

METIOR PRO

Platform Walkthrough Guide

A complete, screenshot-driven tour of Metior Pro for the people who will actually use it — contractors, admins, auditors, and the customers who view quotes and pay invoices via the public portals.

Audience — Contractors, organisation admins, auditors, end customers

Sections — 19 walkthrough chapters, 37 screenshots

Captured — 2026-05-06, against the running platform on the `feat/voice` branch

Format — Letter, dark-mode screenshots with one light-mode parity callout

A complete, screenshot-driven tour of the Metior Pro platform — written for the people who will actually use it: independent contractors, small construction companies, their admins, and their auditors.

Every screenshot in this document was captured from the running platform on **2026-05-06** against the `feat/voice` branch. UI labels in **bold** match what you see on screen verbatim. Screenshots are dark mode by default — Metior Pro fully supports light mode and renders the same content with a swapped colour palette.

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1. What is Metior Pro?

Metior Pro is the all-in-one platform for Canadian contractors. One place for estimates, quotes, customer records, invoices, payment tracking, and AI-powered blueprint takeoffs — replacing the four-to-six tools most contractors currently juggle.

The platform is built around the way a job actually flows: a customer enquiry comes in, you produce an estimate (either from a re-usable template in five minutes, or by uploading the architectural plans and letting the AI extract quantities), you turn the estimate into a quote and send it for the customer to view and accept, you convert the accepted quote into an invoice, you collect payment via Stripe, and you sync the books to QuickBooks Online. Every step lives in the same app, with the same customer record threading through.

Metior Pro is built and operated in Canada. Pricing is in CAD. Tax rules and labour costs are tuned to Canadian provinces (StatsCan-sourced labour, Home Depot Canada-sourced materials). Plans start at \$0/month and scale up to enterprise — billed in CAD, cancel anytime.

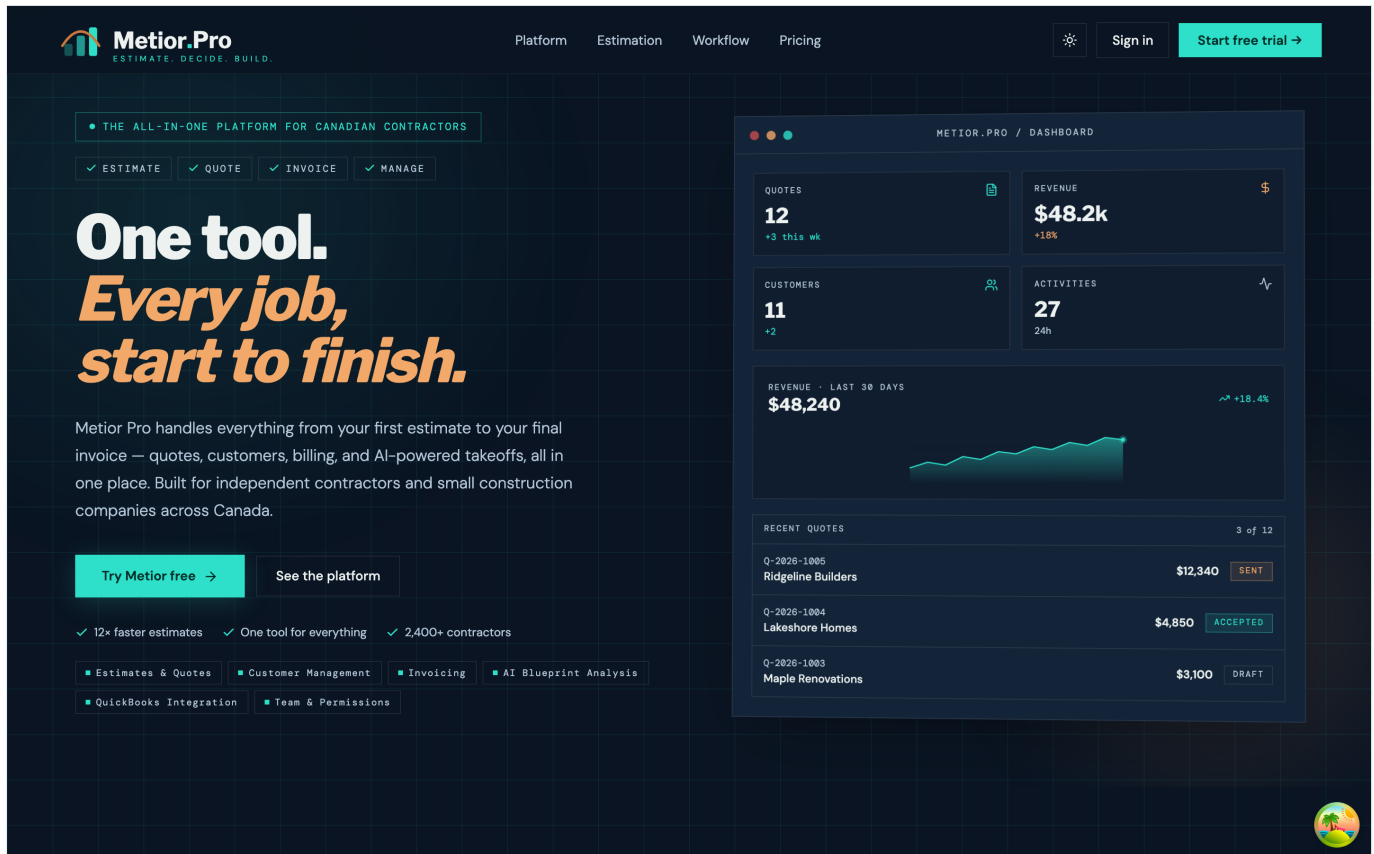
2. Who uses what — a 60-second map

If you are...	You enter at	You land on	Key thing you do
A new contractor (Free)	/login	/app/home	Build template-based quotes and manage customers
A growing contractor (Pro)	/login	/app/home	Everything Free does + Blueprint AI, invoicing, dashboard analytics, premium voice
An organisation admin	/login	/app/home	Pro features + invite team members, manage Stripe/QuickBooks, edit pricing library
An external auditor	/login	/app/blueprint	Read-only review of takeoffs and bids; customer PII is masked
A customer reviewing a quote	/q/<token>	quote portal	View and accept/reject the quote — no account needed
A customer paying an invoice	/pay/<token>	payment portal	Pay via Stripe — no account needed

Expected path: an organisation admin signs up, configures Stripe and QuickBooks, invites their team via email, and the team works day-to-day in the contractor surface. Auditors are invited later as needed for read-only verification.

3. First impressions — the public site

3.1 Landing — hero and headline

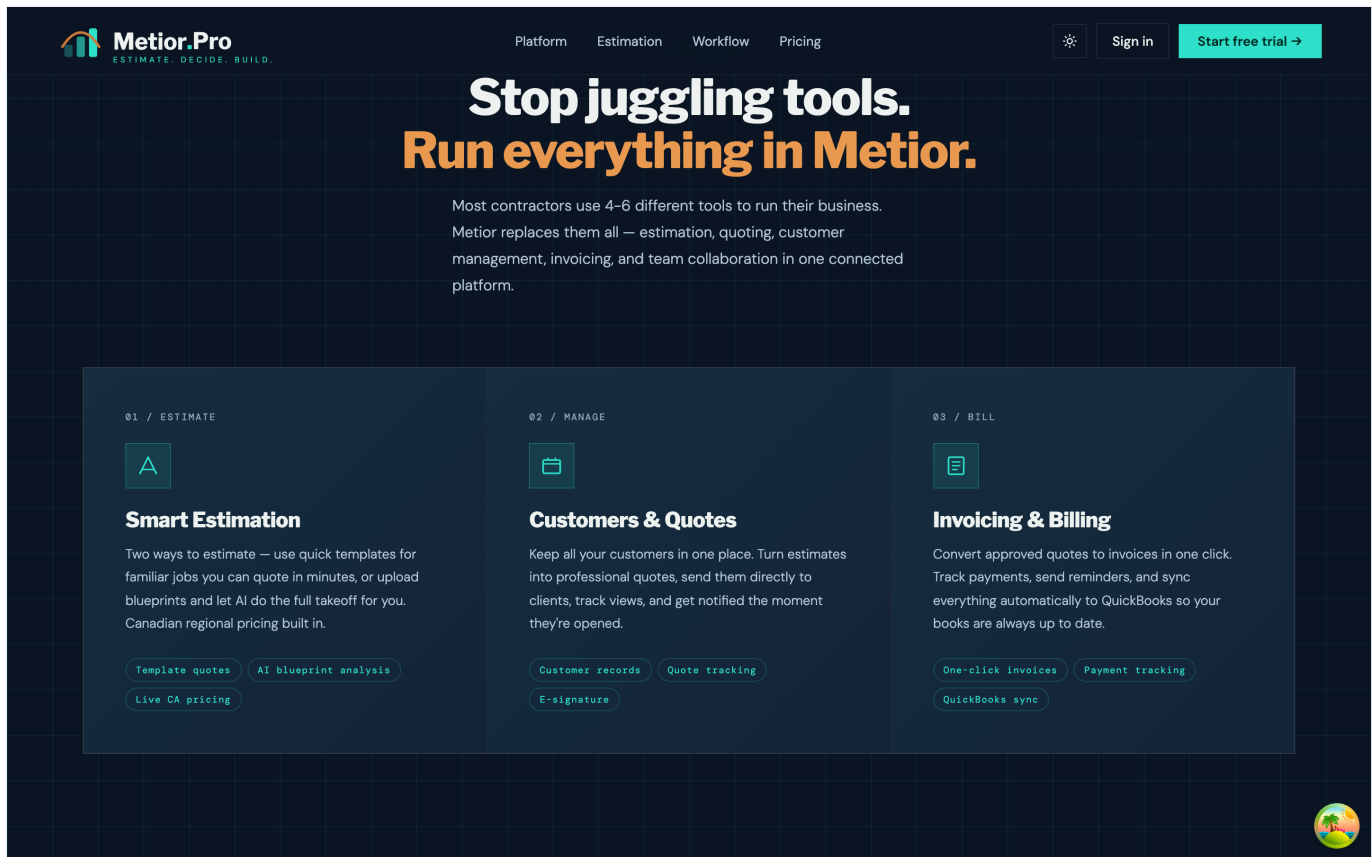


Hero — One tool. Every job, start to finish.

The landing page leads with the product's promise in two sentences: **"One tool. Every job, start to finish."** The eyebrow chip at top reads **THE ALL-IN-ONE PLATFORM FOR CANADIAN CONTRACTORS**, followed by four checked category pills — **Estimate · Quote · Invoice · Manage** — and a subhead that names the integrations and the Canadian tilt explicitly. The two CTAs underneath are **Try Metior free** (teal, primary) and **See the platform** (outline, jumps to the platform-overview section).

Trust callouts immediately below the CTAs: **12x faster estimates · One tool for everything · 2,400+ contractors**. Next to the copy, a stylised dashboard preview shows the kind of business view a Pro user sees after login.

3.2 Platform overview — three pillars



Platform overview pillars

The first scroll surface presents the platform in three numbered pillars: **01 / ESTIMATE — Smart Estimation** (template quotes, AI blueprint analysis, live CA pricing), **02 / MANAGE — Customers & Quotes** (records, tracking, e-signature), **03 / BILL — Invoicing & Billing** (one-click invoicing, payment tracking, QuickBooks sync). Each pillar uses brand teal/copper accents on dark cards and lists three tag pills summarising its features.

3.3 Estimation deep-dive

The screenshot shows the Metior.Pro website with a dark blue background and a grid pattern. The header includes the Metior.Pro logo (a stylized 'M' with a house icon) and the tagline 'ESTIMATE. DECIDE. BUILD.' on the left. On the right, there are links for 'Platform', 'Estimation', 'Workflow', and 'Pricing', along with 'Sign in' and 'Start free trial →' buttons. Below the header, the word 'ESTIMATION' is centered in a small font. The main heading reads 'Two ways to estimate. Both get the job done fast.' in large, bold, white and orange text. Below this, a paragraph explains that the platform is for quoting familiar jobs or analyzing complex drawings. Two main sections are presented: 'Template-Based Estimation' (marked with a 'QUICK QUOTE' tag) and 'AI Blueprint Analyzer' (marked with an 'AI TAKEOFF' tag). Each section includes a brief description and a list of features/benefits. A small globe icon is visible in the bottom right corner of the screenshot.

Metior.Pro
ESTIMATE. DECIDE. BUILD.

Platform Estimation Workflow Pricing

Sign in Start free trial →

ESTIMATION

Two ways to estimate. Both get the job done fast.

Whether you're quoting a familiar job on the fly or analyzing a complex set of drawings, Metior gives you the right tool for the situation.

QUICK QUOTE

Template-Based Estimation

For jobs you've done before, there's no need to start from scratch. Build from your own saved templates, fill in the quantities, and have a professional quote ready in minutes.

- Pre-built and custom templates for common job types — framing, drywall, roofing, concrete, and more
- Adjust quantities, swap materials, and apply your markup — all in a clean, familiar interface
- Best for repeat work, small jobs, and situations where you need a quote on the spot
- No drawings or plans required — just your knowledge of the job

AI TAKEOFF

AI Blueprint Analyzer

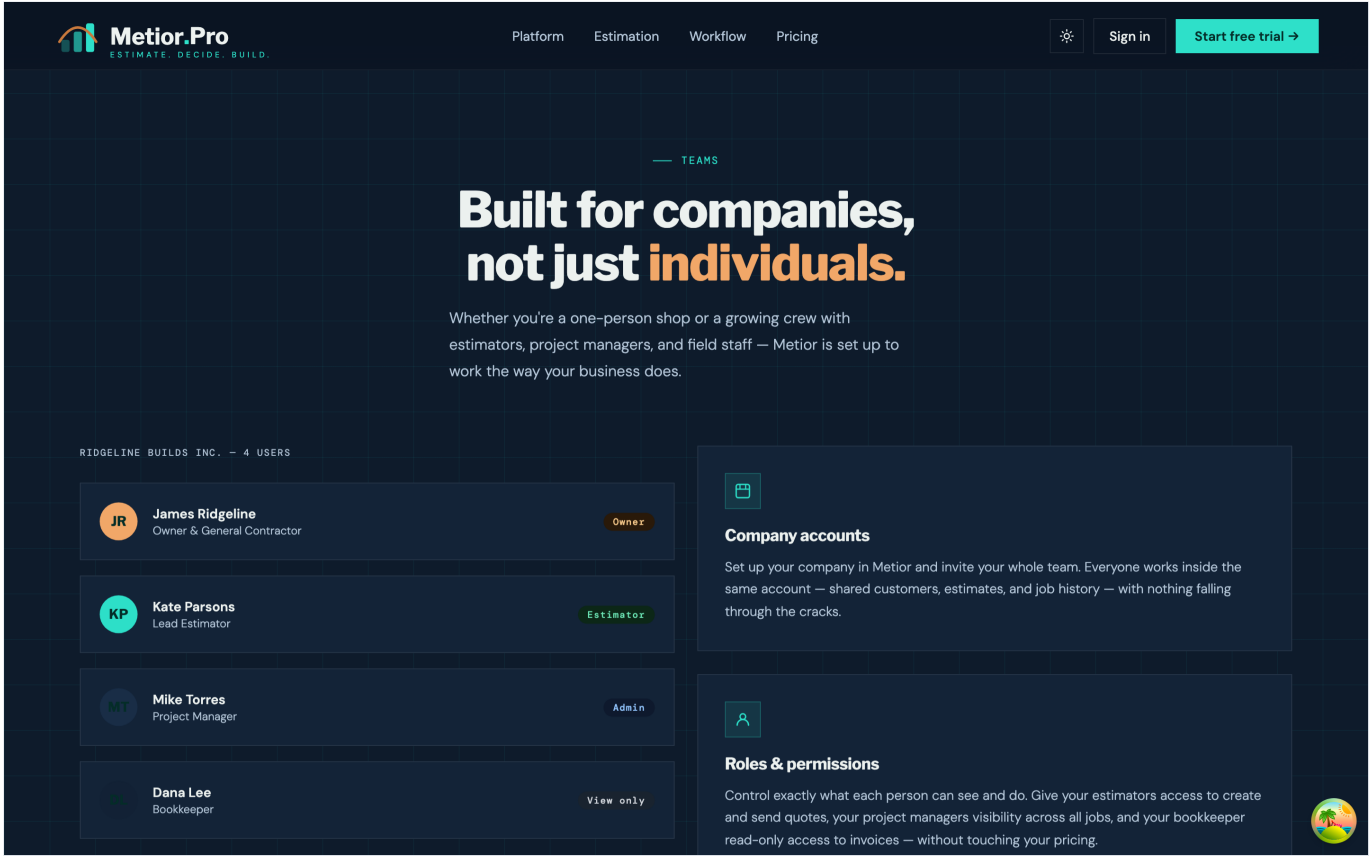
Upload architectural drawings, blueprints, or site plans and let Metior's AI read them. It identifies every scope item, calculates quantities, and builds a detailed estimate — automatically.

