Format C: Direct Service Offer Enquiries

General Description

Direct Service Offer is a workflow where the client is immediately offered a clearly defined service package (scope, fee, and payment instructions) rather than an exploratory consultation or open-ended quotation process. This is preferable to assigning to a User, because the value is low for these services and the risk that the client would use the opportunity presented by a call from a lawyer to obtain information about the legal process.

This would include requests for all types of certificates, and some other low value highly-standardised legal processes that have little variation and can easily be presented to the client by email - if the client responds, agreeing to the proposal, great! If not, no big loss.

It is used when the enquiry fits a standardised service that Advocate Abroad can package and price upfront - typically obtain and the business goal is to convert quickly with minimal back-and-forth.

When a Direct Service Offer is created, the system marks the record as a Direct Service (isdirectservice = true / Direct Service flag in Overview) and switches on Direct Service–specific behaviours, including templated offer emails and automated follow-up reminders if the client does not respond.

The client can later be handled as a normal full service lead (Created Lead / In Progress, etc.), but the Direct Service nature of the enquiry remains visible for reporting and automation rules.

Goals & Objectives

- **Rapid Conversion of High-Fit Enquiries**: Turn suitable enquiries into paying clients quickly by presenting a concrete service proposal (scope, fixed/ranged fee, and payment instructions) at the earliest opportunity.
- **Standardised Service Packaging**: Ensure consistent pricing, scope descriptions, and expectations for common services using Strategy Guides and templates per ET and country.
- **Automation of Follow-Ups:** Automatically chase non-responsive Direct Service clients with scheduled reminder emails, reducing manual admin workload while keeping leads active.

- **Workflow Segmentation:** Keep Direct Service records logically distinct from regular “Created Lead” flows and Paid Consultations, so reporting, anonymisation, and notification rules can treat them differently.
- **Control Over Elimination:** Ensure that once a Direct Service enquiry is eliminated, all Direct Service follow-ups stop, while preserving the fact that it was a Direct Service in case the client returns later.

Step?by?Step Procedure

Phase 1: Intake & Classification

1. **Enquiry Received**

- Client submits an enquiry via the main website form; Laravel routes it to the correct ET and country and BackOffice creates a client record with status New Enquiry.
- Autoassign tries to assign the enquiry to an eligible professional (profession, ET capabilities, country, capacity, OOO rules); if successful, assigneduser is set and the professional is notified; otherwise the record goes to NPD – Awaiting Assignment for Admin action.

2. **Admin Classification**

- Admin reviews new enquiries (New Enquiries / Daily Updates) and decides which workflow is appropriate: Regular, Direct Service Offer, or Paid Consultation.
- When the enquiry fits a standard, well-scoped service that can be priced without lengthy exploration, Admin chooses Direct Service Offer from the Overview/status controls or using the dedicated Direct Service Offer button in the client record.
- On selection, the system sets the Direct Service flag (isdirectservice true) and the status becomes Direct Service (logical sub-status of Created Lead) while keeping the ET and other data unchanged.

Phase 2: Configure Direct Service Strategy

3**. Open Direct Service Configuration**

- From the client Overview, Admin clicks Direct Service Offer (visible when status is New Enquiry / Created Lead and user has permission), which opens the Direct Service configuration popup.
- The popup is driven by Strategy Guides, filtered by the client’s ET and country (e.g., Spain Property Purchase vs Turkey Immigration), so only relevant service packages are available.

4. **Select Strategy Guide and Template**

   In the Direct Service configuration popup:

- Strategy Guide dropdown: Admin selects the appropriate strategy (e.g., “Spain Property Purchase – Standard Package”), filtered by ET and jurisdiction.
- Email Template dropdown: Admin selects a Direct Service Offer email template; only texts previously saved with Save As New Template are listed, avoiding one-off texts polluting the template library.
- Quotation details:
  - Fee type: fixed fee or fee range fields (Minimum / Maximum) are available and pre-filled from quotation profiles where configured.
  - VAT/tax: VAT is auto-computed based on ET and country tax rules.
  - Payment methods: checkboxes for Bank Transfer, Card/PayPal, Wise, etc., determine which payment instructions will be included in the final email.

