# Software Requirements Specification

# for

# WhatsApp ChatBot

**Version 1.0**

**Prepared by**


**GROUP: Group 1**

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## Revisions

| Version | Primary Author(s) | Description of Version | Date Completed |
|---|---|---|---|
| Draft 1 | Patrick Marsden<br>Tiana Samuels<br><br>Tahjric Allen<br><br>Jason Matthews<br>Jada Cole | This is the initial version of the Software Requirements Specification document. | 11/8/2025 |
| Draft 2 | Patrick Marsden | Update Requirements based on Clients Feedback and Group Resources | 12/1/2025 |

# 1 Overall Description

## 1.1 Product Context and Need

### Product Context

White Rose Interiors Ltd. is an Interior Design and Home Services company specializing in: sanitization, custom cleaning, pest control, carpet installation, car interior cleaning, and blinds (build/sell/repair & installation). Each service has unique data requirements (e.g., measurements, materials, site access, schedule) that currently require significant manual back-and-forth with customers.

### NEED

Current customer-service operations are heavily manual, causing delays, inconsistent data capture, and higher operating costs. The absence of an automated assistant to collect measurements, generate estimates, route leads, and follow up results in slower response times and lost sales opportunities. This project aims to solve this by developing a customer-service chatbot to streamline sales interactions and improve efficiency.

## 1.2 Product Functionality

The chatbot system will automate key customer interactions and provide management oversight.

The major functions are:

- Automate quotation capture for key lines of business (blinds, carpet install/cleaning, cleaning services, pest control).
- Support appointment scheduling, reminders, and rescheduling.
- Generate standardized estimates/invoices and send them to customers.
- Provide order/status tracking (e.g., job scheduled, in progress, completed).
- Centralize conversation history and analytics for management.

### 1.3 Stakeholders and Users Characteristics

**Customers/Clients**: Will use the system to request quotes, schedule different services and to approve and/or pay for requested products/services

**Management/Owners:** Will use the system to monitor daily operations, staff and communicate with them. As owners, their decisions

**IT/Admin:** Need secure access, roles/permissions, and system backups

**Sales/CS Agents:** Need standardized lead data; desire automation for repetitive steps to focus on high-value tasks.

### 1.4 Operating Environment

The system will operate in a cloud-hosted environment. The backend services (business logic, pricing engine, database) will be hosted on a Windows-based server environment.

- **User (Client) Environment:** The system shall be accessible to users on any smartphone, tablet, or computer capable of running WhatsApp, Instagram, or a modern web browser (for the web chat fallback). No specialized client hardware is required.
- **Administrator Environment:** The Admin Dashboard shall be a web-based application accessible via modern web browsers (e.g., Chrome, Firefox, Safari, Edge) on a desktop or tablet.
- **System Environment:** The core application will run on a server (e.g., AWS, Azure, or private VPS) running a Windows OS. It will interface with a local JSON file storage. for persistent data storage and external APIs for messaging and email.

### 1.5 Design and Implementation Constraints

**Inaccurate Customer Measurements:** The accuracy of automated quotes relies on measurements provided by customers who are not professionals. The system must be designed to guide users carefully and flag potential errors, with a human review step before a final invoice.

**Technology Stack:** The backend system shall be developed using compatible technologies for a Windows hosting environment. The system uses JSON storage. This removes SQL complexity but introduces constraints such as file-locking risks, atomic write requirements, and size limitations for very large datasets.

**Chatbot Library Dependency:** The system will be built using a client-side automation library (e.g., whatsapp-web.js). This is **not** an official, supported Meta API. This creates significant constraints:

1. **Reliability:** The bot's functionality is dependent on the WhatsApp Web interface, which can be updated by Meta at any time, potentially breaking the bot until the library is updated.
2. **Persistent Session:** This approach requires a local server or host to be persistently online, connected, and authenticated to maintain the WhatsApp Web session. If the session logs out, the bot will stop working.

### 1.6 Assumptions and Dependencies

**Stable Internet Connectivity:** It is assumed that both the end-users (Customers) and the system's hosting environment have stable and reliable internet access for communication.

**User Literacy:** We assume customers are familiar with using messaging applications like WhatsApp and can follow guided prompts to provide text and numeric input.

**Price List Accuracy:** We assume that White Rose Interiors Ltd. will provide and maintain an accurate and structured price list that can be translated into business rules for the pricing engine.

**Server and Library Stability:** The project is critically dependent on (a) a local server or host remaining powered on, connected to the internet, and authenticated 24/7, and (b) the web.js library being functional and compatible with the current version of WhatsApp Web.

