QuoteCraft — Product Requirements Document

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1. Executive Summary

Vision

QuoteCraft is the fastest way for any tradesperson to turn a job description, photo, or document into a professional quote — in 60 seconds or less.

Mission

Eliminate the quoting bottleneck for sole traders and small trade businesses by replacing spreadsheets, Word docs, and scribbled notes with an AI-powered tool that does one thing brilliantly: quotes.

Problem Statement

Tradespeople lose revenue and professionalism because quoting is painful:

- **Time drain:** The average tradie spends 3–5 hours per week preparing quotes manually — evenings on the couch, copying and pasting from old quotes in Word or Excel.
- **Lost jobs:** Slow quotes lose jobs. A homeowner requesting quotes from three electricians will hire whoever responds fastest. Studies show 44% of customers go with the first quote received.
- **Unprofessional output:** Hand-typed emails or scribbled estimates on the back of a business card undermine credibility and make it harder to charge premium rates.
- **Existing tools are overkill:** simPRO, ServiceM8, Tradify, Fergus, and Jobber all try to be full job-management platforms with scheduling, invoicing, inventory, timesheets, and CRM. A sole trader doing 5–15 jobs a month doesn't need — or want — a $50-$200/mo platform. They need great quotes.

Target User Persona

Name	Dave Mitchell
Age	34
Trade	Electrician (sole trader)
Location	Western suburbs of Melbourne, Australia
Business size	Just him + occasional subcontractor
Revenue	~$180K/year
	Medium — uses iPhone daily, can navigate apps,

Tech comfort	but won't watch a 20-minute onboarding tutorial
Current quoting method	Copy-pastes from old Word docs, sometimes just texts a price. Has a rough Excel template he hates.
Pain points	Quoting takes too long; quotes look unprofessional; forgets to follow up; no idea which quotes were accepted
What he wants	Something dead simple: describe the job → get a proper quote → send it → know when they've read it

Value Proposition

"Upload anything. Describe the job. Get a professional quote in 60 seconds."

QuoteCraft is the anti-platform. No scheduling. No timesheets. No CRM. Just fast, AI-powered, beautiful quotes — for $15/month.

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2. Market Analysis

Total Addressable Market (TAM)

Region	Licensed Tradespeople	Source
Australia	~1.1 million	ABS Labour Force data (2025) — electricians, plumbers, carpenters, painters, landscapers, HVAC, tilers, concreters, roofers
United States	~6.5 million	Bureau of Labor Statistics — specialty trade contractors, maintenance/repair
Combined	**~7.6 million**	

TAM (revenue): 7.6M × $15/mo × 12 = **$1.37 billion/year**

Serviceable Addressable Market (SAM)

Filtering for: - Sole traders and businesses with 1–5 employees (≈60% of all trades businesses) - English-speaking, digitally active (own a smartphone, use email) — ≈80% of that subset - In trades that regularly quote (excludes salaried/employed tradies) — ≈50%

SAM: 7.6M × 0.60 × 0.80 × 0.50 = **1.82 million businesses SAM (revenue):** 1.82M × $15/mo × 12 = **$328M/year**

Serviceable Obtainable Market (SOM) — Year 1

Realistic target: 500 paying users in 12 months.

SOM (revenue): 500 × $15/mo × 12 = **$90,000/year**

Competitor Landscape

Product	Price	Quoting	Full Platform	AI Quoting	Photo Upload	Target
simPRO	$50–$200/user/mo		Job mgmt, scheduling, invoicing, inventory			10–200 employee businesses
ServiceM8	$29–$149/mo		Job mgmt, scheduling, invoicing		Basic (attach only)	1–20 employees, AU-focused
			Job mgmt,			1–20

Tradify	$49/user/mo		scheduling, timesheets		Basic	employees, NZ/AU
Fergus	$49–$85/user/mo		Job mgmt, invoicing, scheduling		Basic	1–50 employees, NZ/AU
Jobber	$39–$259/mo		CRM, scheduling, invoicing, payments		Basic	1–50 employees, US/CA
Invoice2go	$5–$12/mo	Partial	Invoicing-first			Freelancers, sole traders
Quotient	$25/mo		Quotes only			All industries
QuoteCraft	$15/mo		**Quotes only**	**GPT-4o**	**Vision AI**	**Sole traders, 1–5 employees**

Our Positioning

QuoteCraft occupies a unique position: **quoting-only + AI-first + affordable**.

- Competitors bundle quoting into bloated platforms. We unbundle it.
- Quotient does quotes-only but has zero AI — it's just a form builder.
- No competitor uses AI vision to analyze job photos and generate line items.
- At $15/mo, we're 50–90% cheaper than every job-management platform.

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3. User Stories & Jobs to Be Done

Core Jobs to Be Done

1. **Create a quote quickly** when I'm still on-site or driving home
2. **Look professional** so customers trust me and I can charge what I'm worth
3. **Know what's happening** with my quotes (viewed? accepted? ghosted?)
4. **Follow up** without it being awkward or forgotten
5. **Get paid faster** by making it easy for customers to say yes

User Stories

Quote Creation

US-01: As Dave (electrician), I want to describe a job in plain English ("rewire downlights in kitchen, 6 LED downlights, replace old dimmer switch") and have AI generate a detailed, itemised quote so that I don't have to manually type every line item.

US-02: As Dave, I want to upload photos of a job site (e.g., a switchboard that needs upgrading) and have AI analyze them to suggest scope and line items, so that I can create quotes on the spot before leaving the site.

US-03: As Sarah (painter), I want to upload an old quote (PDF, Word doc, or photo of handwritten notes) and have QuoteCraft extract the details and create a new formatted quote, so I can digitise my existing quotes without retyping.

US-04: As Dave, I want to forward a customer's email (describing the work they need) to QuoteCraft and have it generate a draft quote from the email contents, so I can respond to enquiries in minutes instead of hours.

US-05: As Marco (landscaper), I want to select from my saved templates ("Standard Garden Maintenance", "Retaining Wall Build") and modify the pre-filled items for this specific job, so I can quote common jobs in under 30 seconds.

Quote Editing & Customisation

US-06: As Dave, I want to edit any line item (description, quantity, unit price) in the AI-generated quote before sending, so the quote is accurate and reflects my actual pricing.

US-07: As Sarah, I want to choose from at least 10 professional PDF templates and see a live

preview, so my quotes match my brand and look polished.

US-08: As Sarah, I want to add my logo, business name, ABN, licence number, and payment terms to my business profile once and have them appear on every quote automatically, so I don't have to re-enter this information.

US-09: As Marco, I want to add optional line items that the customer can choose to include or exclude, so I can upsell additional services (e.g., "Add mulching — $350").

US-10: As Dave, I want to add notes, terms and conditions, and warranty information to the bottom of my quote, so the customer has all the information they need to make a decision.

Sending & Tracking

US-11: As Dave, I want to send a quote via email with one tap, and have the customer receive a professional, branded email with a link to view the quote online, so they don't get a random PDF attachment.

US-12: As Dave, I want to know when a customer has viewed my quote (and how many times), so I can gauge their interest and time my follow-up.

US-13: As Sarah, I want customers to be able to accept or decline a quote directly from the online link (with a digital signature or "Accept" button), so I get a clear answer without chasing.

US-14: As Dave, I want to see a dashboard showing all my quotes with their status (draft, sent, viewed, accepted, declined, expired), so I have a clear picture of my pipeline.

Business Profile & Setup

US-15: As Dave, I want to complete my business profile (name, ABN, licence, logo, phone, email, address, bank details, payment terms) in under 5 minutes during onboarding, so I'm ready to send professional quotes immediately.

