

# MountainVista Master Roadmap v1

This roadmap details the **all-in-one software build plan** for MountainVista Cleaning Services, LLC, designed for modular white-label scalability. Each module contains purpose, features, rules/guardrails, dependencies, required accounts/software, AI enhancements, and white-label notes.

## Module 0: Core Foundation

**Purpose:** Establish secure, scalable base for MVP + long-term white-label reuse.

**Features:**

- Hosting: Vercel for app, Neon for Postgres DB.
- Stack: Next.js (App Router), Prisma ORM, Tailwind, shadcn/ui.
- Modular architecture: per-instance deployment now, multi-tenant ready later.
- DB schemas with org\_id stubs (avoid merge of client data).

**Rules/Guardrails:**

- Role-based access (admin, staff, accountant, provider).
- Per-instance environment variables to isolate clients.

**Dependencies:** None, must be first.

**Accounts/Software Needed:**

- Vercel (done). Neon DB (done). GitHub repo (done). Stripe (personal now).

**AI Enhancements:** AI code scaffolding + schema validation.

**White-label notes:** Build “tenant-ready” schemas early.

## Module 1: Lead Generation MVP

**Purpose:** Generate real leads (not just capture). Monetizable centerpiece.

**Features:**

- Lead Streams:
  - Cold B2B leads (prepaid bundles: \$50, \$100, \$200).
  - Hot leads via Google LSA API (bundles: \$250, \$500, \$750 with markups \$10→\$8).
  - RFP/Bid leads (Colorado focus; pass-through subs now, resell later).

- Employee referrals (manual entry) + \$50 employee payout tracked (payout external).
- Customer manual entry (avoid duplicates).
- Conflict resolution: Employee referral > system lead if same day unless system already acknowledged.
- Fraud guardrails: Anti-gaming checks, override limits, escalation path to provider portal.
- AI lead scoring per stream: cold vs hot vs RFP.
- Dashboard: overview + drill-down per stream.
- Stripe invoicing: \$100/job or relationship-based lead fees.

**\*\*Rules/Guardrails:\*\***

- Relationship vs job classification must be confirmed, flagged if misused.
- Fraud warnings + correction option.

**\*\*Dependencies:\*\*** Core Foundation.

**\*\*Accounts/Software Needed:\*\***

- Stripe (active personal account now). Uplead/LSA API keys later.

**\*\*AI Enhancements:\*\*** Lead scoring, fraud detection, bidding tips.

**\*\*White-label notes:\*\*** Flexible markup rules; toggleable integrations.

## **Module 1.5: Website Rebuild & Online Presence**

**\*\*Purpose:\*\*** Improve MountainVistaClean.com; make site part of lead funnel.

**\*\*Features:\*\***

- Rebuild site: modern, responsive, SEO-optimized.
- Lead capture forms → direct into MVP DB.
- Online presence: GMB optimization, local SEO, schema markup, citation cleanup.
- Stub for marketing suite integration.

**\*\*Dependencies:\*\*** MVP (Module 1).

**\*\*Accounts/Software Needed:\*\*** Domain access (done), Google Business, SEO tools.

**\*\*AI Enhancements:\*\*** Auto SEO suggestions, AI blog posts, social media stubs.

**\*\*White-label notes:\*\*** Modular site template for resell.

## Module 2: CRM & Lite Accounting

**Purpose:** Manage leads→customers; basic accounting to hook client use.

**Features:**

- Customer profiles, lead→customer conversion.
- Invoices, bids, contracts (send via system).
- Simple ledger: income, expenses, COGS.
- Budget envelopes: seed defaults, editable.
- Conflict rules: prevent duplicate billing.

**Dependencies:** MVP complete.

**Accounts/Software Needed:** Stripe (for invoicing).

**AI Enhancements:** Smart reminders, fraud alerts.

**White-label notes:** Full accounting suite later; stub accountant portal now.

## Module 3: Scheduling & Job Management

**Purpose:** Core cleaning business operations.

**Features:**

- Jobs: assign staff, track status, notes, attach photos.
- Scheduling: calendars, recurring jobs, notifications.
- Contract + bid management: RFP engine leads integrate here.

**Dependencies:** CRM basics.

**Accounts/Software Needed:** Calendar sync APIs (Google, Outlook optional).

**AI Enhancements:** Predict scheduling conflicts, optimize resource allocation.

**White-label notes:** Adapt for other industries (fencing, leveling, etc).

## Module 4: Employee Portal

**Purpose:** Give staff mobile access to jobs + referrals.

**Features:**

- Clock in/out with geofencing.
- Job checklist completion + photo upload.
- Submit referrals directly from portal.
- View pay/referral credit status.