# 2 Specific Requirements

## 2.1 External Interface Requirements

### 2.1.1 Hardware Interfaces

The system shall not interface with any specialized hardware. The only hardware interaction is with the end-users' devices (smartphones, tablets, computers) via standard software interfaces (messaging apps, web browsers).

### 2.1.2 Software Interfaces

**WhatsApp Web Automation Library:** The system shall interface with a web.js library (e.g., whatsapp-web.js) to automate sending and receiving messages by controlling a headless browser instance of WhatsApp Web.

**Web Chat Widget:** The system shall provide a JavaScript-based web chat widget to be embedded on the White Rose Interiors website as a fallback channel.

**PDF Generation Library:** The system shall use an internal software library (e.g., iTextSharp, PDFsharp) to programmatically generate PDF documents for quotes and invoices.

**Operating System:** The backend application shall interface with the Windows Server OS for file system access (e.g., storing logs, temporary files) and network communication.

**JSON Storage (File System):**

The system shall use the Node.js `fs` module to interact with JSON files that store orders, reminders, pricing, conversation states, and logs.

### 2.1.3 Communications Interfaces

**HTTPS:** All communication between the user's device and the system's backend, and between the system and external APIs (Meta, Email), shall occur over HTTPS using TLS 1.2 or higher to ensure data encryption in transit.

**RESTful API:** The backend shall expose RESTful APIs for the web chat widget and Admin Dashboard to interact with. All data exchange shall use the JSON format.

**WebSockets (WhatsApp):** The backend server will maintain a persistent WebSocket connection to WhatsApp's web servers, managed via the web.js automation library. This is the primary interface for sending and receiving WhatsApp messages.

**SMTP (Email):** The system shall use the Simple Mail Transfer Protocol (SMTP) to send outgoing emails (quotations, invoices) to customers via the configured email service.

## 2.2 System Features

**Requirement 1: User Interface**

**Use Case:** Generates a user interface

**Rationale:**
This allows the customer to interact with the system easily and improves the overall user experience by providing clear options and guidance when making service requests.

**Relates to / Dependencies:**
WhatsApp API, Stable Internet Connection, Active Server

**Priority:** High

**Team Owner:** Patrick Marsden

**User Requirement:**
The system shall allow users to input service details through the WhatsApp interface in order to receive an automated response.

**System Requirements:**
**1.1** The system shall send a GUI-like message (e.g., a numbered list or quick-reply buttons) to the user listing the available service options upon initial contact.

**1.2** The system shall allow the user to select a service by replying with the corresponding number or keyword.

**1.3** The system shall notify the user if an invalid input is detected and prompt for correction.

**1.4** The system shall provide a response or next-step instruction based on the selected option (e.g., measurement input, quote generation, or invoice delivery).

**1.5** The system shall notify the user if an invalid input is detected and prompt for correction.

**Acceptance Criteria:**

Upon initial interaction, the system displays a structured message listing available services 100% of the time.

The user can successfully select a valid option by entering a number or keyword.

Invalid or unrecognized inputs trigger an automated help message prompting the user to re-enter their selection.

All interactions and responses from the bot occur within 5 seconds of user input under normal operating conditions.

**Requirement 2: Price Calculator**

**Use Case:** Generates and sends a quotation

**Rationale:** After selecting a product, this allows the user to quickly and efficiently view the price and details of the product

**Priority:** High priority

**Team Owner:** Patrick Marsden

**User Requirement:** The system shall allow users to view  fast, accurate pricing for blinds, carpets, and service details of the products they intend to purchase

**System Requirements:**

**2.1** The system shall generate an estimate for the product/s intended to be purchased including details such as the quantity, unit price, total amount, terms and conditions and ship date.

**2.2** The system shall send a copy of the quotation to the customer's whatsapp

**Acceptance Criteria:**

1. The PDF quotation is generated and sent to the user within 60 seconds of the user providing all required information.
2. The pricing on the quotation accurately reflects the measurements provided and the internal price list.

3. The quotation PDF is successfully stored in the system and linked to the customer's conversation

**Requirement 3: Invoice/Quotation Generation**

**Use Case:** Generates and sends an invoice to the customer

**Rationale:** After a customer confirms an order, this feature allows the system to automatically generate an invoice showing the products purchased, their costs, and payment details

**Priority:** High Priority

**Team Owner:** Jason Matthews

**User Requirement:** The system shall allow users to receive an invoice that displays all products purchased, including item details, prices, and payment information.

**System Requirements:**

**3.1** The system shall generate an invoice for all confirmed purchases
**3.2** The system shall store each invoice and related order details in `orders.json`
**3.3 T**he system shall send a copy of the invoice to the customer's email address upon order confirmation

**Acceptance Criteria:**

1. The invoice clearly lists all products/services purchased with their respective quantities and final prices.
2. The invoice includes accurate totals, payment details, and due date.

