Damelie Studio PA – MVP Specification

Goal:

A personal assistant system that knows all ongoing projects, consolidates information, and provides daily and weekly guidance so that no critical task, follow-up, or decision is forgotten. The system prepares drafts and reminders but never sends anything without explicit approval.

Scope (MVP):

- Project & Client hub for Project Management work

- Daily and weekly personal assistant briefing

- Task management with priority logic

- Meeting and site visit summaries with task extraction

- Reminder and follow-up preparation

- Lightweight BoQ support

- Basic per-project financial visibility

- Advisor-style alerts (overload / margin risk)

- Global portfolio view

Out of scope for MVP:

- Tiles and transportation logic

- Full accounting / VAT replacement

- External collaborator portals

- Automatic sending of communications

- Marketing and social media automation

- Advanced voice actions

Core Entities:

Client, Project, Task, Meeting/Visit, Message (optional), Financial Entry, System Settings.

Daily PA Behaviour:

- Today: meetings, urgent tasks, overdue items

- This week: upcoming deadlines, red flags

- Yesterday: short activity recap

- Weekly: financial snapshot and workload risks

Priority Logic (Default):

1. Active running projects

2. Payment / money-related tasks

3. BoQs and offers

4. Reports and summaries

5. New opportunities

Manual priority overrides always apply.

Meeting / Visit Flow:

- Paste raw notes

- Generate structured summary

- Extract decisions and tasks

- User confirms before saving

Reminders:

- Automatic detection of overdue or waiting items

- Draft reminder messages prepared

- User approval required before sending

BoQ Helper:

- Reuse data from offers up to 3 years old

- Prefer most recent data

- Translate and format according to provided templates

- User review required

Finance Visibility:

- Budget vs invoiced

- Estimated vs actual cost and time

- Project margin indicators

Stop Rules:

- Warn if effort exceeds plan

- Warn if margin risk detected

Statuses:

Projects: Lead, Negotiation, Active, On Hold, Closed (Won/Lost)

Tasks: Open, Pending, Awaiting Price, Awaiting Client, In Progress, Complete, Cancelled

Trust & Error Handling:

- Missing information preferred over incorrect information

- Show source of prices and conclusions

- All suggestions clearly marked and editable

Day One Setup:

- Start with active projects only

- Link existing Google Drive folders

- Gradual onboarding; no full history reconstruction required