
Legacy Keeper Design Directions - Detailed Sidebar Features

Super Admin Interface

1. Dashboard (Home)

The main landing page displaying critical business metrics, system health, and urgent action items requiring attention. Includes real-time data visualizations and quick-action cards.

Global Design Elements

Color Scheme

- Primary: Deep blue (#1a3a6d) - Represents trust and security
- Secondary: Teal (#00a19a) - Represents clarity and efficiency
- Accent: Gold (#ffc107) - Represents value and importance
- Alert: Red (#dc3545) - For urgent notifications
- Success: Green (#28a745) - For confirmations

Typography

- Headings: Montserrat (Sans-serif)
- Body: Open Sans (Sans-serif)
- Data values: Roboto Mono (Monospace) for better readability of numbers

Layout Principles

- Responsive design with minimum 1200px optimization for admin dashboards
- Card-based UI for easy scanning of information
- Consistent spacing (8px grid system)
- Clear visual hierarchy with section dividers

Super Admin Interface

+-----+ SUPER ADMIN DASHBOARD +-----+	
Sidebar Options +-----+	
1. Dashboard	
- Home	
2. User Management	
- All Users	
- Trial Users	
- Paid Subscribers	
- Trustees & Nominees	
3. Team Management	
- Support Team	
- Operations Team	
- Affiliate Program	
4. Finance	
- Revenue Reports	
- Commission Payouts	
- Pricing Management	
5. System	
- Access Controls	
- Feature Management	
- Maintenance	
6. Emergency Access	
- Pending Requests	
- Access Logs	
- Protocol Settings	
7. Reports	
- Executive Summary	
- User Analytics	
- Team Performance	
8. Settings	
- Personal Account Settings	
- Notification Preferences	

Dashboard Cards

text



+-----+
+-----+-----+-----+
| Total Users: 1,245 | Active Trials: 83 | Emergency Requests: 5 |
+-----+-----+-----+
+-----+-----+-----+

2. User Management

- All Users
- Trial Users
- Paid Subscribers
- Trustees & Nominees

All Users Table with Cards

text

+-----+

[All Users] [Trial Users] [Paid Subscribers] [Trustees & Nominees]

```
+-----+
+-----+-----+
| Total Users: 1,245 | Active Users: 1,000 | Inactive: 245 |
+-----+-----+
```

TABLE NAME: ALL USERS

[Add New User] [Export User Data] [Send Communication]

Sorting Options:

1. Name (A-Z/Z-A)
2. Sign-up Date (Newest-Oldest/Oldest-Newest)
3. Last Active (Recent-Least Recent)

Filtering Options:

1. Plan Type: Free, Basic, Advanced
2. Referral Source: Organic, Affiliate, Paid Ads

Table Entries:

User ID	Name	Email	Plan Type
U001	Priya Sharma	priya@example.com	Advanced
U002	Rahul Verma	rahul@example.com	Basic

Table: Trial Users

text

[All Users] [Trial Users] [Paid Subscribers] [Trustees & Nominees]

+-----+

+-----+

| Active Trials: 83 | Expiring Soon: 12 | Conversion Rate: 25%|

+-----+

[Send Trial Expiry Reminder] [Extend Trial Period]

[Assign Conversion Campaign] [Export Trial Data]

Sorting Options:

1. Trial Expiry Date (Soonest-Latest)

2. Conversion Probability (High > Medium > Low)

Filtering Options:

1. Days Left in Trial: 1-3 days, 4-7 days

2. Feature Usage: Document Uploads, Nominee Setup

Table Entries:

User ID	Name	Trial Expiry Date	Conversion Probability
T001	Vikram Singh	Apr 3, 2025	High (75%)
T002	Neha Sharma	Apr 5, 2025	Medium (50%)

Table: Paid Subscribers

text



[All Users] [Trial Users] [Paid Subscribers] [Trustees & Nominees]

+-----+
+-----+-----+-----+
| Paid Users: 1,000 | Avg LTV: ₹8,500 | Retention Rate: 90%|
+-----+-----+-----+

[Pause Subscription] [Upgrade/Downgrade Plan]
[Send Renewal Reminder]

- Sorting Options:
- 1. Renewal Date (Soonest-Latest)
 - 2. Lifetime Value (High-Low)

- Filtering Options:
- 1. Plan Type: Basic, Advanced
 - 2. Payment Method: UPI, Credit Card

Table Entries:

User ID	Name	Email	Renewal Date	LTV(₹)
U001	Priya Sharma	priya@example.com	Apr 10, 2025	₹12,000
U002	Rahul Verma	rahul@example.com	Apr 15, 2025	₹8,500

Table: Trustees & Nominees

text



[All Users] [Trial Users] [Paid Subscribers] [Trustees & Nominees]

+-----+

+-----+-----+-----+

| Total Trustees: 342 | Total Nominees: 586 | Verified Trustees/Nominees:200|

+-----+-----+-----+

[Send Invitation to Register] [Assign Marketing Campaign]

[View Relationship Details] [Export Trustee/Nominee Data]

- Sorting Options:
- 1. Age (Youngest-Oldest)
 - 2. Verification Status (Verified > Pending)

- Filtering Options:
- 1. Relationship Type: Spouse, Child, Parent
 - 2. Age Group: <25, 26-40, >40

Table Entries:

Trustee ID	Name	Relationship	Age	Verification
T001	Priya Sharma	Spouse	35	Verified
T002	Rahul Verma	Child	25	Not Verified

All Users

A comprehensive user directory with advanced filtering options. Display user profiles with subscription status, sign-up date, referral source, and activity metrics. Include actions for account management, impersonation for troubleshooting, and direct communication.

Trial Users

Focused view of users in trial period with countdown timers to expiration. Show engagement metrics, feature usage, and conversion probability scores. Include batch actions for sending targeted communications and extending trials for promising prospects.

Paid Subscribers

Complete management of paying customers with subscription details, renewal dates, and lifetime value calculations. Provide tools for plan changes, subscription pausing, and special offer management to increase retention.

Trustees & Nominees

Directory of all trustees and nominees in the system with relationship mapping to primary users. Display verification status, age demographics, and conversion potential. Include tools for targeted marketing to high-potential trustees/nominees.

3. Team Management

Team Management Dashboard Cards

text

+-----+

+-----+

| Support Team: 10 Agents | Operations Team: 5 Members | Affiliates: 50 Active |

+-----+

+-----+

| Avg Resolution Time: 3.5 hrs | Avg Campaign Efficiency: 85% | Conv. Rate: 28% |

+-----+

- Support Team
- Operations Team
- Affiliate Program

Table: Support Team

text



[Support Team] [Operations Team] [Affiliate Program]

```

+-----+
+-----+-----+-----+
| Total Agents: 10 | Avg CSAT Score: 4.7/5 | SLA Compliance: 95% |
+-----+-----+-----+

```

TABLE NAME: SUPPORT TEAM	
1	Support Team Lead
2	Support Team Member
3	Support Team Member
4	Support Team Member
5	Support Team Member
6	Support Team Member
7	Support Team Member
8	Support Team Member
9	Support Team Member
10	Support Team Member
11	Support Team Member
12	Support Team Member
13	Support Team Member
14	Support Team Member
15	Support Team Member
16	Support Team Member
17	Support Team Member
18	Support Team Member
19	Support Team Member
20	Support Team Member
21	Support Team Member
22	Support Team Member
23	Support Team Member
24	Support Team Member
25	Support Team Member
26	Support Team Member
27	Support Team Member
28	Support Team Member
29	Support Team Member
30	Support Team Member
31	Support Team Member
32	Support Team Member
33	Support Team Member
34	Support Team Member
35	Support Team Member
36	Support Team Member
37	Support Team Member
38	Support Team Member
39	Support Team Member
40	Support Team Member
41	Support Team Member
42	Support Team Member
43	Support Team Member
44	Support Team Member
45	Support Team Member
46	Support Team Member
47	Support Team Member
48	Support Team Member
49	Support Team Member
50	Support Team Member
51	Support Team Member
52	Support Team Member
53	Support Team Member
54	Support Team Member
55	Support Team Member
56	Support Team Member
57	Support Team Member
58	Support Team Member
59	Support Team Member
60	Support Team Member
61	Support Team Member
62	Support Team Member
63	Support Team Member
64	Support Team Member
65	Support Team Member
66	Support Team Member
67	Support Team Member
68	Support Team Member
69	Support Team Member
70	Support Team Member
71	Support Team Member
72	Support Team Member
73	Support Team Member
74	Support Team Member
75	Support Team Member
76	Support Team Member
77	Support Team Member
78	Support Team Member
79	Support Team Member
80	Support Team Member
81	Support Team Member
82	Support Team Member
83	Support Team Member
84	Support Team Member
85	Support Team Member
86	Support Team Member
87	Support Team Member
88	Support Team Member
89	Support Team Member
90	Support Team Member
91	Support Team Member
92	Support Team Member
93	Support Team Member
94	Support Team Member
95	Support Team Member
96	Support Team Member
97	Support Team Member
98	Support Team Member
99	Support Team Member
100	Support Team Member