3. The invoice is successfully generated and emailed to the customer within 60 seconds of order confirmation.

**Requirement 4: Admin Dashboard**

**Use Case:** Centralized management of system generated data

**Rationale:** A centralized dashboard for administrators enhances visibility, control, and decision-making across orders, customer interactions and business performance

**Priority: High**

**Team Owner: Tahjric Allen**

**User Requirement:** The system shall display a centralized dash board for managing collected data.

**System Requirements:**

**4.1** The system shall generate a report at the request of the user.
**4.2** The dashboard shall allow filtering by date range, customer type, and order status.
**4.3** The dashboard shall display data such as total orders, and unresolved tickets.

**Acceptance Criteria:**

1. A user with admin privileges can access the dashboard via a secure login 100% of the time.
2. Dashboard analytics (e.g., total orders) are accurate and update in near-real-time (within 5 minutes).
3. Administrators can filter and search dashboard data (e.g., find a customer) with results returned in less than 5 seconds.
4. Administrators can request and receive a downloadable report within 30 seconds.

**Requirement 5:** Status Updates

**Use Case:** Provides job status to a customer

**Rationale:** This proactively informs customers about their service status, reducing "where is my technician?" inquiries and improving customer satisfaction.

**Priority:** Medium

**Team Owner:** Jada Cole

**User Requirement:** The system shall allow a customer to check the status of their scheduled job or receive automatic updates.

**System Requirements:**
**5.1** The system shall allow a customer to query the status of their order using their order number or phone number.

**5.2** fetch the job status from the stored order record in `orders.json` (e.g., "Scheduled," "En-Route," "In Progress," "Completed")

**5.3** The system shall (optional, via Admin update) send proactive notifications to the customer when their job status changes.

**5.4** Upon job completion, the system shall send a final message to the customer via Whatsapp.

**Acceptance Criteria:**

1. A customer query for order status returns the correct, current status within 10 seconds.
2. Proactive status update messages (if implemented) are sent within 5 minutes of the status being updated in the Admin Dashboard.

**Requirement 6:** Automated Appointment Reminders

**Use Case:** Sends automated reminders for booked appointments.

**Rationale:** To reduce the number of customer "no-shows" for scheduled services, which saves the company time and lost revenue.

**Relates to/Dependencies:** Feature 5 (Appointment Scheduling)

**Priority:** Medium

**Team Owner:** Patrick Marsden

**User Requirement:** The system shall automatically send a reminder to customers before their scheduled service appointment.

**System Requirements:**

**6.1** The system shall automatically scan `orders.json` daily for appointments daily for all appointments scheduled for the following day (24 hours in advance).

**6.2** For each upcoming appointment found, the system shall send a pre-defined reminder message via WhatsApp to the customer (e.g., "Hi [Name], this is a friendly reminder of your appointment with White Rose Interiors tomorrow at [Time].").

**6.3** The system shall provide the user with quick reply options to "Confirm" or "Reschedule" their appointment within the reminder message.

**6.4** The system shall log in `reminders.json` that the reminder was sent that the reminder has been successfully sent and update the appointment status if the user confirms.

**Acceptance Criteria:**

1. A reminder message is successfully sent via WhatsApp between 24-48 hours before 100% of all scheduled appointments.
2. If the user replies "Reschedule" to the reminder, the system successfully triggers the Appointment Scheduling flow (Feature 5).

3. The Admin Dashboard is updated to show that a reminder was sent and whether the customer confirmed

**Requirement 7: Manage Orders**

**Use Case: Allows a customer to modify or cancel an existing appointment.**

**Rationale:** To provide customers with self-service options to manage their bookings 24/7, which reduces the manual administrative work for staff (e.g., answering calls or sending messages to reschedule).

**Relates to/Dependencies:** Feature 5 (Appointment Scheduling)

**Priority:** Medium

**Team Owner:** Tiana Samuels

**User Requirement:** The system shall allow a customer to easily change the time of or cancel a service they have already booked.

**System Requirements:**
**8.1** The system shall provide a menu option (e.g., "Manage My Booking") for a user to select.

**8.2** The system shall authenticate the user (e.g., by their phone number) and retrieve upcoming appointments from `orders.json`.

**8.3** The system shall present the user with their upcoming appointment details and ask if they want to "Reschedule" or "Cancel".

**8.4** If "Reschedule" is selected, the system shall re-initiate the Appointment Scheduling flow (Feature 5) to find a new time slot.

