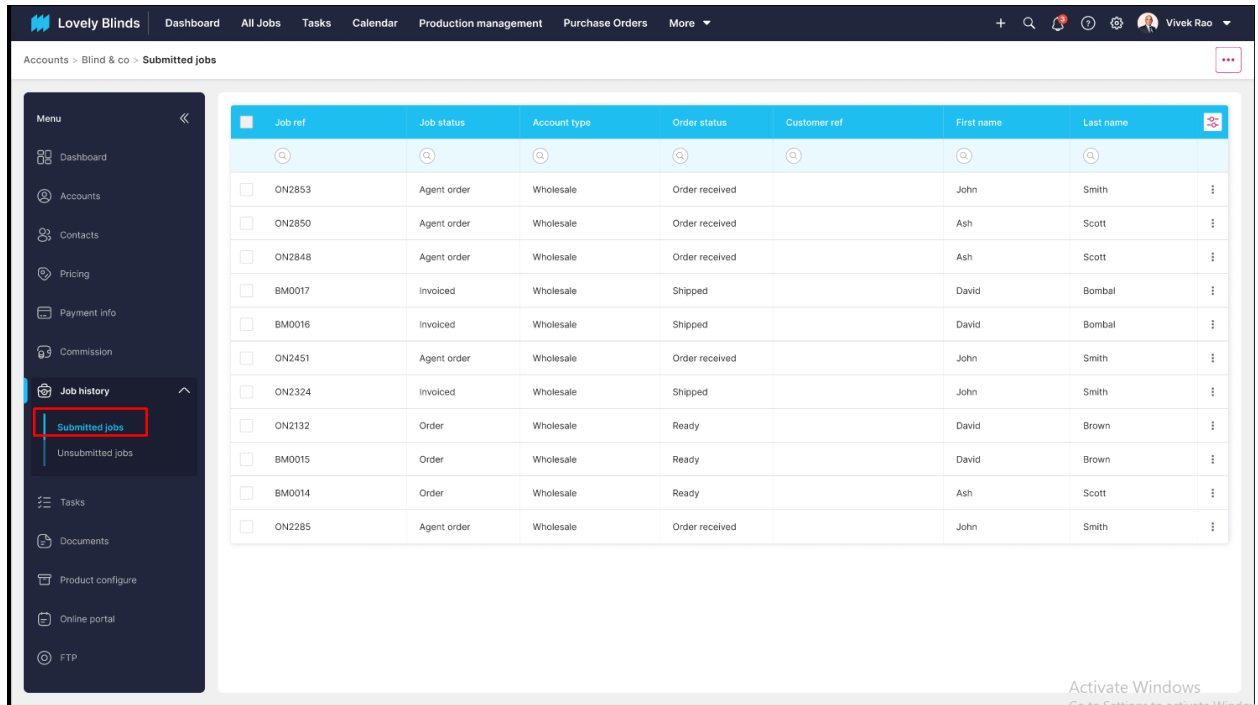
All Jobs Submit job Trade customer report End customer report

Default view

Job ref	Job status	Account type	Order status	Customer ref	First name	Last name
<input type="checkbox"/> BM0024	Quote	Wholesale	Order confirmed		John	Smith
<input type="checkbox"/> -	Agent quote	Wholesale	Not confirmed yet		Ash	Scott
<input type="checkbox"/> BM0020	Quote	Wholesale	Order confirmed		Ash	Scott
<input type="checkbox"/> BM0019	Quote	Wholesale	Not confirmed yet		David	Bombal
<input type="checkbox"/> BM0018	Quote	Wholesale	Not confirmed yet		David	Bombal
<input type="checkbox"/> -	Agent quote	Wholesale	Order confirmed		John	Smith
<input type="checkbox"/> -	Agent quote	Wholesale	Order confirmed		John	Smith
<input type="checkbox"/> -	Agent quote	Wholesale	Not confirmed yet		David	Brown
<input type="checkbox"/> -	Agent quote	Wholesale	Not confirmed yet		David	Brown
<input type="checkbox"/> -	Agent quote	Wholesale	Order confirmed		Ash	Scott
<input type="checkbox"/> -	Agent quote	Wholesale	Order confirmed		John	Smith

Total records: 00

2. When this unsubmitted job from portal appears on the **Desktop**:
  - a. The job status will be **an Agent Quote**.
  - b. The job will not have a job reference number until it is submitted.
  
3. Once the user submits the job from the **Online Portal**:
  - a. The job status will change to **an Agent Order** on the Desktop and job reference number will get generated.



Job ref	Job status	Account type	Order status	Customer ref	First name	Last name
<input type="checkbox"/> ON2853	Agent order	Wholesale	Order received		John	Smith
<input type="checkbox"/> ON2850	Agent order	Wholesale	Order received		Ash	Scott
<input type="checkbox"/> ON2848	Agent order	Wholesale	Order received		Ash	Scott
<input type="checkbox"/> BM0017	Invoiced	Wholesale	Shipped		David	Bombal
<input type="checkbox"/> BM0016	Invoiced	Wholesale	Shipped		David	Bombal
<input type="checkbox"/> ON2451	Agent order	Wholesale	Order received		John	Smith
<input type="checkbox"/> ON2324	Invoiced	Wholesale	Shipped		John	Smith
<input type="checkbox"/> ON2132	Order	Wholesale	Ready		David	Brown
<input type="checkbox"/> BM0015	Order	Wholesale	Ready		David	Brown
<input type="checkbox"/> BM0014	Order	Wholesale	Ready		Ash	Scott
<input type="checkbox"/> ON2285	Agent order	Wholesale	Order received		John	Smith

4. When multiple jobs are selected for submission, only jobs with products will be submitted. Jobs without products will be skipped and will remain in the **Unsubmitted Jobs** section.