US-16: As Marco, I want to set default payment terms (e.g., "50% deposit, balance on completion" or "Net 14 days") that auto-populate on every quote, so I don't have to type them each time.

Client Management

US-17: As Sarah, I want to save client details (name, email, phone, address) when I create a quote, so I can quickly select them for future quotes without re-entering their info.

US-18: As Dave, I want to see all quotes I've sent to a specific client in one place, so I can reference previous work when quoting new jobs for repeat customers.

PDF & Output

US-19: As Dave, I want to download any quote as a PDF so I can attach it to a text message or print it for clients who prefer paper.

US-20: As Marco, I want the PDF to include my logo, ABN, and a unique quote number, so it looks professional and meets Australian business requirements.

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4. Core Features — MVP (Phase 1)

4.1 AI Quote Builder

The centrepiece feature. Three input modes, one output: a professional quote.

Input modes: 1. **Text description** — User types or pastes a job description. GPT-4o-mini extracts line items, quantities, and suggests pricing based on trade type and location. 2. **Photo upload** — User uploads 1–5 photos. GPT-4o (vision) analyzes the images, identifies the work needed, and generates line items. User confirms/edits. 3. **Document upload** — User uploads a PDF, Word doc, or image of an old quote. AI extracts line items, client details, and creates a new formatted quote.

AI behaviour: - Generates structured JSON: `{ lineItems: [{ description, qty, unit, unitPrice }], notes, subtotal, gst, total }` - Uses trade-specific knowledge (e.g., an electrician's quote should include compliance testing, an RCD check) - Suggests pricing based on trade averages for the user's region (AU metro, AU regional, US by state) - Always editable — AI is a starting point, never the final word - GST handling: auto-calculates 10% GST for AU businesses; US tax is excluded (noted as "plus

applicable tax")

Token budget: ~2,000 tokens per quote generation (GPT-4o-mini). ~4,000 tokens for vision-based quotes (GPT-4o). Target cost: $0.01–0.05 per quote.

4.2 PDF Templates

10 built-in professional templates:

#	Name	Style	Best For
1	**Clean**	Minimal, modern, lots of white space	All trades
2	**Bold**	Dark header, strong typography	Builders, concreters
3	**Classic**	Traditional layout, serif fonts	Established businesses
4	**Trade Blue**	Blue accent, tradesman feel	Plumbers, electricians
5	**Earth**	Green/brown tones	Landscapers, tree services
6	**Monochrome**	Black & white, high contrast	Minimalists, print-friendly
7	**Stripe**	Alternating row colours	Complex multi-line quotes
8	**Compact**	Dense layout, small text	Large quotes (20+ items)
9	**Photo**	Includes uploaded job photos in PDF	Renovation, painting
10	**Premium**	Gold accents, luxury feel	High-end fit-outs

All templates include: logo, business name, ABN/EIN, licence number, quote number, date, expiry, client details, line items, subtotal, GST/tax, total, payment terms, T&Cs, digital acceptance link.

Custom branding (Pro): Upload logo, set primary colour, choose font family.

4.3 Photo-to-Quote (AI Vision)

- Accepts JPEG, PNG, HEIC (converted server-side), WebP
- Max 5 photos per quote, max 10MB each
- GPT-4o vision analyzes photos and returns:
  - Identified work required
  - Suggested line items with descriptions
  - Estimated quantities where visible
  - Confidence indicators (high/medium/low) for each suggestion
- User reviews, edits, adjusts pricing, then confirms
- Photos optionally embedded in the PDF output

4.4 Quote Sending & Tracking

Email delivery: - Transactional email via Resend (or SendGrid) - Professional HTML email template with: - Business logo and name - Quote summary (total, expiry date) - "View Quote" CTA button linking to public quote page - PDF attached as fallback - Tracking events: sent, delivered, opened, viewed (via tracking pixel + link click), accepted, declined

Public quote page: - Unique URL: quotecraft.com.au/q/{shortId} - Displays full quote in branded, responsive format - "Accept Quote" button → captures digital acceptance (name, date, IP) - "Decline" option with optional reason field - No login required for the client

4.5 Business Profile

Required fields: - Business name - Owner name - Email, phone - Address - ABN (Australia) or EIN (US) — validated format - Trade type (dropdown: electrician, plumber, builder, painter, landscaper, HVAC, tiler, roofer, concreter, carpenter, other) - Logo upload (PNG/JPG, max 2MB)

Optional fields: - Licence/registration number - Insurance details - Default payment terms (free text or presets) - Default T&Cs - Bank details for payment (displayed on quote, not processed by us) - Website URL - Social media links

4.6 Dashboard

Summary cards: - Quotes this month (count) - Total value quoted ($$) - Acceptance rate (%) - Average quote value

Quote list: - Filterable by status: All | Draft | Sent | Viewed | Accepted | Declined | Expired - Sortable by date, value, client name - Search by client name or quote number - Quick actions: View, Edit, Duplicate, Resend, Download PDF

4.7 Mobile-First Responsive Design

- Primary design target: iPhone (375px width)
- Fully functional on mobile — every feature works without desktop
- Touch-optimised: large tap targets (min 44px), swipe actions on quote list
- Camera integration for photo upload (direct capture, not just gallery)
- Responsive breakpoints: 375px (mobile), 768px (tablet), 1024px (desktop)

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5. Phase 2 Features

Target: Month 3–6 post-launch.

5.1 Voice-to-Quote

- Record audio description of the job (up to 2 minutes)
- Whisper API transcribes → GPT-4o-mini generates quote
- "Just got off the phone with a customer, let me dictate this quote while I drive"

5.2 Saved Quote Templates

- Save any quote as a reusable template
- Name it (e.g., "Standard Hot Water Replacement")
- One-tap to create new quote from template, then customise

5.3 Follow-Up Automation

- If quote not viewed after 24 hours → gentle email reminder
- If viewed but not accepted after 3 days → follow-up email
- If no action after 7 days → final nudge
- Configurable: user can adjust timing or disable
- Smart: doesn't send if client has already responded

5.4 Quote → Invoice Conversion

- One-tap convert accepted quote to invoice
- Adds payment details, due date, invoice number
- Separate PDF template for invoices
- Basic invoice tracking (sent, paid, overdue)

5.5 SMS Delivery

- Send quote link via SMS in addition to email
- Twilio integration
- Higher open rates than email (~98% vs ~20%)
- User pays per SMS or included in Business tier

5.6 Stripe Billing Integration

- Subscription management via Stripe
- Usage tracking for free tier limits
- Upgrade prompts when approaching limits

5.7 Client Portal

- Clients get a link to view all their quotes from this business
- No login required (magic link via email)
- Accept/decline, view history, download PDFs

5.8 Multi-Language Support

- Initially: English (AU), English (US)
- Phase 2: Spanish (US market), Mandarin (AU market)
- Affects UI labels, email templates, and AI-generated content

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6. Phase 3 Features

Target: Month 6–12 post-launch.