**8.5** If "Cancel" is selected, the system shall ask the user to confirm. Upon confirmation, the system shall delete or update the corresponding entry in `orders.json` and send a confirmation message.

**Acceptance Criteria:**

1. A user with an existing appointment can successfully retrieve their booking details within 5 seconds of selecting the "Manage My Booking" option.

2. A user can successfully cancel an appointment, and the system sends a cancellation confirmation message 100% of the time.
3. A user can successfully reschedule an appointment, and the data correctly reflects the new date/time.
4. The Admin Dashboard accurately reflects all cancellations and rescheduled appointments.

## 2.3 Use Case View

A use case is fundamentally a mechanism used in software engineering to model system interactions, representing a discrete task that involves external interaction with a system

**USE CASE DIAGRAM**

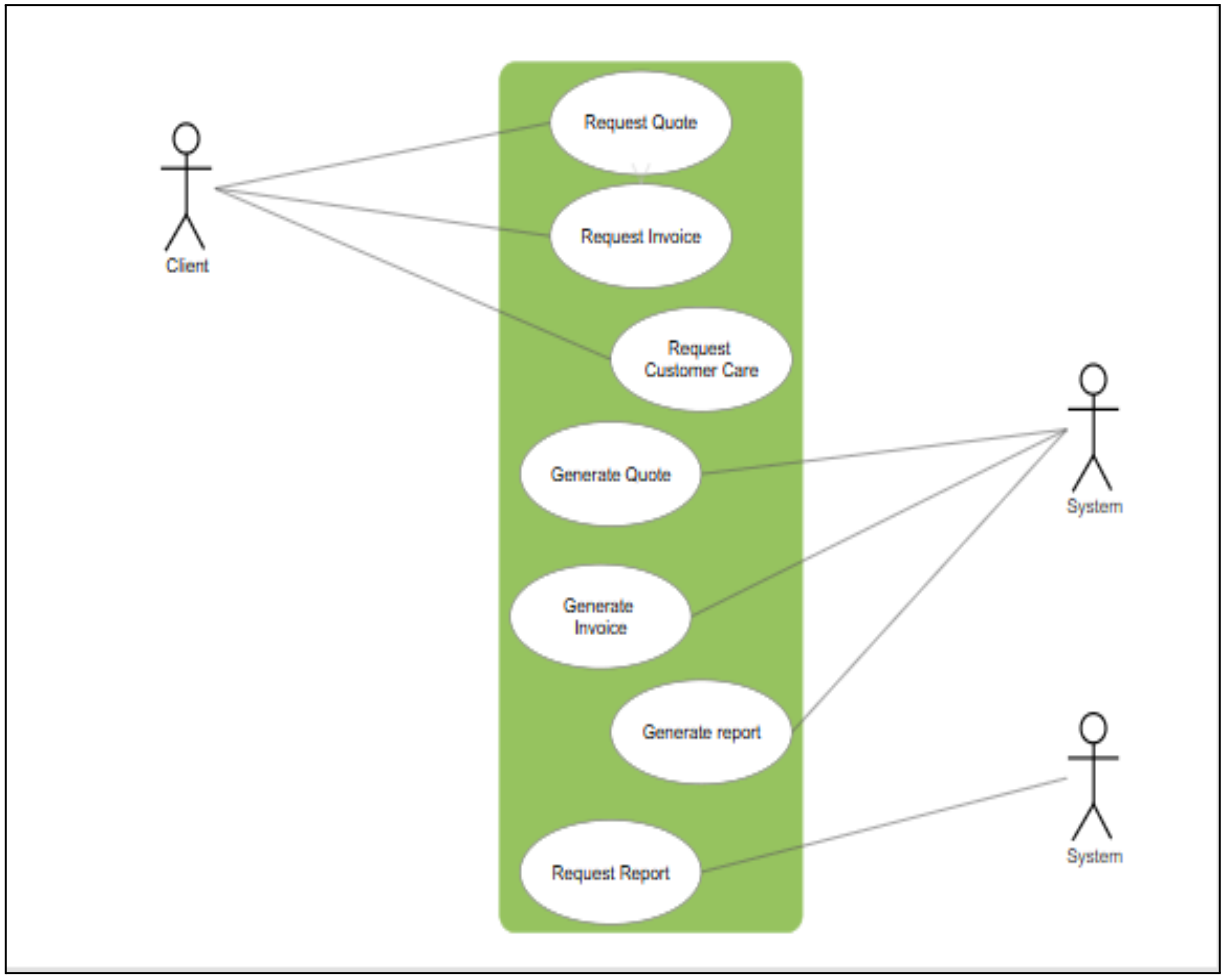



Figure 1: Use case Diagram

**Use Case Narratives:**

**Name:** Generating  a user interface through WhatsApp

**Related Requirements:**

**Goal in Context:** To display an interface where customers can interact with the service

**Description:** The system provides the user with an interface which guides the user with structured prompts.

**Primary Actors:** Customers

**Triggers:** The applicant wishes to upload a document.

**Precondition:** The customer must have access to WhatsApp and also have a stable internet connection.

**Basic Flow:**

1. Customer sends a message to the business WhatsApp number.
2. System responds with a GUI-like structured message listing available service options.
3. Customer replies with a valid number or keyword corresponding to a service.
4. System validates the input and confirms the selected option.
5. System provides a response or next-step instruction (e.g., measurement input, quote generation).
6. Interaction completes within 5 seconds of each user input.

**Post-condition:** The customer receives a response/prompt based on the selected services.

**Fail Post-Condition:** Incorrect inputs are identified and corrected through different prompts.

**Name:** Generating Quotation

**Related Requirements:**

**Goal in Context:** To provide the customer with summary of product,s quantity and price chosen

**Description:** The system generates and provides a detailed quotation of selected goods and services.

**Primary Actors:** Customers

**Triggers:** The customer wishes to get a product or service.

**Precondition:** The customer has selected at least one or more products/services

**Basic Flow:**

1. Customer selects product(s) for purchase.
2. System compiles quotation details: quantity, unit price, total amount, terms, and ship date.
3. System generates the quotation.
4. System generates a downloadable document for the customer.

**Post-condition:** The system provides a quotation and generates a downloadable file for the customer to review.

**Fail Post-Condition:** The system fails to provide a downloadable file of the quotation.

**Name:** Generating Invoice

**Related Requirements:**

**Goal in Context:** To provide the customer with an invoice after the customer confirms an order

**Description:** The system provides an invoice for the customers

**Primary Actors:** Customers

**Triggers:** The customer wishes to get a product or service.

**Precondition:** The customer has confirmed an order for products chosen

**Basic Flow:**

1. Customer selects preferred products and places an order
2. Customer confirms the order.
3. System retrieves order details.
