**Green Lines – Customer CFO App Specification**

*Version 1.0 | 15 Oct 2025 | Mobile + Web | EN/AR | ERP‑aware Dashboard + AI Assistant*

# 1. Goals & Principles

* Give customers a configurable ERP‑aware financial dashboard + their CFO plan status in one screen.
* Enable self‑service for sessions, payments, documents, add‑ons, and AI assistance.
* Maintain transparency of milestones, tasks, SLAs, and acceptance states.

# 2. Main Screen (Dashboard)

|  |  |  |  |
| --- | --- | --- | --- |
| Widget | Data | Customization | Actions |
| ERP KPI Board | Sales, Expenses, Cashflow, Inventory | Drag & drop; add/remove cards | Open KPI detail |
| Plan Overview | Term, Status, KPIs (TTFV, On‑time %, Variance) | Pick KPIs | Open Plan |
| Next Session | Date/time, Teams link | — | Join, Reschedule |
| Milestones | Traffic‑light status | — | Open milestone |
| Payments | Invoice list | — | Pay now |
| Add‑ons | Recommended services | — | Browse store |

* If ERP Gate active: show ERP Setup widget (phase, ETA, Tech Partner).
* AI Assistant floating action available on all screens.

# 3. AI Assistant (ChatGPT‑like)

* Natural language chat: ‘Where are we vs plan?’, ‘Explain cashflow variance’, ‘What’s next?’, ‘Recommend add‑ons’.
* Data sources: ERP KPIs, Plan/Milestones, Sessions, Invoices/Payments, Evidence summaries.
* Actions: Deep links to pages; generate summaries; export answers as PDF.

# 4. Plan & Milestones

|  |  |  |  |
| --- | --- | --- | --- |
| Item | Fields | Actions | Rules |
| Milestone List | Title, Due, Status, Linked sessions/tasks | Open detail | Locked if ERP Gate |
| Milestone Detail | Description, SLA, Evidence preview | Accept, Request Rework, Message | Acceptance starts payout clock |
| Tasks (read‑only) | Assignee (agent/team), Due, Status | Open task detail | — |

# 5. Sessions & Meetings

* Calendar view; Teams links; reschedule with ≥24h notice; reminders 24h/1h.

# 6. Payments & Invoices

* Invoice list/detail with VAT, integration fee (if applicable); Pay now (Checkout.com / Amazon PS); receipts; refunds show credit note ref.

# 7. Add‑ons Store

|  |  |  |
| --- | --- | --- |
| Card | Details | Action |
| Service | Scope, SLA, price | Add to cart → Pay → Assign |

# 8. Documents & Reports

* Vault with folders (by engagement/milestone); versioning; tagging; CFO Pack, VAT filings, forecasts; upload/download/share.

# 9. Chat & Support

* Threaded chat with Consultant and assigned agents; attachments; canned quick actions; audit logs.

# 10. Top Settings Menu

* Profile
* Sessions & Meetings
* Payments & Invoices
* Documents & Reports
* Chat & Support

# 11. Non‑Functional & Security

* EN/AR; RTL; weekend Sat–Sun; push/email/WhatsApp notifications.
* Biometric unlock (mobile); session timeout; token revoke; PDPL alignment.

# 12. Acceptance Criteria (Key)

* Dashboard shows ERP KPIs and Plan KPIs together; user can re‑order KPI cards.
* AI Assistant answers link to relevant pages and may export summaries as PDF.
* Milestone acceptance triggers payout eligibility; locked milestones respect ERP Gate.
* Payments work with Apple/Google Pay; refunds show credit note reference.