6.1 Team Features

- Multiple users per business account
- Roles: Owner, Admin, Quoter (can create/send but not change settings)
- Per-seat pricing addition

6.2 Quote Analytics

- Win rate by trade type, quote value range, client, month
- Average time from sent → accepted
- Revenue pipeline (sum of outstanding quotes)
- Trends over time (charts)

6.3 Accounting Integrations

- Xero (priority — dominant in AU)
- MYOB (AU)
- QuickBooks Online (US)
- Sync: push accepted quotes / invoices as transactions

6.4 Materials/Inventory Database

- Saved materials with descriptions and unit prices
- Quick-add from materials list when building quotes
- Price update alerts (e.g., copper price changes)

6.5 Geolocation-Based Pricing

- Different default rates by region
- Metro vs regional pricing suggestions
- State-based tax handling (US)

6.6 White-Label Option
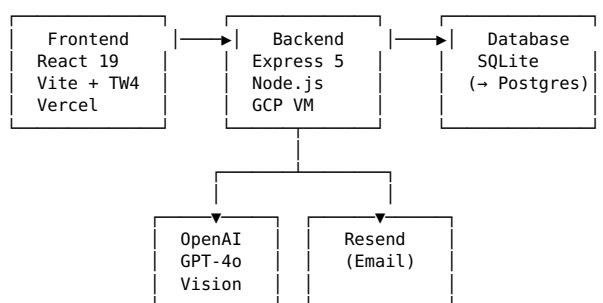
- Trade associations or franchises can offer QuoteCraft under their brand
- Custom domain, logo, colours
- Bulk licensing

6.7 Mobile App (React Native)

- iOS and Android native app
- Offline quote creation (sync when online)
- Push notifications for quote events
- Camera integration for photo-to-quote

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7. Technical Architecture

System Overview

```
┌──────────┐   ┌──────────┐   ┌──────────┐
│ Frontend │   │ Backend  │   │ Database │
│ React 19 │──▶│ Express 5│──▶│ SQLite   │
│ Vite + TW4│  │ Node.js  │   │ (→ Postgres)│
│ Vercel   │   │ GCP VM   │   │          │
└──────────┘   └──────────┘   └──────────┘
                     │
               ┌─────┴─────┐
               │           │
          ┌────▼────┐ ┌────▼────┐
          │ OpenAI  │ │ Resend  │
          │ GPT-4o  │ │ (Email) │
          │ Vision  │ │         │
          └─────────┘ └─────────┘
```

Frontend
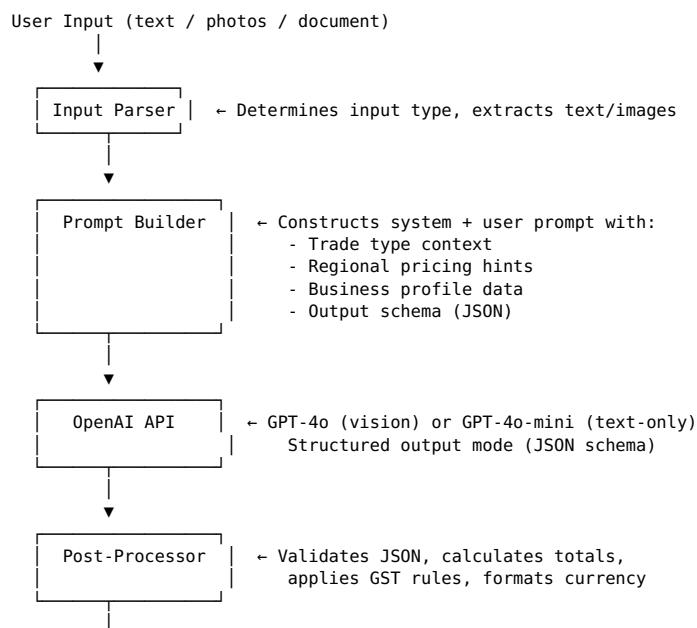
Component	Choice	Rationale

Framework	React 19	Industry standard, large ecosystem, RSC support
Bundler	Vite 6	Fast HMR, ESM-native
Styling	Tailwind CSS v4	Utility-first, rapid prototyping, small bundle
State	Zustand	Lightweight, no boilerplate
Routing	React Router 7	Standard, supports lazy loading
Forms	React Hook Form + Zod	Validation with type safety
HTTP	Axios	Interceptors for auth, error handling
PDF Preview	react-pdf	Client-side PDF rendering for template preview
Hosting	Vercel	Free tier, global CDN, easy deploys from GitHub

Backend

Component	Choice	Rationale
Runtime	Node.js 22 LTS	JavaScript end-to-end, async I/O
Framework	Express 5 (ESM)	Mature, minimal, async middleware support
Database	SQLite via better-sqlite3	Zero-config, single-file, fast for <10K users. Migrate to PostgreSQL when needed.
ORM	Drizzle ORM	Type-safe, lightweight, supports SQLite + PostgreSQL
Auth	JWT (access + refresh tokens)	Stateless, scalable
Password	bcrypt (cost factor 12)	Industry standard
File Upload	Multer → local disk	Simple. Move to S3-compatible (GCS) at scale.
PDF Generation	pdfkit	Programmatic PDF creation, full layout control
AI	OpenAI SDK (GPT-4o, GPT-4o-mini)	Best vision model, good structured output
Email	Resend SDK	Developer-friendly, good deliverability, free tier (100 emails/day)
Validation	Zod	Shared schemas with frontend
Logging	Pino	Fast JSON logging
Hosting	GCP e2-micro VM (free tier) → e2-small	Cost-effective, scales to thousands of users

AI Pipeline

```
User Input (text / photos / document)
        │
        ▼
┌─────────────┐
│ Input Parser │  ← Determines input type, extracts text/images
└─────────────┘
        │
        ▼
┌─────────────┐
│ Prompt Builder │  ← Constructs system + user prompt with:
│             │       - Trade type context
│             │       - Regional pricing hints
│             │       - Business profile data
│             │       - Output schema (JSON)
└─────────────┘
        │
        ▼
┌─────────────┐
│ OpenAI API  │  ← GPT-4o (vision) or GPT-4o-mini (text-only)
│             │     Structured output mode (JSON schema)
└─────────────┘
        │
        ▼
┌─────────────┐
│ Post-Processor │  ← Validates JSON, calculates totals,
│             │     applies GST rules, formats currency
└─────────────┘
        │
```

```
        ▼
  Quote Object (ready for review/edit)
```

Infrastructure

- **Domain:** quotecraft.com.au (AU primary), quotecraft.app (global)
- **SSL:** Let's Encrypt (auto-renewed via Caddy or Certbot)
- **CI/CD:** GitHub Actions → deploy frontend to Vercel, backend to GCP VM via SSH
- **Monitoring:** UptimeRobot (free), Sentry (error tracking)
- **Backups:** Daily SQLite backup to GCS bucket (cron job)

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8. Data Model

Entity Relationship Overview

```
User (1) ──── (N) Quote
User (1) ──── (N) Client
User (1) ──── (1) BusinessProfile
User (1) ──── (N) QuoteTemplate
Quote (N) ──── (1) Client
Quote (1) ──── (N) LineItem
Quote (1) ──── (N) QuoteEvent
Quote (1) ──── (N) QuoteFile
```