4. System generates an invoice with itemized products, prices, totals, and payment info.

**Post-condition:** An invoice is generated and made ready for download

**Fail Post-Condition:** The system fails to provide a downloadable file of the quotation.

**Name:** Centralized Management of System

**Related Requirements:**

**Goal in Context:** To provide a dashboard for administrators to access the operational data.

**Description:** The system displays a dashboard for data generation, filtering and viewing.

**Primary Actors:** Administrators

**Triggers:** The administrator logs in and request reports

**Precondition:** The administrator has been authenticated and the system has stored necessary data

**Basic Flow:**

1. Administrator logs in securely
2. System grants access to the dashboard
3. Administrator applies filters (date range, customer type, order status)
4. System displays relevant data: total orders, active conversations, unresolved tickets
5. Administrator requests a report
6. System generates and provides a downloadable report

**Post-condition:** Admin dashboard is displayed and data and reports can be generated successfully

**Fail Post-Condition:** The administrators doesn't have access to the dashboard due to incorrect credentials.

**Name:** Provides Job Status to a Customer

**Related Requirements:**

**Goal in Context:** To allow the customer to check or receive updates about the status of their scheduled job

**Description:** The system provides status updates to customers

**Primary Actors:** Customers

**Triggers:** The customer queries their job status or the system detects a status change

**Precondition:** The customer has a scheduled job and a valid order number or phone number

**Basic Flow:**

- Customer queries job status using order number or phone number
- System retrieves current job status from the JSON storage (`orders.json`) (e.g., "Scheduled," "En-Route," "In Progress," "Completed")
- System returns the job status to the customer within 10 seconds
- (Optional) Admin updates job status in dashboard
- System sends proactive notification to customer within 5 minutes of status change

**Post-condition:** The customer receives accurate job status and a satisfaction survey after completion **Fail Post-Condition:** The system fails to return the correct status or send updates/survey within the expected time frame

**Name:** Provides Price Calculation

**Related Requirements:** Price estimation, customer self-service

**Goal in Context:** Allow customers to calculate the estimated cost of blinds based on their measurements

**Description:** The system provides an automated price calculation based on width, height, and product type.

**Primary Actors:** Customers

**Triggers:** Customer enters a valid height and width in inches (and selects a blind type)

**Preconditions:**

- Measurement inputs must be numeric and within the supported size range
- The selected product type must exist in the system's price list
- System must have access to the current price table

**Basic Flow:**

- Customer opens the price calculator interface.
- Customer inputs width (inches) and height (inches).
- Customer selects blind type (e.g., Roller, Woodlook, PVC, Vertical).
- Customer submits the measurement.
- System validates the inputs (numeric, within allowed limits).
- System determines the square area / category based on measurement.
- System retrieves the correct price from the price table.
- System calculates the total cost (base + optional install fee).
- System displays the estimated price instantly (under 3 seconds).
- (Optional) Customer downloads or receives the quote via WhatsApp/email.