- Supports PDF blueprints, scanned drawings, and image uploads — even hand-drawn sketches
- AI extracts trades, materials, and quantities directly from the drawings with no manual input
- Cross-references live Canadian regional pricing to populate accurate costs for your province
- Best for new builds, complex renovations, and larger commercial or multi-trade projects

Two ways to estimate

This section, captioned "**Two ways to estimate. Both get the job done fast,**" explains the two ways a Metior Pro user can produce a takeoff: a **Template-Based Estimation** card (for repeat work — pre-built templates, just adjust quantities, no drawings required), and an **AI Blueprint Takeoff** card (upload blueprints, AI extracts quantities, regional pricing applied, best for complex jobs).

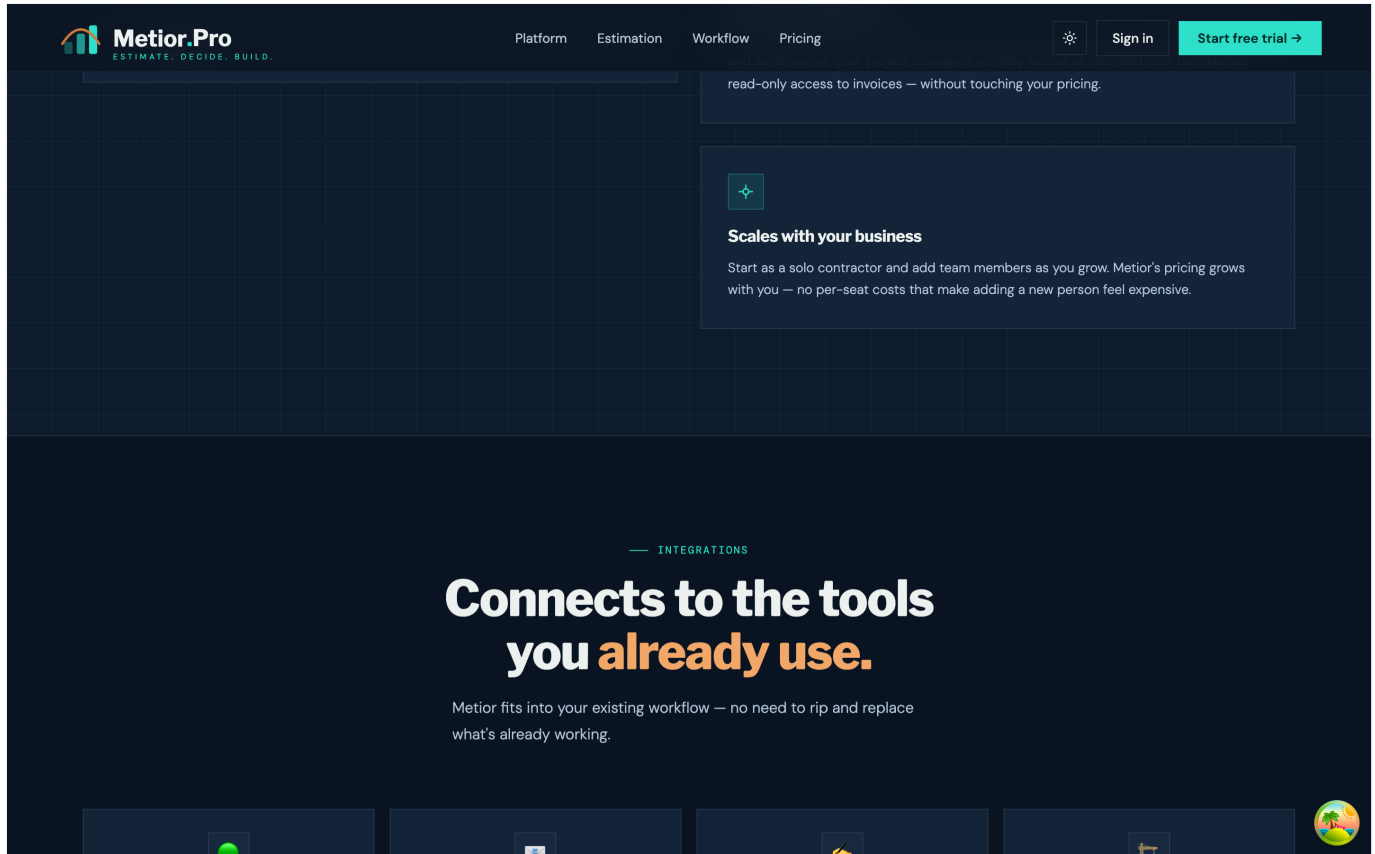
3.5 Teams — built for collaboration



Teams section — four personas

Shows the four built-in team personas — **Owner**, **Estimator**, **Admin**, **Bookkeeper** — each with their typical permissions. This anchors the platform's multi-user story.

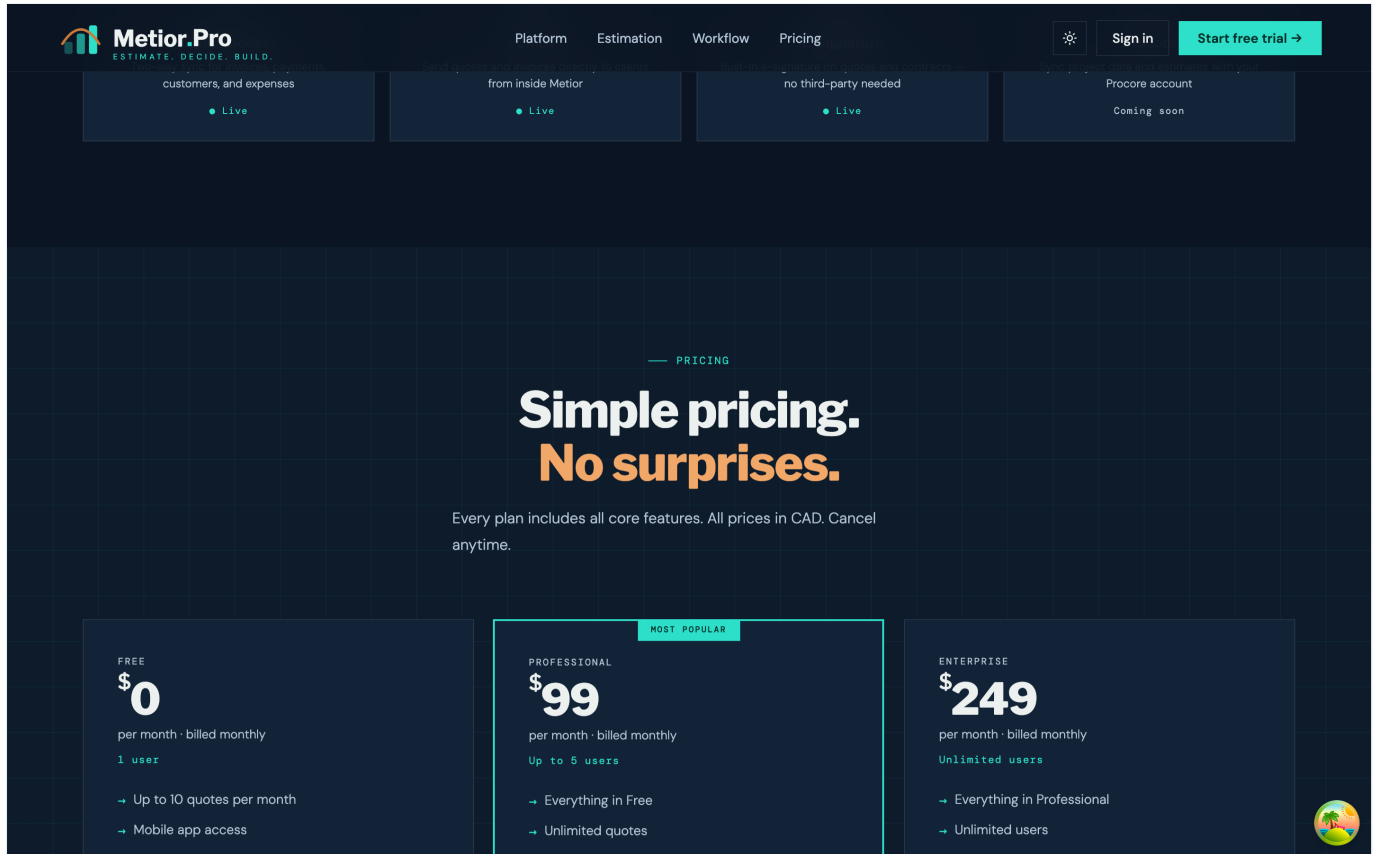
3.6 Integrations



Integrations section

Four tiles for **QuickBooks** (two-way sync, live), **Email** (send quotes and invoices, live via Mailjet), **E-Signature** (built in, live), and **Procore** (project sync, marked **coming soon**). Live integrations have no badge; not-yet-shipped ones are explicitly flagged so a buyer doesn't get surprised.

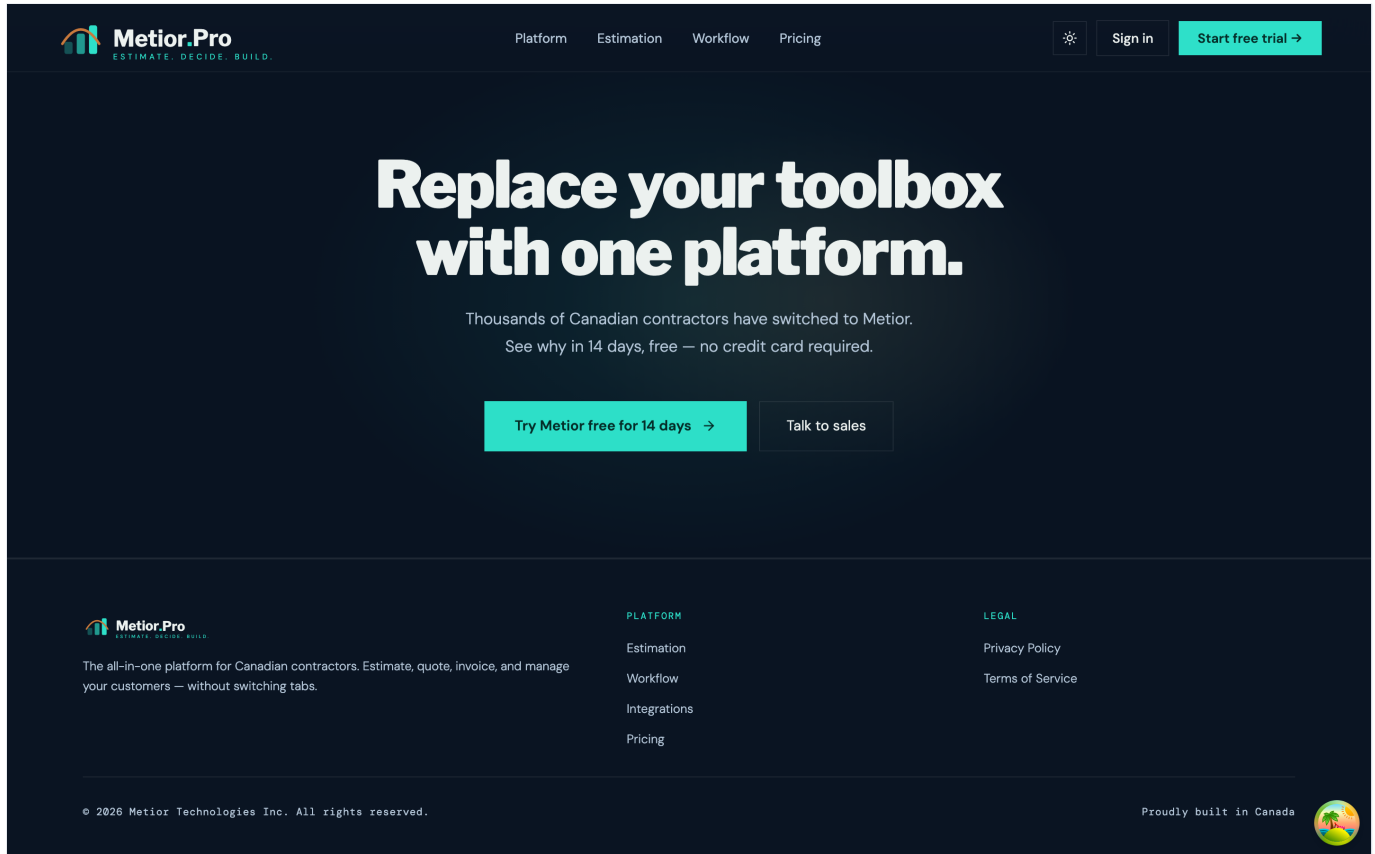
3.7 Pricing



Pricing — Free / Professional / Enterprise

Three plan cards — **Free**, **Professional** (tagged **MOST POPULAR**), and **Enterprise** — with prices, feature lists, and tier-specific CTAs (**Get started free** / **Start 14-day free trial** / **Book a demo**). The plan data is read live from the backend's `/api/v1/plans/` endpoint, so this card grid, the in-app subscription tab, and the signup dialog always agree.

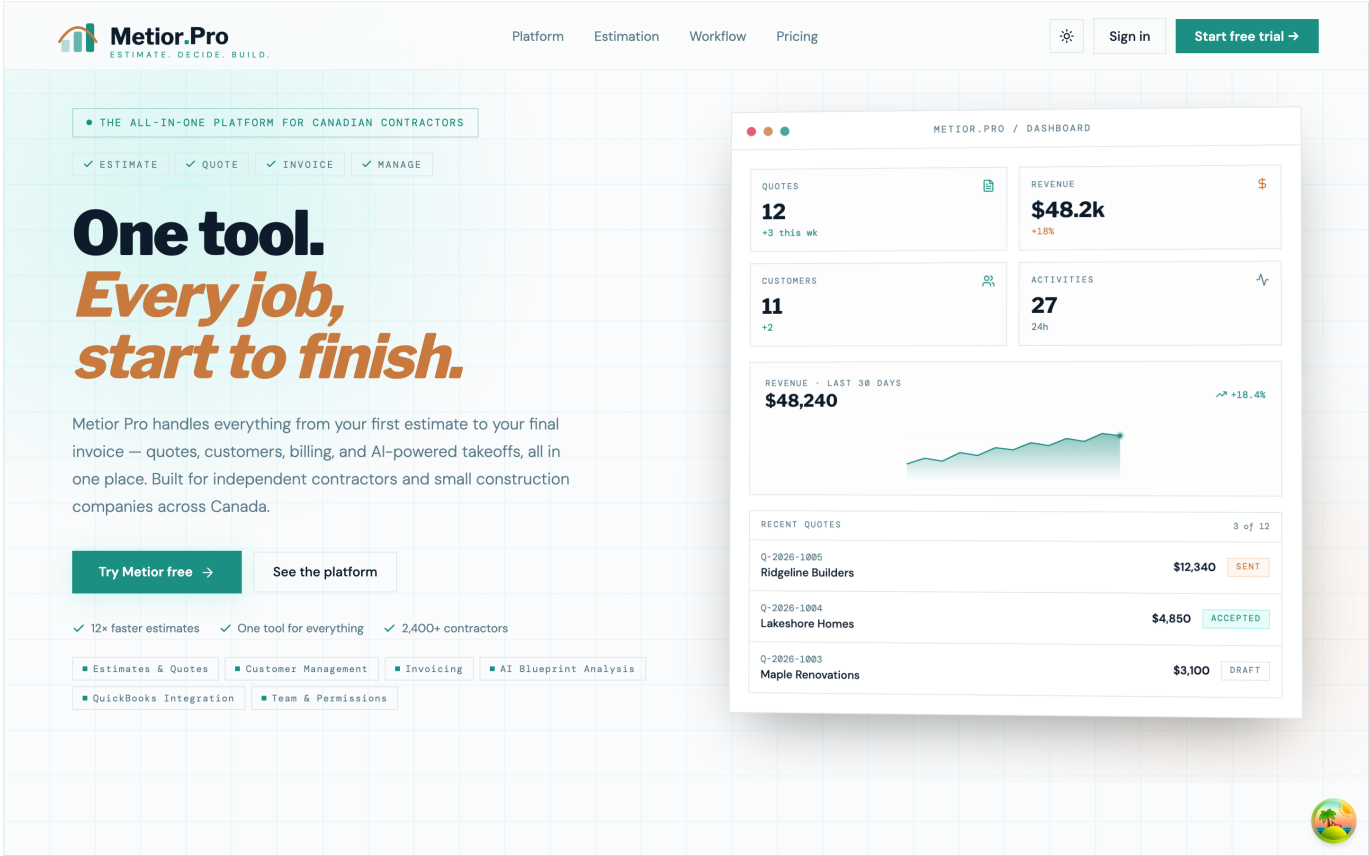
3.8 CTA band and footer



CTA + footer

A full-width final CTA — **"Replace your toolbox with one platform."** — followed by a footer with the Metior.Pro lockup, three column groups (**PLATFORM**, **LEGAL**), and copyright.

