Service Proposals

Send multi-option sales proposals to prospects before drafting a Service Agreement. Accept converts to a pre-filled SA in one click.

Up to date as of v1.31.0

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What this is and why

Service Proposals (SP) is a Premium module that sits between your first conversation with a prospect and the signed Service Agreement. You send a structured sales proposal with up to five priced options. The prospect compares them in a secure portal, accepts one (or sends a structured counter-offer), and you convert their decision into a pre-filled Service Agreement draft with one click. The proposal carries every field the SA needs — client identity, family roster, matter framing, scope, professional fee, payment schedule, government fees, indicative timeline, applied template — so the conversion is a clean field map, not a re-keying exercise.

> **Note**: A proposal is a sales document, not a retainer. The legal-defensibility surface still lives in the Service Agreement. Service Proposals carry the CICC* posture only by virtue of converting into an SA that itself meets the Code; the proposal itself is not a regulated instrument.

Building a proposal

Open Service Proposals from the sidebar and click Create proposal. The Builder is laid out like the Service Agreement Builder: proposal details on top (internal title + language), then a Client and family identity card, then Recipients, then Options, then Send. Each option carries its own label, professional fee, included people (the main client plus any family members from the proposal-level roster), matter override (optional — defaults to the proposal-level matter framing), scope (what we will do and what we will not), service components, tax rate override, government fees, payment schedule, indicative timeline, and notes. Use the right-rail jump-to-section search to navigate quickly; the Send checklist shows every blocker that would prevent you from sending the proposal.

AI Populate

Click AI Populate in the right rail to open the modal. Upload your consultation notes, IRCC letters, and any ID photos / passports for the main client and family. Assign a role to each upload (client, spouse, dependent under 22, etc.). Optionally type a short prompt giving Claude any extra context the documents do not carry ("Spousal sponsorship from Punjab; agreed fee around $6,500"). Click Run. After ~30 to 60 seconds you will see a result panel listing observations, per-field proposals you can accept or discard row by row, recommended family members, a recommended template, and any recommended service components. Click Apply selected. The modal closes and your proposal updates immediately — no refresh needed. When the recommended template is applied, its professional fee, payment schedule, and indicative timeline are populated from the template snapshot.

> **Note**: AI Populate counts toward your shared 50-prompt-per-day Premium AI quota. If you do not see a template recommendation, manually click Apply template on the recommended option editor and pick one from your published library — the manual flow populates the same fee, schedule, and timeline as the AI flow.

Government fees

Each option carries its own government-fee block. Click Add fee and then Pick a fee from the catalogue to open the breadcrumb modal: drill Federal ’ IRCC ’ Permanent Residence ’ Spousal sponsorship or use the search box (e.g. "biometrics", "RPRF"). Pick the fee; the row pre-fills the catalogue amount, the per-unit hint, and the effective date. Use the override checkbox if your matter requires a different amount (e.g. the client paid biometrics earlier this calendar year and is exempt). Use Custom / provincial for Quebec program fees and one-off disbursements. A warning will appear in the Send checklist if you leave the government fees empty — pure-advisory matters can ignore it, but most retainers itemise at least IRCC application + biometrics + RPRF + translation + medicals.

Recipients and sending

The Recipients card accepts up to ten recipients per proposal. Each recipient carries a decision authority: Decides (can accept or counter-offer), Advises (can view and comment), or Informed (can only view). The validator requires at least one Decides recipient before send. Click Send. The platform mints a per-recipient secure portal token, sends an invitation email from the RCIC App brand (info@rcicapp.ca via Reply-To resolution to your firm), and flips the proposal to Sent. Reminder emails fire automatically on day 2, day 5, and day 9 if no decision lands; tokens rotate on each reminder so old links stop working. After thirty days without a decision the proposal auto-expires.

Counter-offers

Counter-offers are structured. The prospect enters a numeric counter-fee plus optional scope additions or removals plus an optional free-text note. The proposal status flips to Countered and a card appears on your dashboard with the delta clearly highlighted. The right-rail Send checklist surfaces a blocker ("Counter-offer from {recipient} — review and accept or reject before re-sending") with a jump-to-counter button. Accepting a counter spawns a new option on the proposal seeded from the counter's fields; rejecting leaves the existing options on the table. Either decision lifts the blocker.

Converting to a Service Agreement

When the prospect accepts an option (or after you accept their counter and they accept the spawned option), the proposal's dashboard shows a Convert button. Click it. The platform reads the accepted option's payload — client identity, family members, matter framing, scope, professional fee, payment schedule, government fees, indicative timeline, applied template version — and writes a new Service Agreement draft seeded from those values. The Service Agreement Builder opens on the new draft. You review, finalise, and send for signature through the existing SA flow. The proposal's status flips to Converted and the audit ledger records the link between the two documents.

Save the proposal to Drive

When your firm has Google Drive or OneDrive connected, every **Service Proposal** carries a Save to Drive button. Click it and the platform renders a PDF of the current record, finds the prospect's folder under **RCIC App / Pre-Service Agreement / {Prospect Name} - {Email}/**, and uploads the PDF there. If the prospect doesn't have a folder yet, the platform creates one; if they do, the existing folder is reused so every pre-SA document for that prospect lands in one place.

The same prospect's records from Booking Notes, Service Proposals, and Intake Forms ALL share one folder per drive provider. The dedup key is the prospect's email address (lowercased + trimmed). When a prospect doesn't have an email yet, their folder gets a **(no email)** suffix; filling in the email on a later save renames the existing folder in place rather than orphaning it and creating a duplicate. Same applies if you correct a typo in the prospect's name — the existing Drive folder is renamed, every file inside is preserved.

If you edit a prospect's email to match a folder that ALREADY exists for another saved record (e.g. you saved a booking note under **(no email)** a week ago, then made a Proposal under the prospect's email, then went back to the booking and filled in the email), the platform merges the two records onto the existing email-matching folder. The earlier **(no email)** folder is left in Drive untouched for your audit trail — you can prune it manually if you'd like.

The button is disabled when Drive isn't connected (with an inline link to the Drive settings page) and when the connection is flagged for reconnect. Connecting Drive is an Owner-only setting; once it's connected, every team member with access to the source record can save to it.

> **Privacy note.** The PDF the platform uploads stays inside your tenant's drive — the prospect never sees it (this is an internal record-keeping artifact, not a prospect-facing document). The originals stored in the platform's database are encrypted at rest under your tenant's data-encryption key; the PDF lives in your drive under your firm's own access controls.

Audit and encryption posture

Every state change writes an append-only event to a ledger your tenant owns: proposal created, option added or removed, recipients updated, proposal sent, recipient invited, portal viewed, counter received, counter accepted or rejected, decision recorded, converted to SA, expired. The ledger is INSERT-only with a database trigger that blocks UPDATE — the legal-defensibility record cannot be tampered with after the fact. Every proposal's identity envelope, options, recipients, counter-offers, and uploaded context documents are encrypted at rest under your tenant's data encryption key, the same posture Service Agreements use.