5. **Preview & Adjust Offer**

- Admin clicks Preview Email to see a rendered version of the Direct Service Offer email, including: service scope (from strategy guide), fee/fee range, VAT, total, and payment instructions.
- If required, Admin edits text and amounts in the preview; changes affect only this client unless Admin explicitly saves a new template with Save As New Template in the email editor.

Phase 3: Send Direct Service Offer

6. **Send Offer Email**

- When satisfied, Admin clicks Send Offer.
- System actions:
  - Status set to Direct Service, Direct Service flag true.
  - Direct Service Offer email is sent to the client; a copy is stored in the Emails tab.
  - Updates Record is updated with entries like “[DateTime] – Direct Service offer sent by [User/ Admin].”
  - Assigned user receives a notification that a Direct Service offer has been sent for this client.

7. **Initial Follow-Up Window**

- The system starts the Direct Service follow-up timer; if no new client email is received within 48 hours, follow-up automation will begin.

Phase 4: Follow?Up Automation

8. **First Automated Follow-Up**

- After approximately 48 hours without client response, the system automatically sends a Direct Service follow-up email based on the configured Direct Service follow-up template.

- Updates Record logs the action, e.g., “[DateTime] – Direct Service follow-up 1 sent (automated).”

9. **Second/Final Follow-Up**

- After a further delay (commonly around 7 days from the original offer, configurable in templates/cron), the system sends a final Direct Service reminder if there is still no client response.
- Another Updates Record entry is created; after this point, no more automated Direct Service follow-ups are sent unless the workflow is manually restarted.

10. **Expiry**

- When the final follow-up has been sent and no response received, the Direct Service offer is considered expired; Admin may receive a dashboard or email indicator (e.g., “Direct Service offer expired for [Client].”) and should decide whether to Eliminate or re-engage manually.
- Status remains Direct Service until a user manually changes it; elimination does not happen automatically.

Phase 5: Client Responds to Direct Service Offer

11. **Client Response Handling**

- When the client replies to any Direct Service email, the response is stored in the Emails tab and marked as unread; the assigned User receives a “Client Email Received” notification.
- There is no automatic status change on email receipt; the User must manually progress the record once it is clear the client wishes to proceed.

12. **Convert to Active Work**

    Typical paths after a positive response:

- User changes status from Direct Service to Created Lead or In Progress once terms are agreed or client explicitly says they want to go ahead.
- Strategy Guide / quotation details created under the Direct Service offer remain part of the record; the case then continues through normal work phases: In Progress, Waiting for Response, Completed, Closed.
- All Direct Service flags remain set, so reporting still recognises that the engagement arose from a Direct Service Offer.

Phase 6: Elimination & Re?activation

13**. Elimination from Direct Service**

- If the client does not respond and the User/Admin decides not to continue chasing, status is changed from Direct Service to Eliminated – Rejected / Unsuitable via the regular status popup.

- On confirmation:
  - All Direct Service follow-up automation stops immediately.
  - The Direct Service flag remains true, preserving history that this was a Direct Service enquiry.
  - The record becomes eligible for anonymisation after the configured period (typically six months of inactivity without professional engagement).

14. **Client Returns After Elimination**

- If the client returns later (e.g., via new email), the User or Admin can change status back from Eliminated to Created Lead (or another active status); the system must preserve Direct Service behaviour (maintain the Direct Service flag) and must not silently convert the enquiry into a Paid Consultation.
- Direct Service follow-ups do not automatically restart; further communication is handled manually or via new strategy actions.

Common Confusion & Errors

Issue	Description	Resolution
Direct Service vs Paid Consultation	Users confuse Direct Service Offer (full service proposal) with Paid Consultation (advice-only call) because both share some Strategy Guide UI elements.	Check the Overview flags: Direct Service flag vs is_consultation_only; only Direct Service records trigger Direct Service chaser emails and use Direct Service templates.
Templates not appearing	Users expect one-off edited texts to show in the Direct Service template dropdown.	Only texts saved via **Save** As New Template appear as reusable Direct Service templates; one-offs remain bound to the specific client.
Direct Service follow-ups still sending after elimination	Users forget that follow-ups continue while status is Direct Service even if they consider the case “dead”.	Always change status to Eliminated – Rejected / Unsuitable to stop Direct Service follow-ups; this immediately cancels scheduled Direct Service reminders.
Loss of Direct Service context after status change	In earlier iterations some flows treated returning clients as regular leads without keeping Direct Service history.	Business rule: any status transitions must preserve the Direct Service flag; eliminating and re-opening should not convert to Paid Consultation or strip Direct Service reporting fields.