A successful toast will appear. **Message:** “Jobs with products were submitted successfully”.

The screenshot shows the 'All Jobs' page in the Lovely Blinds CRM. A success toast message is displayed at the top, indicating that jobs with products were submitted successfully. Below the toast is a table of jobs with columns for Job ref, Job status, Account type, Order status, Customer ref, First name, and Last name. The table contains 14 rows of data, with the first five rows having checkboxes selected.

Job ref	Job status	Account type	Order status	Customer ref	First name	Last name
<input checked="" type="checkbox"/>	BM0024	Quote	Wholesale	Order confirmed	John	Smith
<input checked="" type="checkbox"/>	-	Agent quote	Wholesale	Not confirmed yet	Ash	Scott
<input checked="" type="checkbox"/>	BM0020	Quote	Wholesale	Order confirmed	Ash	Scott
<input checked="" type="checkbox"/>	BM0019	Quote	Wholesale	Not confirmed yet	David	Bombal
<input checked="" type="checkbox"/>	BM0018	Quote	Wholesale	Not confirmed yet	David	Bombal
<input type="checkbox"/>	-	Agent quote	Wholesale	Order confirmed	John	Smith
<input type="checkbox"/>	-	Agent quote	Wholesale	Order confirmed	John	Smith
<input type="checkbox"/>	-	Agent quote	Wholesale	Not confirmed yet	David	Brown
<input type="checkbox"/>	-	Agent quote	Wholesale	Not confirmed yet	David	Brown
<input type="checkbox"/>	-	Agent quote	Wholesale	Order confirmed	Ash	Scott
<input type="checkbox"/>	-	Agent quote	Wholesale	Order confirmed	John	Smith

If all the jobs selected does not have products, then failed toast will appear

**Header:** Submission Failed

**Message:** Job(s) without products cannot be submitted.

**Submission failed**  
Job(s) without products cannot be submitted.

Submit job Trade customer report End customer report

Menu  
Submitted jobs  
Unsubmitted jobs

Default view

<input type="checkbox"/>	Job ref	Job ref	Job status	Account type	Order status	Customer ref	First name	Last name	
<input checked="" type="checkbox"/>	BM0024	0/0	Quote	Wholesale	Not confirmed yet		John	Smith	⋮
<input checked="" type="checkbox"/>	-	0/0	Agent quote	Wholesale	Not confirmed yet		Ash	Scott	⋮
<input checked="" type="checkbox"/>	BM0020	0/0	Quote	Wholesale	Not confirmed yet		Ash	Scott	⋮
<input type="checkbox"/>	BM0019	0/0	Quote	Wholesale	Not confirmed yet		David	Bombal	⋮
<input type="checkbox"/>	BM0018	1/1	Quote	Wholesale	Not confirmed yet		David	Bombal	⋮
<input type="checkbox"/>	-	0/1	Agent quote	Wholesale	Order confirmed		John	Smith	⋮
<input type="checkbox"/>	-	0/1	Agent quote	Wholesale	Order confirmed		John	Smith	⋮
<input type="checkbox"/>	-	0/1	Agent quote	Wholesale	Not confirmed yet		David	Brown	⋮
<input type="checkbox"/>	-	1/1	Agent quote	Wholesale	Not confirmed yet		David	Brown	⋮
<input type="checkbox"/>	-	2/1	Agent quote	Wholesale	Order confirmed		Ash	Scott	⋮
<input type="checkbox"/>	-	0/0	Agent quote	Wholesale	Order confirmed		John	Smith	⋮

On the job details page, the **Submit** button will be disabled if the job has no products.

A tool tip will appear while mouse hovering the submit button.

**Tooltip:** “Add a product to enable submission”.

Add job

Lovely blinds - AM & Co
Job Ref No: 
Account ref: ON2314

Customer ref: 
Additional ref:

Add product ▼
Billing address ▼
Trade customer report ▼
End customer report ▼
⋮

Product	Description	Qty	Item price	Net price	VAT	Gross price	Status
Total			00.00	00.00	00.00	00.00	00.00

**Trade price** Dates

Delivery charge \$ 0.00

VAT \$ 0.00

Gross price \$ 0.00

**End customer price**

Delivery charge Inc.VAT  \$ 0.00

Fitting cost Inc.VAT  \$ 0.00

Sales tax  \$ 0.00

VAT \$ 0.00

Gross price \$ 0.00

**Email** Notes

No rows to show

Show more

Add a product to enable submission.
Submit
Save
Cancel

Also, if there are jobs that have not been submitted among the products, only the submitted jobs will be moved. Otherwise, only the unsubmitted ones will be moved.

### Scenarios to be considered:

- **If an unsubmitted job is deleted in the Online Portal, should it be removed from Desktop immediately, and should the same apply the other way around?**

From the unsubmitted section, if the Jobs are created directly from the **online portal**, it can be deleted. However, jobs created from the **desktop application** cannot be deleted .

- **Can a job in Agent Quote status move only to Agent Order, or are other status changes allowed?**

From **Agent Quote**, the job can be moved to any other status.

If the status remains in a **quoting** stage, the job stays in the **Unsubmitted** section.

If the status is changed to an **ordering** stage, the job moves to the **Submitted** section.

- When **Job Status Override** is enabled, can a job move back from **Agent Order** to **Agent Quote**? Yes
- If a job is moved back to **Agent Quote**, should it be treated as **unsubmitted** again in **Desktop**?

Yes, it should be treated as an unsubmitted job based on its status.