**Post-condition:** Customer receives an accurate price estimate based on their measurement and product type.

**Fail Post-Condition:** System cannot calculate price due to invalid input, missing product type, or unavailable price list.

# 3 Other Non-functional Requirements

## 3.1 Performance Requirements

**Response Time:** The chatbot's automated responses to user inputs shall be processed and sent in less than 2 seconds under typical load.

**Document Generation:** PDF quotations and invoices shall be generated and sent to the user (via chat or email) within 5 seconds of the user confirming all details.

**Dashboard Load Time:** The Admin Dashboard shall load for an authenticated administrator in less than 3 seconds. All data filtering and report generation on the dashboard shall complete within 10 seconds.

File-based JSON reads and writes must complete within 50–200ms under normal load.

### 3.2 Safety and Security Requirements

- **Data Encryption:** All data in transit (between user, system, and APIs) shall be encrypted using HTTPS (TLS 1.2+). All personally identifiable information (PII) stored in JSON files (e.g., customer name, phone, email, address) shall be encrypted at rest.

- **Access Control:** The Admin Dashboard shall be protected by a secure authentication mechanism. Access shall be role-based (RBAC) to ensure employees can only access the data and functions necessary for their job (e.g., a sales agent cannot change system settings).

- **Privacy Compliance:** The system shall be designed to comply with Jamaica's Data Protection Act (DPA, 2020). This includes:
    - Displaying a clear privacy notice to users on first contact.
    - Collecting only the minimum data necessary to provide the service.
    - Providing a mechanism for users to request access to or deletion of their data.
- **Secure Backups:** The system's database and configuration files shall be backed up automatically on a daily basis to a secure, off-site location to prevent data loss.

### 3.3 Software Quality Attributes

**Usability (for Customer):** The chatbot's conversational flow shall be simple, clear, and intuitive. It will use simple language, validate inputs, and provide examples (e.g., "Please enter the width in inches, like '36.5'") to minimize customer error and frustration.

**Maintainability (for Admin):** The system shall be highly maintainable by administrators without developer intervention. This will be achieved by:

- Allowing all service pricing, rules, and surcharges to be managed via the Admin Dashboard's "Manage Price Tables" interface.

- Allowing all bot-facing text (greetings, questions, prompts) to be edited in a content management section of the Admin Dashboard.

**Reliability:** The system shall have an uptime of ≥99.5%, excluding scheduled maintenance and outages of third-party dependencies (e.g., Meta APIs). All user inputs shall be logged to ensure no leads are lost in the event of a processing failure.

## 4 Other Requirements

JSON corruption detection

Auto-regeneration of missing files

Versioning of JSON data

## Appendix

**Requirements Elicitation Summary**

The requirements in this document were gathered through a combination of direct stakeholder interviews, analysis of existing business processes, and review of the project proposal.

**1. Initial Stakeholder Interview (Meeting Log)**

- **Date:** September 20, 2025
- **Attendees:** Group 1 (Patrick Marsden), Office Administrator/ Manager.
- **Summary of- Key Findings:**
    - **Problem:** Confirmed that the "biggest bottleneck" is the manual process of quoting for blinds and carpet cleaning. It involves significant back-and-forth on WhatsApp to get measurements, which is slow and error-prone.
    - **Need:** "I need a way to get the customer to give me all the measurements I need *before* a human has to get involved."
    - **Channels:** Confirmed that 90% of inquiries come through WhatsApp, with the rest from Instagram DMs. The company website is a lower priority but a "nice to have."
    - **Functions:** The owner prioritized (1) Quotation, (2) Scheduling, and (3) a way to see all the leads in one place (Dashboard).