**\*\*Dependencies:\*\*** Job management.

**\*\*Accounts/Software Needed:\*\*** Geofencing API, payroll adapter stub.

**\*\*AI Enhancements:\*\*** Anomaly detection (e.g., location spoof).

**\*\*White-label notes:\*\*** Add HR/payroll integration later.

## **Module 5: Marketing Suite**

**\*\*Purpose:\*\*** Let clients run their own marketing in-app.

**\*\*Features:\*\***

- AI blogs (weekly auto-post to site).
- Social scheduling (FB, IG, LinkedIn).
- Paid ads integration (FB Ads, Google Ads).

**\*\*Dependencies:\*\*** Website presence (1.5).

**\*\*Accounts/Software Needed:\*\*** Meta Business, Google Ads.

**\*\*AI Enhancements:\*\*** Auto-generate campaigns, optimize targeting.

**\*\*White-label notes:\*\*** Marketable upsell.

## **Module 6: Provider/Developer Portal**

**\*\*Purpose:\*\*** Your control center for all clients.

**\*\*Features:\*\***

- Billing + monetization reports (your \$100/job, bundle pack sales).
- Client list, switch org context.
- Debugging tools, log access, version control.
- Hidden or separate provider route.

**\*\*Dependencies:\*\*** MVP functional.

**\*\*Accounts/Software Needed:\*\*** Admin account, Stripe (provider).

**\*\*AI Enhancements:\*\*** Log summarization, guided fixes.

**\*\*White-label notes:\*\*** Becomes full SaaS provider app.

## **Module 7: Accountant Portal**

**\*\*Purpose:\*\*** Give accountants direct access to client books.

**\*\*Features:\*\***

- Read-only/limited write accounting access.
- Budget suite expansion (targets, envelopes, YNAB-style).
- Export tools.

**\*\*Dependencies:\*\*** CRM + Lite Accounting.

**\*\*Accounts/Software Needed:\*\*** Accountant logins.

**\*\*AI Enhancements:\*\*** Budget forecasts, anomaly detection.

**\*\*White-label notes:\*\*** Adds compliance credibility.

## **Module 8: Integrations Hub**

**\*\*Purpose:\*\*** Adapter-based system for third-party services.

**\*\*Features:\*\***

- Stripe (first, active). QuickBooks (stub). ADP/Paychex payroll stubs.
- Messaging: Resend (email), Twilio (SMS post-A2P).

**\*\*Dependencies:\*\*** Accounting + CRM.

**\*\*Accounts/Software Needed:\*\*** QuickBooks, ADP, Paychex accounts later.

**\*\*AI Enhancements:\*\*** Auto-map fields, suggest config.

**\*\*White-label notes:\*\*** Core modular design.

## Module 9: AI Everywhere

**Purpose:** Embed AI value-add across system.

**Features:**

- Lead scoring + fraud detection.
- Bidding tips from RFP data.
- Reporting summaries.
- Ops copilot for debugging.

**Dependencies:** Runs alongside all.

**Accounts/Software Needed:** OpenAI API key.

**White-label notes:** Central differentiator.

## Module 10: Security & Compliance

**Purpose:** Protect data, reduce liability.

**Features:**

- RBAC roles. TLS via Neon/Vercel. Audit logs.
- Disclaimers: no liability for tax/accounting.
- PII minimization.

**Dependencies:** Always active.

**Accounts/Software Needed:** None beyond core.

**White-label notes:** Modular compliance.

## Module 11: Monetization

**Purpose:** Ensure you earn revenue.

**Features:**

- Stripe invoicing: \$100/job or relationship leads.
- Prepaid packs: B2B cold leads (\$50, \$100, \$200). LSA (\$250, \$500, \$750 tiered markups). RFP pass-through.
- Subscription toggle: future \$100–\$500/mo range.

- Reporting: converted leads, payment owed.

**\*\*Dependencies:\*\*** MVP core.

**\*\*Accounts/Software Needed:\*\*** Stripe (personal → business later).

**\*\*AI Enhancements:\*\*** Fraud scoring, upsell triggers.

**\*\*White-label notes:\*\*** Flexible pricing per client.

## **Module 12: White-Label Scaling**

**\*\*Purpose:\*\*** Extend MVP to SaaS for new industries.

**\*\*Features:\*\***

- Rebrand instances easily (logos, colors, domain).
- Per-instance → multi-tenant migration path.
- Resell RFP subscriptions across clients.

**\*\*Dependencies:\*\*** MVP stable + 2nd client live.

**\*\*Accounts/Software Needed:\*\*** Domains per client.

**\*\*AI Enhancements:\*\*** Auto rebrand generator.

**\*\*White-label notes:\*\*** Enables franchise growth.

## **End of Roadmap**