3.9 Light mode — same content, swapped palette

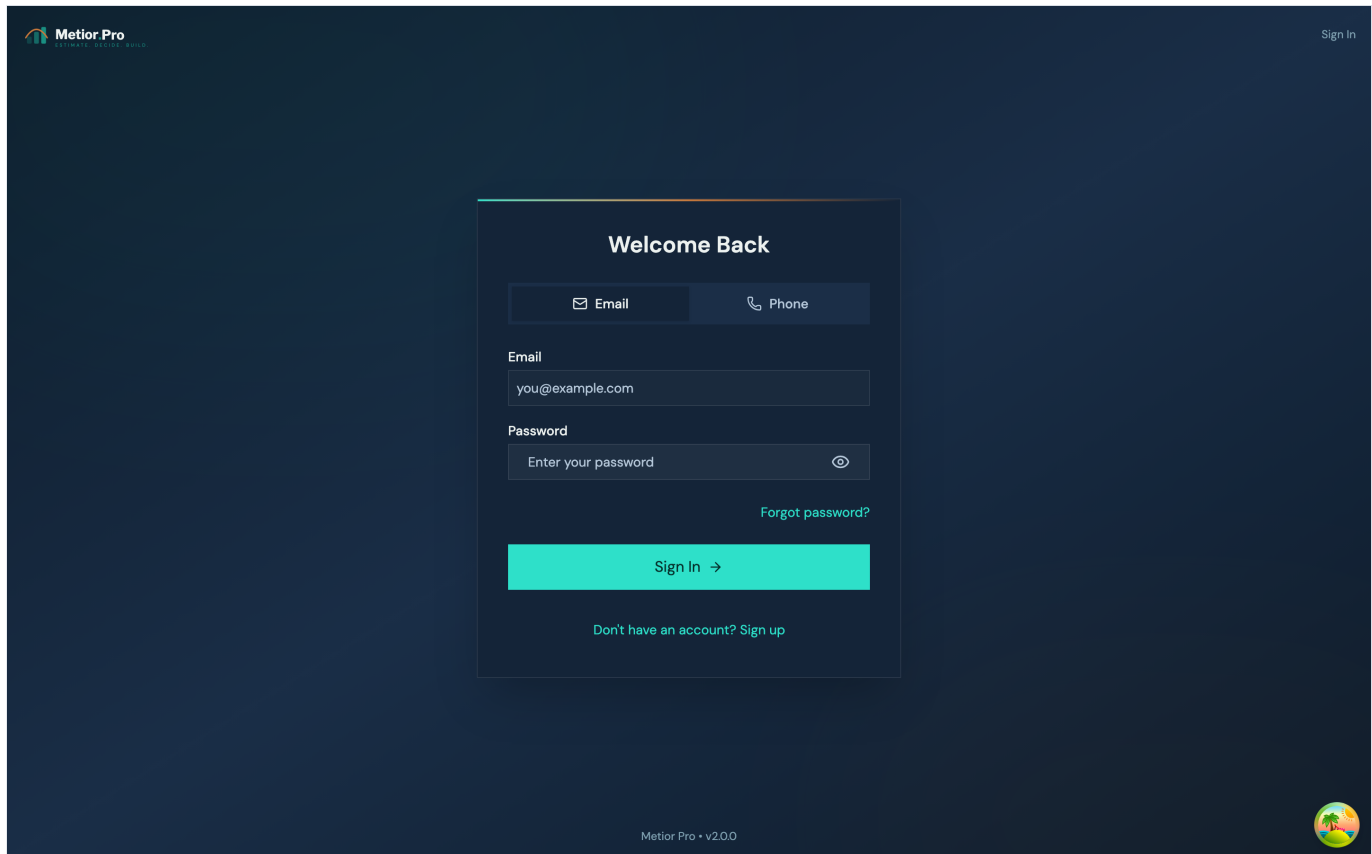


Hero in light mode

Every public and authenticated page in Metior Pro renders cleanly in both dark and light modes. Theme is auto-detected from system preferences, with a manual toggle in the top-right of the landing page and inside the app's top bar.

4. Login, verification, and recovery

4.1 Login



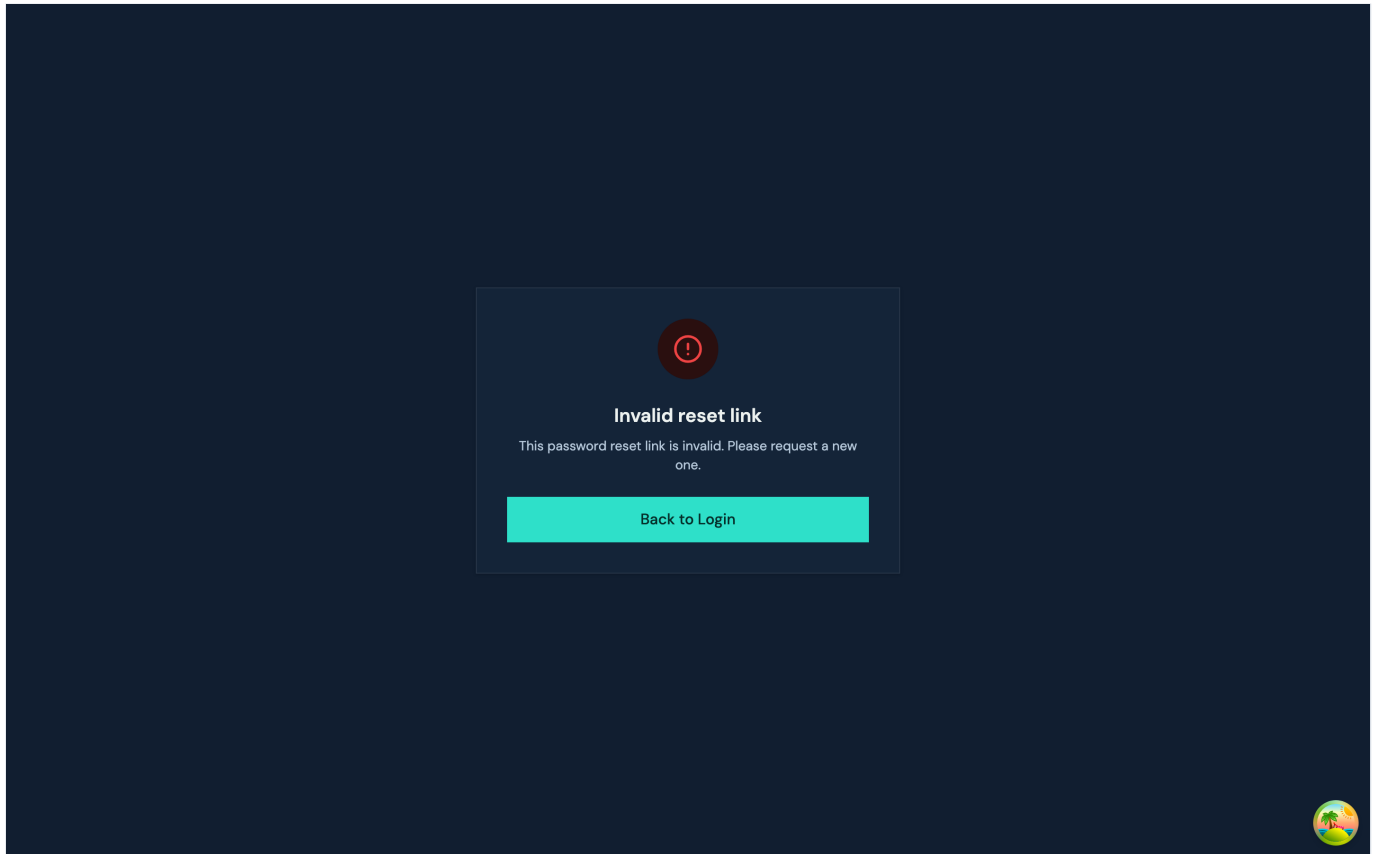
Login screen

The login page offers two tabs: **Email** (default — email + password) and **Phone** (one-time-code login via SMS). The email tab has a **Show password** affordance, a **Forgot password?** link, and a primary **Sign in** button. The footer link **Don't have an account? Sign up** routes to the public landing where signup is initiated via the **Start free trial** CTA.

If the user has 2FA enabled, login becomes a two-step flow: credentials → 6-digit code (delivered via email or SMS, with **Resend Code** behind a 30-second cooldown and a 10-minute session). The 2FA challenge auto-submits when the 6th digit is entered.

If the account is unverified (free tier), the user is routed to `/check-email` where they can resend the verification email (with a 60-second cooldown).

4.2 Password reset



Reset password

The reset flow is token-based and completed in two screens: request (enter email → receive link) and confirm (enter new password and confirm). Tokens are single-use and expire after 1 hour. A successful reset issues a JWT pair so the user is logged in automatically — no need to re-enter credentials.

4.3 Legal — Privacy and Terms

[← Back to home](#)

Privacy Policy

Last updated: April 2026

1. Information We Collect

We collect information you provide directly: name, email, phone number, company name, and payment information when you create an account or use our services. We also collect usage data including blueprint uploads, quote activity, and feature usage to improve our platform.

2. How We Use Your Information

We use your information to provide and improve our construction quoting services, process payments, send notifications about your quotes and projects, and communicate important updates about our platform.

3. Data Storage & Security

Your data is stored on secure servers with encryption at rest and in transit. Blueprint files are stored in encrypted cloud storage. We use industry-standard security practices including HTTPS, JWT authentication, and field-level encryption for sensitive data like payment credentials.

4. Third-Party Services

We integrate with third-party services to provide our platform: OpenAI for AI-powered blueprint extraction, Stripe for payment processing, Twilio for SMS notifications, and Mailjet for email delivery. Each service has its own privacy policy governing their use of your data.

5. Your Rights

You may request access to, correction of, or deletion of your personal data at any time by contacting us. You may also export your data including quotes, customers, and project information.

6. Cookies

We use essential cookies for authentication and session management. We do not use third-party tracking cookies or sell your data to advertisers.



Privacy policy

[← Back to home](#)

Terms of Service

Last updated: April 2026

1. Acceptance of Terms

By accessing or using Beni30 ("the Service"), you agree to these Terms of Service. The Service is operated by Meteor Pro Inc. If you do not agree, do not use the Service.

2. Description of Service

Beni30 is a construction quoting and bidding platform that provides: quote creation and management, AI-powered blueprint extraction, customer management, invoicing, and related tools for construction contractors.

3. User Accounts

You must provide accurate information when creating an account. You are responsible for maintaining the security of your account credentials. Each organization may have multiple users with different roles and permissions.

4. Subscription & Payment

Some features require a paid subscription. Subscription fees are billed in advance on a monthly or annual basis. You may upgrade, downgrade, or cancel your subscription at any time through the Settings page.

5. Intellectual Property

You retain ownership of all content you upload, including blueprints, quotes, and customer data. We retain ownership of the Service, its design, and underlying technology. AI-generated content (descriptions, extractions) is provided as a tool output and you own the resulting work product.

6. Limitation of Liability

The Service is provided "as is". AI-generated estimates and extractions are tools to assist your work and should be independently verified. We are not liable for business decisions made based on AI-generated outputs.



Terms of service

Both legal pages are reachable from the landing footer and live at `/privacy` and `/terms`. They cover information collection, third-party services (OpenAI, Stripe, Twilio, Mailjet), data storage and security, and the standard Canadian SaaS terms.

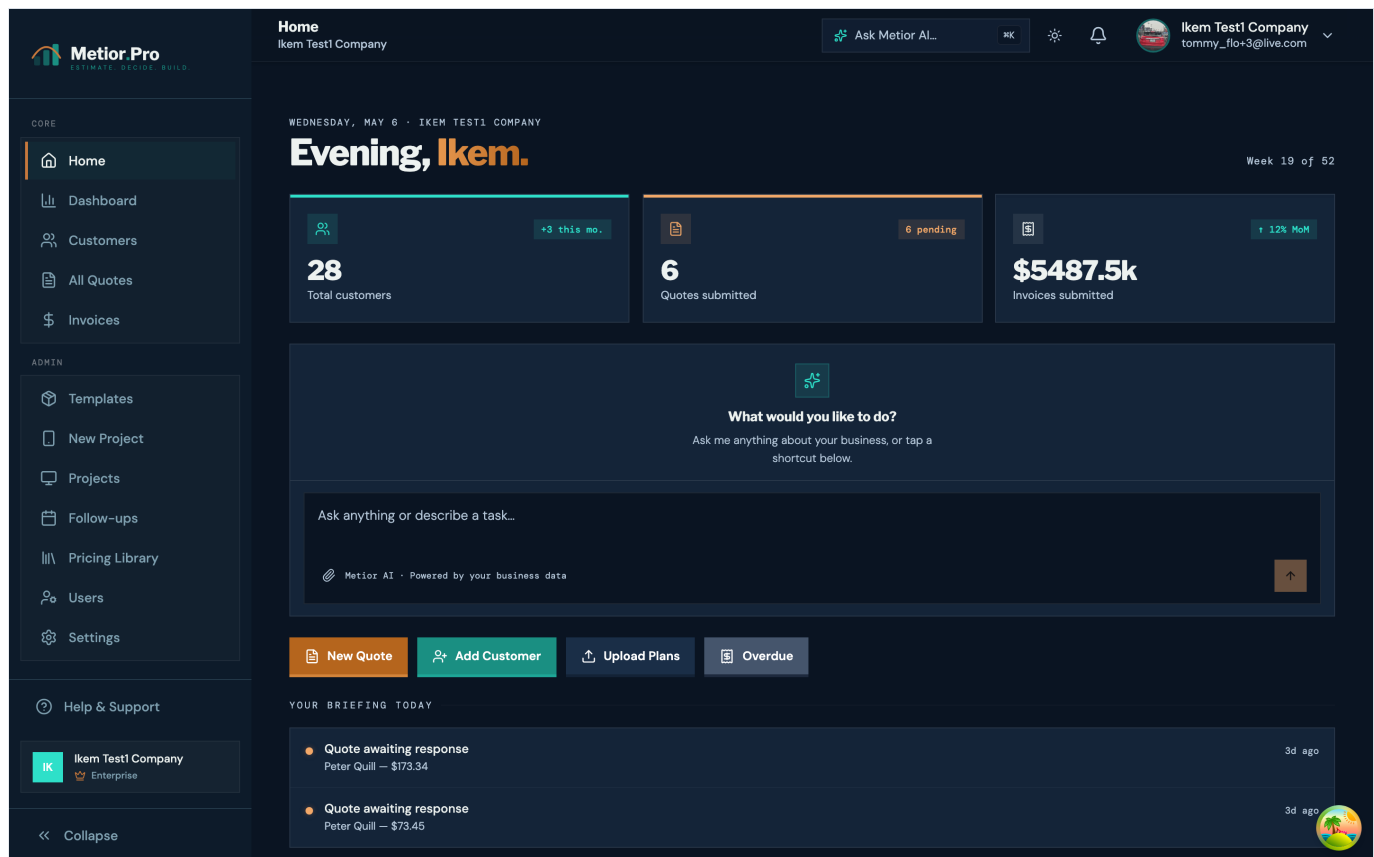
5. Joining a team via invitation

When an admin invites a teammate by email, the recipient lands on `/accept-invite?id=...&token=...`. The page asks for first name, last name, phone (optional), and a password. **Accept Invitation** creates the account inside the inviting organisation and lands the user at `/app/home`.

State	What happens
Valid token	Form renders, on submit user is logged in and routed to <code>/app/home</code>
Already used	"Invitation already used" — link to <code>/login</code>
Expired	"Invitation link expired" — admin needs to re-send

Invitation tokens are single-use and bound to the email they were sent to. Admins manage pending and accepted invites under **Settings** → **Users**.

6. The home screen — your daily landing



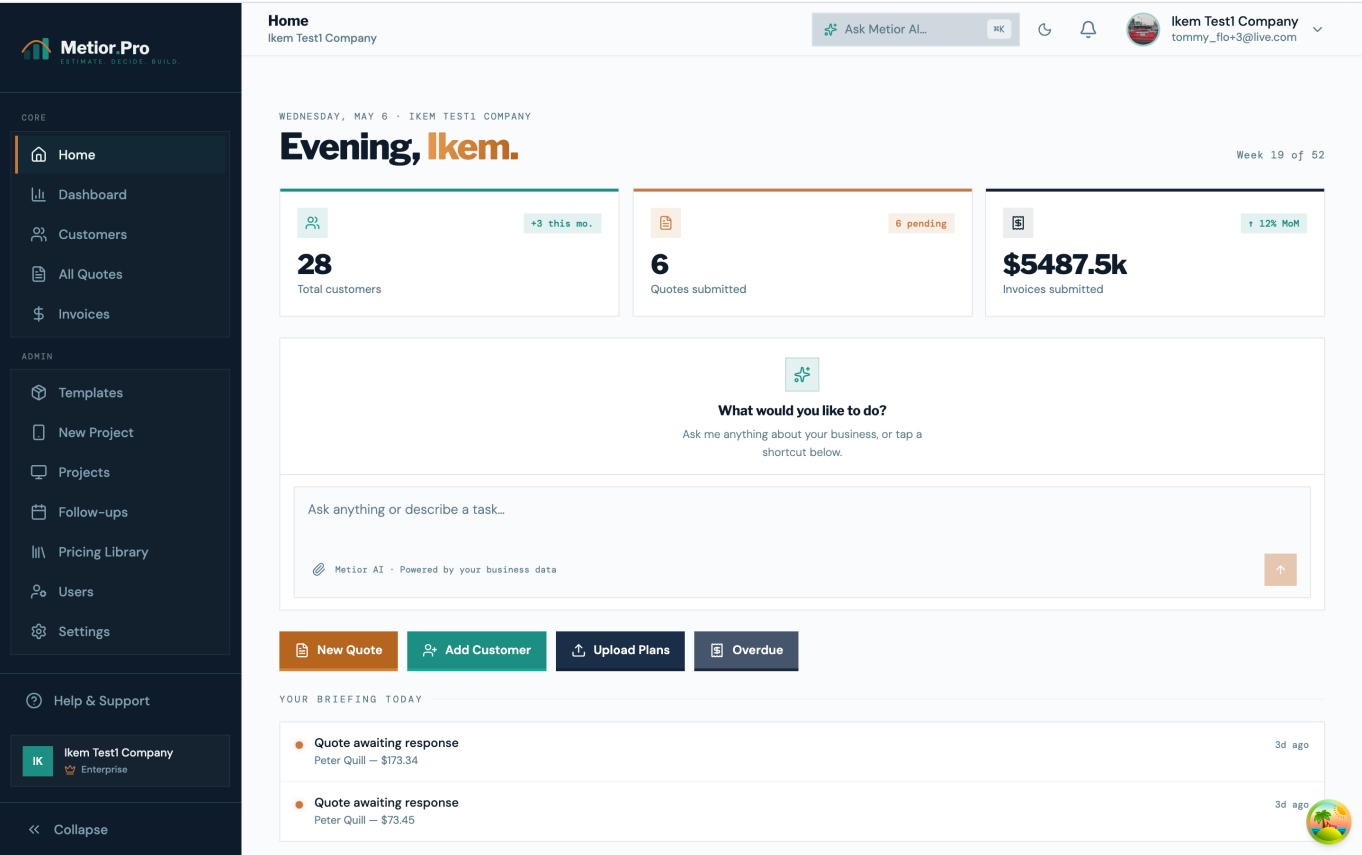
Home — Morning, Ikem.

