

AI Filing Platform - Full Developer Specification

Overview

This AI Filing Platform is a web-based document management system designed for small businesses. It uses OCR and AI to auto-organize, summarize, and tag documents from various input sources. Privacy is a core value, and the user retains control over all actions. The product is designed to launch with real estate professionals in LA but is intended for broader use across service-based small businesses.

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User Flow

1. Landing Page: Marketing site with call-to-action and signup/login.
2. Signup: Email/password or OAuth (future).
3. Onboarding:
 - Select industry (Real Estate, Legal, etc.)
 - Select business type (Solo, Team)
 - Describe what documents you need to organize
 - Text prompt to describe desired folder/tag setup
 - AI proposes structure -> user edits/approves
4. Main Portal:
 - Sidebar: Folder structure
 - Top bar: Search, alerts, integrations
 - Main panel: Files in selected folder
 - Right drawer: Command box, 'Add Files' button
5. Upload Modal:
 - Upload PDFs, images, scans, emails, etc.
 - AI runs OCR -> extract metadata -> generate summary -> auto-tags
 - Files are auto-placed or sent to 'Unstructured' folder
6. AI Command Box:
 - Users type commands ('Move all leases to X')
 - AI stages changes -> preview modal -> user confirms
7. Chat With Files (Future-Ready):
 - Ask questions like 'Summarize all leases from 2023'
 - Results shown in sidebar
8. Notifications:

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- Unstructured files, integration issues, summaries done

9. History:

- Past prompts and file changes
- Reversible and searchable

10. Export:

- Entire file system export as ZIP
- Includes folder structure, raw files, metadata, summaries

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Core Features

- AI-based folder/tag creation from user prompt
- OCR for scanned docs (Tesseract or Google Vision)
- AI summarization (OpenAI GPT or open-source NLP)
- Multi-source upload: web, mobile, email, desktop sync
- Privacy-first architecture
- Editable file system and manual override
- Text-based command box for actions
- File export system
- Integration with DocuSign and Acrobat

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Tech Stack (Suggested)

- Frontend: React
- Mobile: React Native (future)
- Backend: Node.js + Express
- DB: MongoDB Atlas
- File Storage: AWS S3
- Auth: Firebase Auth
- Email: Mailgun routes
- OCR: Tesseract.js or Vision API
- AI: OpenAI GPT-4 or HuggingFace pipeline

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MVP Build Plan

1. Account setup + onboarding wizard
2. File system creation from prompt
3. File upload via web UI
4. Run OCR + summarization
5. Categorize and display files
6. Show summaries, allow overrides
7. Implement AI command box (basic)
8. Email ingestion
9. Export function
10. Add DocuSign & Acrobat integration