✉️ Scope Document: White-Labeled Direct Mail SaaS Platform for GoHighLevel

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🚀 Overview

This SaaS platform delivers a fully white-labeled, deeply integrated direct mail automation experience within GoHighLevel (GHL). Designed for marketing agencies and their clients, the platform allows users to design, personalize, send, and track physical mail as part of GHL's automated workflows. It includes a rich design editor, support for dynamic QR codes, Google imagery, AI content generation, adaptive pricing models, multi-address sending, advanced analytics, and flexible print fulfillment.

🔐 1. White Labeling & Branding

🌐 Fully White-Labeled App

- Agencies can fully rebrand the platform
- Custom logos, color schemes, and brand names
- Branded login screen and interface elements
- GHL App Marketplace listing is white-labeled per agency

🌈 Branding Controls

- Admin UI allows:
    - Logo upload
    - Primary/secondary color selection
    - Accent color selection
    - Branded email templates

✖️ 2. GoHighLevel Integration

📦 Marketplace App Installation

- OAuth-based login (SSO)
- Auto-installs:
  - Workflow builder actions and triggers
  - Contact-level UI buttons
  - Custom navigation tab in GHL sidebar

🔹 Workflow Actions

- Send Direct Mail (with custom field and address mapping)
- Generate QR Code (with phone call, SMS, URL options)
- Preview Mailer Proof
- Assign Google Map Type (Street View/Satellite View)

🔹 Workflow Triggers

- QR Code Scanned
- Mail Delivered

🔹 Contact UI Enhancements

- "Send Mail" and "Preview Proof" buttons on contact record
- Mail interaction panel with delivery history, scan events, address mappings

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🎨 3. Mail Design Studio

🌟 Feature-Rich Editor

- Canva-style drag-and-drop interface
- Support for multiple mail types:
  - Postcards (4x6, 6x9, etc.)
  - Letters
  - Envelopes
  - Super Admin can define additional formats
- Dynamic variables from GHL:
  - System fields
  - Custom fields
- Conditional content blocks ("Show if Tag = VIP")

🧠 AI Assistant

- Suggests headlines, CTAs, and body copy
- Optional tone/style settings
- Smart content auto-generation using contact data

🌍 Google Imagery Support

- Selectable per design:
    - Street View image
    - Satellite View image
- Dynamically pulled per recipient address
- Costs billed per piece when used (see Pricing)

📂 Media Storage Integration

- Users can:
    - Upload media from desktop
    - Store and retrieve media from GHL Media Storage
    - Use uploaded/stored images in their mail designs
- Media is accessible through a file picker integrated into the design studio

💼 Template Management

- Super Admin can share templates globally
- Agencies can share templates within their ecosystem
- Version control and lockable templates

🏠 4. Multi-Address Contact Mapping

🔗 Address Management

- Each contact can have multiple mapped addresses
- Editable inside platform or synced from GHL custom fields
- Address labels (e.g., "Home", "Rental Property")

📩 Sending Logic

- Send to:
    - Primary address only
    - Selected addresses
    - All mapped addresses
- Each address generates a separate mail record

🔄 Workflow-Compatible

- "Send Direct Mail" action includes "Send to All Mapped Addresses" toggle

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📱 5. QR Code Engine

◆ Types

- URL Redirect
- Phone Call
- SMS Text
    - Custom phone number
    - Custom message

◆ Dynamic Mapping

- Full support for inserting GHL fields into messages or URLs
- Mappable via the design editor or workflow actions

◆ Trigger-Enabled

- Scan triggers GHL workflows
- Data passed:
    - Contact ID
    - Scan time
    - QR code type

💲 6. Pricing, Billing & Markup

◆ Base Pricing by Super Admin

- Define:
    - Mailer type price tiers (quantity-based)
    - Feature add-on prices (QR code, Street View, Satellite View)
- Cannot be altered by agencies

◆ Agency Markups

- Agencies can mark up:

- ○ Each mail format
- ○ QR code usage
- ○ Google imagery usage
- Final user sees agency-modified pricing

◆ Tiered Pricing System

- UI to define pricing ranges:
  - ○ Example: 1-99, 100-499, 500+
- Calculated in real-time during campaign send

💳 Stripe Integration

- Usage-based billing
- Secure card storage
- Monthly invoicing
- Reporting per client, agency, and campaign

💡 7. Print Fulfillment & API Layer

◆ Adaptive Fulfillment Engine

- Initial integration with PCM Integrations
- Modular adapter layer for other vendors:
  - ○ Lob
  - ○ QuickPrint Studio
  - ○ PrintRunner

◆ Capabilities

- Dynamic job creation
- Batch submission
- Real-time delivery tracking
- Status updates tied to GHL contacts

📊 8. Analytics Dashboard

◆ Campaign-Level Metrics

- Mail sent
- Delivery status
- QR code scans
- Google imagery usage

◆ Filters

- Date range
- Campaign
- Client
- Format type

◆ Export Tools

- CSV
- PDF
- Shareable client reports

📄 9. Navigation Panel in GHL

- Adds a new tab in GHL sidebar navigation titled **"Direct Mail"** (customizable per agency branding).

📂 Navigation Structure

- **Landing Page (Analytics)**
  - Displays comprehensive campaign analytics on load
  - Visual graphs for mail volume, delivery rates, QR scans, and feature usage
  - Filterable by campaign, client, format, and time period
- **Design Studio**
  - Access to build, edit, and manage mail designs
  - Media upload via GHL Media Storage or desktop
- **Templates**
  - Agency and Super Admin template sharing and management
- **Mail History**
  - Overview of all mailers sent, grouped by contact or campaign
  - Status breakdown and QR scan logs
- **Integrations**
  - Manage connected print providers and third-party APIs
- **Settings**
  - Pricing configuration, markup control, branding settings, permissions

💼 10. User Roles & Permissions

Role	Permissions
Super Admin	Define base prices, impersonate agencies, manage vendors, share templates
Agency Admin	Set markups, manage users/templates, view analytics
End User	Build/send mailers, preview proofs, access analytics

✅ Deliverables Summary

Module	Functionality
GHL Integration	Workflow actions/triggers, UI buttons, sidebar link
Mail Design Studio	AI, dynamic maps, variable support, multiple formats
QR Code Engine	Multiple types, triggers, variable support
Pricing Engine	Tiered pricing, feature costs, agency markup

Fulfillment Adapter	PCM + additional vendor support
Analytics Dashboard	Per campaign/contact reporting, exports, filters
White Label Controls	Logo, color scheme, domain, branding
Admin Management	Impersonation, permission control, template sharing
Media Integration	Upload from desktop or GHL Media Storage

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