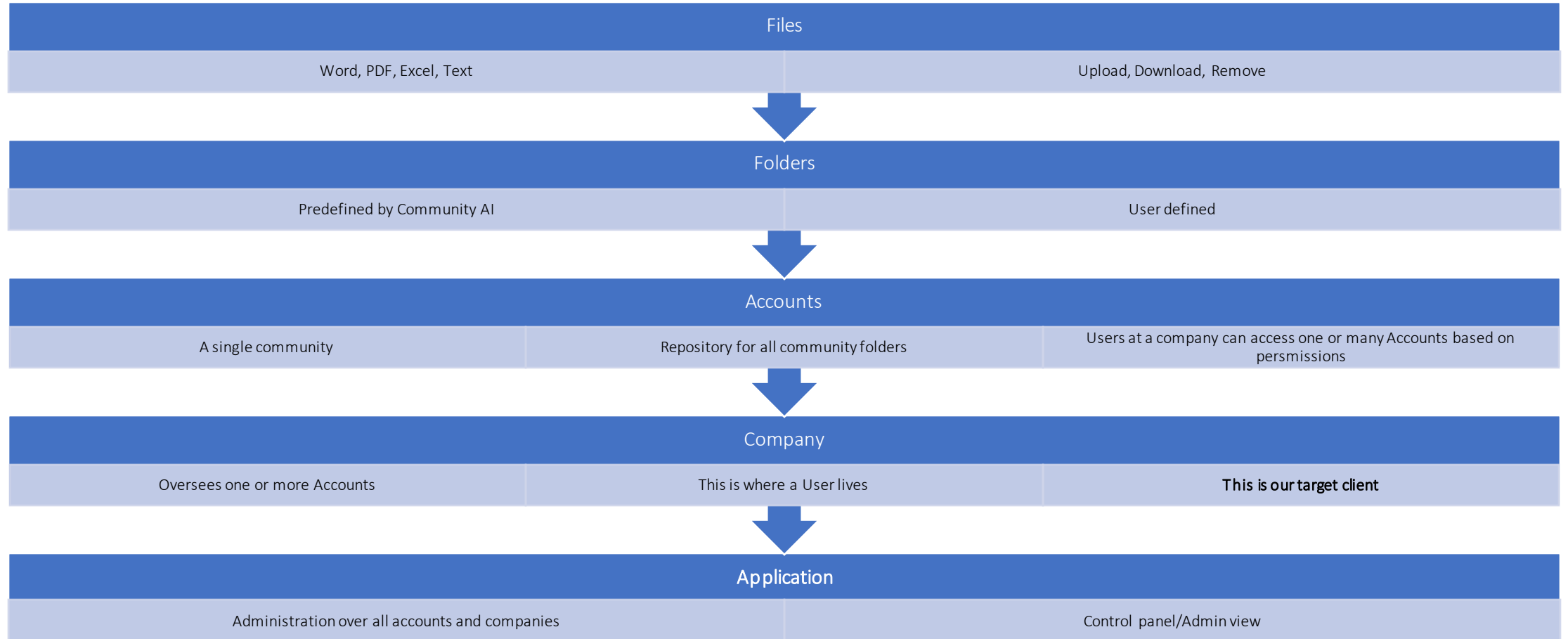# Community AI Requirements

5/10/2023

Vision

- Community AI will be a digital assistant for Community Management professionals.
- The ideal client for Community AI is residential communities and the companies that manage them
- Community AI will become the de facto expert on a community through ingesting a repository of files (PDF, Word, Excel, Text)
- These files may not normally be easily accessible or digestible by a lay person due to their nature being legal or financial
- Users can administer a library of key documents and use the App to perform research and analysis without being intimate to the underlying files
- The app would also provide the structure (folders) for the user to easily know what files to upload and where to upload them
- The application will be able to perform analysis across a single file, a folder, or the entire community repository

Structure

Files		
Word, PDF, Excel, Text		Upload, Download, Remove

Folders		
Predefined by Community AI		User defined

Accounts		
A single community	Repository for all community folders	Users at a company can access one or many Accounts based on persmissions

Company		
Oversees one or more Accounts	This is where a User lives	**This is our target client**

