SalesAice SaaS – Detailed Developer Blueprint (Phases 1 & 2)

Total Estimated Hours: 86

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1. User Authentication & Roles *(6 hours)*

Features & Workflow

- **Login/Signup Page:**
  - New users register with email and password.
  - Existing users login with email and password.
  - Password reset (email link).
- **Roles:**
  - *Admin*: Can manage all users, packages, and view analytics for entire system.
  - *User (Subscriber)*: Can access and configure their own agents, manage calls, billing, business data.
- **Post-Login:**
  - All users are redirected to the Dashboard.
  - Access is restricted based on role (Admin/User).

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2. Dashboard *(6 hours)*

Features & Workflow

- **Summary Stats:**
  - Total inbound and outbound calls this billing cycle.
  - Current subscription plan/package.
  - Plan renewal/expiry date and usage bar (e.g., minutes used/remaining).
- **Quick Access Buttons:**
  - Inbound Calls
  - Outbound Calls
  - Agent Management
  - Call Histories
  - Billing/Subscription

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3. Subscription & Packages *(9 hours)*

Features & Workflow

- **Packages Setup (Admin Only):**
  - Admin creates and manages subscription packages. Each package defines:
    - Package Name (e.g., Starter, Pro, Enterprise)
    - Monthly Price
    - Call/minutes limit (inbound, outbound, or total)
    - Number of agents allowed
    - Access to analytics/explainability (yes/no)
    - Other features (e.g., number of campaigns, advanced analytics, API access)
- **Package Selection (User):**
  - On first login (or when not subscribed), user must choose a package.
  - List of available packages with feature comparison table.
- **Subscription Management (User):**
  - Subscribe, upgrade, downgrade, or cancel plan.
  - Stripe integration for secure payments (monthly/annual billing options).
  - View and download invoices.
  - Handle webhooks for payment events (renewal, cancellation, payment failure).
  - Usage/billing alerts if limits are near/exceeded.
  - User can only access features allowed by their plan (e.g., no advanced analytics if not included).
- **Stripe Portal Integration:**
  - Embedded Stripe billing portal for payment method update, invoice download, etc.

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4. Agent Management & Configuration *(16 hours)*

Features & Workflow

- **Agent List Page (User):**
  - See all agents configured by the subscriber.
  - For each: Name, Type (Inbound/Outbound), Status (Active/Paused), Calls Handled.
  - Option to create, edit, or delete agent (limit based on package).
- **Create/Edit Agent Page:**
  - **Common Agent Settings:**
    - Name, Agent Type (Inbound/Outbound), Status (Active/Paused)
    - Hume AI API key/config
    - Voice/tone selection
    - Operating hours (time windows for agent to work)
    - Enable/disable auto-answer (for inbound)
    - Upload sales script/template (file upload)
  - **Business Knowledge Section:**
    - Website link (URL field)
    - Upload text / pdf / docx files for business knowledge
  - **For Outbound Agents Only:**
    - Upload contacts file (CSV: Name, Phone, Notes, Preferred Time)
    - Schedule campaign: pick start date/time or start immediately

        - View call queue (pending/completed), status
    - **Save/Update Agent** button with validation.
- **Delete Agent:**
    - User can remove any agent not currently in an active call/campaign.

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5. Call Panel (Unified) *(11 hours)*

Features & Workflow

- **Two Main Tabs:**
    - **Inbound Tab:**
        - Shows status: "Agent is active and will auto-answer calls."
        - Real-time log of current inbound calls, with live transcript, caller info, and emotion/tone tags (from Hume AI).
        - Upon call completion, summary and transcript move to history.
        - If user's plan allows, view analytics/explainability for recent calls right here.
    - **Outbound Tab:**
        - **Quick Call:**
            - User enters number, agent immediately makes outbound call.
            - Real-time transcript and AI emotion/tone tags.
        - **Scheduled/Bulk Calls:**
            - Shows queue/progress for batch/scheduled calls from uploaded CSV.
            - For each: callee, scheduled time, status (pending/active/completed/failed), call outcome.
        - All transcripts and outcomes recorded and accessible in Outbound History.

