

Project Requirements Document (PRD): Tarefo AI

1. Project Overview

Tarefo AI is a conversational personal assistant that lives inside messaging apps (WhatsApp, Telegram) and pairs with a lightweight web dashboard. It tackles daily chaos—missed appointments, scattered routines, lost bill payments and fragmented financial visibility—by letting users set reminders, manage calendars and track expenses with simple text, voice or image commands. No new app install, no steep learning curve: Tarefo AI meets users where they already communicate.

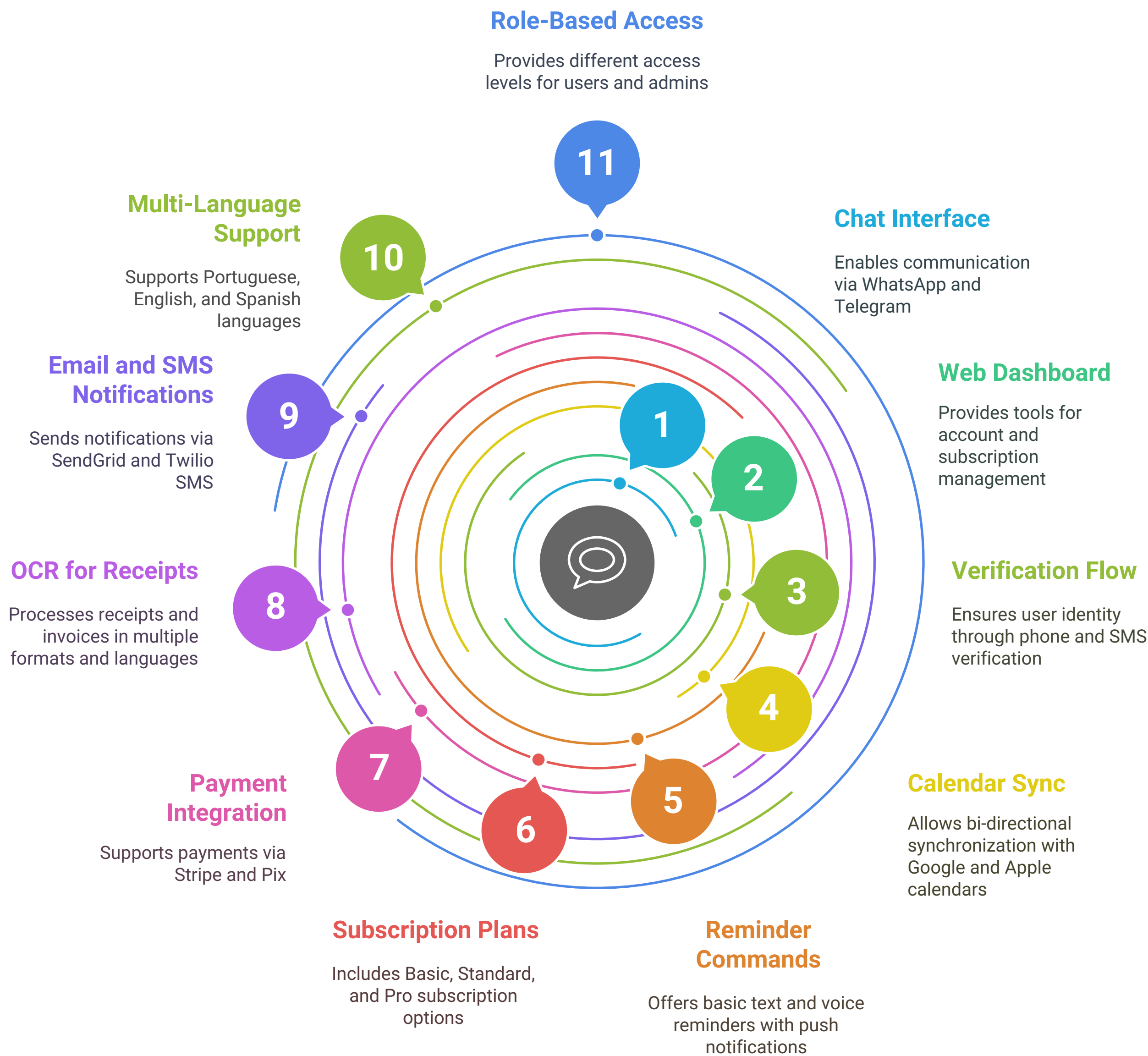
We're building Tarefo AI to solve chronic disorganization, especially for people with ADHD, freelancers and multitasking professionals. Success means users reliably add and view events via chat or dashboard, receive timely reminders across channels (chat, email, SMS), and—at higher tiers—gain clear, AI-driven financial insights. Key metrics include active users, reminder delivery rate > 99%, calendar sync accuracy > 98% and subscription conversion from free to paid tiers.

