PulseBoard AI - Feature Summary & Next Steps

Current Features (Production-Ready)

Authentication & Tenant Access

Secure multi-tenant access system with role-based permissions, session management, and protected routing.

Database & Core Engine

PostgreSQL schema with Drizzle ORM for user, tenant, KPI, and fraud data. Activity logging and team invites included.

Business KPI Dashboard

Real-time metrics with customizable KPI cards, graphs, and auto-refresh.

Task Management

Track tasks with status, priority, user assignment, and per-tenant customization.

AI-Powered Fraud Detection

Claude AI integration for transaction scoring, pattern recognition, fraud reports.

Fraud Case Manager

Case lifecycle tracking, flagged transactions, fraud confidence scoring.

Team Management

Invite users, assign roles, track user activity and statistics.

White-Label & UI Customization

Tenant logos, themes, module renaming, and responsive layout.

Frontend & Backend Infrastructure

React + Tailwind + TypeScript frontend, Express.js REST API backend, fully deployed with DigitalOcean.

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Navigation & Layout

Responsive layout with sidebar, topbar, theming, and mobile nav.

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Upcoming Features (Recommended Additions)

Accounting Integration

Connect QuickBooks/Xero to import revenue and expense data. Output plain-English profit/loss summaries.

Profit Leak Detector

AI-detected waste such as duplicate billing, missed invoices, or unused subscriptions.

Module-Based Document Uploads

Upload files (PDF, CSV, receipts, permits) to any dashboard, task, or fraud case with OCR and matching.

AI Business Insights

Natural language queries and uploads analyzed into clear, actionable explanations.

Auto-Audit Bot

Daily/weekly alerts of suspicious spending or missing data (e.g., unmatched receipts, late payments).