

## QuotePilot Deployment Roadmap and Work Session Checklist

### Part 1. Roadmap to Public Testing on quotepilothq.com

#### 1. Finish v1 product behavior locally

- Validate QPSAH200S with multiple test part numbers
- Validate QPMAG with multiple test part numbers
- Confirm invalid codes return clean errors
- Lock in base prices and adder values for v1

#### 2. Clean and prepare the GitHub repo

- Remove unused files
- Ensure backend folder structure is clean
- Create requirements.txt containing all dependencies

#### 3. Improve UI for testers

- Optional: Add simple instructions text
- Optional: Add a future pretty-view layout

#### 4. Prepare for deployment

- Ensure api.py and engine files have no local-only paths
- Confirm engines require no external API keys
- Ensure everything runs clean from start

#### 5. Choose backend hosting (Railway recommended)

- Connect GitHub repo to Railway
- Configure Python version and install requirements
- Set start command: unicorn api:app

#### 6. Deploy backend

- Push latest changes to GitHub
- Deploy via Railway
- Test /health, /version, /docs, and /ui on Railway URL

## 7. Decide frontend strategy

- Option A: Serve quote\_ui.html from FastAPI (simple)
- Option B: Host on Netlify/Vercel and point to Railway API

## 8. Test live system

- Visit Railway URL /ui
- Confirm DP and MAG quotes work online
- Confirm errors display correctly

## 9. Connect quotepilothq.com

- Create DNS record pointing to Railway
  - Test domain once DNS propagates
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## Part 2. Standard Work Session Workflow

Start-of-session checklist:

1. Open VS Code in QuotePilot folder
2. Open terminal and navigate into backend:

```
cd C:\Users\shuls\Desktop\QuotePilot\backend
```

3. Start local backend:

```
uvicorn api:app --reload
```

4. Open local UI:

```
http://127.0.0.1:8000/ui
```

5. Identify session goal:

- Engine logic
- UI changes
- Cleanup and fixes
- Deployment steps

End-of-session checklist:

1. Run quick test quotes:

- QPSAH200S
- QPMAG

2. Verify nothing is broken

3. Save all files

4. (If using Git)

- git add .
- git commit -m "Update message"
- git push

5. Stop unicorn (CTRL+C)

6. Optional: Write a one-line reminder for next session