Tables

users

```
CREATE TABLE users (
  id              TEXT PRIMARY KEY DEFAULT (lower(hex(randomblob(16)))),
  email           TEXT NOT NULL UNIQUE,
  password_hash   TEXT NOT NULL,
  name            TEXT NOT NULL,
  created_at      TEXT NOT NULL DEFAULT (datetime('now')),
  updated_at      TEXT NOT NULL DEFAULT (datetime('now')),
  plan            TEXT NOT NULL DEFAULT 'free' CHECK (plan IN ('free', 'pro', 'business')),
  stripe_customer_id TEXT,
  stripe_subscription_id TEXT,
  quotes_this_month INTEGER NOT NULL DEFAULT 0,
  month_reset_at TEXT
);
```

business_profiles

```
CREATE TABLE business_profiles (
  id              TEXT PRIMARY KEY DEFAULT (lower(hex(randomblob(16)))),
  user_id         TEXT NOT NULL UNIQUE REFERENCES users(id) ON DELETE CASCADE,
  business_name   TEXT NOT NULL,
  owner_name      TEXT,
  email           TEXT,
  phone           TEXT,
  address_line1   TEXT,
  address_line2   TEXT,
  city            TEXT,
  state           TEXT,
  postcode        TEXT,
  country         TEXT NOT NULL DEFAULT 'AU' CHECK (country IN ('AU', 'US')),
  abn             TEXT,           -- AU: 11-digit ABN
  ein             TEXT,           -- US: EIN
  trade_type      TEXT,
  licence_number  TEXT,
  insurance_details TEXT,
  logo_path       TEXT,
  website         TEXT,
  default_payment_terms TEXT,
  default_terms_conditions TEXT,
  bank_name       TEXT,
  bank_bsb        TEXT,
  bank_account    TEXT,
  bank_account_name TEXT,
  primary_colour  TEXT DEFAULT '#2563EB',
  template_id     TEXT DEFAULT 'clean',
  created_at      TEXT NOT NULL DEFAULT (datetime('now')),
```

```
    updated_at      TEXT NOT NULL DEFAULT (datetime('now'))
);
```

clients

```
CREATE TABLE clients (
  id          TEXT PRIMARY KEY DEFAULT (lower(hex(randomblob(16)))),
  user_id     TEXT NOT NULL REFERENCES users(id) ON DELETE CASCADE,
  name        TEXT NOT NULL,
  email       TEXT,
  phone       TEXT,
  address     TEXT,
  city        TEXT,
  state       TEXT,
  postcode    TEXT,
  notes       TEXT,
  created_at  TEXT NOT NULL DEFAULT (datetime('now')),
  updated_at  TEXT NOT NULL DEFAULT (datetime('now'))
);
CREATE INDEX idx_clients_user ON clients(user_id);
```

quotes

```
CREATE TABLE quotes (
  id             TEXT PRIMARY KEY DEFAULT (lower(hex(randomblob(16)))),
  user_id        TEXT NOT NULL REFERENCES users(id) ON DELETE CASCADE,
  client_id      TEXT REFERENCES clients(id) ON DELETE SET NULL,
  quote_number   TEXT NOT NULL,         -- e.g., "QC-2026-0042"
  short_id       TEXT NOT NULL UNIQUE,  -- 8-char for public URL
  status         TEXT NOT NULL DEFAULT 'draft'
                    CHECK (status IN ('draft','sent','viewed','accepted','declined','expired')),
  title          TEXT,                  -- e.g., "Kitchen Rewire — 14 Smith St"
  description    TEXT,                  -- Job description (user input)
  subtotal       REAL NOT NULL DEFAULT 0,
  tax_rate       REAL NOT NULL DEFAULT 10.0,  -- 10% GST for AU, 0 for US
  tax_amount     REAL NOT NULL DEFAULT 0,
  total          REAL NOT NULL DEFAULT 0,
  currency       TEXT NOT NULL DEFAULT 'AUD',
  notes          TEXT,                  -- Additional notes on the quote
  terms          TEXT,                  -- Payment terms for this quote
  valid_until    TEXT,                  -- Expiry date
  accepted_at    TEXT,
  accepted_name  TEXT,                  -- Digital signature name
  accepted_ip    TEXT,
  declined_at    TEXT,
  decline_reason TEXT,
  template_id    TEXT DEFAULT 'clean',
  ai_model_used  TEXT,                  -- 'gpt-4o' or 'gpt-4o-mini'
  ai_input_type  TEXT,                  -- 'text', 'photo', 'document', 'voice'
  ai_tokens_used INTEGER,
  sent_at        TEXT,
  sent_via       TEXT CHECK (sent_via IN ('email', 'sms', 'both')),
  viewed_at      TEXT,
  view_count     INTEGER NOT NULL DEFAULT 0,
  created_at     TEXT NOT NULL DEFAULT (datetime('now')),
  updated_at     TEXT NOT NULL DEFAULT (datetime('now'))
);
CREATE INDEX idx_quotes_user ON quotes(user_id);
CREATE INDEX idx_quotes_short_id ON quotes(short_id);
CREATE INDEX idx_quotes_status ON quotes(user_id, status);
```

line_items

```
CREATE TABLE line_items (
  id          TEXT PRIMARY KEY DEFAULT (lower(hex(randomblob(16)))),
  quote_id    TEXT NOT NULL REFERENCES quotes(id) ON DELETE CASCADE,
  sort_order  INTEGER NOT NULL DEFAULT 0,
  description TEXT NOT NULL,
  quantity    REAL NOT NULL DEFAULT 1,
  unit        TEXT DEFAULT 'each',      -- each, hour, m², m, sqft, lot
  unit_price  REAL NOT NULL DEFAULT 0,
  total       REAL NOT NULL DEFAULT 0,  -- quantity × unit_price
  is_optional INTEGER NOT NULL DEFAULT 0,  -- 1 = optional/add-on item
  created_at  TEXT NOT NULL DEFAULT (datetime('now'))
);
CREATE INDEX idx_line_items_quote ON line_items(quote_id);
```

quote_files

```
CREATE TABLE quote_files (
  id         TEXT PRIMARY KEY DEFAULT (lower(hex(randomblob(16)))),
  quote_id   TEXT NOT NULL REFERENCES quotes(id) ON DELETE CASCADE,
  file_path  TEXT NOT NULL,
  file_name  TEXT NOT NULL,
  file_type  TEXT NOT NULL,          -- 'photo', 'document', 'pdf_output'
  mime_type  TEXT NOT NULL,
  file_size  INTEGER NOT NULL,       -- bytes
  ai_analysis TEXT,                  -- JSON: AI's interpretation of this file
  created_at TEXT NOT NULL DEFAULT (datetime('now'))
);
CREATE INDEX idx_quote_files_quote ON quote_files(quote_id);
```

quote_events

```
CREATE TABLE quote_events (
  id         TEXT PRIMARY KEY DEFAULT (lower(hex(randomblob(16)))),
  quote_id   TEXT NOT NULL REFERENCES quotes(id) ON DELETE CASCADE,
  event_type TEXT NOT NULL
              CHECK (event_type IN
('created','edited','sent','delivered','opened','viewed','accepted','declined','expired','reminder_sent')),

  metadata   TEXT,                   -- JSON: additional event data
  ip_address TEXT,
  user_agent TEXT,
  created_at TEXT NOT NULL DEFAULT (datetime('now'))
);
CREATE INDEX idx_quote_events_quote ON quote_events(quote_id);
```

quote_templates

```
CREATE TABLE quote_templates (
  id          TEXT PRIMARY KEY DEFAULT (lower(hex(randomblob(16)))),
  user_id     TEXT NOT NULL REFERENCES users(id) ON DELETE CASCADE,
  name        TEXT NOT NULL,         -- e.g., "Standard Hot Water Install"
  description TEXT,
  line_items  TEXT NOT NULL,         -- JSON array of line item templates
  notes       TEXT,
  terms       TEXT,
  created_at  TEXT NOT NULL DEFAULT (datetime('now')),
  updated_at  TEXT NOT NULL DEFAULT (datetime('now'))
);
CREATE INDEX idx_quote_templates_user ON quote_templates(user_id);
```

Data Retention Policy

Data Type	Retention	Rationale
User accounts	Indefinite while active; 90 days after deletion request	Allow recovery period
Quotes	7 years from creation	Australian tax record requirements (5 years + buffer)
Uploaded files	12 months after quote expiry or decline	Storage cost management
Quote events	2 years	Analytics needs
Deleted account data	Anonymised after 90-day grace period	Privacy compliance

9. API Specification

Base URL

```
Production: https://api.quotecraft.com.au/v1
Development: http://localhost:3000/v1
```

Authentication

All protected endpoints require:

```
Authorization: Bearer <access_token>
```

Access tokens expire in 15 minutes. Refresh tokens expire in 30 days.