Permissions & Access Control Rules

- Visibility & Routing: Only Users whose profession and ET permissions match the enquiry’s ET and country (configured in Laravel) will be eligible for Direct Service assignments

through autoassign.

- Creating Direct Service Offers:
  - Admin can always initiate a Direct Service Offer from New Enquiry or Created Lead, regardless of assigned user.
  - Some implementations allow Users to trigger Direct Service offers for their own clients; business logic assumes Admin is the primary actor for initial Direct Service creation.
- Direct Service Flag: The Direct Service flag in the Overview tab (isdirectservice) is typically Admin-editable only to avoid accidental removal; normal Users control status but not the underlying Direct Service flag.
- Status Changes: Assigned Users can move Direct Service records through Created Lead, In Progress, Waiting for Response, Eliminated, Completed, Closed according to general status rules.

Timing, Deadlines & Automation Rules

Rule	Description
24-Hour Contact Expectation	Direct Service enquiries still fall under the general expectation that the assigned professional contacts the client within about 24 hours, even though the first contact may be a templated offer.
Direct Service Follow-Up Schedule	First automated Direct Service reminder sent about 48 hours after initial Direct Service Offer if no response; a final reminder follows after an additional delay (around 7 days total).
Follow-Up Cut-Off	After the configured final Direct Service follow-up, no further automatic Direct Service chasers are sent; status remains Direct Service until manually changed.
Elimination Effect	Changing status from Direct Service to Eliminated immediately stops all planned Direct Service follow-ups.
GDPR Anonymisation	Direct Service enquiries that never proceed to active work and are set to Eliminated become eligible for anonymisation after approximately six months of inactivity, in line with general non-engaged enquiry rules.

Related Processes & Dependencies

- Prerequisites:
  - Correct ET configuration in Laravel (ET must support Direct Service strategies and have appropriate pricing/commission defaults).
  - At least one Direct Service Strategy Guide and Direct Service Offer template configured for the ET and country.
  - Autoassign and OOO rules functioning so an appropriate professional is assigned, or Admin can step in from NPD.

- Dependencies / Downstream Processes:
  - Strategy Guides & Quotation Profiles: Direct Service relies on Strategy Guides for standardised scope and quotation data (fee ranges, VAT, additional services), which also feed into later work when the client proceeds.
  - Recurring Services: For some ETs (e.g., Income Tax Declaration, Accounting/Bookkeeping), a Direct Service engagement may later trigger recurring service setup once initial work is complete and the relationship becomes ongoing.
  - Surveys & Closure: Once Direct Service work is completed, the case uses the same Completion and survey workflows as other leads (status Completed then Closed triggers satisfaction survey and anonymisation timers).

Error Recovery & Retry Logic

Scenario	System Behaviour	Recovery Action
Autoassign failure for a potential Direct Service case	Lead is created with status NPD – Awaiting Assignment and an Admin alert is sent; no Direct Service Offer can be sent until someone is assigned or Admin intervenes.	Admin assigns a suitable user from the Unassigned Leads view or decides not to proceed (Eliminated); then initiates Direct Service Offer if appropriate.
Direct Service Offer email fails to send	Email client returns a send error; the UI shows a message such as “Email could not be sent, please try again or contact support.”	User retries sending the offer, or contacts Admin/devs if repeated failures occur; no automatic resend loop is configured.
Client replies but remains in Direct Service with expired follow-ups	Follow-up scheduler does not change status on email receipt.	User manually updates status to Created Lead / In Progress as soon as they start substantive work; this resumes standard workflow and statistics.
Direct Service flag removed incorrectly	Earlier bugs or manual overrides may have stripped the Direct Service flag when switching statuses.	Admin corrects Overview flags in the client record and confirms that status logic preserves Direct Service behaviour going forward (do not convert to Paid Consultation).

