Mikasa – Specification of New Tabs & Flows (v1)

> A didactic, sketch-style brief to guide the IT/engineering team on the new additions to the system.

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1) Overview

Goal: add **Property Management / Concierge** operational modules to Mikasa, covering check-in/out, calendar, access/COIs, a services pipeline (from quote request to payment), documents, finance with highlights, and media management (photos/videos).

User roles: - **Admin** (Casa & Concierge): full access. - **Ops** (internal team): create/edit tasks, checklists, check-ins/outs, request quotes, attach COIs, send messages. - **Vendor** (optional portal): submit quotes, update statuses, upload COIs. - **Owner/Client** (optional portal): approve quotes, download invoices, view calendar/visits.

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2) Navigation (wireframe)

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Sidebar (fixed)                    Main Area
──────────────────────────       ───────────────────────────────────────────
Dashboard                        [Header filters: Property ▾  Date ▾  Status ▾
Search]
Properties ▾
  • Overview                     [Finance Highlights Cards]
  • Units                        - Month revenue | A/R | Commissions to pay |
Active jobs

Operations ▾                      [Active Tab]
  • Check-in / Check-out         ◉ Check-in/out  ○ Calendar  ○ To-Do  ○
Issues/Photos
  • Calendar (Arrivals/Cleaning)
  • To-Do List                   [Table / Kanban with actions]
  • Issues & Photos (Checklist)

Documents ▾
  • Contracts (Casa & Concierge)
  • Employee Documents
  • Access Authorizations / COIs
  • Building COIs
  • Service Authorization Messages (Templates)
```

```
Finance ▾
  • Service Pipeline (Quote → Payment)
  • Invoices – Casa & Concierge
  • Commissions (Sheet)
  • Highlights

Extras ▾
  • Key Control
  • Filter Sizes

Media ▾
  • Photos & Videos (by unit/job)
```

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3) Modules / Tabs (functional scope)

3.1 Extras: Key Control

- Register by **Property/Unit** (key ID, label, copies, notes, photo).
- **Movements** (check-out/return): responsible person, date/time, reason, e-signature (optional), receipt upload.
- **Alerts**: overdue keys.

3.2 Extras: Filter Sizes

- Per-**Unit** table with sizes (A/C, fridge, hood, etc.), quantity, replacement cadence.
- **Notes** (model/reference), filter photo upload.
- **Export** CSV/PDF for purchasing.

3.3 Check-in / Check-out

- Forms with required fields: date/time, agent, checklist (unit-specific), photos, documents.
- **Digital signature** of attendee (resident/rep).
- **PDF generation** of the report (with embedded photos and metadata).

3.4 Calendar – Arrivals, Departures & Cleanings

- Views: **Month / Week / List**. Colors: arrivals (green), departures (orange), cleanings (blue).
- iCal/Google Calendar integration (read-only feed + optional push).
- Rules: departure → cleaning → arrival (dependencies/SLAs).

3.5 Contracts (Casa & Concierge)

- Repository with versioning, statuses (draft/signed/active/expired), and **e-signature** (DocuSign/ Adobe Sign optional).
- Metadata: property, term, value, attachments.

3.6 Employee Documents

- Records (ID, role, hire date, trainings), uploads (W-4, I-9, certificates, OSHA, etc.).
- Expiry/recertification **alerts**.

3.7 To-Do List

- Per property/unit lists, **Kanban** (To Do → In Progress → Done) + dates, owners, priority, tags.
- Comments, @mentions, attachments.

3.8 Issues & Photos (Checklist)

- Log issues with **customizable checklists**, photos/videos with timestamp and location (if available).
- Status, SLA, assignee, history (audit log).

3.9 Commissions Sheet

- Configurable rules by **service type** (percent, flat, splits, SLA bonuses).
- Auto-calculated from **Pipeline** and **Invoices**; CSV/PDF export.

3.10 Access Authorizations / COIs (per Vendor)

- Access request: date, time window, areas, building contact, **vendor COI** (upload), validity.
- Status: requested → approved → completed → expired.
- Generate **email/WhatsApp** with QR/access code (if applicable).

3.11 Service Authorization Messages (Templates)

- Message library (EN/PT/ES) with **placeholders**: {unit}, {date}, {vendor}, {COI_valid_through}, etc.
- Quick send via email/SMS/WhatsApp (through integrations) + unit history log.

3.12 Building COIs

- Master table per **Condo/Building**: COI requirements, coverage limits, admin contacts, access policies, service elevator rules.
- Upload model PDFs, review dates.

3.13 Service Pipeline (quote → payment)

- **States**: Request quote → Received quote(s) → Sent to client → **Approved** → Service executed → Payment received → **Commission calculated/paid**.
- Multiple quotes per request, with side-by-side compare (price, ETA, COI coverage, notes).
- Transition buttons with **validations** (e.g., cannot advance without valid COI).
- Timeline (who did what/when), attachments (photos, PDFs, videos), comments.

3.14 Invoices – Casa & Concierge

- Issue invoices (numbering, logo, payment terms), statuses (Draft/Sent/Paid/Overdue), payment links (gateway).
- Link to pipeline/job, line items (service, fee, reimbursement), taxes.

3.15 Finance – Highlights

- **Cards/KPIs**: Month revenue, A/R (30/60/90), Delinquencies, Commissions due, Month costs, Margin per job.
- **Alerts**: invoices nearing due, COIs nearing expiration, SLAs at risk.

3.16 Media – Photos & Videos

- Drag-and-drop upload, link media to **Unit/Job/Issue/Checklist**.
- Auto-thumbnails, embedded video player.
- Permissions (who can view/download/share), expiring public links.

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4) Flows (sketches)

4.1 Service Pipeline (state → state)

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[Quote Request]
     │ (send to vendors + require COI)
     ▼
[Quote(s) Received]
     │ (compare / select)
     ▼
[Sent to Client]
     │ (approval + digital acceptance)
     ▼
[Approved]
     │ (schedule service + access authorization + ensure valid COI)
     ▼
[Service Executed]
     │ (attach photos/videos, report, checklists)
     ▼
[Payment Received]
     │ (close job, generate invoice/receipt)
     ▼
[Commission Calculated/Paid]
```