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6. Call Histories *(6 hours)*

Features & Workflow

- **Inbound Call History:**
    - List all inbound calls handled by agents for this subscriber.
    - Each row: Timestamp, Caller, Agent, Duration, Outcome.
    - Click to expand: Full transcript, emotion analytics, explainability panel (if enabled in package).
    - Filters: date range, agent, outcome.
- **Outbound Call History:**
    - Same as above, for all outbound calls (quick and batch).
    - Each row: Timestamp, Callee, Agent, Outcome, Campaign ID (if batch).
    - Filters: date range, agent, status.

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7. Billing/Subscription Management *(6 hours)*

Features & Workflow

- **Current Plan:**
  - Show active plan/package, limits, renewal/expiry date.
- **Upgrade/Downgrade:**
  - Button to change plan/package (with feature comparison popup).
- **Invoices:**
  - Table of all past invoices (date, amount, download link).
- **Stripe Portal:**
  - Embedded or linked for managing payment method.
- **Usage Tracking:**
  - Warnings if user is near/exceeding allowed minutes, agents, or campaigns (per package).
- **Cancel Subscription:**
  - Option to cancel, with info about what features will be lost.

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8. Profile & Settings *(3 hours)*

Features & Workflow

- Edit user details (name, email, password).
- Change password.
- Set notification preferences (optional).

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9. Admin Panel *(3 hours)*

Features & Workflow

- List/manage all users (search, filter by status, reset password, activate/deactivate).
- Create, edit, or retire subscription packages.
- View system-level usage analytics (total users, active agents, call volume).

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10. Sales AICE Architecture (Phase 2 Features) *(20 hours total)*

a. CLARIFIES-Based Conversation Logic *(7 hours)*

- All agent calls (inbound/outbound) follow CLARIFIES sales objection/decision flow.
- Each response/action is logged with step-by-step reasoning and objection tags.

- If a call is escalated or a lead is won/lost, this is marked and viewable in call history.

b. Conversation Analytics Dashboard *(7 hours)*

- Visual charts:
    - Types of objections handled, escalation/override rates, win/loss rate, tone trends.
    - Filters for agent, date range, campaign.
- Table and chart views for easy comparison and export.

c. Explainability Panel (per call) *(3 hours)*

- User can click any call in history to view:
    - Transcript, objections detected, CLARIFIES logic path, and decision points.
    - Graphical step-by-step reasoning with links to transcript sections.

d. Risk Filter *(3 hours)*

- Regex-based content filter runs before AI responds.
- If flagged, event is logged for admin review and blocked from being sent to customer.
- Admin dashboard shows all flagged events for audit.

Step-by-Step Developer Build Sequence

1. **User Authentication & Roles**
2. **Dashboard**
3. **Admin Panel:**
    - Create/edit packages before anything else (must exist for users to subscribe)
4. **Subscription & Packages:**
    - User selects/activates package on first login (cannot use system without active plan)
    - Stripe integration for all payment flows and usage limits
5. **Agent Management & Configuration**
    - Users configure inbound and outbound agents, with business knowledge section (website, PDFs, notes, scripts)
6. **Call Panel (Unified)**
    - Inbound (auto-answer, logs)
    - Outbound (quick call, scheduled/bulk, logs)
7. **Call Histories**
    - Inbound and outbound, with transcript, analytics, explainability if enabled
8. **Billing/Subscription Management**
    - Plan status, upgrades/downgrades, invoices, Stripe portal
9. **Profile & Settings**
10. **Sales AICE Phase 2 Features**
    - CLARIFIES logic for all agent calls
    - Analytics dashboard for objections/escalations
    - Per-call explainability

- Risk filter integration

Important Notes (for Client and Developer)

- **Total work capped at 86 hours**.
- Features above are covered in hours; extra or uncontracted work will increase time/cost.
- **Business knowledge upload (website link, PDF, notes) is standard in agent config.**
- **Subscription/packages must be set up before Stripe and usage enforcement.**