Performance & Scalability Considerations

- Direct Service follow-up emails are processed by background jobs/cron, allowing the system to handle large volumes of Direct Service records without blocking the UI.
- Autoassign and Strategy Guide filtering ensure only relevant professionals and strategies are evaluated, reducing query load and avoiding N+1 patterns when listing candidates or templates.
- Template management is centralised; using Save As New Template reduces proliferation of similar templates and keeps the Direct Service email selection lists performant.

Configuration & Customisation Options

Setting	Location	Description
Direct Service Offer Strategy Guides	Laravel > Strategy Guides	Define per-ET, per-country Direct Service packages (questions, proposals, default fees) used when constructing Direct Service offers.
Direct Service Offer Template	BO Email Templates / Laravel Templates (Direct Service category)	Email bodies for initial Direct Service offers (ID category “Direct Service Offer Template” in notification section).
Follow-Up Templates & Delays	Laravel / Notification Templates – 9.3 Direct Service Followup Emails	Templates for first and second Direct Service chasers and their timing configuration.
ET-Level Defaults	Laravel > Enquiry Types	Default fee ranges, commission, country constraints, and recurring flags that apply to Direct Service strategies for that ET.

Notification & Communication Rules

Event	Recipient	Timing	Content
Direct Service Offer sent	Client	Immediately on Send Offer	Full Direct Service proposal: scope, fees, VAT, payment instructions, next steps.
Direct Service Offer sent (internal)	Assigned User	Immediately	Summary that a Direct Service offer has been sent for the client, with link to the record.
Direct Service follow-up 1	Client	~48 hours after offer, no response	Polite reminder about the Direct Service proposal with reference to original scope and fee.
Direct Service follow-up final	Client	After configured delay (e.g., 7 days total), if still no response	Final reminder indicating the offer is still available but may expire; no further automated chasers afterwards.
Direct Service expiry	Admin/User	After final follow-up	Dashboard/notification indicating “Direct Service offer expired” so User/Admin can decide whether to Eliminate or re-engage manually.

Event	Recipient	Timing	Content
NO Automated Suppression	N/A	N/A	Unlike Paid Consultation, Direct Service records are explicitly included in follow-up reminder automation until eliminated.

Historical Changes & Deprecations

- Earlier behaviour sometimes allowed Direct Service enquiries that were set to Eliminated and later reactivated to lose their Direct Service identity or be treated as Paid Consultations; current business logic explicitly requires preserving the Direct Service flag and behaviour across such status transitions.
- Template management was tightened so that only texts saved as templates appear in Direct Service template lists, reducing clutter and mis-selection risks.
- Trello/JSON feedback led to clarifications that Direct Service Elimination must always stop chasers and that list/status behaviour for Direct Service records is consistent with other statuses.

Compliance & Legal Considerations

- Fee Transparency: Direct Service Offer emails must clearly state fees, any VAT or local tax, and what is included/excluded in the service, to avoid misunderstandings and satisfy consumer law expectations.
- Record Keeping: Direct Service offers, follow-up emails, and responses are all logged in the Emails and Updates Record tabs, providing an audit trail of what was offered and when.
- GDPR: Direct Service enquiries follow the same anonymisation and deletion rules as other non-engaged leads (e.g., anonymise after about six months of no engagement, delete later), with configuration by jurisdiction.
- Commission Tracking: Once a Direct Service lead converts and payments are declared, standard commission calculation and logging rules apply; these logs are immutable and adjustments require credit notes or explicit corrections.

Backend Processes / Code Services

- Direct Service Offer Workflow Engine: Backend logic handles the Direct Service Offer popup, application of Strategy Guides, fee defaults, and setting the isdirectservice flag and Direct Service status.
- Direct Service Follow-Up Scheduler: A background job/cron checks Direct Service records with no client response and sends follow-up emails according to timing rules, while respecting elimination and status changes.
- Strategy Guide Filtering: Service code filters Strategy Guides by ET and country so only valid Direct Service packages are selectable for a given client; this same mechanism underpins Direct Service and full-service strategies.

- Notification Template System: Direct Service Offer and Direct Service follow-up emails are mapped to specific template IDs in the notification engine (9.3.x group), ensuring consistent text and behaviour across the platform.

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