[Add Agent] [Reassign Tickets] [Review Performance]

Sorting Options:

1. Tickets Resolved (High-Low)
2. CSAT Score (High-Low)
3. Avg Resolution Time (Fastest-Slowest)

Filtering Options:

1. Role: Agent, Lead, Manager
2. Availability: Online, Offline, Busy
3. SLA Compliance: Met (>95%), Missed (<95%)

Table Entries:

Agent ID	Name	Tickets Resolved	Avg Resolution Time	CSAT Score
ST001	Priya Sharma	120	3.2 hrs	4.9/5
ST002	Rahul Verma	100	3.8 hrs	4.7/5

Table: Operations Team

text

[Support Team] [Operations Team] [Affiliate Program]

+-----+

+-----+

| Total Members: 5 | Active Campaigns: 12 | Avg Efficiency: 90% |

+-----+

[Add Member] [Approve Campaigns] [Review Process Efficiency]

Sorting Options:

1. Campaigns Managed (High-Low)

2. Process Efficiency (High-Low)

3. Task Completion Rate (High-Low)

Filtering Options:

1. Campaign Type: Email, Social Media, Paid Ads

2. Task Status: On Track, Delayed, Completed

3. Member Role: Campaign Manager, Analyst, Coordinator

Table Entries:

Member ID

Name

Campaigns Managed

Efficiency (%)

Status

OT001

Ananya Patel

15

92%

On Track

OT002

Vikram Singh

12

85%

Delayed

Table: Affiliate Program

text

[Support Team] [Operations Team] [Affiliate Program]

+-----+

+-----+

| Total Affiliates: 50 | Active Affiliates: 40 | Avg Conv. Rate: 28% |

+-----+

[Add Affiliate] [Approve Application] [Review Performance]

Sorting Options:

1. Total Sign-ups (High-Low)

2. Conversion Rate (High-Low)

3. Commission Earned (High-Low)

Filtering Options:

1. Status: Active, Pending, Suspended

2. Tier: Gold, Silver, Bronze

3. Payout Method: UPI, PayPal, Bank Transfer

Table Entries:

Affiliate ID	Name	Total Sign-ups	Conversion Rate (%)	Tier
AF001	Priya Sharma	28	32.1%	Gold
AF002	Rahul Verma	23	28.7%	Silver

Support Team

Performance dashboard for support agents with ticket resolution metrics, quality scores, and workload distribution. Provide tools for reassigning tickets, adjusting agent availability, and reviewing customer satisfaction ratings.

Operations Team

Oversight of operations activities including campaign management, system optimization, and process efficiency metrics. Include approval workflows for major operational changes and resource allocation tools.

Affiliate Program

Comprehensive management of affiliate relationships, including application approvals, commission structure adjustments, and performance monitoring. Provide tools for managing referral codes, reviewing marketing materials, and resolving payment disputes.

4. Finance

- Revenue Reports
- Commission Payouts
- Pricing Management

text

```
+-----+
|          SUPER ADMIN DASHBOARD          |
+-----+
| Sidebar Options                          |
|-----|
| 4. Finance                             |
|   - Revenue Reports                     |
|   - Commission Payouts                  |
|   - Pricing Management                  |
+-----+
```

Finance Dashboard Cards

text



```
+-----+
+-----+-----+-----+
| Total Revenue: ₹1,30,000 | MRR Growth: 4%   | Churn Rate: 5%   |
+-----+-----+-----+
+-----+-----+-----+
| Total Commissions: ₹24,000 | Pending Payouts: ₹6,200 | Active Plans: 2 |
+-----+-----+-----+
```

Table: Revenue Reports

text

[Revenue Reports] [Commission Payouts] [Pricing Management]

+-----+

+-----+

| This Month: ₹1,30,000 | Top Plan: Basic | New Users: 170 |

+-----+

+-----+

| TABLE NAME: REVENUE REPORTS |

+-----+

[Generate Report] [Export Data] [Filter by Plan Type] [View Forecast]

Sorting Options:

1. Month/Quarter/Year (Chronological)

2. Total Revenue (High-Low)

3. Growth Rate (High-Low)

Filtering Options:

1. Plan Type: Basic, Advanced

2. Acquisition Channel: Organic, Affiliate, Paid Ads

3. Churn Rate: <5%, 5-10%, >10%

4. Date Range: Weekly, Monthly, Quarterly

Table Entries:

Month | Total Revenue | Basic Plan | Advanced Plan | New Users | Churn Rate

January | ₹1,20,000 | ₹80,000 | ₹40,000 | 150 | 5%

February | ₹1,25,000 | ₹85,000 | ₹40,000 | 160 | 4.8%

Table: Commission Payouts

text

[Revenue Reports] [Commission Payouts] [Pricing Management]

+-----+

+-----+

| Total Paid: ₹24,000 | Pending: ₹6,200 | Affiliates: 50 |

+-----+

+-----+

| TABLE NAME: COMMISSION PAYOUTS |

+-----+

[Approve Payout] [View Pending Payouts] [Export Payment History]

[Schedule Payment]

Sorting Options:

1. Payout Date (Soonest-Latest)

2. Commission Amount (High-Low)

3. Affiliate Tier (Gold > Silver > Bronze)

Filtering Options:

1. Payment Status: Paid, Pending, Failed

2. Affiliate Tier: Bronze, Silver, Gold

3. Payout Method: UPI, Bank Transfer, PayPal

4. Date Range: Last 7/30/90 days

Table Entries:

Affiliate ID	Name	Total Sign-ups	Conversion Rate	Commission (₹)
Payment Status				
A001	Priya Sharma	28	32.1%	₹8,400
Paid (Mar 29)				
A002	Rahul Verma	23	28.7%	₹6,200
Pending				
A003	Ananya Patel	19	26.3%	₹5,100
Paid (Mar 28)				

Table: Pricing Management

text

[Revenue Reports] [Commission Payouts] [Pricing Management]

+-----+

+-----+-----+-----+

| Active Plans: 2 | Last Price Update: Mar 15 | Promos: 1 |

+-----+-----+-----+

+-----+

| TABLE NAME: PRICING MANAGEMENT |

+-----+

[Edit Subscription Pricing] [Create Promotional Offer] [Run A/B Test]

[Analyze Impact]

Sorting Options:

1. Price (High-Low)

2. Users Subscribed (High-Low)

3. Last Updated (Recent-Old)

Filtering Options:

1. Plan Type: Free, Basic, Advanced

2. Promotion Status: Active, Expired

3. A/B Test Group: Variant A, Variant B

Table Entries:

+-----+

Plan Type | Current Price (₹) | Users Subscribed | Last Updated

+-----+

Free Tier | Free | N/A | Mar 1

Basic Plan | ₹600 (Promo) | 850 | Mar 15

Revenue Reports

Detailed financial analytics with revenue breakdowns by plan type, user cohort, and acquisition channel. Include forecasting tools, churn analysis, and lifetime value projections with exportable reports for accounting.

Commission Payouts

Management interface for affiliate commission calculations, payment scheduling, and transaction history. Include verification workflows for large payouts, tax documentation management, and payment method administration.

Pricing Management

Tools for adjusting subscription pricing, creating promotional offers, and A/B testing different price points. Include impact analysis for proposed changes and scheduled implementation of pricing updates.

5. System

- Access Controls
- Feature Management
- Maintenance

Super Admin Sidebar (Systems Section)

text

+-----+

| SUPER ADMIN DASHBOARD |

+-----+

| Sidebar Options |

|-----|

| 5. System |

| - Access Controls |

| - Feature Management |

| - Maintenance |

+-----+

Systems Dashboard Cards

text



```
+-----+
+-----+-----+-----+
| Total Roles: 6      | Features Enabled: 12 | System Uptime: 99.98% |
+-----+-----+-----+
+-----+-----+-----+
| Active Sessions: 18  | Last Backup: 2h ago | Pending Updates: 1    |
+-----+-----+-----+
```

Table: Access Controls

text

[Access Controls] [Feature Management] [Maintenance]

+-----+

+-----+-----+-----+

| Total Roles: 6 | Active Users: 32 | Last Change: Apr 25|

+-----+-----+-----+

+-----+

| TABLE NAME: ACCESS CONTROLS |

+-----+

[Add New Role] [Edit Permissions] [View Audit Logs] [Deactivate User]