Rate Limits

Tier	Rate Limit
Free	30 requests/minute
Pro	60 requests/minute
Business	120 requests/minute
AI endpoints	10 requests/minute (all tiers)

Endpoints

Auth

```
POST /v1/auth/register
  Body: { email, password, name }
  Response: { user, accessToken, refreshToken }

POST /v1/auth/login
  Body: { email, password }
  Response: { user, accessToken, refreshToken }

POST /v1/auth/refresh
  Body: { refreshToken }
  Response: { accessToken, refreshToken }

POST /v1/auth/forgot-password
  Body: { email }
  Response: { message: "Reset email sent" }

POST /v1/auth/reset-password
  Body: { token, newPassword }
  Response: { message: "Password updated" }
```

Business Profile

```
GET  /v1/profile
  Response: { profile: BusinessProfile }

PUT  /v1/profile
  Body: { businessName, ownerName, email, phone, ... }
  Response: { profile: BusinessProfile }

POST /v1/profile/logo
  Body: multipart/form-data (file)
  Response: { logoUrl: string }
```

Clients

```
GET    /v1/clients?search=&page=1&limit=20
  Response: { clients: Client[], total: number }

POST   /v1/clients
  Body: { name, email, phone, address, ... }
  Response: { client: Client }

GET    /v1/clients/:id
  Response: { client: Client }

PUT    /v1/clients/:id
  Body: { name, email, phone, ... }
  Response: { client: Client }

DELETE /v1/clients/:id
  Response: { message: "Deleted" }
```

Quotes

```
GET    /v1/quotes?status=&page=1&limit=20&search=
  Response: { quotes: Quote[], total: number }

POST   /v1/quotes
  Body: { clientId?, title, description, lineItems: [], notes, terms, validUntil, templateId }
```

```
  Response: { quote: Quote }

GET    /v1/quotes/:id
  Response: { quote: Quote, lineItems: LineItem[], files: QuoteFile[], events: QuoteEvent[] }

PUT    /v1/quotes/:id
  Body: { title, description, lineItems, notes, terms, ... }
  Response: { quote: Quote }

DELETE /v1/quotes/:id
  Response: { message: "Deleted" }

POST   /v1/quotes/:id/duplicate
  Response: { quote: Quote }  // New quote with same line items

POST   /v1/quotes/:id/send
  Body: { via: "email" | "sms" | "both", recipientEmail?, recipientPhone? }
  Response: { message: "Quote sent", sentAt: string }

GET    /v1/quotes/:id/pdf
  Response: application/pdf (streamed)

GET    /v1/quotes/:id/events
  Response: { events: QuoteEvent[] }
```

AI Generation

```
POST /v1/ai/generate
  Body: multipart/form-data {
    tradeType: string,
    description?: string,          // Text description of the job
    photos?: File[],              // Up to 5 photos
    document?: File,              // PDF/Word/image of existing quote
    region?: "AU-metro" | "AU-regional" | "US",
  }
  Response: {
    lineItems: [{ description, quantity, unit, unitPrice, confidence: "high"|"medium"|"low" }],
    suggestedTitle: string,
    suggestedNotes: string,
    aiModel: string,
    tokensUsed: number
  }
```

Public Quote (No Auth)

```
GET  /v1/public/quotes/:shortId
  Response: { quote: PublicQuote, business: PublicBusinessProfile }

POST /v1/public/quotes/:shortId/accept
  Body: { name: string }
  Response: { message: "Quote accepted", acceptedAt: string }

POST /v1/public/quotes/:shortId/decline
  Body: { reason?: string }
  Response: { message: "Quote declined" }
```

Dashboard Stats

```
GET /v1/dashboard/stats?period=month
  Response: {
    quotesCount: number,
    totalValue: number,
    acceptanceRate: number,
    averageValue: number,
    byStatus: { draft: n, sent: n, viewed: n, accepted: n, declined: n, expired: n }
  }
```

File Upload

- Max file size: 10MB per file
- Accepted types: image/jpeg, image/png, image/heic, image/webp, application/pdf,
  application/msword, application/vnd.openxmlformats-
  officedocument.wordprocessingml.document
- Max 5 files per request
- Files stored at: ./uploads/{userId}/{quoteId}/{filename}

10. UI/UX Requirements

Design System

Colours

Token	Hex	Usage
Primary	#2563EB (Blue 600)	CTAs, links, active states
Primary Dark	#1D4ED8 (Blue 700)	Hover states
Secondary	#F59E0B (Amber 500)	Accents, highlights, badges
Success	#10B981 (Emerald 500)	Accepted, positive metrics
Warning	#F59E0B (Amber 500)	Pending, expiring soon
Danger	#EF4444 (Red 500)	Declined, errors, destructive actions
Neutral 50	#F9FAFB	Page background
Neutral 100	#F3F4F6	Card backgrounds
Neutral 200	#E5E7EB	Borders
Neutral 500	#6B7280	Secondary text
Neutral 900	#111827	Primary text

Typography

Element	Font	Size	Weight
H1	Inter	28px / 1.75rem	700 (Bold)
H2	Inter	22px / 1.375rem	600 (Semibold)
H3	Inter	18px / 1.125rem	600
Body	Inter	16px / 1rem	400 (Regular)
Small	Inter	14px / 0.875rem	400
Caption	Inter	12px / 0.75rem	500 (Medium)

Spacing Scale
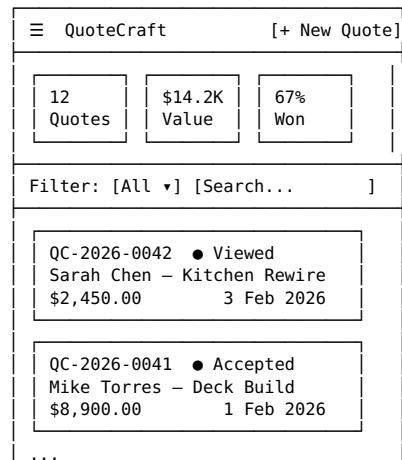
Based on 4px grid: 4, 8, 12, 16, 20, 24, 32, 40, 48, 64, 80, 96px.