2. In-Scope vs. Out-of-Scope

In-Scope (MVP & V2)

- Chat interface on WhatsApp and Telegram (via Twilio Z-API, BotFather)
- Web dashboard for signup, account settings, subscription management
- Phone-number + SMS/WhatsApp verification flow
- Bi-directional sync with Google Calendar (OAuth) and Apple Calendar (CalDAV)
- Basic reminder commands (text, voice) and push notifications via chat
- Subscription plans: Basic (free), Standard, Pro
- Payment integration: Stripe (cards), Pix
- OCR for receipts/invoices in PDF, JPEG, PNG (Portuguese & English)
- Email and SMS notifications (via SendGrid, Twilio SMS)
- Multi-language support: Portuguese, English, Spanish
- Role-based access: individual users and therapists/company admins

Tarefo AI Feature Breakdown



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Out-of-Scope (Future Phases)

- iMessage, LINE channels
- Integrations with Calendly, Notion, Trello, Todoist
- White-label B2B API and enterprise portal
- Advanced NLP beyond command parsing (e.g., open-ended chat)
- Custom theming or branding toolkit
- Mobile app clients

3. User Flow

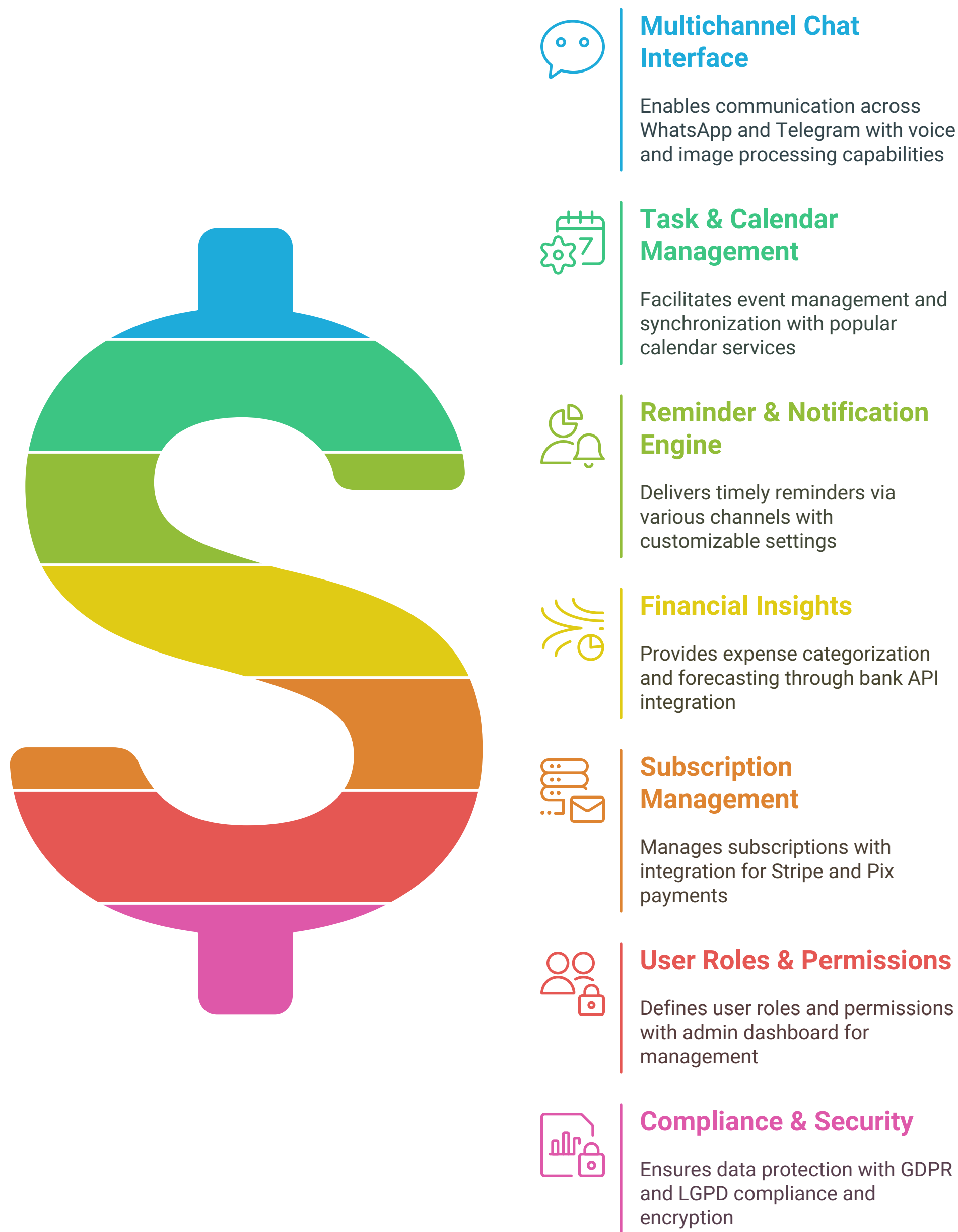
New users click a “Get Started” link (from ads or referral), pick WhatsApp or Telegram, and land in a chat greeting. They enter name and phone number, receive a code via SMS or chat, then confirm to activate their free Basic account. Tarefo AI prompts users to try a sample reminder (“Remind me to call John tomorrow at 10am”) and explains how to switch notification channels (email, SMS).

