

## RECKLESSBEAR – FULL SYSTEM CONTEXT FOR CHATGPT

### PURPOSE OF THIS DOCUMENT

This document exists so that any new ChatGPT conversation can immediately understand the full scope, history, current phase, and direction of the RecklessBear system rebuild. It should be treated as the single source of truth for context before giving advice, writing code, or suggesting architecture.

### BACKGROUND & PROBLEM STATEMENT

RecklessBear previously used a fragmented system made up of:

- Airtable for leads, reps, and tracking
- Trello for production/job tracking
- WhatsApp Business API tools for messaging
- Manual processes and duplicated data
- Multiple paid tools with per-user pricing

Over time, the system became:

- Hard to use
- Expensive to scale
- Difficult to onboard new users
- Fragile (automations break when inactive)

Some automations were paused after inactivity. API tokens expired. The system still worked in theory, but not in practice.

The decision was made to rebuild everything into ONE unified admin app.

### HIGH-LEVEL GOAL

Build a single, clean, role-based Admin Web App that:

- Is easy for non-technical users
- Centralizes all operations
- Reduces monthly software costs
- Scales without per-user pricing
- Acts as the source of truth

External tools react to the app. The app controls the logic.

### WHAT THE SYSTEM INCLUDES (FULL SCOPE)

#### 1) LEAD MANAGEMENT SYSTEM

- Central leads table in Supabase
- Each lead has:
  - Unique lead\_id
  - Customer details
  - Source (website, WhatsApp, etc.)
  - Status (new, assigned, in progress, completed, etc.)
  - Assigned rep
- Leads list view with search & filters
- Lead detail view with full history

#### 2) REP ASSIGNMENT

- Reps are assigned MANUALLY inside the app
- No auto-assignment logic
- Assignment creates an event in lead history
- Assignment later triggers alerts via n8n

### 3) LEAD EVENTS & NOTES

- Every important action creates a lead event:
- Status changes
- Rep assignment
- Notes added
- Full timeline visible per lead
- Auditable and traceable

### 4) USER & ROLE MANAGEMENT

- Users are managed via Supabase Auth + profiles table
- Roles:
- CEO: full access, analytics, reports
- Admin: operational control
- Rep: limited access (assigned leads only)
- Admins can manage users inside the app

### 5) ALERTING SYSTEM (AUTOMATION)

- Alerts are handled by n8n ONLY
- Alerts include:
- WhatsApp notifications
- Email notifications
- Alerts trigger AFTER:
- Rep is assigned
- App writes state, n8n reacts
- n8n never assigns reps or changes logic

### 6) SETTINGS & TOGGLES

- Admin/CEO can enable or disable:
- WhatsApp alerts
- Email alerts
- This allows pausing messaging without breaking workflows

### 7) PRODUCTION / JOB TRACKING (PLANNED)

- Replacement for Trello
- Orders/jobs move through production stages
- Each stage update is logged
- Customers can later receive updates

### 8) STOCK TRACKING SYSTEM (PLANNED)

- Materials inventory table
- Product material usage mapping
- Orders deduct stock when confirmed
- Admin visibility into:
- Low stock
- Usage per order
- Built into the same admin app

### 9) DASHBOARD & REPORTING

- CEO dashboard shows:
- New leads
- Lead sources

- Rep workload
- Pipeline overview
- Simple, readable, not over-engineered

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## TECH STACK (FINAL)

### Frontend:

- Next.js (App Router)
- Tailwind CSS
- shadcn/ui
- Mobile-first responsive design

### Backend:

- Supabase
- Postgres
- Auth
- Row Level Security (RLS)

### Automations:

- n8n (alerts only)
- WhatsApp Business Cloud API
- Email provider

### Deployment:

- GitHub + Vercel
- Environment variables managed in Vercel

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## CORE RULES (VERY IMPORTANT)

- Airtable is NO LONGER USED
- Supabase is the ONLY source of truth
- All core logic lives in the app
- n8n reacts, never decides
- Manual control before automation
- Mobile and desktop must always work
- No over-engineering

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## CURRENT PHASE

### Phase 1: Core App Rebuild (IN PROGRESS)

#### Included:

- Authentication
- Role-based access
- Leads list & detail
- Rep assignment
- Lead events & notes
- Users management
- Settings page
- Basic dashboard

#### Not included yet:

- AI features

- Quote preview designer
- Advanced analytics

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#### FUTURE IDEAS (NOT ACTIVE)

- In-app help chatbot
- Onboarding walkthrough
- AI quote preview designer
- Customer live order tracking
- Advanced analytics

Do NOT implement unless explicitly requested.

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#### HOW TO USE THIS DOCUMENT

When starting a new ChatGPT chat, say:

“Please read the file ‘RecklessBear\_Full\_System\_Context.pdf’ first. This explains the entire system, current phase, and rules.”

This document overrides assumptions.