Border Radius

- Small (inputs, badges): 6px
- Medium (cards, buttons): 8px
- Large (modals, panels): 12px
- Full (avatars, pills): 9999px

Key Screens

Screen 1: Dashboard (Home)

```
┌─────────────────────────────┐
│ ≡  QuoteCraft     [+ New Quote]│
├─────────────────────────────┤
│                             │
│ ┌──────┐ ┌──────┐ ┌──────┐  │
│ │ 12   │ │$14.2K│ │ 67%  │  │
│ │Quotes│ │Value │ │ Won  │  │
│ └──────┘ └──────┘ └──────┘  │
├─────────────────────────────┤
│ Filter: [All ▾] [Search...  ]│
├─────────────────────────────┤
│ ┌─────────────────────────┐ │
│ │ QC-2026-0042  ● Viewed  │ │
│ │ Sarah Chen — Kitchen Rewire│ │
│ │ $2,450.00      3 Feb 2026│ │
│ └─────────────────────────┘ │
│                             │
│ ┌─────────────────────────┐ │
│ │ QC-2026-0041  ● Accepted│ │
│ │ Mike Torres — Deck Build│ │
│ │ $8,900.00      1 Feb 2026│ │
│ └─────────────────────────┘ │
│ ...                         │
└─────────────────────────────┘
```

```
|                             |
| [Dashboard] [Quotes] [Clients] [⚙] |
|                             |
```

Screen 2: New Quote (AI Builder)

```
| ← New Quote                  |
|                              |
|                              |
|  How would you like to create|
|  this quote?                 |
|                              |
|   ┌─────────────────────┐    |
|   │   Describe the Job   │   |
|   │ Type or paste a description │
|   └─────────────────────┘    |
|                              |
|   ┌─────────────────────┐    |
|   │   Upload Photos      │   |
|   │ AI analyzes your job photos │
|   └─────────────────────┘    |
|                              |
|   ┌─────────────────────┐    |
|   │   Upload Document    │   |
|   │ PDF, Word, or photo of │  |
|   │ existing quote       │   |
|   └─────────────────────┘    |
|                              |
|   ┌─────────────────────┐    |
|   │ ✎  Start from Scratch │  |
|   │ Blank quote, add items │  |
|   │ manually             │   |
|   └─────────────────────┘    |
|                              |
|                              |
```

Screen 3: Quote Editor

```
| ← Edit Quote          [Preview]  |
| Client: [Sarah Chen       ▼]     |
| Title:  [Kitchen Rewire — 14 Sm...] |
|                                  |
| LINE ITEMS            [+ Add]    |
|  ┌────────────────────────┐      |
|  │ Supply & install 6x LED │     |
|  │ downlights (IC-4 rated) │     |
|  │ 6 × $85.00      = $510.00 │   |
|  │              [✎] []│     |    |
|  └────────────────────────┘      |
|                                  |
|  ┌────────────────────────┐      |
|  │ Replace existing dimmer │     |
|  │ switch with LED-compatible │  |
|  │ 1 × $120.00     = $120.00 │   |
|  │              [✎] []│     |    |
|  └────────────────────────┘      |
|                                  |
|  ┌────────────────────────┐      |
|  │ Electrical compliance test │ |
|  │ & certificate           │    |
|  │ 1 × $150.00     = $150.00 │   |
|  │              [✎] []│     |    |
|  └────────────────────────┘      |
|                                  |
|          Subtotal:    $780.00    |
|          GST (10%):    $78.00    |
|          TOTAL:       $858.00    |
|                                  |
| Notes: [                ]        |
| Valid until: [14 Feb 2026    ]   |
| Template: [Clean            ▼]   |
|                                  |
| [Save Draft]      [Send Quote →] |
```

Screen 4: Public Quote View (Client-Facing)

```
|         [LOGO]               |
```

```
┌─────────────────────────────────────┐
│  Dave's Electrical Services         │
│  ABN: 12 345 678 901                │
│  Licence: EC12345                   │
├─────────────────────────────────────┤
│  QUOTE #QC-2026-0042                │
│  Date: 3 February 2026              │
│  Valid until: 17 February 2026      │
├─────────────────────────────────────┤
│  Prepared for:                      │
│  Sarah Chen                         │
│  14 Smith Street                    │
│  Hawthorn VIC 3122                  │
├─────────────────────────────────────┤
│  Kitchen Rewire                     │
│                                     │
│  Item          Qty    Amount        │
│  ─────────────────────────────      │
│  LED downlights  6    $510.00       │
│  Dimmer switch   1    $120.00       │
│  Compliance test 1    $150.00       │
│  ─────────────────────────────      │
│  Subtotal             $780.00       │
│  GST                   $78.00       │
│  TOTAL                $858.00       │
├─────────────────────────────────────┤
│  Payment: 50% deposit, balance      │
│  on completion.                     │
├─────────────────────────────────────┤
│                                     │
│  [  Accept Quote ]                  │
│  [ × Decline ]                      │
│                                     │
│  [ Download PDF]                    │
└─────────────────────────────────────┘
```

Mobile-Specific Considerations

- Bottom navigation bar (thumb-friendly)
- Swipe left on quote card → quick actions (resend, duplicate, delete)
- Pull-to-refresh on quote list
- Camera opens directly for photo-to-quote (no file picker first)
- Sticky "Send Quote" button on editor screen
- Keyboard-aware layout — inputs scroll above keyboard
- Haptic feedback on key actions (quote sent, accepted)

Accessibility Requirements

- WCAG 2.1 AA compliance
- All interactive elements keyboard-navigable
- Colour contrast ratio ≥ 4.5:1 for text
- Screen reader labels on all buttons and form fields
- Focus indicators visible
- Alt text on all images
- Error messages associated with form fields via `aria-describedby`

---

11. Pricing Strategy

Tier Comparison

Feature	Free	Pro ($15/mo)	Business ($29/mo)
Quotes per month	3	Unlimited	Unlimited
AI quote generation			Priority (GPT-4o always)
Photo-to-Quote	1/month	Unlimited	Unlimited
PDF templates	3 basic	All 10 + custom branding	All 10 + custom branding
Quote tracking		Viewed/accepted/declined	
Custom logo on PDF			
Email sending	(QuoteCraft branding)	(Your branding)	
SMS sending			(50/mo included)
Voice-to-Quote			
Follow-up automation			

	Quote → Invoice			
	Client portal			
Support	Community	Email (24h)		Priority email (4h)

Annual Pricing

- Pro: $150/year ($12.50/mo — save $30, equivalent to 2 months free)
- Business: $290/year ($24.17/mo — save $58, equivalent to 2 months free)

Price Justification

Why $15/mo for Pro: - Competitors charge $29–$200/mo for platforms where quoting is just one feature - Quotient (quotes-only, no AI) charges $25/mo — we're cheaper AND smarter - $15/mo is approximately one hour of a tradie's time — if QuoteCraft saves 3+ hours per week, the ROI is 12:1 minimum - Low enough to be an impulse decision, not a budget discussion - ServiceM8 Starter is $29/mo; we offer better quoting at half the price

Why $29/mo for Business: - Voice-to-quote and automation are high-value features for busy tradies - Quote→Invoice conversion reduces the need for a separate invoicing tool - Still 40–85% cheaper than full platforms - SMS delivery alone (50 messages) would cost ~$5/mo via Twilio

Why Free tier exists: - Removes friction for trial — no credit card needed - 3 quotes/month is enough to experience the value but not enough to run a business on - Conversion funnel: Free → "Wow this is easy" → Pro by month 2

AI Cost Per Quote

Model	Input	Output	Cost/Quote
GPT-4o-mini (text)	~800 tokens	~500 tokens	~$0.002
GPT-4o (vision, 1 photo)	~1,500 tokens	~500 tokens	~$0.02
GPT-4o (vision, 5 photos)	~5,000 tokens	~800 tokens	~$0.05

At $15/mo with an estimated 20 quotes/month per user, AI cost is ~$0.10–0.50/user/month (1–3% of revenue). Healthy margin.