After login, every contractor lands on `/app/home`. The page leads with a personalised greeting (**Morning / Afternoon / Evening, [Name]**), the current week of the year, and the org name. Below the greeting, three stat cards summarise total customers, quotes submitted, and invoices submitted at a glance.

The middle section is a **What would you like to do?** prompt over the inline AI assistant input — type or click the mic and Metior Pro will route the request through the appropriate tool (create a quote, search customers, send an invoice, etc. — see §14).

The bottom row holds four action tiles in the brand palette: - **New Quote** (orange/copper, primary action) - **Add Customer** (teal) - **Upload Plans** (navy — Blueprint AI, Pro+ only) - **Overdue** (deep-navy — jumps to the overdue invoice list)

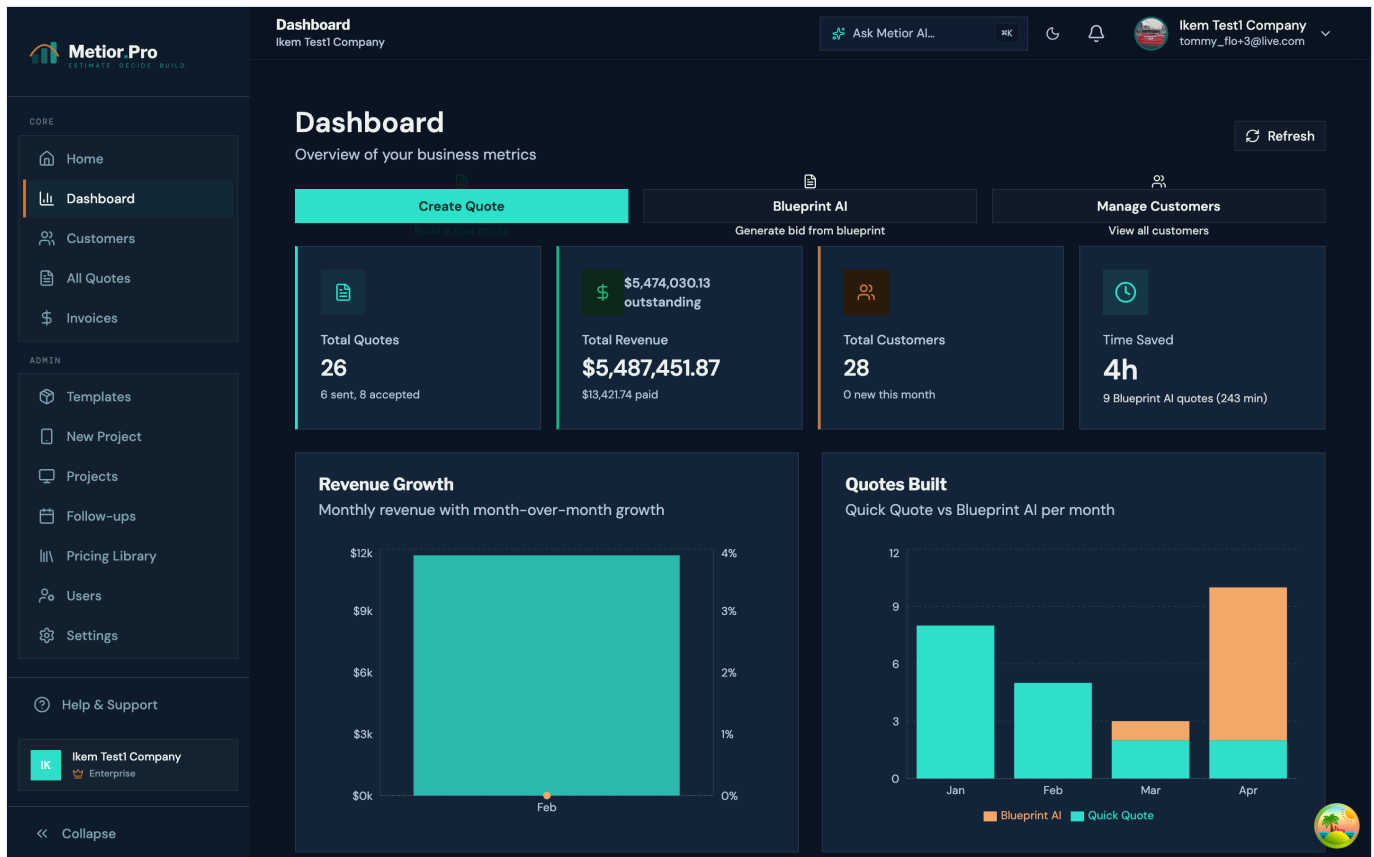
Below those, **Your briefing today** lists recent activity — quotes awaiting response, payments received, customer updates — chronologically.



Home — light mode

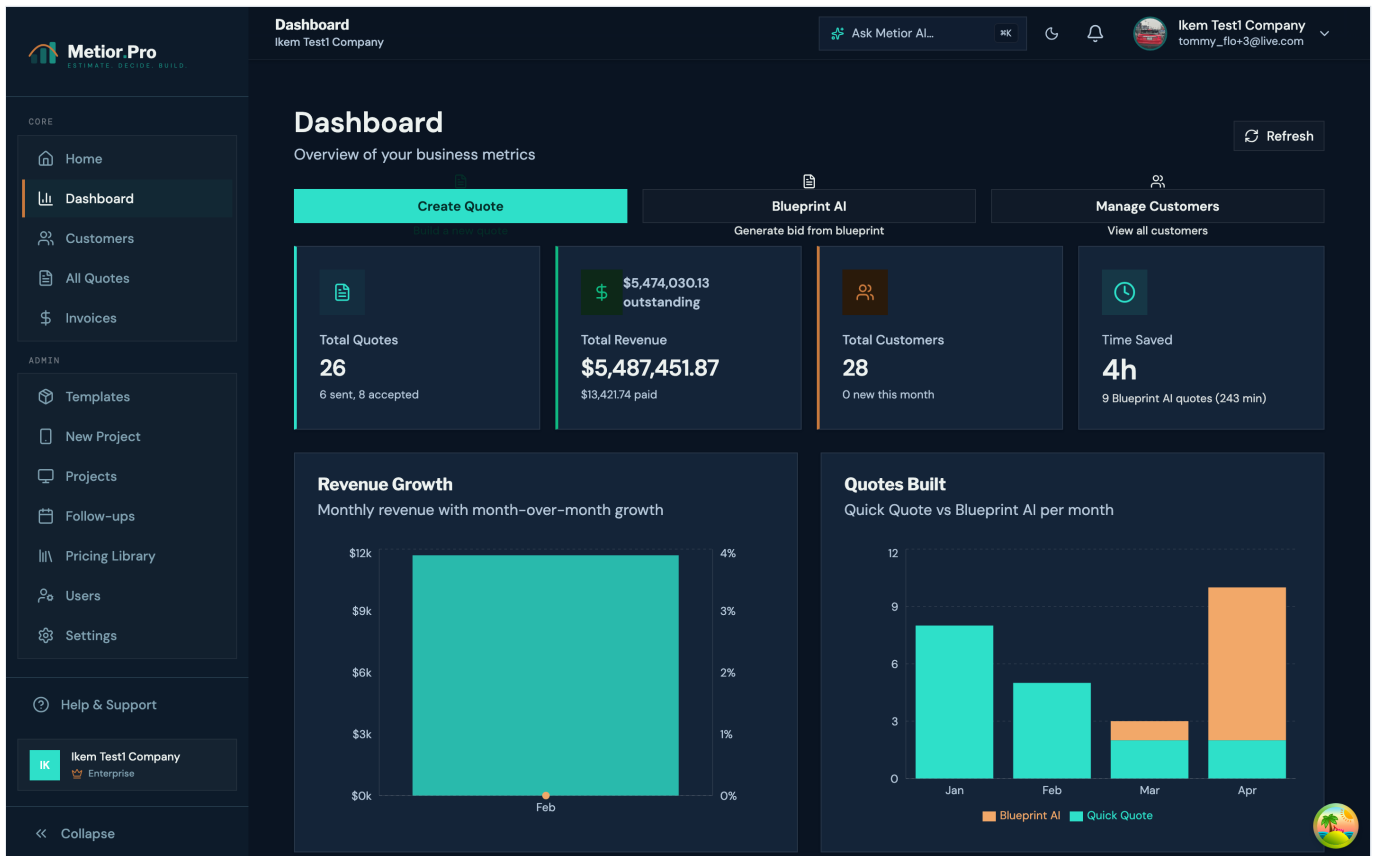
Light mode shows the same content with the swapped palette.

7. The Pro dashboard — business at a glance



Dashboard

`/app/dashboard` is the Pro+ command centre. **Free users see a Pro upsell gate here**, with a one-click upgrade CTA. Pro users see four metric cards across the top: **Total Quotes** (sent / accepted breakdown), **Total Revenue** (with outstanding amount), **Total Customers** (with new-this-month delta), and **Time Saved** (hours saved via Blueprint AI).



Dashboard — full page

Scrolling down reveals: **Revenue Growth** (12-month line chart), **Quotes Built** (Quick Quote vs. Blueprint AI bar chart), **Client Growth** (cumulative line), and a **Quote Status Breakdown** donut chart split into accepted / sent / viewed / draft / rejected / expired. The lower half lists **Recent Activity** chronologically and a **Top Customers** table ranked by revenue.

The dashboard quick-actions row at the top also offers **Create Quote**, **Blueprint AI**, and **Manage Customers** for fast jumps.

8. Customers — your CRM



CORE

Home

Dashboard

Customers

All Quotes

Invoices

ADMIN

Templates

New Project

Projects

Follow-ups

Pricing Library

Users

Settings

Help & Support

IK

Ikem Test1 Company

Enterprise

<< Collapse

Customers

Ikem Test1 Company

Ask Metior AI...

Ikem Test1 Company

tommy_flo+3@live.com

< Home

Customers

Manage your customer relationships, contacts, and site addresses

Export CSV

Add Customer

Total Customers

28

0 active

Total Revenue

\$5703K

All customers

Avg Revenue

--

Per customer

Customer Mix

9/19

Residential / Commercial

All Customers

Search customers...

All cities

All provinces

Name

20 / page

Customer ^{TL}	TYPE	Contact ^{TL}	LOCATION	Last Updated ^{TL}	STATS	ACTIONS
Amy's Bird Sanctuary Customer type: commercial...	Commercial	Birds@Intuit.com +16505553311	4581 Finch St. Bayshore, CA, 94326	May 6, 2026	0 quotes Win: 0% Rev: \$0	...
Barnett Design Customer type: commercial...	Commercial	Design@intuit.com +16505571289	19 Main St. Middlefield, CA, 94303	May 6, 2026	0 quotes Win: 0% Rev: \$0	...

Customers list

`/app/customers` shows every customer in your organisation — paginated (default 20/page; 10/50/100 selectable), filterable by city and province, sortable by name / recency / activity, and searchable across name + email + company. Stats cards at the top track total customers, total revenue, average revenue per customer, and the residential-vs-commercial mix.

Each row displays the customer name, type badge (**Residential** or **Commercial**), email + phone, address, last-updated date, and a stats column (quote count, win rate, total revenue). The rightmost cell hosts a kebab that opens **View details** / **Edit** / **Send quote** / **Send email** / **Delete**.

Export CSV and **Add Customer** are the two top-right CTAs.

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8.1 Adding or editing a customer

The screenshot displays the 'New Customer' form in the Metior Pro application. The interface is dark-themed with a sidebar on the left containing navigation links for Home, Dashboard, Customers, All Quotes, Invoices, Templates, New Project, Projects, Follow-ups, Pricing Library, Users, Settings, Help & Support, and a company profile for 'Ikem Test1 Company'. The main content area is titled 'New Customer' and shows the 'Residential' customer type selected. The 'Contact Information' section includes fields for First name (James), Last name (Hartley), Company name (Hartley Properties Ltd.), Job title (Project Manager, Owner...), Phone number (+1 (905) 555-0142), and Email address (james@hartley.ca). The 'Preferred contact' section shows 'Phone call' selected. The 'Customer Preview' on the right shows a progress bar at 6% and a preview of the customer's full name and contact information.

Customer form — empty

The customer form has two top-level sections: **What kind of customer?** (toggle between **Residential** — homeowner or individual — and **Commercial** — business or organisation) and **Contact information**. The Commercial path requires a company name; Residential does not.

The screenshot displays the 'Edit Customer' interface in Metior Pro. The top navigation bar includes the Metior Pro logo, a user profile for 'Ikem Test1 Company', and a search bar. The left sidebar contains a 'CORE' section with links to Home, Dashboard, Customers (active), All Quotes, and Invoices, and an 'ADMIN' section with links to Templates, New Project, Projects, Follow-ups, Pricing Library, Users, and Settings. The main content area is titled 'Edit Customer' and shows a customer named 'Amy's Bird Sanctuary'. The form is divided into sections: 'WHAT KIND OF CUSTOMER?' (Residential/Commercial), 'CONTACT INFORMATION' (First name, Last name, Company name, Job title, Phone number, Email address, Preferred contact), and 'SITE ADDRESS' (Street address). A 'CUSTOMER PREVIEW' card on the right shows the customer's profile with a '100% Profile complete' status. The form includes a 'Cancel' button and a 'Save Changes' button.

Customer form — filled

When editing an existing customer, every field is hydrated from the backend. The form covers first name, last name, company name, job title (optional), phone (with E.164 validation and a country code picker), email, **Preferred contact** (Phone call / Text / SMS / Email — single-select pills), site address (street, unit, city, Canadian province dropdown, postal code, country), and a **Notes & tags** section with a 300-character notes field plus tag suggestions like **Referral, Repeat, High value, Framing, Roofing, Renovation**.

A live preview card on the right (desktop) shows completion status: *"Just getting started → Almost ready → Ready to save → Profile complete."* Save with **Save Customer** (creates) or **Save Changes** (edits). On mobile, a sticky bottom bar holds **Cancel** and the save button so the user never has to scroll to commit.

9. Quotes — Quick Quote builder



CORE

Home

Dashboard

Customers

All Quotes

Invoices

ADMIN

Templates

New Project

Projects

Follow-ups

Pricing Library

Users

Settings

Help & Support

Ikem Test1 Company

Enterprise

<< Collapse

All Quotes

Ikem Test1 Company

Ask Metior AI...

Ikem Test1 Company

tommy_flo+3@live.com

>

< Home

All Quotes

Browse, filter and manage every quote in your pipeline

FOLDERS

All Quotes

TAGS

No tags yet

Total Quotes

26

All quotes

Total Value

\$5726K

All quotes combined

Accepted

8

31% win rate

Pending

8

Awaiting response

Q Search quotes...