Next, the assistant offers calendar integration. Clicking the link opens the web dashboard where users consent to Google or Apple Calendar access. Once connected, all existing calendar events sync. Users can now add, view or update events by chat (“What’s on my schedule today?”) or by logging into the dashboard, which shows a three-pane view: sidebar (navigation), main calendar, and notifications panel. As due dates approach, reminders fire via the user’s chosen channels.

4. Core Features

- **Multichannel Chat Interface:**• Send/receive messages in WhatsApp and Telegram• Voice message transcription and command parsing• Image-based OCR for receipts/invoices
- **Task & Calendar Management:**• Create, read, update, delete events via chat or dashboard• Bi-directional sync with Google Calendar [OAuth] and Apple Calendar [CalDAV]• Outlook/Microsoft 365 support via Microsoft Graph API
- **Reminder & Notification Engine:**• Scheduled reminders delivered via chat, email, SMS• Configurable lead time and repeat settings
- **Financial Insights (Pro tier):**• Connect to banks via Belvo or Pluggy APIs• Auto-categorize expenses, cash-flow forecasts, personalized summaries
- **Subscription Management:**• Stripe (cards) and Pix integration• Dynamic plan upgrade prompts in chat and dashboard
- **User Roles & Permissions:**• Individual users vs. therapists/admins• Admin dashboard for managing multiple user profiles and aggregated reports
- **Compliance & Security:**• LGPD and GDPR-compliant consent workflows• Encryption in transit (TLS) and at rest (AES-256)• Role-based access control (RBAC)

Tarefo AI Core Features Overview



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5. Tech Stack & Tools

- Frontend: React.js, Tailwind CSS [dashboard]
- Backend: Node.js, Express.js
- Database & ORM: PostgreSQL, Prisma
- Authentication: JSON Web Tokens [JWT]
- Chatgateways: Twilio API [WhatsApp & SMS], Telegram Bot API
- Calendar APIs: Google Calendar API, CalDAV, Microsoft Graph API
- OCR & NLP: Tesseract.js [OCR], OpenAI API [NLP command parsing]

- Finance APIs: Belvo API, Pluggy API
- Payments: Stripe SDK, Pix integration
- Email: SendGrid
- Storage & Hosting: AWS S3 [receipts], Docker for containerization, AWS ECS or Kubernetes
- IDE/Plugins: Replit for prototyping, Lovable.dev for rapid front-end scaffolding

6. Non-Functional Requirements

- **Performance:**• <200 ms average chat-command response time• Calendar sync jobs complete within 30 seconds
- **Scalability:**• Support 100k concurrent users in first year• Auto-scale microservices via container orchestration
- **Security & Compliance:**• TLS everywhere, AES-256 data encryption at rest• LGPD/GDPR audit logs, user data export/deletion endpoints
- **Usability:**• Chat responses <2 lines, clear CTAs in both chat and dashboard• 95% of first-time users complete onboarding without support

7. Constraints & Assumptions

- Requires availability of WhatsApp Business API [Twilio or Z-API]
- OpenAI API quotas for NLP must be monitored; fallback to simple regex
- Assumes user devices support image upload over chat apps
- Users have basic literacy in Portuguese, English or Spanish
- Bank APIs [Belvo/Pluggy] may impose regional limits; initial launch focused on Brazil

8. Known Issues & Potential Pitfalls

- **API Rate Limits:**• Chat gateways and calendar APIs enforce QPS limits.• Mitigation: implement request queuing and back-off logic.
- **OCR Accuracy:**• Variations in invoice formats may reduce text extraction quality.• Mitigation: tune Tesseract settings, offer manual correction flow in dashboard.
- **Payment Failures:**• Network errors or Pix settlement delays.• Mitigation: real-time payment status polling and user notifications.
- **Compliance Delays:**• LGPD/GDPR data-subject requests could require manual review.• Mitigation: build self-service portal for common data requests.
- **User Onboarding Drop-off:**• Some users may find multi-step verification frictionful.• Mitigation: allow email verification fallback and “skip for now” for calendar sync.

This PRD captures all essential requirements for the AI-driven Tarefo AI assistant’s initial release, ensuring unambiguous guidance for subsequent technical design and implementation documents.