---

12. Go-to-Market Strategy

Phase 1: Beta (Month 1)

Channel: Personal network - Leo recruits 10 tradie mates (electricians, plumbers, painters) to beta test - Goal: validate core flow, identify bugs, gather testimonials - Incentive: free Pro for life if they provide detailed feedback + a video testimonial - Feedback collection: simple Google Form + fortnightly Zoom/phone call

Phase 2: Soft Launch (Month 2)

Channels: Organic social, trade groups

- **Facebook Groups:** Join 20+ trade-specific groups (e.g., "Aussie Sparkies", "Plumbers of Australia", "US Electricians Forum"). Contribute value first (answer questions), then share QuoteCraft when relevant. Not spammy — genuinely helpful.
- **Reddit:** r/electricians, r/plumbing, r/Construction, r/AusFinance (as a side project story)
- **Product Hunt:** Launch for visibility with dev/startup audience
- **X (Twitter):** Build-in-public content — share progress, metrics, learnings

Phase 3: Paid Acquisition (Month 3+)

Facebook/Instagram Ads

Targeting: - AU: Males 25–55, interests in "tradesman", "electrician", "plumber", specific trade tool brands (Milwaukee, DeWalt, Makita), ServiceM8, Tradify - US: Similar demographics, interests in construction, trade tools, Jobber, Housecall Pro - Lookalike audiences from beta users (once pixel has data)

Creative strategy: - **Hook:** "Still quoting on the back of an envelope?" / "Your quotes shouldn't take longer than the job" - **Format:** 15-second video showing photo → AI generates quote → send → done

(screen recording) - **Social proof:** Quote from beta tester Dave: "I used to spend Sunday night doing quotes. Now I do them in the van."

Budget: - Month 3–4: $500/mo (testing creatives and audiences) - Month 5–6: $1,000/mo (scale winners) - Month 7–12: $2,000/mo (optimise CAC)

Expected metrics: - CPC: $1.50–3.00 (trade services niche) - Landing page conversion: 8–12% - Free → Pro conversion: 20–30% - Target CAC (Pro subscriber): $30–50 - LTV (12-month): $150–180 (accounting for ~15% monthly churn) - LTV:CAC ratio: 3:1 to 5:1

Google Ads

- Keywords: "quoting software tradies", "trade quote template", "electrician quote app", "plumber quoting tool"
- Search volume is lower but intent is extremely high
- Budget: $300/mo from Month 4

Content Marketing & SEO

Target keywords: - "free quote template electrician" (high volume, we offer free tier) - "quoting software for tradies" - "how to quote a job" + [trade type] - "plumber quote template Australia" - "contractor estimate template" - "AI quoting tool"

Blog topics: 1. "How to Write a Quote That Wins the Job (Tradie's Guide)" 2. "Quote vs Estimate: What's the Difference and When to Use Each" 3. "10 Quoting Mistakes That Are Costing You Jobs" 4. "How Long Should a Quote Be Valid? A Guide for Australian Tradies" 5. "Free Electrician Quote Template (Download + Online Tool)" 6. "Why Tradies Lose 30% of Jobs to Slow Quoting"

Distribution: Blog on quotecraft.com.au/blog, repurpose to LinkedIn, Facebook groups, and short-form video.

Partnerships

Partner	Type	Value
Bunnings Trade	Cross-promotion	Access to 500K+ trade account holders
Master Electricians Australia	Affiliate/endorsed tool	Credibility + distribution to 6,000+ members
Master Plumbers Association	Same model	
TAFE / trade schools	Educational partner	Teach new tradies to quote properly using QuoteCraft
Accountants (regional)	Referral	"Tell your tradie clients about this"
Tool/material suppliers	Co-marketing	Bundle mentions in newsletters

Referral Program

- Existing user refers a friend → both get 1 month free (Pro)
- Unique referral link on dashboard
- Track referrals and display count ("You've referred 3 tradies!")
- Cap: 6 free months per year via referrals (prevents abuse)

---

13. Success Metrics & KPIs

North Star Metric

Quotes sent per week (across all users)

This captures both user acquisition AND engagement. A growing number means more users, more active users, or both.

Weekly KPIs

Metric	Target (Month 6)
New signups	25/week
Free → Pro conversion rate	25%

Quotes created	200/week
Quotes sent	150/week
Quote acceptance rate (client-side)	40%+
Weekly active users (created or sent ≥1 quote)	80

Monthly KPIs

Metric	Definition
MRR	Monthly recurring revenue
Paying users	Users on Pro or Business
Churn rate	% of paying users who cancel
CAC	Cost to acquire a paying user
LTV	Average revenue per user over lifetime
NPS	Net Promoter Score (survey quarterly)

Month-by-Month Targets (Year 1)

Month	Total Users	Paying Users	MRR	Cumulative Revenue
1	15	0	$0	$0
2	40	5	$75	$75
3	80	15	$225	$300
4	130	30	$480	$780
5	200	55	$875	$1,655
6	300	100	$1,600	$3,255
7	400	140	$2,240	$5,495
8	520	190	$3,040	$8,535
9	650	250	$4,000	$12,535
10	800	310	$4,960	$17,495
11	970	390	$6,240	$23,735
12	1,150	500	$8,000	$31,735

Assumptions: - Average revenue per paying user: $16/mo (mix of Pro at $15 and Business at $29) - Free-to-paid conversion: 25% over first 60 days - Monthly churn: 8% (high initially, improving to 5% by month 12) - Paid ads begin Month 3; organic + referrals carry Month 1–2

Revenue Projections (Year 2 if targets met)

- Month 12 MRR: $8,000
- Projected Month 24 MRR (with continued growth): $25,000–40,000
- Annual run rate at Month 24: $300K–480K

---

14. Risk Assessment

Technical Risks

Risk	Likelihood	Impact	Mitigation
AI generates inaccurate pricing	High	Medium	Always present AI output as editable draft; never auto-send. Show confidence indicators. Collect pricing feedback to improve prompts.
OpenAI API downtime	Low	High	Implement fallback to manual quote creation. Cache common responses. Alert users of degraded mode. Consider secondary AI provider (Anthropic Claude).
OpenAI pricing increases	Medium	Medium	Abstract AI layer so provider is swappable. Monitor cost per quote. Budget ceiling alerts.
SQLite scaling limits	Low (long-term)	Medium	Migration path to PostgreSQL already planned via Drizzle

Risk	Likelihood	Impact	Mitigation
File storage costs	Low	Low	ORM. Trigger at 5,000+ users. Compress images server-side. Enforce file size limits. Prune expired quote files.

Market Risks

Risk	Likelihood	Impact	Mitigation
Tradies won't pay for quoting software	Medium	Critical	Free tier eliminates risk for user. $15/mo is trivially low. Focus on time-saved messaging.
Low awareness / hard to reach tradies	Medium	High	Facebook groups and word-of-mouth are primary channels. Tradies trust other tradies — referral program is key.
Tradies prefer WhatsApp / text quotes	Medium	Medium	QuoteCraft quotes can be shared via link on any channel. SMS delivery in Phase 2. The quote is a webpage, not locked to email.

Competitive Risks

Risk	Likelihood	Impact	Mitigation
ServiceM8/Tradify add AI quoting	High (12–18 months)	Medium	First-mover advantage. They'll add AI as a feature; we build the entire experience around it. Their AI will be bolted on; ours is native. Their price is still 2–10x ours.
New AI-first competitor	Medium	High	Move fast, build brand loyalty, lock in with templates and data. Network effects from saved quotes and client relationships.
ChatGPT / generic AI makes dedicated tool unnecessary	Low	Medium	ChatGPT can't send branded emails, track views, handle acceptances, generate branded PDFs, or manage a quote pipeline. We're the last mile.

