

Treasure Coast AI – Pre-Client Upgrade Checklist

Goal

Make the demo platform fully client-ready with minimal complexity.

Every upgrade below is designed so you can edit, create, and manage bots without digging into code.

1. One-Click “Clone Demo → Create Client”

A simple admin button that:

- Lets you select any demo bot (restaurant, barber, auto, etc.)
- Opens a small form for business name, website, phone, hours
- Automatically generates the new bot JSON
- Registers the client in the system
- Adds the bot to the client's dashboard

This replaces all manual file editing.

2. Client Status System (Active / Paused / Demo)

Add a simple “status” field per client:

- ACTIVE → bot fully runs
- PAUSED → bot returns “service inactive”
- DEMO → limited features

This keeps your system clean and prevents unpaid bots from running.

3. Editable Bot Settings Page

A simple UI in the admin panel where you can update:

- Business name
- Contact info
- Hours
- Services
- FAQs
- Bot tone

All changes save to the bot's JSON automatically. No digging in folders.

4. Stripe Subscription + Auto-Deactivate

Stripe handles monthly billing automatically.

When a client stops paying:

- Status switches to PAUSED
- Bots stop responding normally
- Login access is blocked

When they resume paying:

- Status returns to ACTIVE

Zero manual involvement required.

5. Clean, Unified UI Styling

Match dashboard, admin panel, and landing page with the same:

- Colors
- Fonts
- Buttons
- Cards
- Layout spacing

This makes your entire platform feel premium and consistent.

6. Basic Analytics Summary

From logs, show:

- Total messages
- Leads captured
- Booking requests
- Bot activity timeline

This helps you justify pricing and show clients real value.

7. Industry■Specific Demo Pages

Each industry gets its own clean demo page:

- Restaurant
- Barber
- Home Services
- Auto Shop
- Gym
- Faith House

Makes you look specialized, not generic.

8. Minimal Complexity Rules

Every new feature must follow:

- No manual file edits
- No deep navigation
- No touching server code for simple changes
- Everything editable in one clean admin UI

This keeps the system easy to maintain long■term.