**2. Follow-up Elicitation (Questionnaire Summary)**

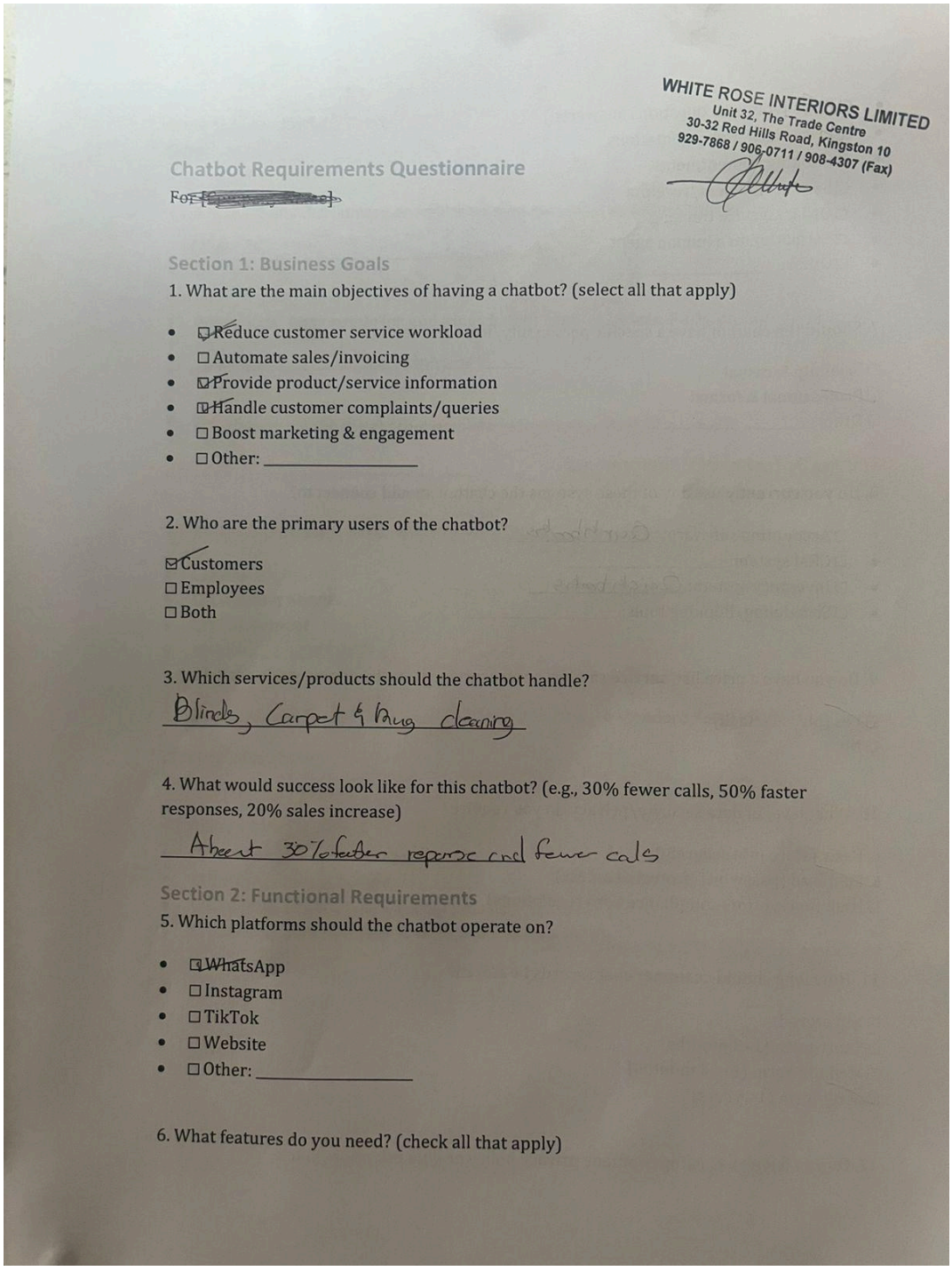
- **Date:** September 27, 2025
- **Method:** A short questionnaire was sent to the two Sales/CS Agents at White Rose Interiors.
- **Summary of Key Findings:**
    - Agents spend approximately 60% of their day answering repetitive questions (e.g., "What are your prices?", "How do I measure?").
    - The most common customer error is mixing up width and height for blinds or providing room dimensions in "feet" when "inches" are needed for the supplier. This strongly supports the need for clear, guided instructions (Requirement 1 & 2).
    - A major pain point is manually checking the paper calendar and a Google Calendar to find an open slot, then confirming with the customer. This supports the need for an integrated scheduling feature (Requirement 5).
    - Both agents requested a way to "take over" a chat from the bot if the customer gets confused or asks a complex question (This is noted for future "Phase 2" development).

Figure 2 : Questionnaire/Interview

### 3. Artifact Analysis

- **Analyzed:** Sample invoices, quotations, and WhatsApp message histories provided by the client.
- **Findings:**
    - Quotations and invoices have a standard format that can be replicated in a PDF template (Requirements 2 & 3).
    - WhatsApp histories show that customers are very willing to provide measurements and photos if asked clearly, validating the core concept of the project.