Operational Risks

Risk	Likelihood	Impact	Mitigation
Solo founder burnout	Medium	Critical	Keep scope minimal (quotes only!). Don't feature-creep. Automate everything possible. Set realistic timelines.
Support burden at scale	Medium	Medium	In-app help, FAQ, video tutorials. Chatbot for common questions. Community forum.

15. Legal & Compliance

Australia

Quote Legal Requirements

- Quotes must include the business's **ABN** (Australian Business Number) — required for any business transaction over $82.50 (including GST)
- GST-registered businesses (turnover >$75K) must show GST separately or state "Total includes GST"
- Quotes should clearly state **validity period** (common: 14 or 30 days)

- **Australian Consumer Law (ACL):** If a quote is accepted, it forms a binding agreement. The quote should clearly state terms, scope, and exclusions.
- State-specific licensing: Electrical work requires an electrical licence number to be displayed (varies by state). Similar for plumbing, building.
- QuoteCraft must prompt users to enter their licence number and include it on quotes for relevant trades.

Consumer Protection

- Quotes must not be misleading or deceptive (ACL Section 18)
- Price should be the total price payable (including GST for B2C)
- Any conditions or limitations must be clearly stated

United States

Estimate/Quote Requirements

- No federal law mandating specific quote format
- **State-level requirements vary:**
  - California: Home improvement contracts over $500 require written agreement
  - Many states require contractor licence number on estimates
  - Some states require "Estimate" vs "Quote" distinction (estimate = non-binding, quote = fixed price)
- QuoteCraft should clearly label documents and let users choose "Quote" or "Estimate"
- EIN (Employer Identification Number) display is standard but not always legally required

Privacy & Data Protection

Australian Privacy Act 1988

- Applies to businesses with annual turnover >$3M (QuoteCraft itself may fall below initially, but best practice to comply)
- **APP 1:** Open and transparent management of personal information — publish a privacy policy
- **APP 3:** Collection of personal information must be necessary and lawful
- **APP 5:** Notify individuals about collection (privacy notice at signup)
- **APP 6:** Use and disclosure only for collected purpose
- **APP 8:** Cross-border disclosure — if data stored outside AU (GCP region should be AU)
- **APP 11:** Security — reasonable steps to protect personal information
- **APP 12:** Access — individuals can request their data
- **APP 13:** Correction — individuals can request corrections
- **Notifiable Data Breaches (NDB):** Must notify OAIC and affected individuals if eligible data breach occurs

Data Handling Specifics

- **Uploaded documents:** May contain client PII (names, addresses, phone numbers). Encrypted at rest. Auto-deleted per retention policy.
- **AI processing:** Data sent to OpenAI API. OpenAI's data use policy: API data is NOT used for training (as of 2024+). Document this in privacy policy.
- **Payment data:** Never stored. Stripe handles all payment processing (PCI DSS compliant).
- **Location data:** Country/region stored for pricing suggestions. No GPS tracking.
- **Cookie policy:** Minimal cookies (auth token, preferences). No third-party tracking cookies in MVP.

Required Legal Documents

1. **Privacy Policy** — What we collect, why, how it's stored, user rights
2. **Terms of Service** — Liability limitations, acceptable use, subscription terms
3. **Cookie Policy** — What cookies, why, opt-out
4. **Acceptable Use Policy** — Don't use QuoteCraft for fraud, spam, etc.
5. **Data Processing Addendum** — For when we handle client data on behalf of users

Implementation Notes

- Host data in **GCP Sydney region (australia-southeast1)** for AU users
- GCP US region for US users (when US expansion begins)
- Encrypt all data at rest (SQLite encryption extension or filesystem-level encryption)
- HTTPS everywhere (enforced)

- Regular security audits (quarterly self-assessment, annual third-party when budget allows)
- Implement data export (user can download all their data as JSON/CSV)
- Implement data deletion (user can delete account and all associated data)

---

16. Timeline & Milestones

Week 1–2: MVP Build

Day	Milestone
1–2	Project setup: React + Vite + Tailwind frontend, Express backend, SQLite schema, auth (register/login/JWT)
3–4	Business profile CRUD, client CRUD, core quote CRUD (manual creation)
5–6	AI integration: text-to-quote (GPT-4o-mini), photo-to-quote (GPT-4o vision)
7–8	PDF generation (2–3 templates), quote editor UI
9–10	Email sending (Resend), public quote page, accept/decline flow, tracking events
11–12	Dashboard with stats, mobile responsive polish, quote list with filters
13–14	Testing, bug fixes, deploy to Vercel + GCP VM, SSL, domain setup

MVP Definition of Done: - User can register, set up business profile, create AI-generated quote (text + photo), edit it, send via email, and track status - Client can view quote at public URL, accept/decline - Dashboard shows quote stats - Works well on mobile - 3 PDF templates functional

Month 1: Beta Testing

Week	Activity
3	Recruit 10 beta testers (Leo's network)
3	Onboard individually — watch them use it (screen share or in-person)
4	Collect feedback, prioritise bug fixes and UX improvements
4	Iterate: fix top 5 issues, polish onboarding

Beta Exit Criteria: - 10 users have each sent ≥3 real quotes - NPS ≥ 40 - No critical bugs - <5 second quote generation time - 2+ video testimonials collected

Month 2: Soft Launch

Week	Activity
5	Enable Stripe billing, implement free tier limits
5	Remaining PDF templates (10 total)
6	Launch in 5 Facebook trade groups (organic posts)
6	Product Hunt launch
7	Reddit posts (build-in-public story)
8	First 5 paying customers (target)

Month 3: Growth Begins

Week	Activity
9	Facebook Ads start ($500/mo budget)
9	Start blog (2 SEO articles)
10	Google Ads start ($300/mo budget)
10	Implement referral program
11	Begin Phase 2 development (voice-to-quote, saved templates)
12	15 paying users target

Month 4–6: Scale & Iterate

- Phase 2 features ship incrementally
- Increase ad spend as CAC proves out
- Target: **100 paying users by Month 6**

- Monthly revenue target: **$1,600 MRR**

Month 7–12: Acceleration

- Phase 3 features begin (team, analytics, integrations)
- Evaluate mobile app need based on user feedback
- Target partnerships (one trade association)
- Target: **500 paying users by Month 12**
- Monthly revenue target: **$8,000 MRR**

Appendix A: Glossary

Term	Definition
ABN	Australian Business Number — 11-digit identifier for businesses
ACL	Australian Consumer Law
EIN	Employer Identification Number (US equivalent of ABN)
GST	Goods and Services Tax (10% in Australia)
MRR	Monthly Recurring Revenue
CAC	Customer Acquisition Cost
LTV	Lifetime Value (of a customer)
NPS	Net Promoter Score
Tradie	Australian/NZ slang for tradesperson

Appendix B: Open Questions

1. **Domain:** quotecraft.com.au is ideal for AU launch. quotecraft.app for global. Check availability and pricing.
2. **ABN validation:** Should we verify ABN against the ABR (Australian Business Register) API? Adds legitimacy but adds complexity.
3. **Document upload AI:** How well does GPT-4o handle handwritten quotes in photos? Needs testing with real tradie handwriting.
4. **Pricing for US market:** $15 AUD ≈ $10 USD. Should US pricing be $15 USD ($22 AUD)? Or keep it equivalent?
5. **Mobile app timing:** React Native app is Phase 3, but if 80%+ of users are on mobile, should it be prioritised?
6. **Insurance:** Do we need professional indemnity insurance given we're generating pricing suggestions? Probably yes — consult lawyer.

This document is a living artifact. Update it as decisions are made and the product evolves.

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