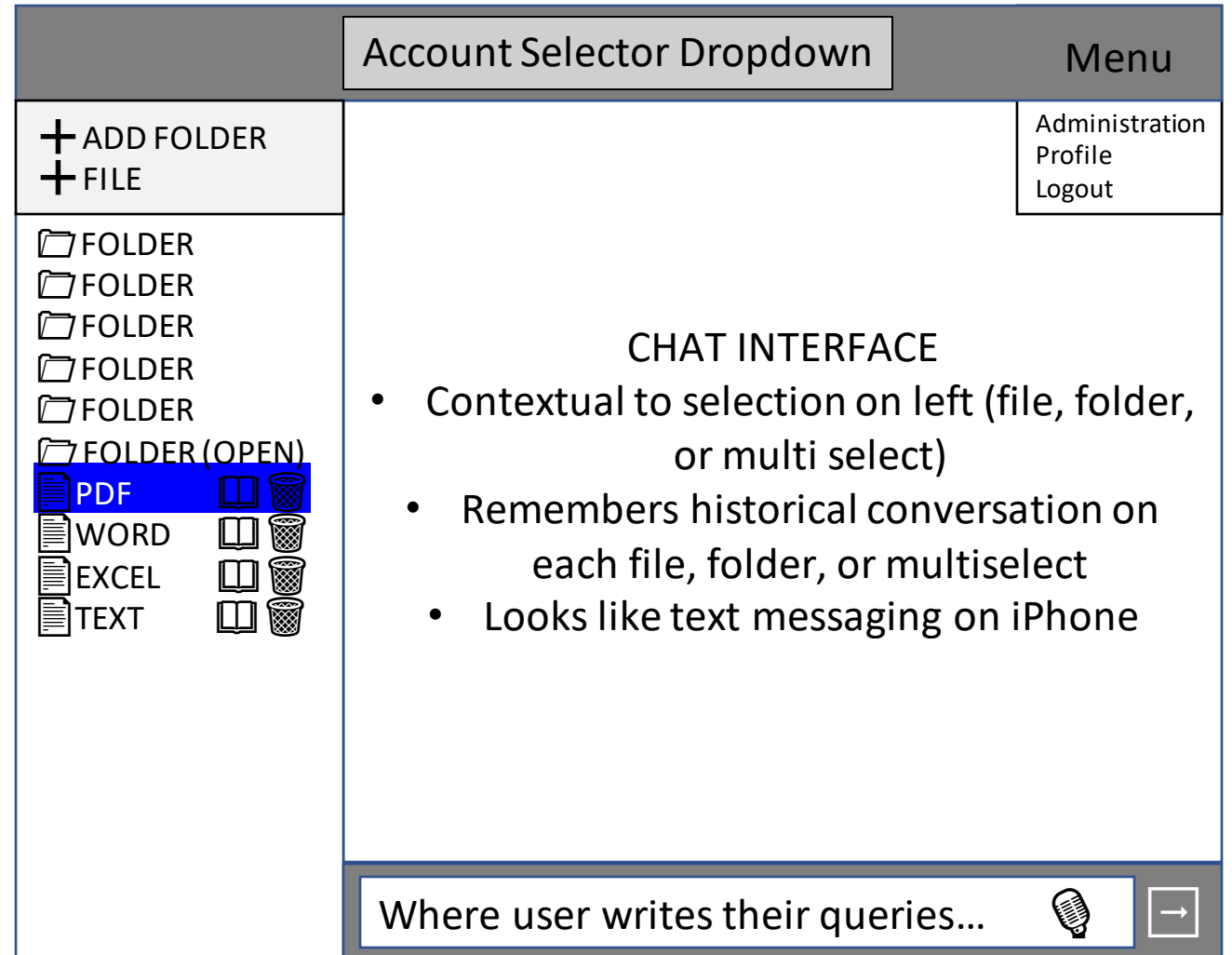| Application		
Administration over all accounts and companies		Control panel/Admin view

Landing Page

- Login screen for users
  - ID/PW
    - Preferably email for ID
    - If successful, grants user access to their company account with related permissions
  - 2FA
- Sign up for new clients
  - Signup creates a **Company**
  - Company chooses plan for service
    - Single Community
    - Management Company
  - Required information
    - Company Name
    - Contact name (first, last)
    - Company mailing address + billing address if different
    - Email address
    - Phone number
    - Consent to terms of service (to be provided)
  - User becomes the Admin for the company upon signup
  - Once company created, prompted to create their first **Account** (Community)
    - REQUIRED
    - Name
    - Address (if different from company)
    - Website address
- Password reset functions

Homepage of Community AI

User should spend most of their time here

Needs to be easy to navigate

- Select files/folders to interact with
  - Multiselect
- Add files/folders (if permissions allow)
- Remove files/folders (if permissions allow)
  - Only folders that are user created can be removed by user
  - Standard folders are not removable
- Chat will be contextual to files/folders selected and not source answers from files outside the selected files/folders
  - Chat will display previous conversation threads with those same files/folders with the same user
- Read a file in a new tab in lieu of chatting with it

Account Selector Dropdown

Menu

Administration
Profile
Logout

+ ADD FOLDER
+ FILE

📁 FOLDER
📁 FOLDER
📁 FOLDER
📁 FOLDER
📁 FOLDER
📁 FOLDER (OPEN)
📄 PDF   📖 🗑
📄 WORD   📖 🗑
📄 EXCEL   📖 🗑
📄 TEXT   📖 🗑

CHAT INTERFACE
- Contextual to selection on left (file, folder, or multi select)
- Remembers historical conversation on each file, folder, or multiselect
- Looks like text messaging on iPhone

Where user writes their queries... 🎤 →

Administration Page

- Manage Accounts/Communities
  - Add/Remove
  - Needs to respect the client's subscription

- Manage Users/Roles
  - Add/Remove
  - Assign User to one or more Accounts/Communities
- Roles
  - View Only – able to chat but not add/remove file/folders
  - User – same as above + can add/view/download files
  - Administrator – same as above but can add/remove users and add/remove files/folders and administer the subscription
- Administer subscription settings
  - Display current plan and billing info
    - Queries current period to date vs. plan
    - Files in storage
    - # of Users
  - Upgrade
  - Downgrade
- Transfer Account
  - An Account can be emancipated to become it's own Company + Account
    - Would need to set up new billing and administrator (this can happen later)
  - An Account can be transferred to an existing Community AI Company

Document Management

- Intuitive UI/UX
- Repository to store files
  - Needs to be performant and cost effective
- Support file types of PDF, Word, XLS, Text
- Ability to upload one or multiple
- Pre-defined set of folders embedded
  - Ability for user to add folders
- Ability to select a folder when uploading documents
  - Maybe drag and drop?
- Ability to delete a file or files (checkbox or multi select?)
  - Only allow User to delete folder that is user created
- Ability to download a file? (I don't think we need ability to archive)
  - Based on permissions
- Ability to replace a file?
- Need to be able to tag the current version of a file
  - Examples: budgets, insurance documents that a company may want to keep historical versions of for comparison and research purposes

Profile

- User can update their information
  - Name, phone, email address
  - Email address change would require verifying the email before change is committed
- Change password
- Add picture?

Chat UX

- See proposed layout – we are open to suggestions, we are not designers :-)