Quorvale

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Operations Dashboard & Automation Proposal

Proposal # P-2026-021
Date Sep 28, 2026
Valid until Oct 31, 2026

PREPARED FOR

Thistlebrook Trading Co.
Attn: Marlo Fenwhistle
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PREPARED BY

Ollo Brightvane, Principal Consultant

Summary

Thistlebrook currently tracks orders, inventory and supplier quotes across four spreadsheets. This proposal outlines a single Airtable base with automated quote and invoice generation, cutting manual admin by an estimated 6-8 hours per week.

Goals

1. One source of truth for orders, inventory and suppliers.
2. Quotes and invoices generated from records in one click.
3. Weekly inventory report emailed automatically.

Approach

We start with a two-hour discovery call to map current workflows, then build the base iteratively with a review at each milestone. Your team gets a recorded walkthrough and written runbook at hand-off.

What's not included

Third-party subscription costs (Airtable, automation platforms) and data clean-up beyond the first 2,000 records.

Timeline

1	**Discovery & data model** Workflow mapping, base schema sign-off	Week 1
2	**Base build & migration** Tables, views, import of existing spreadsheets	Weeks 2-3
3	**Automations & documents** Quote/invoice PDFs, inventory report	Week 4

4	**Training & hand-off** Live session, recording, runbook	Week 5

Investment

#	DESCRIPTION	QTY	UNIT PRICE	AMOUNT
1	**Discovery & data model**	1	$1,500.00	$1,500.00
2	**Base build & migration**	1	$4,200.00	$4,200.00
3	**Automations & document templates**	1	$2,800.00	$2,800.00
4	**Training & hand-off**	1	$900.00	$900.00

Subtotal	$9,400.00
Total	**$9,400.00**

Terms

40% on signature, 40% at milestone 3, 20% on hand-off. Proposal valid until the date above.

ACCEPTANCE

By signing below, Thistlebrook Trading Co. accepts this proposal.

Signature	Name & title	Date