LLMDataVista

Comprehensive AI Business Manager Blueprint

This document explains in clear and structured language how LLMDataVista will function as a persistent AI Revenue and Finance Manager. It outlines the vision, system architecture in simple terms, data processing model, live database connection strategy, monitoring logic, reporting structure, security framework, pricing model, and phased implementation roadmap.

1. Core Vision

LLMDataVista is built to move beyond dashboards and become an automated business oversight system. It continuously monitors revenue and financial performance, detects unusual changes, calculates a business health score, and delivers clear weekly summaries that help business owners act confidently.

2. What Customers Are Paying For

- Peace of mind through automated financial monitoring.
- Time savings from eliminating manual reporting.
- Early detection of revenue drops and expense spikes.
- Structured and consistent KPI tracking.
- Clear decision guidance in simple language.

3. Data Input Methods

- Manual CSV uploads (Orders, Expenses, Ads).
- Platform integrations (Shopify, Stripe, accounting tools).
- Live database connection using read-only credentials.
- Internal workspace storage for historical tracking.

4. Live Database Connection Model

The system connects using secure read-only access. It never edits or deletes data. Users choose which tables are monitored. Data refreshes automatically on a schedule, allowing the AI Manager to operate seamlessly.

- Read-only access at all times.
- User-controlled table selection.
- Logged and transparent data access.
- Disconnect option anytime.
- Strict query limits and security timeouts.

5. Data Processing & Intelligence Engine

Business logic calculates revenue trends, profit margins, expense movement, refund rates, and performance comparisons using consistent formulas. Artificial intelligence is used primarily to summarize findings and provide explanations in clear language.

6. Automated Monitoring Engine

- Revenue trend comparison (week-over-week).
- Profit margin stability.
- Expense spike detection.
- Refund and return monitoring.
- Ad spend versus revenue efficiency.
- Cash flow tracking.

7. Business Health Score

A simplified 0–100 score summarizes overall business performance. It combines revenue growth, profit stability, expense control, and operational consistency into one easy-to-understand metric.

8. Weekly AI Business Report Structure

- Business Health Score overview.
- Revenue performance summary.
- Profit margin changes.
- Top performing and declining products.
- Major expense changes.
- Plain-language explanation of causes.
- Suggested actions.

9. User Experience Flow

- Connect data source or upload CSV.
- Confirm field mapping.
- View initial Business Snapshot dashboard.
- Monitoring activates automatically.
- Receive weekly reports and alerts.
- Log in anytime for detailed analysis.

10. Monetization Strategy

- Free Plan: Manual uploads only.
- Pro Plan: Live connection + automated weekly reports.
- Growth Plan: Alerts and multiple data sources.
- Enterprise Plan: Advanced compliance and team access.

11. Phased Implementation Roadmap

- Phase 1: CSV-based monitoring MVP.
- Phase 2: Postgres live database connection.
- Phase 3: Scheduled alerts and reporting automation.
- Phase 4: Forecasting and predictive insights.
- Phase 5: Enterprise integrations and scaling.