Phase 1 – MVP Scope

1. Multi-Tenant, Secure Client Login & Management

Goal

Provide each business (tenant) with an isolated environment and secure access for both admin and end clients.

Features

- Tenant isolation: Separate databases per client to allow full portability if moving to another platform.
- Role-based access: Admin, staff, and client roles with configurable permissions.
- Secure authentication: Email/password, 2FA optional, single sign-on via Google or Microsoft.
- White-label branding per tenant (logo, colors, contact details).
- Audit logs for all login and data changes.

Configuration

- Admin console for creating and managing tenants.
- Password policy configurable per tenant.

Data model impact

- Separate schemas or databases for each tenant.

UI impact

- Login page customisable for each tenant's brand.
- Clear separation of admin vs client portal.

2. Sales & Quoting Module

Goal

Enable businesses to manage quotes, assign staff, block out work times, and get approvals.

Features

- Central calendar for sales quotes and follow-ups.
- Add quotes with estimated time and assign staff.

- Ability to add products/services from internal database or external links (e.g., Bunnings).
- Block out time in calendar when quote is approved.
- Send quotes via email/SMS/WhatsApp.
- Automated client reminders.
- Client portal approval to start work.

Configuration

- Quote templates with editable line items.
- Reminder intervals configurable.

Data model impact

- Quotes linked to customers and staff.
- Status tracking (Draft, Sent, Approved, Rejected).

UI impact

- Calendar view showing sales appointments and blocked work slots.
- Quote builder with product search.

3. Job Tracking & Invoicing

Goal

Manage active jobs, staff time, and invoice clients efficiently.

Features

- Assign work time to calendar and staff.
- Daily staff timesheet approval by owner/manager.
- Send progress reports to clients.
- Generate and send invoices with payment links.
- Support for progress payments.
- Automated invoice reminders.

Configuration

- Default invoice terms per tenant.
- Time approval workflow.

Data model impact

- Jobs linked to quotes and invoices.

UI impact

- Job detail page with status tracking.
- Integrated timesheet submission and approval screen.

4. Money Collection & Accounting Integration

Goal

Collect payments, manage reconciliation, and integrate with accounting platforms.

Features

- API integration with Xero, QuickBooks, and MYOB.
- Bank reconciliation via connected accounting software.
- Multi-gateway payment support (credit card, direct debit, PayPal, Apple Pay, Google Wallet).
- Split payments support for partial invoices.
- Auto-sync of payment receipts to accounting system.

Configuration

- Default payment methods per tenant.
- Gateway provider selection per tenant.

Data model impact

- Payment transaction records linked to invoices.

UI impact

- Payment status dashboard.
- Setup wizard for accounting software integration.

5. Accounts & Payroll Interface

Goal

Streamline payroll and give admins a single place to manage client payroll needs.

Features

- Payroll handled in accounting software but with summary view in platform.
- Admin interface for payroll data entry for clients using managed payroll services.
- Profit & loss summary from accounting API.

Configuration

- Payroll frequency per tenant.

UI impact

- Payroll summary dashboard.

6. Communication Hub

Goal

Centralise business communication with clients and staff.

Features

- Send email, SMS, and WhatsApp messages.
- Scheduled and repeating communications.
- Automatic responses based on pre-set rules.
- Easy rules setup via clickable templates (no coding).
- AI-assisted responses for common queries (optional approval before sending).

Configuration

- Comms templates per tenant.
- Approval flow toggle.

UI impact

- Conversation view with multi-channel messaging.
- Rule builder interface.

7. Location-Aware Booking with Google Maps

Goal

For on-site services, optimise schedules by preventing inefficient travel.

Features

- Google Maps Distance Matrix API integration.
- When booking, check distance/time from prior job.
- If threshold exceeded, block booking or suggest alternate times.
- Auto-adjust available slots based on travel time.
- Override option for authorised roles.

Configuration

- Thresholds per tenant or job type.

Data model impact

- Store job addresses and geocodes.

UI impact

- Calendar view shows travel times between jobs.
- Warning pop-ups for conflicts.

8. Multi-Booking Calendar by Business Type

Goal

Allow multiple bookings at the same time for relevant industries.