# Questionnaire



WHITE ROSE INTERIORS LIMITED
Unit 32, The Trade Centre
30-32 Red Hills Road, Kingston 10
929-7868 / 906-0711 / 908-4307 (Fax)

## Chatbot Requirements Questionnaire

For: [redacted]

### Section 1: Business Goals

1. What are the main objectives of having a chatbot? (select all that apply)

- ☑ Reduce customer service workload
- ☐ Automate sales/invoicing
- ☑ Provide product/service information
- ☑ Handle customer complaints/queries
- ☐ Boost marketing & engagement
- ☐ Other: _____

2. Who are the primary users of the chatbot?

☑ Customers
☐ Employees
☐ Both

3. Which services/products should the chatbot handle?

Blinds, Carpet & Rug cleaning

4. What would success look like for this chatbot? (e.g., 30% fewer calls, 50% faster responses, 20% sales increase)

About 30% faster response and fewer calls

### Section 2: Functional Requirements

5. Which platforms should the chatbot operate on?

- ☑ WhatsApp
- ☐ Instagram
- ☐ TikTok
- ☐ Website
- ☐ Other: _____

6. What features do you need? (check all that apply)

- ☑ FAQs (common questions answered)
- ☑ Price calculator / quotations
- ☐ Booking appointments
- ☐ Sending invoices/receipts
- ☐ Order/service tracking
- ☐ Escalation to a human agent
- ☐ Other: _____

7. Should the chatbot have a specific personality/tone of voice?

☐ Friendly & casual
☑ Professional & formal
☐ Other: _____

## Section 3: Technical Requirements

8. Do you currently use any of these systems the chatbot should connect to?

- ☐ Accounting software: Quickbooks
- ☐ CRM system: _____
- ☐ Inventory system: Quickbooks
- ☐ Scheduling/Booking tools: _____

9. Do you have a price list, service catalog, or measurement-based pricing guide available?

☑ Yes (please attach)
☐ No

10. What level of data security/privacy do you require?

☐ Basic (store info securely)
☑ Standard (password-protected access)
☐ High (encryption, compliance with regulations)

## Section 4: Legal & Policy Requirements

11. How long should customer chat records be stored?

☐ Not stored
☐ Short-term (1–3 months)
☐ Medium-term (6–12 months)
☑ Long-term (1+ years)

12. Do you have an existing company privacy policy or data retention policy?

☐ Yes (please attach)
☐ No

13. Are there any disclaimers or legal messages that must appear in the chatbot?

N/o

## Section 5: Operational Details

14. Who will be responsible for updating chatbot content (prices, FAQs, etc.)?

Sales Department

15. What hours should the chatbot escalate to human support (if needed)?

24/7

16. Which departments need access to chatbot reports/analytics?

- ☐ Sales
- ☐ Customer Service
- ☑ Management
- ☑ Other: Accounts

17. Do you already have FAQs, customer service scripts, or standard responses?

☐ Yes (please attach)
☑ No

## Attachments Requested (if available):

- ☐ Service catalog / price list
- ☐ Existing FAQs or scripts
- ☐ Company privacy policy & data policies
- ☐ Branding materials (logos, style guide, disclaimers)

**Sample Estimate/Invoice**

**New White Rose Interiors Limited**
Unit 32, The Trade Centre 30-32 Red Hills Road
Kingston 10, Jamaica
+18769297688
whiteroseinteriors@outlook.com
http://www.whiteroseja.com/

# Estimate

**ADDRESS**
Abbey Plummer

**SHIP TO**
Abbey

**ESTIMATE NO.** 15108-WR
**DATE** 11/08/2025
**EXPIRATION DATE** 11/09/2025

**SALES REP**
Patrick M.

| DATE | ACTIVITY | DESCRIPTION | QTY | RATE | AMOUNT |
|---|---|---|---|---|---|
| | **ILLUSION C1** | Illusion Shades: 78WX96H | 1 | 71,071.00 | 71,071.00 |
| | **ILLUSION C1** | Illusion Shades: 70WX96H | 1 | 65,520.00 | 65,520.00 |
| | **BLIN-INST** | Blinds Installation | 2 | 1,525.00 | 3,050.00 |
| | **Transportation** | Transportation | 1 | 3,000.00 | 3,000.00 |

An 80% deposit is required on all Jobs. Goods supplied remain the property of White Rose Interiors Limited until final payments are made.

Payment can be remitted to:
Bank: FirstCaribbean Int'l Bank
Account Type: Current
Account#: 1001638808
Branch: Liguanea
Remittance Advice: om.whiteroseinteriors@outlook.com

| | |
|---|---|
| SUBTOTAL | 142,641.00 |
| TAX | 21,396.15 |
| TOTAL | **JMD 164,037.15** |

Accepted By

Accepted Date