4.2 Check-in / Check-out

```
Schedule → Form (fields + photos) → Signature → PDF → Save to Unit History
```

4.3 Access Authorization

```
Request (vendor + date + areas + COI) → Approve (building rules) → Generate access message → Log completion
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5) Minimal Data Model

Property(id, name, building_id, address, contacts)

Unit(id, property_id, number, owner_id, specs, notes)

Key(id, unit_id, label, photo, notes)

KeyMovement(id, key_id, checked_out_by, returned_by, out_at, in_at, reason, receipt)

Filter(id, unit_id, type, size, cadence, notes, photo)

CheckIO(id, unit_id, kind, date, agent, checklist_json, photos[], pdf)

CalendarEvent(id, unit_id, kind, start, end, assignee, status)

Document(id, category, ref_id, title, file, status, validity)

COI(id, vendor_id, building_id, coverage, valid_through, file)

Vendor(id, name, contact, documents[])

Pipeline(id, unit_id, title, state, description, created_by, timestamps)

Quote(id, pipeline_id, vendor_id, value, eta, attachments, notes)

ClientApproval(id, pipeline_id, approver, date, signature)

ServiceExecution(id, pipeline_id, date, agent, checklist_json, photos[], notes)

Payment(id, pipeline_id, amount, date, method, receipt)

Commission(id, pipeline_id, rule_id, amount, beneficiaries_json, status)

Invoice(id, unit_id, pipeline_id, number, items[], total, status, pay_link)

Issue(id, unit_id, title, description, SLA, assignee, status, photos[])

6) Permissions & Logs

- RBAC by role and **Property/Unit**.
- **Audit log** for all state transitions, uploads, deletions.

7) Notifications & Templates

- Channels: email, WhatsApp/SMS (via integrations), push.
- Versioned templates with placeholders.
- Per-user/unit preferences.

8) Integrations (suggestions)

- **E-signature**: DocuSign/Adobe Sign.
- **Payments**: Stripe/PayPal (link on Invoice).
- **Calendar**: Google Calendar (ICS feed + webhooks).
- **Files**: Google Drive/OneDrive (optional mirror per unit).

9) Reports & Highlights

- **Finance**: monthly revenue per unit, A/R aging (30/60/90), margin per job, commissions paid/due.
- **Ops**: SLA compliance, average pipeline cycle time, open issues by unit, overdue keys.

10) Acceptance Criteria (MVP)

1. Create items in all new tabs; CRUD; permissions enforced.
2. Pipeline working with all **states** and validation gates.
3. **PDF** generation for Check-in/Check-out and Unit History view.
4. Upload/preview **photos and videos** (common formats) in Issues, Pipeline and Media.
5. **COIs** with validity control and expiration alerts.
6. **Invoices** issued with statuses and payment link (sandbox OK).
7. **Calendar** with month/week views and ICS feed.
8. **Finance highlights** showing live month data.

11) Template Examples (summary)

- **Service Authorization (EN)**: "Access authorized for {vendor} at {building}, unit {unit}, on {date} {time_window}. COI valid through {COI_valid_through}. Contact: {contact}."

- **COI Request to Vendor (PT)**: "Por favor, enviar COI com cobertura mínima {limite} até {data}. Anexar documentos e informar equipe que realizará o serviço."

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12) Final Notes

- Global filters (**Property/Unit/Status/Date**).
- Prepare for **multi-language** (EN/PT/ES).
- All modules support **attachments** (PDF/JPG/PNG/MP4) and full-text search.