Features

- Configurable concurrency limits per tenant or job type.
- Visual indicator when slots are full.

9. Social Media & Digital Ads Integration with AI

Goal

Provide in-platform social media marketing and advertising automation.

Features

- Direct API integration with Facebook, Instagram, TikTok, LinkedIn.
- Google Ads integration for paid search/display.
- AI-generated ad copy and creative suggestions.
- Scheduling and posting from platform.
- Basic performance reporting.

10. Photo-to-Accounting & Tax Sync

Goal

Simplify expense and mileage tracking with phone photo sync.

Features

- Mobile photo capture uploads directly to platform.

- AI categorisation (e.g., receipt, mileage, asset).
- Sync to Xero/QuickBooks/MYOB with correct category.
- Special mode for odometer photos (logs mileage automatically).

Phase 2 – Expansion Scope

1. Advanced Analytics & BI Dashboards

Goal

Deliver deep operational and financial insights to help franchise businesses optimise performance.

Features

- Predictive analytics for sales, staffing, and cash flow.
- AI-powered profitability analysis by client, service, and staff.
- Customer churn prediction with recommended retention actions.
- Cross-tenant benchmarking (if opted in).
- Custom KPI creation by tenant.

Configuration

- Dashboard layouts per tenant.
- Opt-in for anonymised benchmarking.

Data model impact

- Historical and aggregated data warehouse.

UI impact

- Interactive Power BI/embedded charts.
- Drill-down to source transactions.

2. AI Job Scheduling & Workforce Optimisation

Goal

Automatically assign jobs and staff based on skills, availability, location, and profitability.

Features

- AI-based shift and job assignment engine.
- Optimises travel, skills, and job duration.
- Learns from historical performance and staff preferences.
- Suggests cost-efficient resource allocation.

Configuration

- Weighting for cost vs time vs customer priority.

Data model impact

- Store staff skill profiles and cost rates.

UI impact

- Suggested schedule view with one-click acceptance.
- Conflict and cost saving indicators.

3. Integrated Supplier & Inventory Management

Goal

Track supplier relationships, orders, and stock levels inside the platform.

Features

- Purchase order generation and approvals.
- Supplier database with performance ratings.
- Stock level tracking with low-stock alerts.
- Integration with suppliers for real-time stock/pricing where available.

Configuration

- Min/max stock levels per item.
- Preferred supplier per item.

UI impact

- Inventory dashboard and reorder panel.

4. Client Self-Service Portal Enhancements

Goal

Give clients greater control and convenience.

Features

- Client ability to reschedule/cancel bookings within rules.
- View invoices, quotes, job progress, and files.
- Chat interface linked to Communication Hub.
- Track loyalty points or credits (if enabled).

5. AI Document & Contract Automation

Goal

Reduce admin work by auto-generating and managing contracts, compliance docs, and forms.

Features

- Templates with dynamic fields populated from CRM/job data.
- E-signature integration.
- Document expiry tracking and renewal reminders.

6. White-Label Marketplace & Partner Portal

Goal

Enable franchises to sell complementary products/services to clients within the portal.

Features

- Tenant-specific online store linked to jobs/invoices.
- Cross-sell partner services.
- Commission tracking for partner sales.

7. Franchise Compliance & Audit Toolkit

Goal

Support franchisors in enforcing standards across the network.

Features

- Scheduled compliance audits with checklists.
- Photo/video evidence capture.
- Scoring and automated reporting to franchisor.

8. Industry Pack Customisation Framework

Goal

Quickly adapt platform for different industries (moat-building).

Features

- Configurable workflows, fields, and forms per industry pack.
- Industry-specific templates for quotes, jobs, and compliance.
- Optional modules enabled per tenant.

9. Loyalty, Referrals, & Customer Engagement Automation

Goal

Help franchises drive repeat business and referrals.

Features

- Automated reward programs.
- AI-driven referral prompts at peak satisfaction times.
- Gamified client engagement (optional).

10. AI Business Advisor Module

Goal

Act as a "virtual franchise coach" giving tailored advice.

Features

- Analyse business data to surface growth opportunities.
- Suggest marketing campaigns and operational improvements.
- Explain recommendations in plain language.
- Integrate with Communication Hub to launch campaigns directly.