All Statuses

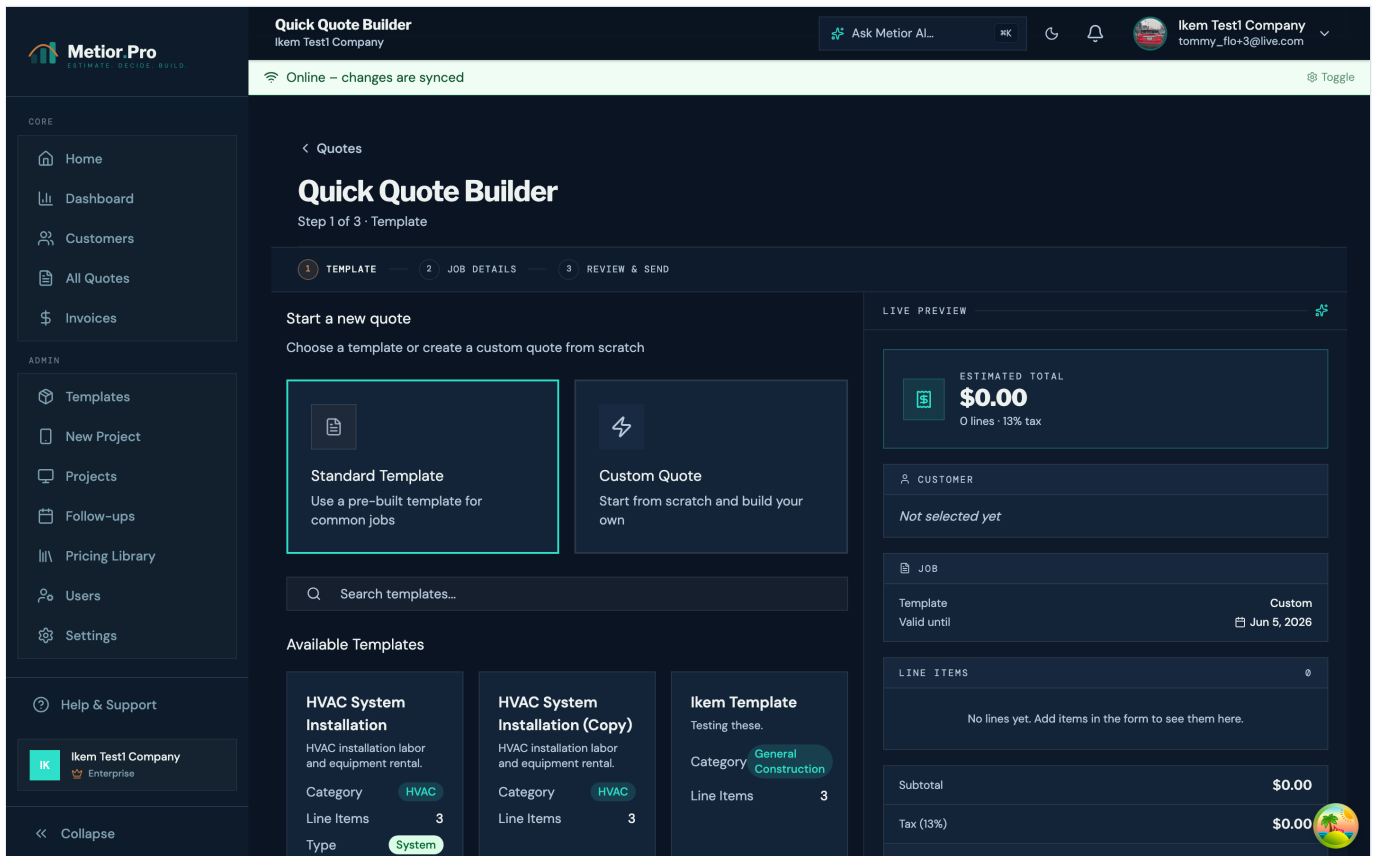
Most Recent

QUOTE #	CUSTOMER	VALUE	ITEMS	STATUS	CREATED	ACTIONS
Q-202604-0013	Peter Quill	\$1,889.72	3	Draft	4/28/2026	...
Q-202604-0009	John Doe	\$1,856.82	3	Accepted	4/17/2026 Sent: 4/17/2026	...
Q-202604-0008	Peter Quill	\$5,473,862.15	129	Accepted	4/12/2026 Sent: 4/18/2026	...
Q-202604-0007	Peter Quill	\$173.34	2	Sent	4/3/2026 Sent: 4/3/2026	...
Q-202604-					4/3/2026	

All quotes

`/app/quotes` lists every quote across the organisation. Each row shows the quote number, customer, total value, line-item count, status badge (**Draft / Sent / Viewed / Accepted / Rejected / Expired**), and a created date. The **New Quote** button (top-right) launches the builder.

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Quote builder

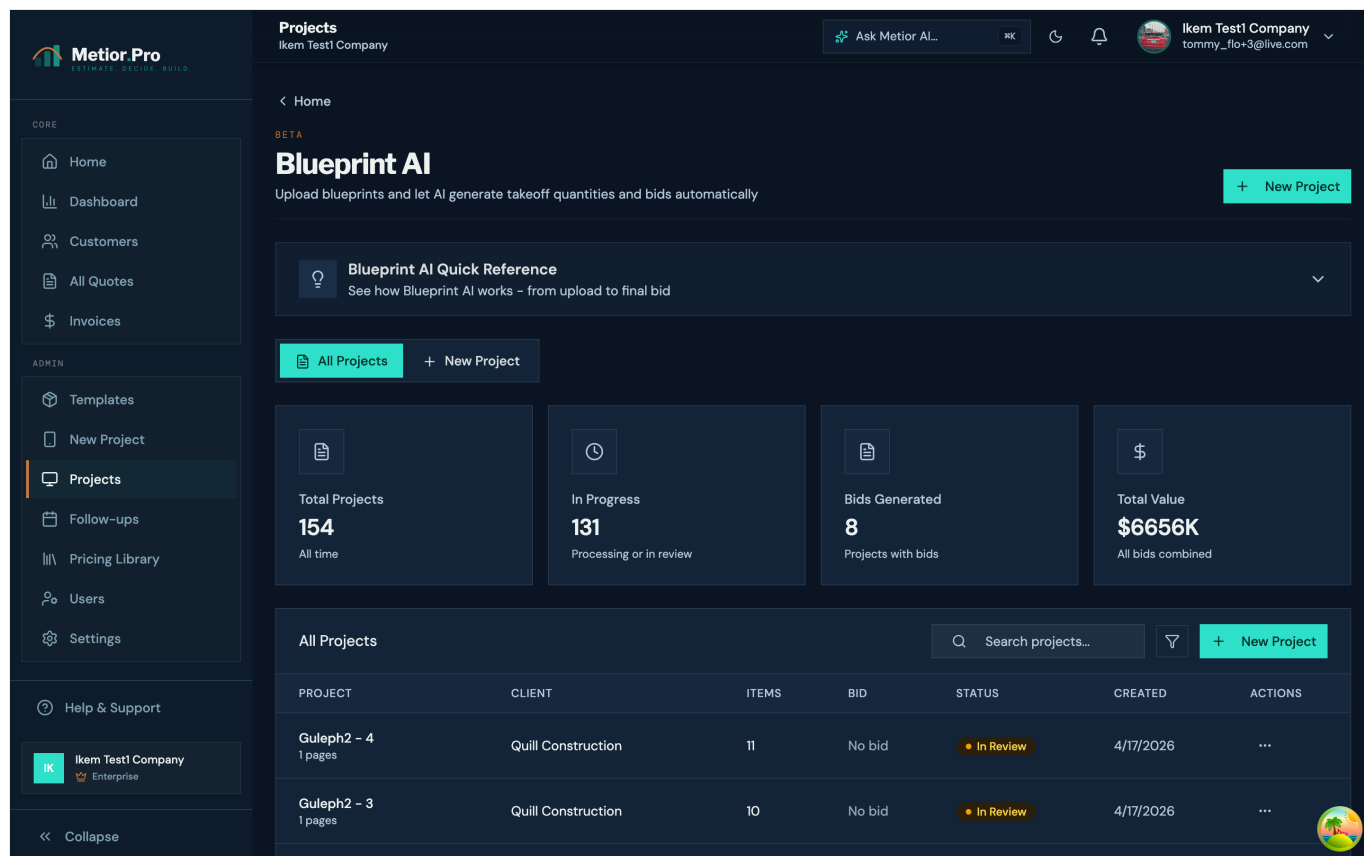
`/app/quote/new` opens a multi-step wizard: pick a template (or start blank) → pick a customer (search-as-you-type) → add line items (with the central pricing library prefilled) → review totals → send. Tax is computed per the customer's province; line items can be edited inline; users can save as a draft at any step.

Line item rows include description, quantity, unit, unit price, and total. The library lookup tier-checks each item: exact match → green check, fuzzy match (≥ 0.6 similarity) → "suggested" badge, no match → "missing — save to library" prompt. This keeps the per-job library growing automatically as you build quotes.

When the quote is sent, the customer receives an email with a private `/q/<token>` link. The portal lets them **Accept Quote** (confirmation modal) or **Reject Quote** (with optional reason). The quote's status updates in real time and the contractor gets a notification on each event.

10. Blueprint AI — auto-takeoffs from PDFs

Pro+ only. Free users see a Pro upsell card here.



Blueprint AI landing

`/app/blueprint` is Metior Pro's signature Phase 2 feature: upload a PDF blueprint and the AI extracts quantities (linear feet of trim, square feet of drywall, count of fixtures, etc.), categorises them by trade, and generates a bid you can convert directly into a quote.

The page header reads **Blueprint AI** with a **Beta** eyebrow tag and the subtitle *"Upload blueprints and let AI generate takeoff quantities and bids automatically."* The **New Project** button starts the upload flow.

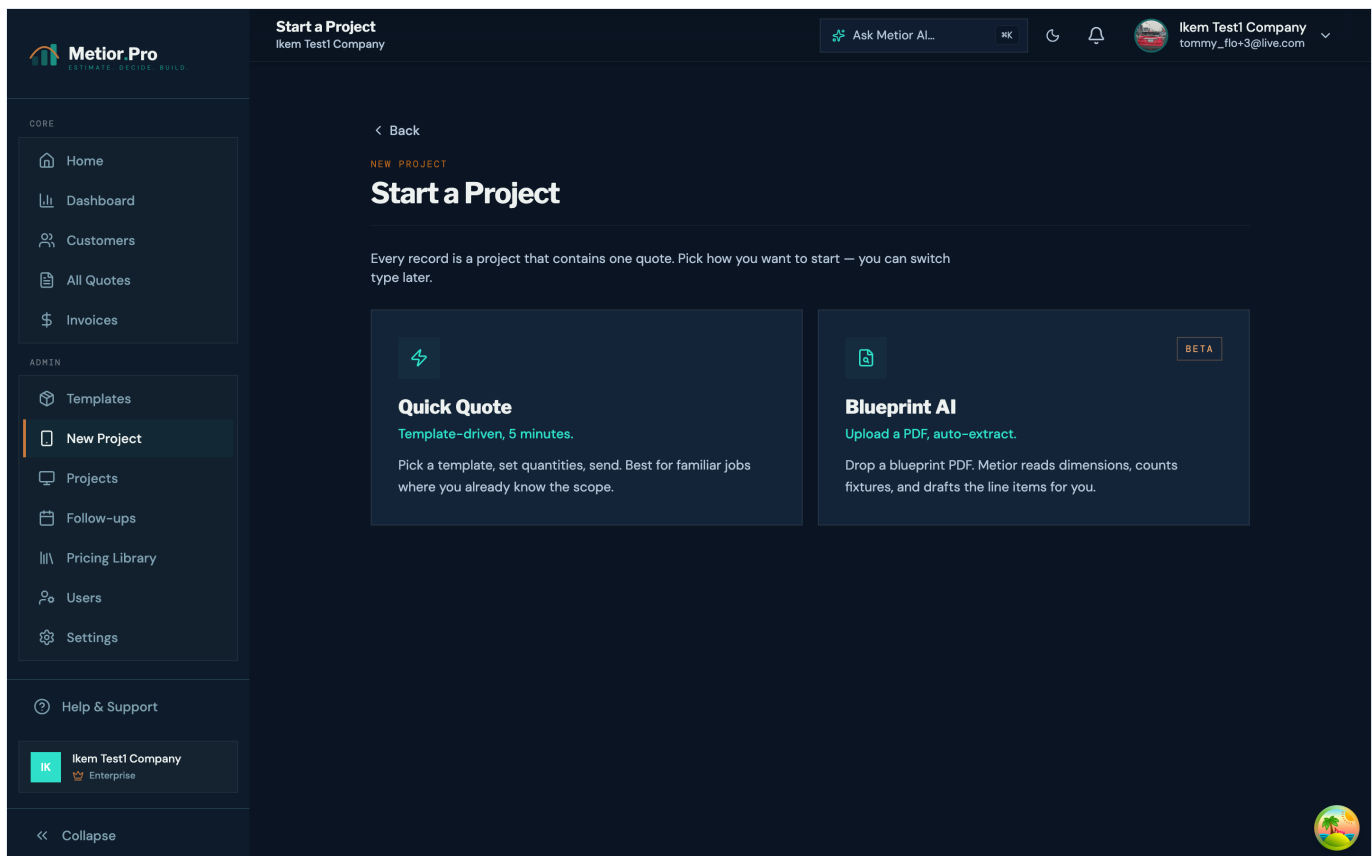
10.1 Upload, processing, review

A new project walks through:

1. **Upload PDF** — drag-and-drop a file up to 50MB, server-side validated.
2. **Processing** — Celery worker runs the v3/v4 extraction pipeline: PaddleOCR pre-pass (every text string gets a bounding box and ID), then GPT-4o vision-extract, then a programmatic dimension verifier, then a targeted dimension re-reader for low-confidence items, then a math validator (area cross-check, count limits, 10x error detection), then a cross-page aggregator. Progress is shown live via WebSocket.

3. **Review extractions** — every extracted item is shown with its source page, calculation method, confidence, and the OCR IDs the AI cited. Items are bucketed as `verified` / `dimension_mismatch` / `math_error` / `verified_after_reread` / `reread_conflict` / `unverifiable`.
4. **Annotated viewer** — the original blueprint with coloured pins for each extracted item; click a pin and the matching extraction card highlights, and vice versa.
5. **Audit checklist (optional)** — define contractor-specific requirements ("must include attic insulation," "must include trim allowance"), the AI evaluates the extraction against each, and flags gaps.
6. **Generate bid** — extractions become priced line items, totalled, and exportable to PDF/Excel — or convertible directly to a Phase 1 quote and onward to an invoice.

10.2 Project gateway



New project picker

`/app/project/new` is a small gateway page that asks the user which path to take — **Quick Quote** (template-driven, 5 minutes) or **Blueprint AI** (upload a PDF, auto-extract, marked **Beta**).

11. Invoices and getting paid

Pro+ only. Free users see a Pro upsell gate.



ESTIMATE. DECIDE. BUILD.

CORE

Home

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Pricing Library

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Help & Support

Ikem Test1 Company

Enterprise

<< Collapse

Invoices

Ikem Test1 Company

Ask Metior AI...

Home

Invoices

Track billing, payments, and outstanding balances

Create Invoice

Total Invoices

7

\$5,487,451.87 billed

Paid

\$13,421.74

5 invoices

Outstanding

\$5,474,030.13

Awaiting payment

Overdue

1

Require follow-up

Search invoices...

All Statuses

Most Recent

From Quote

INVOICE #	CUSTOMER	TOTAL	PAID	BALANCE	STATUS	DUE DATE	ACTIONS
INV-202604-0001 Apr 18, 2026	Peter Quill	\$5,473,862.15	\$0.00	\$5,473,862.15	Draft	May 18, 2026	...
INV-202603-0001 Mar 17, 2026	Peter Quill	\$1,889.72	\$1,721.74	\$167.98	Sent	Apr 16, 2026	...
INV-202602-0007 Feb 19, 2026	John Doe	\$525.00	\$525.00 Feb 19, 2026	\$0.00	Paid	Mar 21, 2026	...
INV-202602-0006 Feb 19, 2026	John Doe	\$339.00	\$339.00 Feb 19, 2026	\$0.00	Paid	Mar 21, 2026	...
INV-202602-0005 Feb 18, 2026	Peter Quill	\$1,889.72	\$1,889.72 Feb 18, 2026	\$0.00	Paid	Mar 20, 2026	...

Invoices list

`/app/invoices` lists every invoice in the organisation with stats cards (**Total Invoices**, **Outstanding**, **Paid**, **Overdue**) up top. Each row shows the invoice number, customer, amount, paid amount, balance, status badge, and due date. Status filters live in a Select control next to the search bar — and the filter is persisted in the URL (`?status=overdue` etc.) so deep links from the home screen "Overdue" tile open the right view.

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11.1 Creating an invoice

The screenshot shows the 'Create New Invoice' dialog in the Metior Pro application. The dialog is a dark-themed form with the following sections:

- Customer ***: A dropdown menu labeled 'Select a customer'.
- Due Date ***: A date picker showing '05/06/2026'.
- Tax Rate**: A dropdown menu showing 'Ontario (13% HST)'.
- Payment Terms**: A text field showing 'Net 30'.
- Line Items ***: A table with columns 'Name', 'Qty', 'Unit', and 'Price'. It contains one item: 'Item name' with Qty '1', Unit 'ea', and Price '0'. There is an '+ Add Line' button.
- Subtotal**: \$0.00
- Tax (13%)**: \$0.00
- Total**: \$0.00
- Notes**: A text area with the placeholder 'Additional notes for this invoice...'.

At the bottom of the dialog are 'Cancel' and '+ Create Invoice' buttons. The background shows the Metior Pro interface with a sidebar and a list of invoices.

Create Invoice dialog

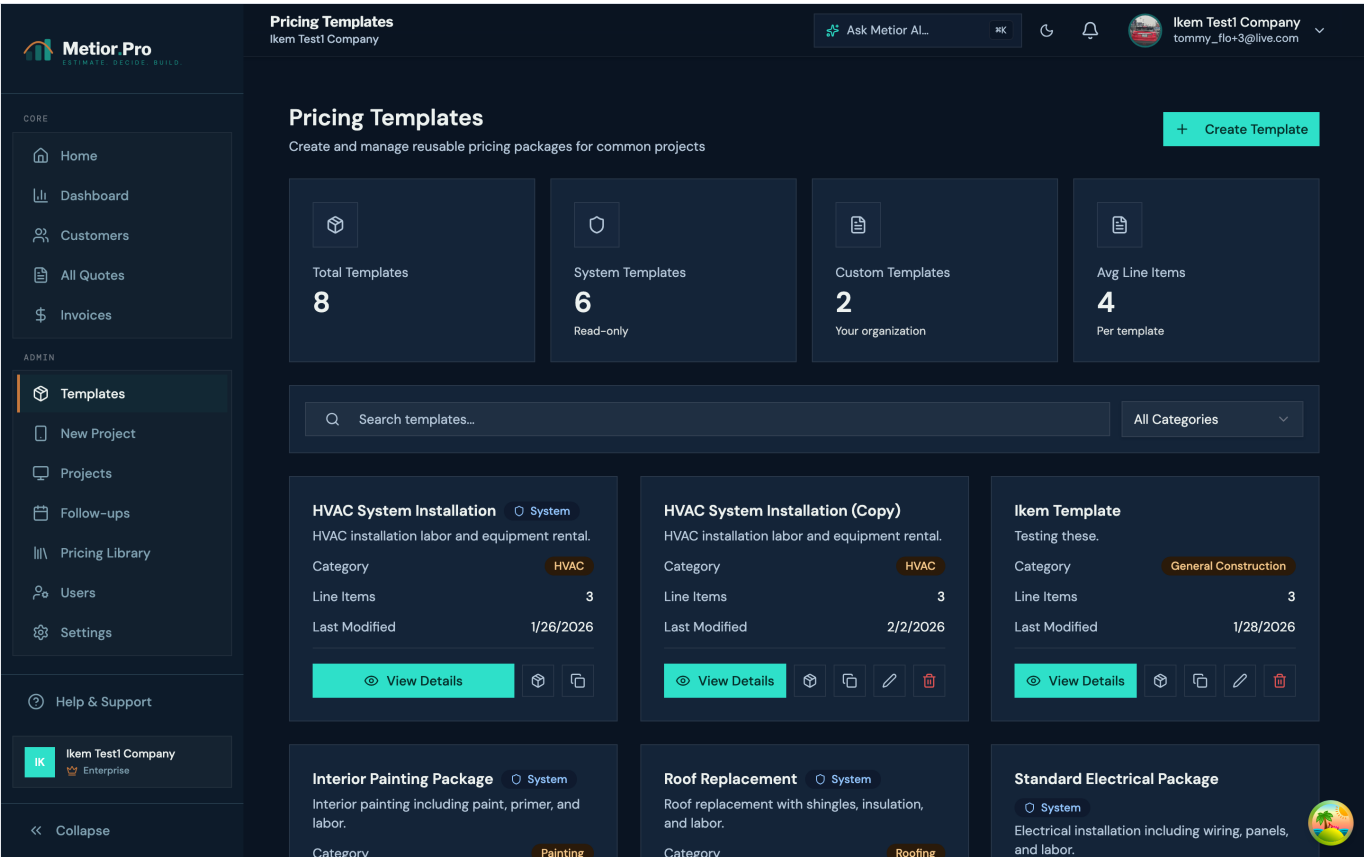
The **Create Invoice** dialog accepts a customer, due date, tax rate (Canadian provincial tax presets — Ontario 13% HST shown), payment terms (Net 30 default), one-or-more line items (each with name, qty, unit, unit price), notes, and optional deposit. A live total panel updates as the user edits. **From Quote** (top-right of the list) opens an alternate flow that converts an accepted quote into an invoice atomically (`source="blueprint"` if the quote came from Blueprint AI, with the source bid linked).

11.2 Sending and getting paid

Once created, an invoice can be sent via email (Mailjet) — the customer receives a `/pay/<token>` link to a public payment portal. The portal renders the invoice (line items, due date, amount due, contractor contact info), and a **Pay Now** button launches Stripe Checkout. On success: green confirmation, downloadable receipt PDF, contractor notified via email + push. On failure: clear decline messaging with retry. Stripe runs per-tenant — each organisation supplies its own encrypted Stripe API keys via Settings → Integrations, and customer payments go straight to that organisation's Stripe account, never to Metior Pro.

12. Templates and the pricing library

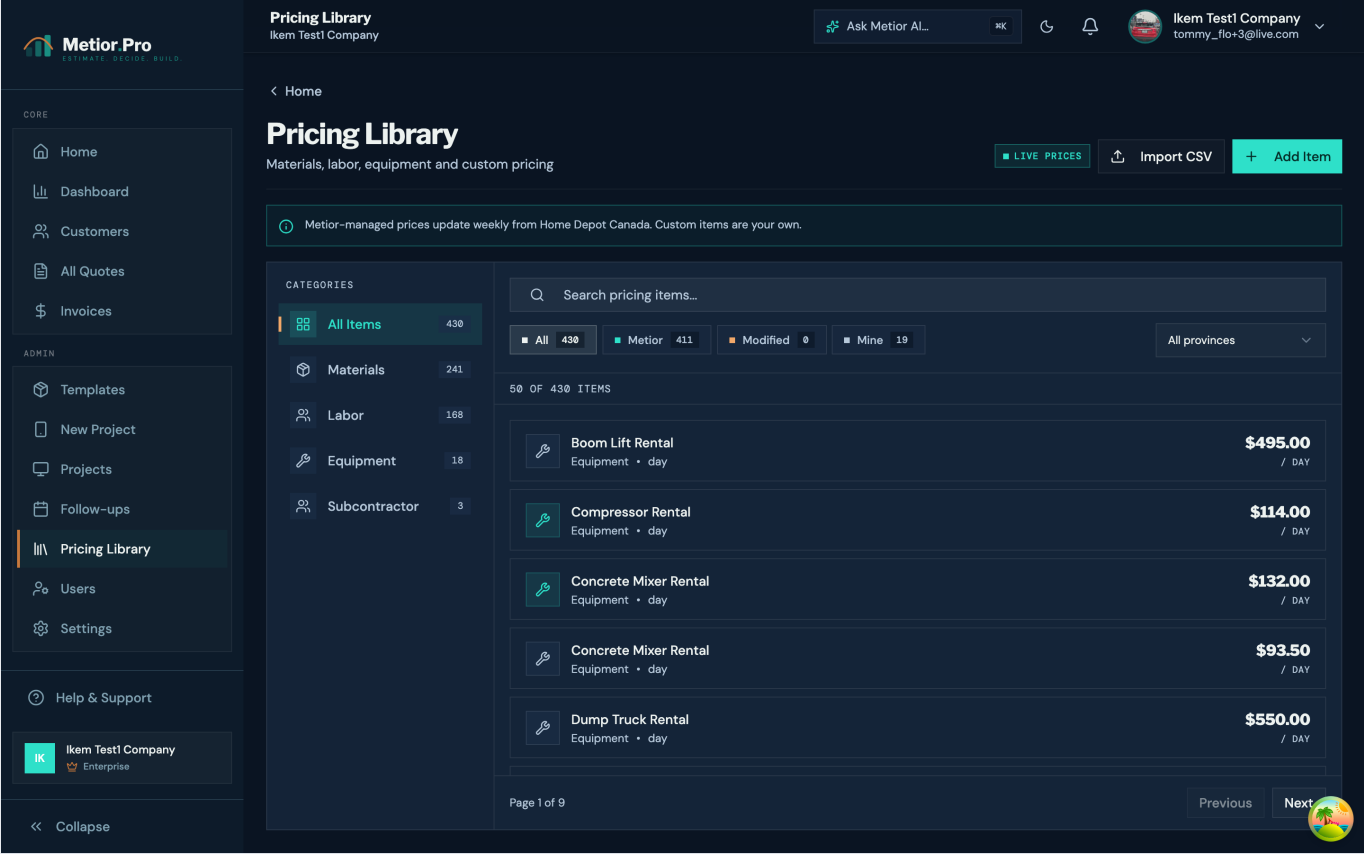
12.1 Templates



Templates

`/app/templates` is where reusable quote templates live. Free users can browse the **System Templates** read-only; Pro+ users can clone, edit, and delete custom ones. Stats cards at the top: **Total Templates / System / Custom / Avg Line Items**. Filter by category, search by name, or open a template's detail modal to see its line items, category, and creation date. **Use template** jumps the user into the quote builder pre-populated with the template's lines.

12.2 Pricing library (admin)



Pricing library

`/app/pricing` is admin-only — non-admins are redirected to the dashboard. This is the central pricing library feeding the quote builder: labour rates by trade and province (sourced monthly from Statistics Canada table 18-10-0005-01) and material costs (sourced weekly from Home Depot Canada via a 4-strategy scraper that handles the four ways their site can render a price). Admins can fork the central library — edits become an org-only override (copy-on-write) without disturbing other tenants. Custom rates can be added by hand or imported via CSV.

13. Follow-ups — keeping deals warm

CORE

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Follow-ups

Ikem Test1 Company

Ask Metior AI...

Ikem Test1 Company

tommy_flo+3@live.com

< Home

Follow-ups

Manage and track customer follow-up reminders

Export

Import

Create New

Total

21

Pending

1

Overdue

1

Due Today

0

Completed

13

All 21

Overdue 1

Due This Week

Next 30 Days

Status: All

List

Calendar

STATUS	QUOTE	CUSTOMER	TYPE	SCHEDULED	MESSAGE	ACTIONS
Completed	Q-202601-0009	John Doe	Email	Jan 31, 2026 2:18 PM 3 months ago	-	Jan 31, 1:30 PM
Completed	Q-202601-0009	John Doe	SMS	Feb 4, 2026 4:46 PM 3 months ago	Ikem Test	Feb 4, 4:50 PM
Completed	Q-202601-0009	John Doe	SMS	Feb 4, 2026 4:48 PM 3 months ago	-	Feb 4, 4:50 PM
Completed	Q-202601-0009	John Doe	Email	Feb 4, 2026 7:29 PM	Email test	Feb 4, 7:30 PM

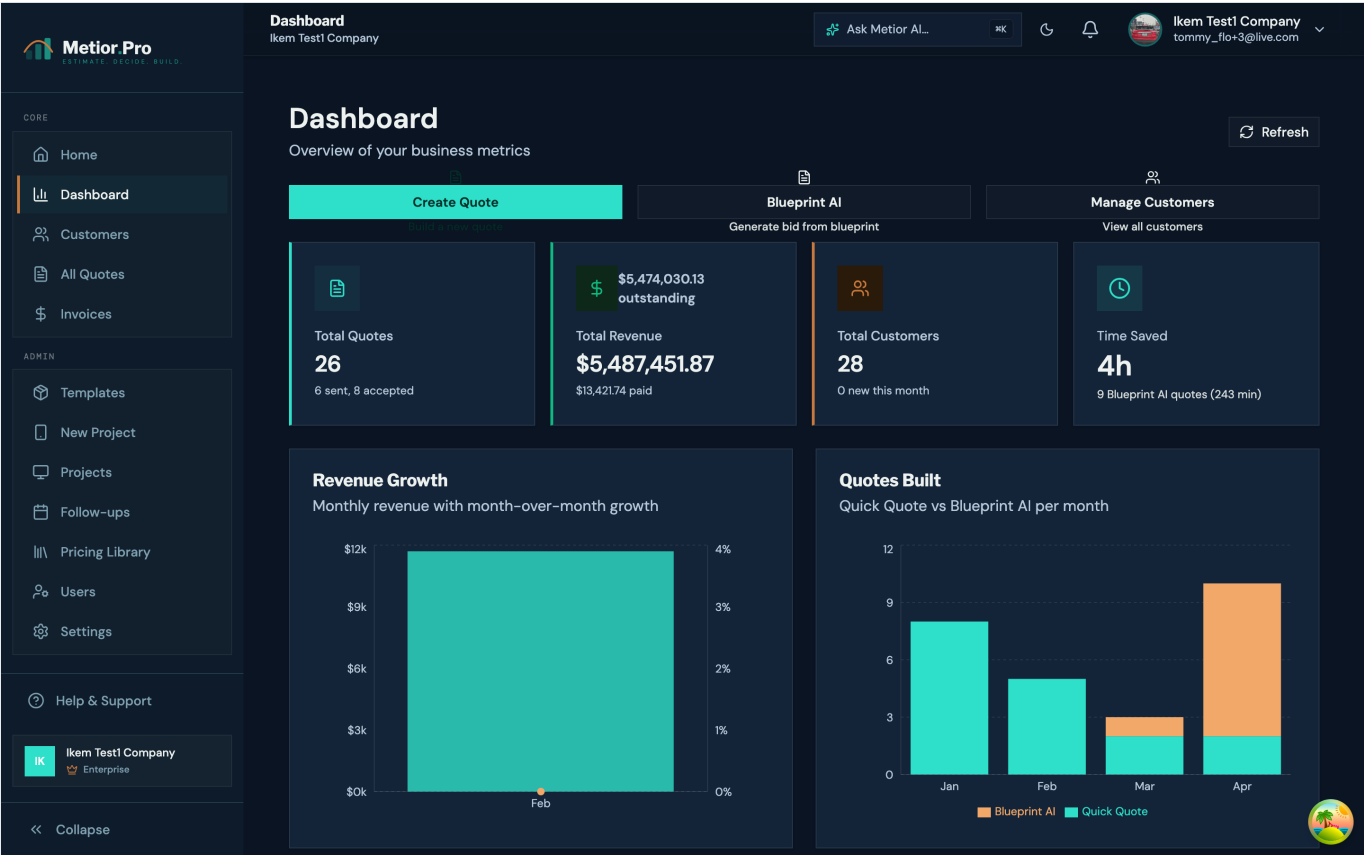
Follow-ups

`/app/followups` is the reminder queue for stale quotes. Tabs: **List** and **Calendar**. Stats: **Total / Pending / Overdue / Due Today / Completed**. Filters: status (All / Pending / Completed / Cancelled) and date range (All / Overdue / Due This Week / Next 30 Days). **Create New** opens a wizard that picks a quote, sets a scheduled date, and chooses a channel (email / SMS / call) plus an optional message. **Export** and **Import** support CSV bulk operations.

The follow-up engine runs on Celery Beat (every 5 minutes) and fires the configured channel automatically when due.

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14. The AI assistant — voice + text



Smart Command Palette — open

The Metior AI assistant lives behind **Cmd+K** (or **Ctrl+K**) and a persistent prompt bar at the bottom of every authenticated page. It does three things:

- 1. **Navigate** — typing **/** filters the navigation menu so you can keyboard-jump to any page.
- 2. **Run tools** — typing a natural-language request matches against 33 built-in tools (search customers, create a quote, send an invoice, get the dashboard summary, etc.) using cosine-similarity intent matching with a GPT-4o fallback for ambiguous cases.
- 3. **Speak** — tap the **mic** button to dictate; tap the **HD** badge (Pro+ only) to switch the engine from the browser's free Web Speech API to the OpenAI Whisper backend route for higher accuracy. The **speaker** toggle in the header reads replies aloud — using the OS voice on free tier, or studio-quality OpenAI TTS voices on Pro.

A daily message cap keeps free-tier costs bounded:

Tier	Daily messages	Voice input	Voice output
Free	30 / day (50 during first 7 days)	Web Speech API (browser)	OS SpeechSynthesis

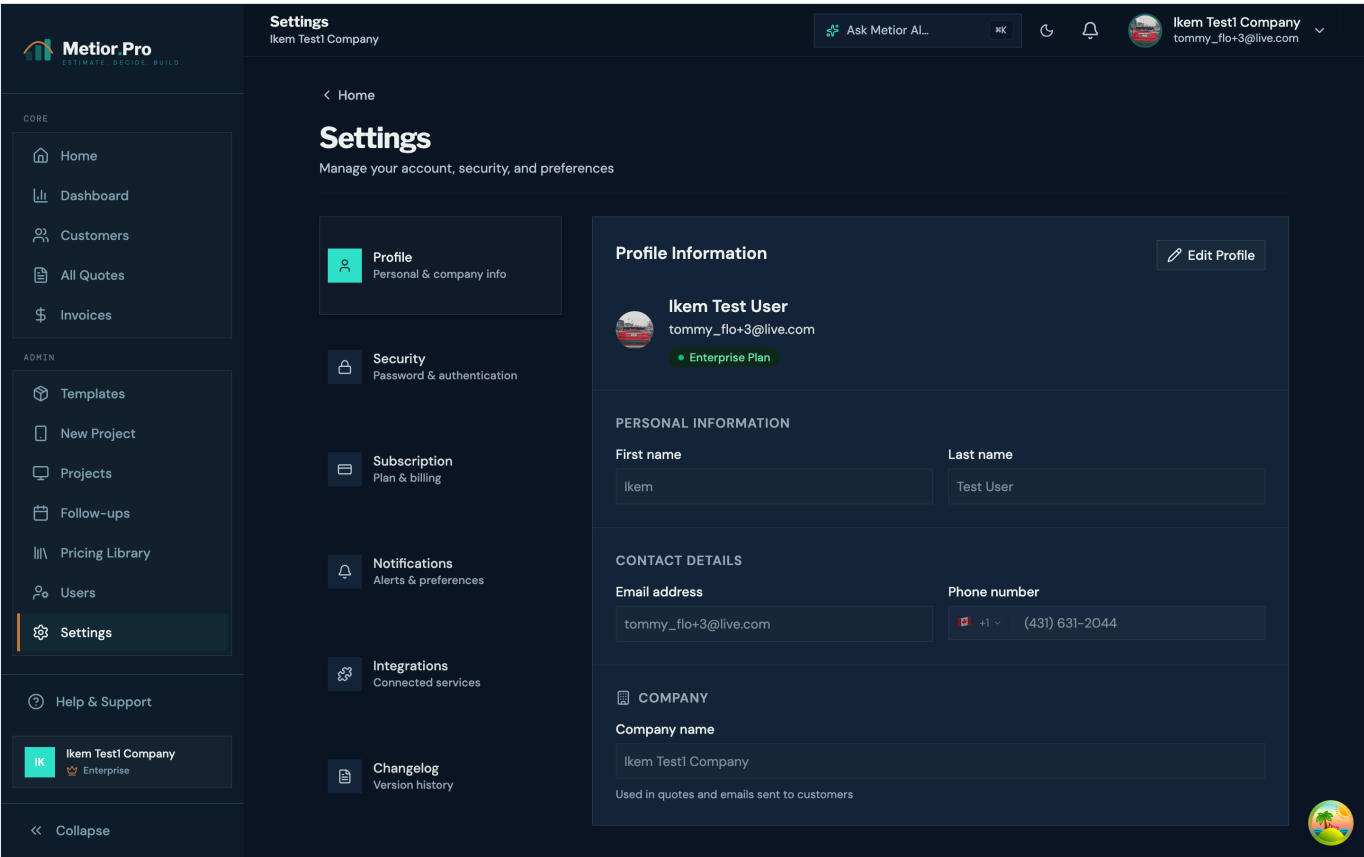
Tier	Daily messages	Voice input	Voice output
Pro	300 / day	Web Speech + Whisper backend	SpeechSynthesis + OpenAI TTS
Admin	uncapped	same as Pro	same as Pro

The cap is configurable per `SubscriptionPlan` from the Django admin — admins can change the values without a deploy. When a free user hits a Pro-gated tool (e.g., asks the assistant to create an invoice), the assistant replies in-character with an upsell affordance: *"That one's a Pro feature — create invoice unlocks once you upgrade. Plans start at \$49/month and include unlimited Metior AI plus invoicing, Blueprint AI, and premium voice."* — followed by an **Upgrade to Pro** CTA button that links straight to the subscription tab.

Note. The voice paths use real services. Web Speech API is on-device (free) but not supported on Firefox; for those users the Whisper backend transparently picks up the slack on Pro. OpenAI TTS audio is delivered as `audio/mpeg` from a Pro-gated `/api/v1/chat/tts/` endpoint and played back via an `<audio>` element. Both directions cancel cleanly when the user opens a new request.

15. Settings, security, and integrations

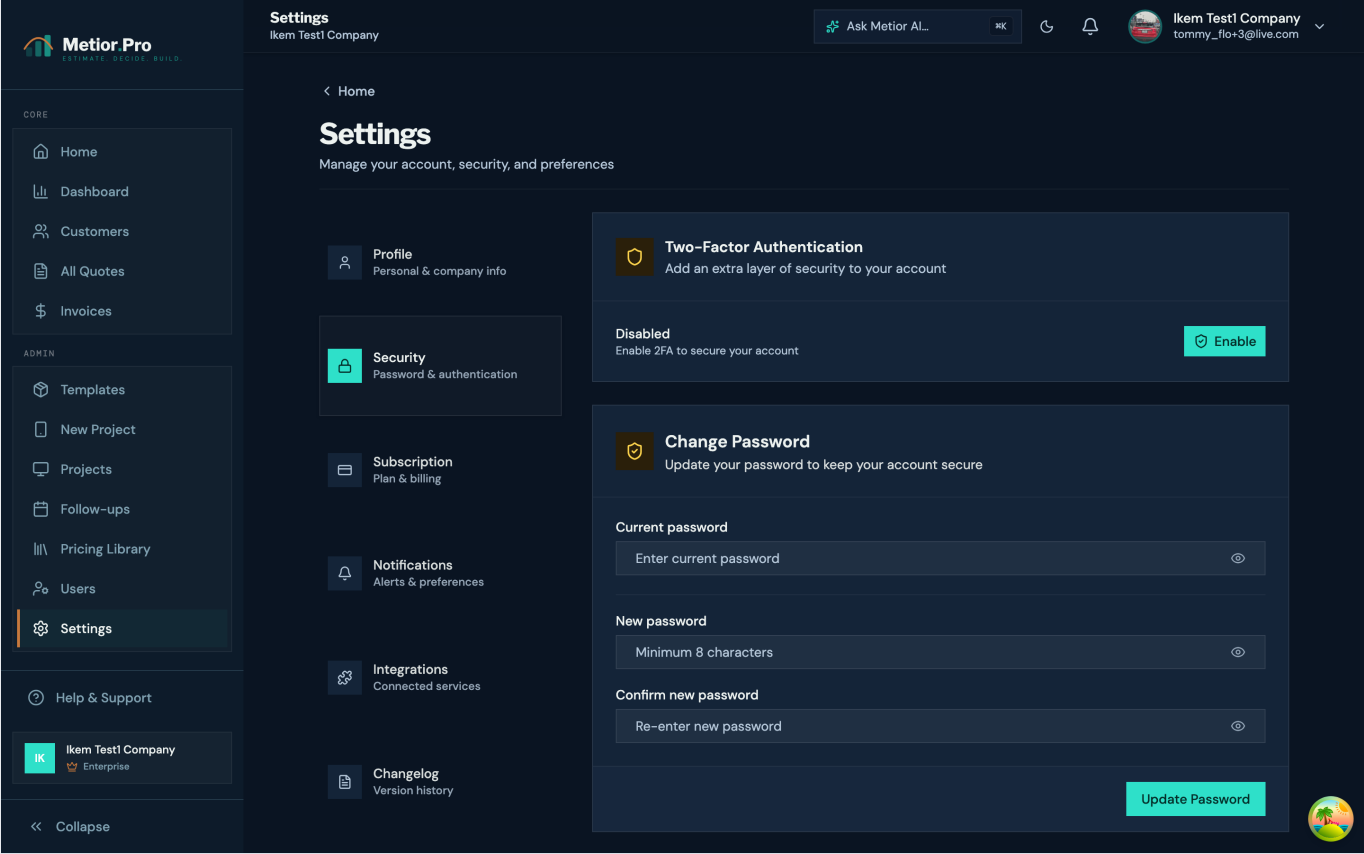
15.1 Profile



Settings — Profile

The profile tab (/app/settings?tab=profile) covers first/last name, email, company name, and phone. The phone field accepts any common format and is normalised to E.164 server-side before save (so legacy-formatted phones from older accounts continue to work transparently).

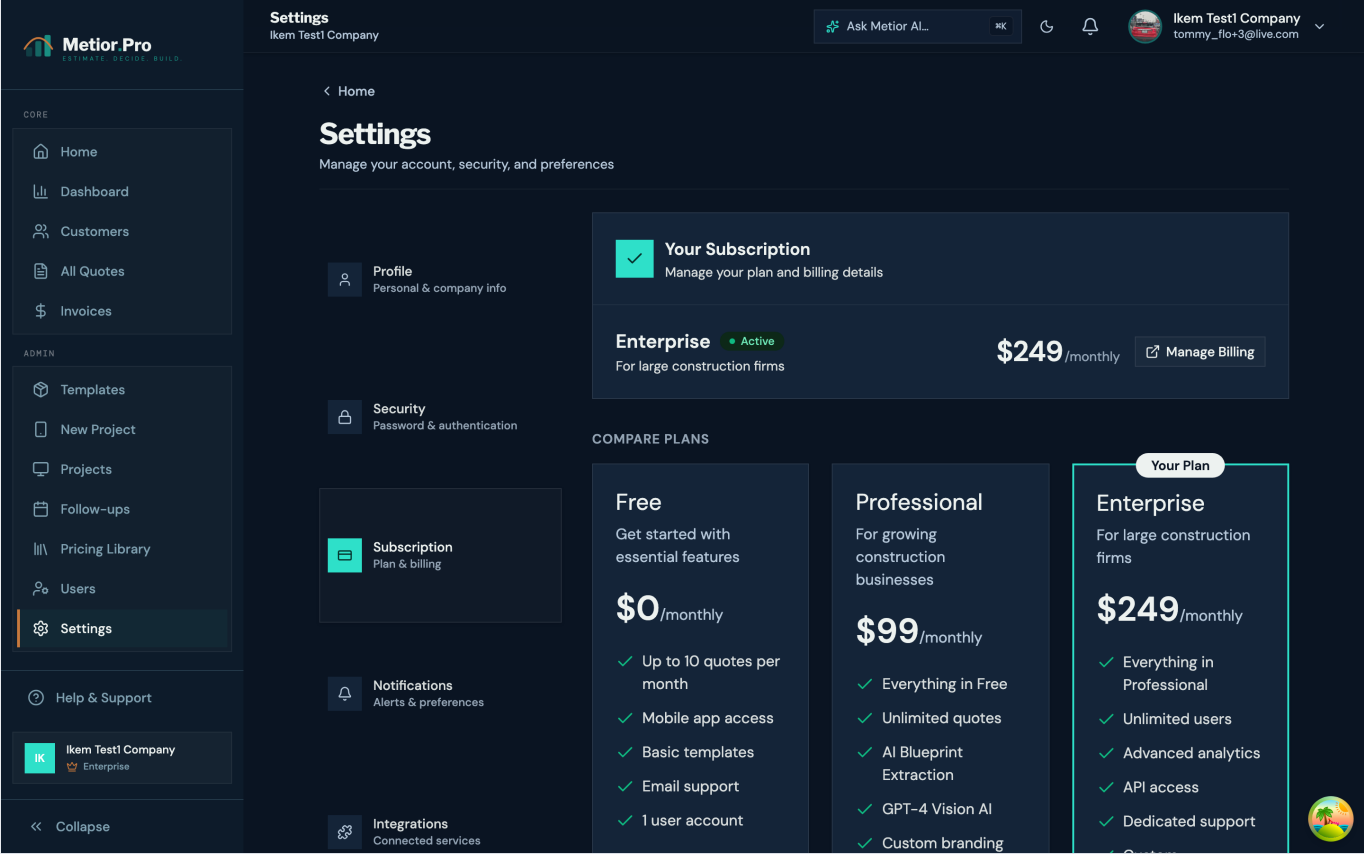
15.2 Security



Settings — Security

Change password, manage active sessions, and configure two-factor authentication. 2FA channels are email and SMS with a 30-second resend cooldown. (Authenticator-app TOTP and backup codes are on the roadmap — see §17.)

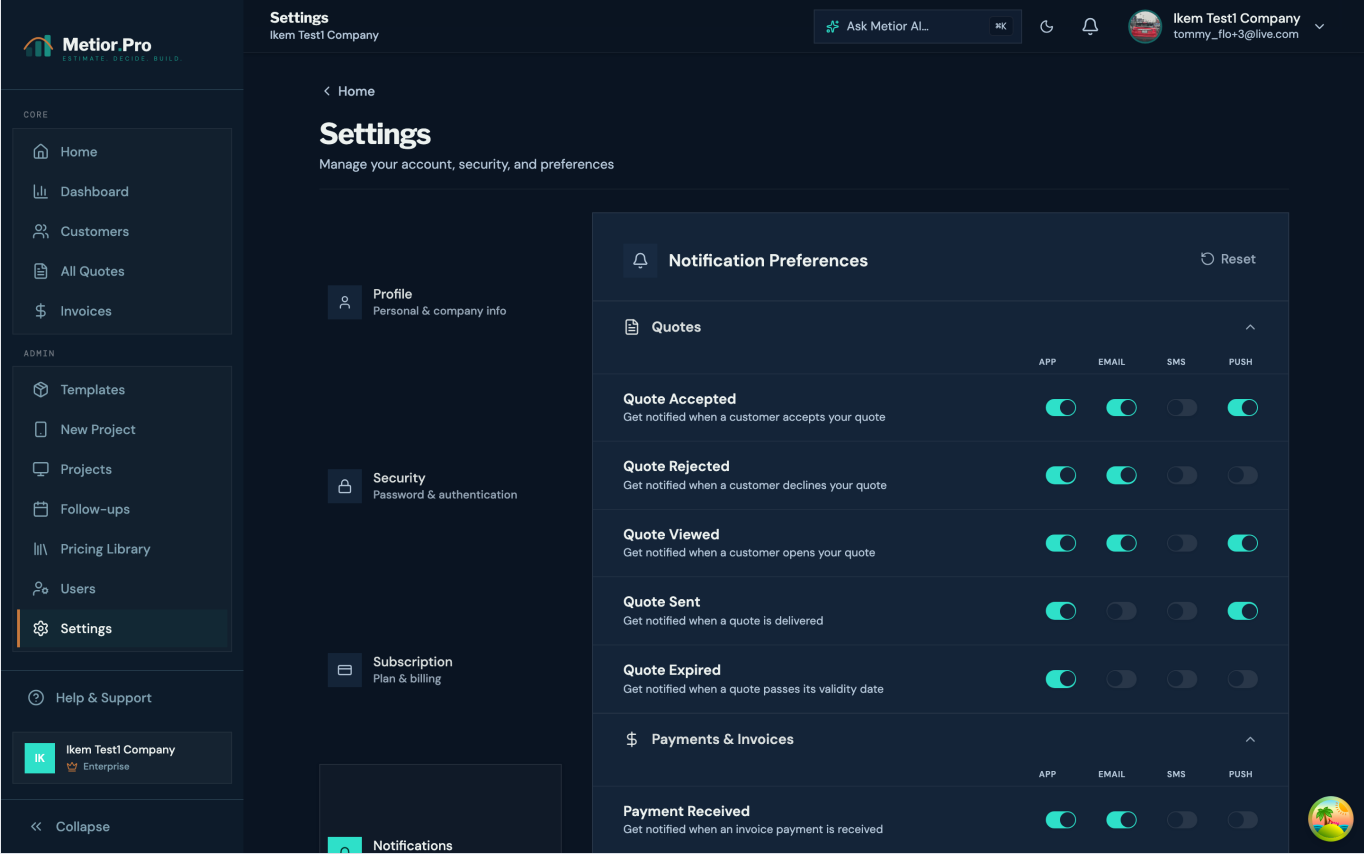
15.3 Subscription



Settings — Subscription

The subscription tab pulls plan data from the same `/api/v1/plans/` endpoint that powers the landing pricing cards, so all three surfaces (landing, signup dialog, in-app) always show identical numbers. A user can upgrade, downgrade, or cancel from here; downgrades take effect at the end of the current billing period.

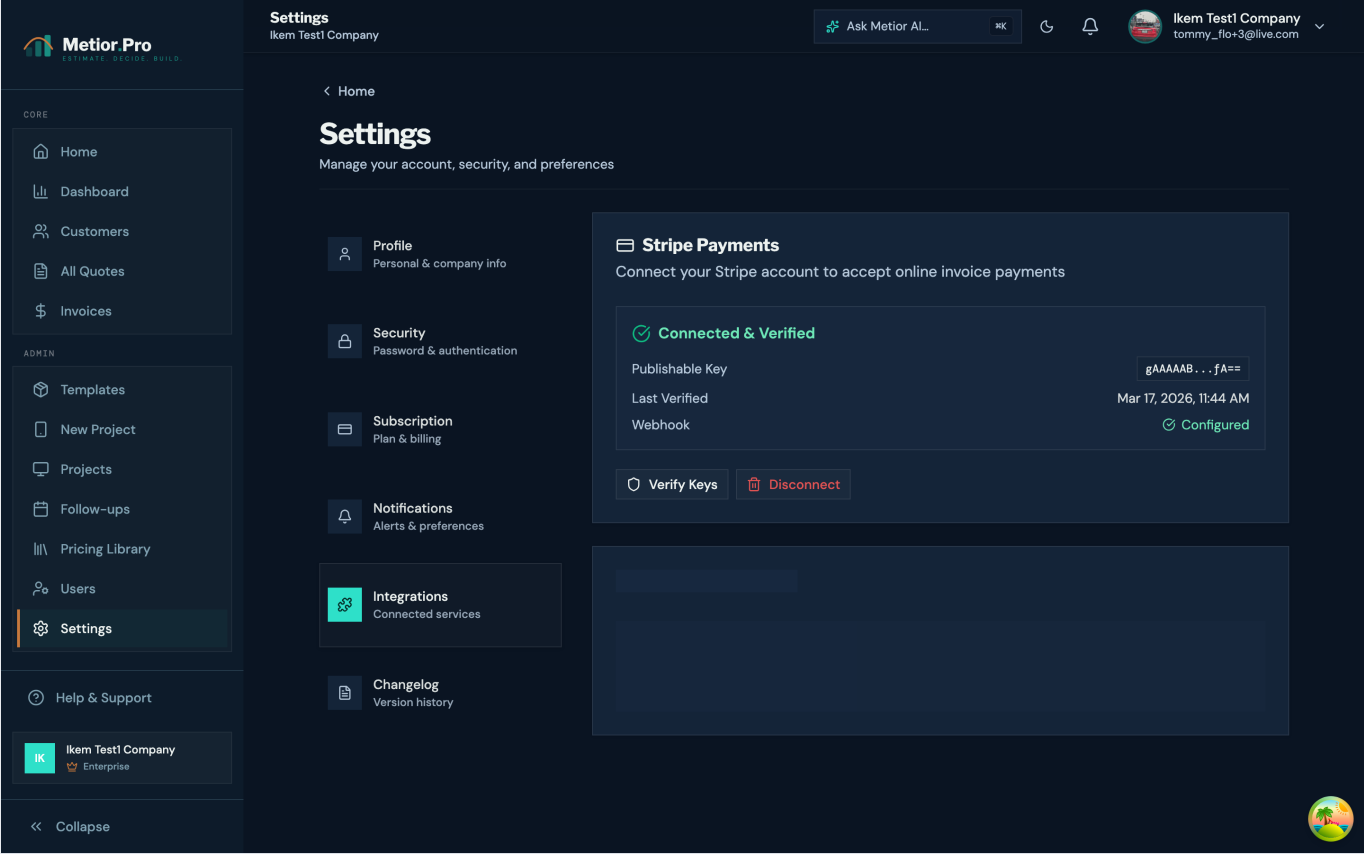
15.4 Notifications



Settings — Notifications

Per-channel preferences (email, push, SMS) for: quote sent, quote viewed, payment received, blueprint completed/failed, and follow-up reminders.

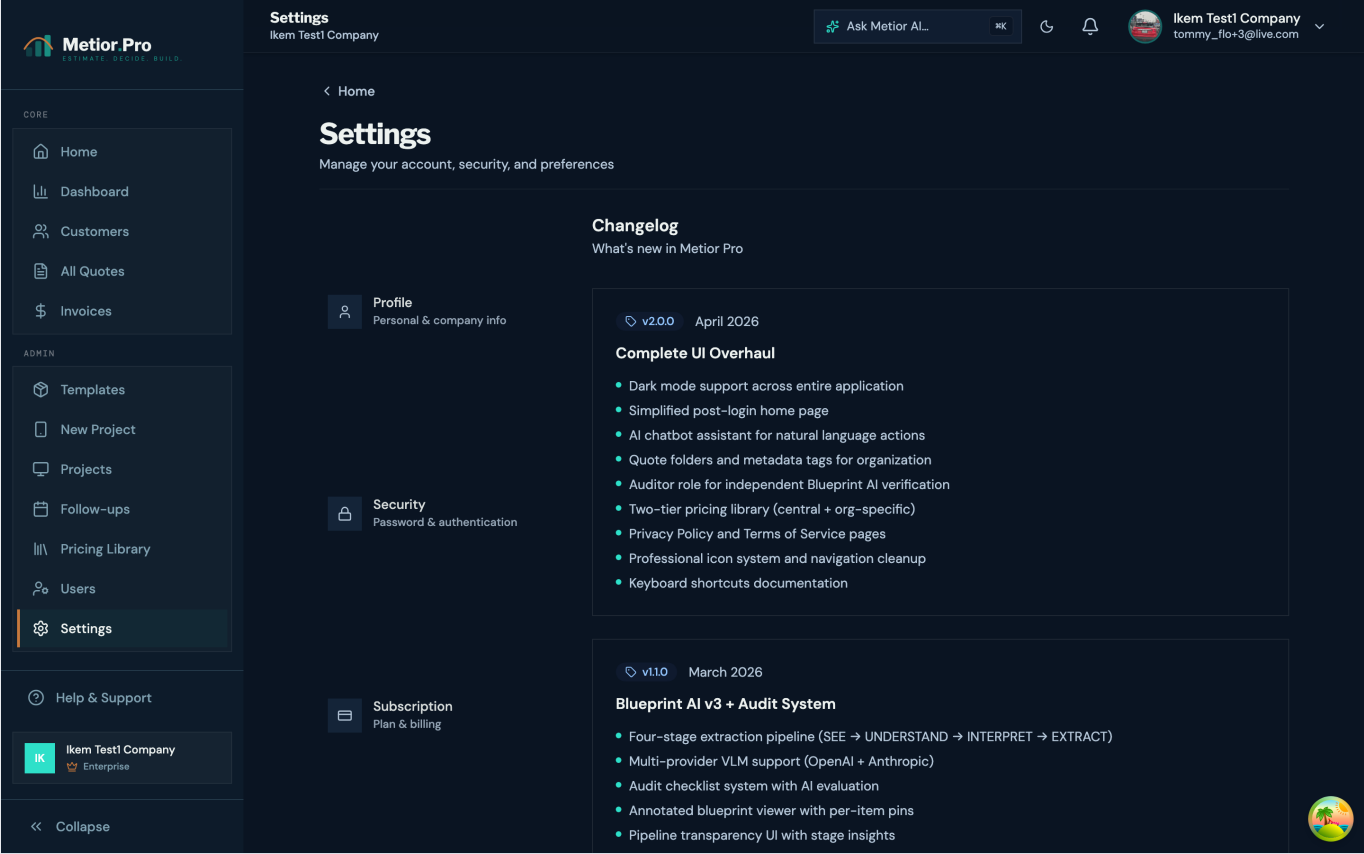
15.5 Integrations (admin only)



Settings — Integrations

Two integrations live behind admin-only setup: **Stripe** (per-tenant API keys stored AES-256-encrypted; **Connect**, verify via live API call, **Disconnect** workflow) and **QuickBooks Online** (OAuth 2.0 flow → daily two-way customer + invoice sync, with a manual **Sync Now** trigger and a sync history). Procore is listed as **coming soon**.

15.6 Changelog



Settings — Changelog

In-app version history. Useful for sales when customers ask "what shipped last month?" — the answer is one click away.

16. Pricing & plans

The pricing data on the landing page is fetched live from `/api/v1/plans/` . Below mirrors the canonical seed values shipped today.

Plan	Price (CAD)	Users	Quotes / month	What it includes
Free	\$0 / mo	1	Up to 10	Mobile app access, basic templates, email support, 1 user account
Professional	\$99 / mo	Up to 5	Unlimited	Everything in Free + Blueprint AI extraction, GPT-4 Vision AI, custom branding, priority support, CRM features
Enterprise	\$249 / mo	Unlimited	Unlimited	Everything in Professional + advanced analytics, API access, dedicated support, custom integrations, SLA guarantee

Plans are billed monthly via Stripe; the in-app subscription tab supports upgrading, downgrading, and cancelling. Cancellation takes effect at the end of the current billing period. All prices in CAD.

17. Live features vs. coming soon

The honest section. Two lists — what's shipped today and what's still in flight.

✅ Live today

Core SaaS - JWT authentication with refresh-token rotation - Email + SMS OTP login (Twilio) - Password reset (PBKDF2-hashed single-use tokens, 1-hour expiry, auto-login on success) - Multi-tenant organisation isolation (every data row scoped to `organization`) - Per-tenant Stripe integration (AES-256 encrypted keys) - Stripe subscription billing with double-layer webhook idempotency (Redis cache + DB record) - QuickBooks Online OAuth + daily two-way sync - Mailjet email (production HTML templates) - Statistics Canada labour cost sync (monthly Celery Beat) - Home Depot Canada material price scraper (weekly, Sunday 03:00 ET) - Audit logging across customers, quotes, projects

Quoting + Invoicing - Quick Quote builder with offline draft sync - AI quote descriptions (GPT-4) - Atomic Quote → Invoice conversion (with `source` field linking back to the bid if Blueprint AI) - Stripe Checkout payment links per invoice - Public quote portal `/q/<token>` and payment portal `/pay/<token>`

Blueprint AI (Phase 2) - PDF upload (50MB cap, server-side validated) - v3/v4 extraction pipeline: SEE → UNDERSTAND → INTERPRET → EXTRACT - PaddleOCR pre-pass with dimension verification + targeted re-reader - AI audit checklist - Bid generation, PDF/Excel export, conversion to Phase 1 quote

AI assistant (Phase 1 + Phase 2 voice) - Smart Command Palette with 33 tools and intent-matching pre-router - Per-plan daily chat cap (configurable from Django admin) - Web Speech voice input on free; Whisper backend on Pro - OS SpeechSynthesis on free; OpenAI `tts-1` on Pro - Pro-tier upsell affordance with one-click upgrade CTA

Mobile - Capacitor iOS + Android setup scripts (with mic + speech recognition entitlements baked in) - Push notifications via FCM (Firebase placeholder shipped — needs real `GoogleService-Info.plist` per deployment)

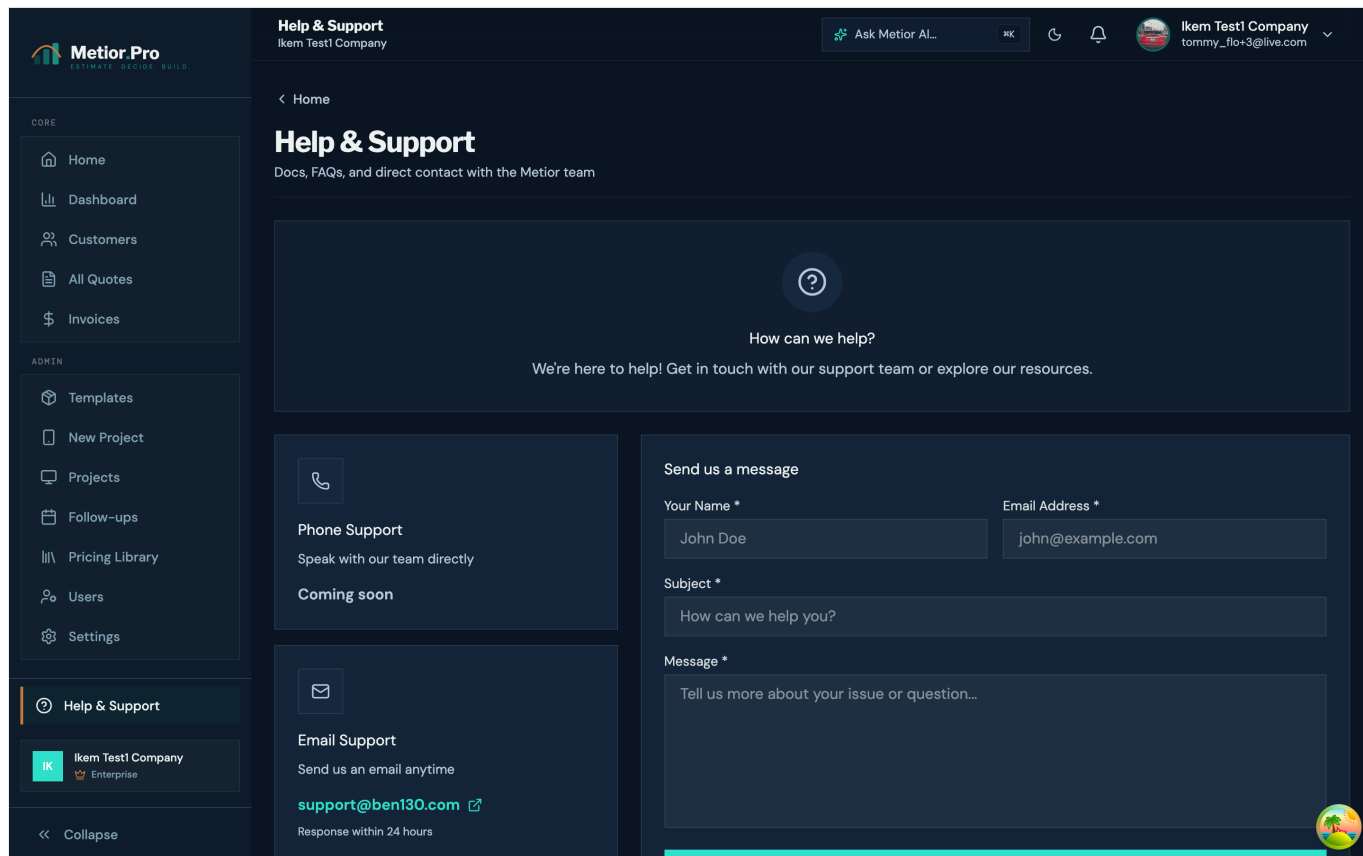
⚠️ Coming soon / behind a flag

- **Authenticator-app 2FA (TOTP)** — the `twofa_enabled` field exists, but pairing with Google Authenticator / Authy and backup-code generation aren't wired into the UI yet. Today's 2FA goes via email or SMS.
- **Email verification gate on signup** — the token model and resend mechanism are live, but the signup flow doesn't yet block the user at the verification gate. Free users can use the app immediately and verify later.
- **Password reset email delivery** — the reset token service and frontend pages are live; the Mailjet task that emails the reset link is wired but pending production-config sign-off.
- **Annotated Blueprint Viewer integration** — the `AnnotatedBlueprintViewer` component is built and dark-mode-clean, but isn't yet exposed inside the extraction-review flow.
- **Procore integration** — listed on the landing page as coming soon. No code today.

Overall production-readiness: ~83% live / shipping-ready as of 2026-05-06. Core SaaS infrastructure is battle-tested; Blueprint AI is feature-complete with high accuracy; remaining gaps are polish on auth flows and one Phase 2 visual surface.

18. Support and getting unstuck

18.1 In-app



Help & Support

`/app/help` is the in-app support centre — FAQ accordion, contact form, links to the documentation site. Every authenticated page also exposes a notifications bell (top-right) and the AI assistant (Cmd+K) which can answer most "how do I..." questions directly.

18.2 Common questions

- **"How long does setup actually take?"** — Solo contractor signing up alone: under 5 minutes (free, no card). Org with 5 users + Stripe + QuickBooks fully configured: 30–60 minutes once you have the QuickBooks admin handy.
- **"Can I keep using QuickBooks?"** — Yes, that's the point. QuickBooks Online stays your books of record; Metior Pro syncs invoices and customers two-way once a day, with a manual Sync Now if you need it sooner.
- **"What happens if I cancel?"** — Your data stays accessible until the end of the current billing period. Export-to-CSV is available throughout. After cancellation, the account is set to read-only for 90 days, then archived.

- **"Where do customer payments go?"** — Straight to your Stripe account, not to Metior Pro. We never touch your money. The per-tenant Stripe integration means the API keys you configure send the funds where you specify.
 - **"Is the AI accurate?"** — Blueprint AI extraction has a multi-stage validator (OCR cross-check → dimension re-reader → math validator → cross-page aggregator) that flags low-confidence items for your review before the bid is finalised. Nothing goes out without a human in the loop.
-

19. Page reference

URL	Who	Auth	Section
/	anyone	none	§3
/login	anyone	none	§4.1
/verify-email	anyone	token	§4
/check-email	anyone	none	§4
/reset-password	anyone	token	§4.2
/accept-invite	anyone	token	§5
/q/:token	customer	token	§9 (last paragraph)
/pay/:token	customer	token	§11.2
/privacy	anyone	none	§4.3
/terms	anyone	none	§4.3
/app/home	free + pro + admin	JWT	§6
/app/dashboard	pro + admin	JWT	§7
/app/customers	free + pro + admin	JWT	§8
/app/customers/new	free + pro + admin	JWT	§8.1
/app/customers/:id/edit	free + pro + admin	JWT	§8.1
/app/quotes	free + pro + admin	JWT	§9
/app/quote/new	free + pro + admin	JWT	§9
/app/quote/edit/:id	free + pro + admin	JWT	§9
/app/blueprint	pro + admin + auditor	JWT	§10
/app/project/new	free + pro + admin	JWT	§10.2
/app/invoices	pro + admin	JWT	§11

URL	Who	Auth	Section
/app/templates	free + pro + admin	JWT	§12.1
/app/pricing	admin	JWT	§12.2
/app/followups	free + pro + admin	JWT	§13
/app/users	admin	JWT	§15.5
/app/settings?tab=profile	any auth user	JWT	§15.1
/app/settings?tab=security	any auth user	JWT	§15.2
/app/settings?tab=subscription	any auth user	JWT	§15.3
/app/settings?tab=notifications	any auth user	JWT	§15.4
/app/settings?tab=integrations	admin	JWT	§15.5
/app/settings?tab=changelog	any auth user	JWT	§15.6
/app/help	any auth user	JWT	§18.1

Appendix — How this guide was built

Every screenshot in this document was captured live on **2026-05-06** using a Node Playwright capture script (`scripts/capture-client-walkthrough.mjs`) against `http://localhost:3000` (frontend) and `http://localhost:8000` (Django backend) on the `feat/voice` branch.

The capture script: 1. Logs in via `POST /api/v1/auth/login/` with the demo admin user (`tommy_flo+3@live.com`). 2. Injects the resulting JWT pair into `localStorage` under the key `ben130-auth-storage` so the in-app surfaces are rendered under a real authenticated session — no fake-token shortcuts. 3. Walks the public surfaces in an unauthenticated browser context (so guards aren't tripped), then the authenticated surfaces in a separate authenticated context. 4. Sets `document.documentElement.classList.add( 'dark' )` and persists the theme to `localStorage` for stable dark-mode shots; one light-mode hero and one light-mode home are captured for variety. 5. Disables CSS animations + transitions via an init script so screenshots are deterministic.

Screenshot files live at `docs/screenshots/client-guide/NN-name.png` and are checked into the repository so this guide stays renderable offline.

To regenerate a stale screenshot:

```
# 1. Boot the dev environment
cd backend && source venv/bin/activate && python manage.py runserver &
pnpm run dev &

# 2. Replace the file in place
node scripts/capture-client-walkthrough.mjs

# 3. Verify and commit
git diff --stat docs/screenshots/client-guide/
```

The companion engineer-facing test harness lives at `e2e/` (Playwright e2e tests).

Metior Pro — built by Benmore Technologies. Questions: hello@metior.pro.