Sorting Options:

1. Role Name (A-Z/Z-A)

2. Last Updated (Recent-Old)

3. Permission Level (Admin > Operations > Support)

Filtering Options:

1. Role Type: Super Admin, Operations, Support, Affiliate

2. Permission Level: Read, Write, Full Access

3. Status: Active, Disabled

Table Entries:

Role Name

| Description

| Assigned Users

| Last Updated

| Status

Super Admin

| Full access

| 2

| Apr 25, 2025

| Active

Operations

| Limited ops access

| 5

| Apr 20, 2025

| Active

Table: Feature Management

text



[Access Controls] [Feature Management] [Maintenance]

+-----+		
+-----+-----+-----+		
Features Enabled: 12	Features in Beta: 2	Last Update: Apr 20
+-----+-----+-----+		

[Enable/Disable Features] [Roll Out Updates] [Manage Feature Flags] [View Usage Analytics]

- Sorting Options:
- 1. Feature Name (A-Z/Z-A)
 - 2. Usage Rate (High-Low)
 - 3. Last Updated (Recent-Old)

- Filtering Options:
- 1. Status: Enabled, Disabled, Beta
 - 2. Feature Category: Security, User Management, Billing
 - 3. A/B Test Group: Control, Variant

Table Entries:

Feature Name	Status	Usage Rate	Last Updated	Category

Emergency Access	Enabled	95%	Apr 20, 2025	Security
Trustee Conversion	Enabled	78%	Apr 18, 2025	User Mgmt
Family Plan (Beta)	Beta	N/A	Apr 10, 2025	User Mgmt
Affiliate Dashboard	Enabled	85%	Apr 15, 2025	Billing

Table: Maintenance

text

[Access Controls] [Feature Management] [Maintenance]

+-----+

+-----+-----+-----+

| Last Backup: 2h ago | Next Maintenance: May 2 | Uptime: 99.98% |

+-----+-----+-----+

[Schedule Maintenance] [Run Backup Now] [View Backup Logs] [Optimize Performance]

Sorting Options:
1. Scheduled Date (Soonest-Latest)
2. Task Type (Backup > Patch > Optimization)
3. Duration (Shortest-Longest)

Filtering Options:
1. Task Type: Backup, Security Patch, Performance Optimization
2. Status: Completed, Scheduled, In Progress
3. Impact Level: High, Medium, Low

Table Entries:

Task Name

| Status

| Scheduled Date

| Last Performed

| Impact

Database Backup

| Completed

| May 2, 2025

| Apr 29, 2025

| High

Performance Check

| Scheduled

| May 2, 2025

| Apr 25, 2025

| Medium

Security Patch

| In Progress

| N/A

| Apr 28, 2025

| High

Access Controls

Comprehensive user role and permission management for all system users (admin team, operations, support, affiliates). Include audit logs of permission changes, session management, and security policy enforcement.

Feature Management

Interface for enabling/disabling platform features, rolling out updates, and managing feature flags for testing. Include A/B testing tools and usage analytics for feature adoption.

Maintenance

System maintenance scheduling, backup management, and performance optimization tools. Include notification management for planned downtime and emergency maintenance procedures.

6. Emergency Access

- Pending Requests
- Access Logs
- Protocol Settings

Super Admin Sidebar (Emergency Access Section)

text

+-----+

| SUPER ADMIN DASHBOARD |

+-----+

| Sidebar Options |

|-----|

| 6. Emergency Access |

| - Pending Requests |

| - Access Logs |

| - Protocol Settings |

+-----+

Emergency Access Dashboard Cards

text

+-----+

+-----+-----+-----+

| Pending Requests: 3 | Avg Approval Time: 18 min | Urgent (SLA <15m): 1 |

+-----+-----+-----+

+-----+-----+-----+

| Total Accesses (This Month): 24 | Last Protocol Update: Apr 20 | Escalations: 2 |

+-----+-----+-----+

[Pending Requests] [Access Logs] [Protocol Settings]

Table: Pending Requests

text

[Pending Requests] [Access Logs] [Protocol Settings]

+-----+

+-----+-----+-----+

| Pending: 3 | Urgent: 1 | Avg Time Left: 22m|

+-----+-----+-----+

+-----+

| TABLE NAME: PENDING REQUESTS |

+-----+

[Verify Request] [Approve Access] [Deny Access] [Contact Requestor] [Escalate to Support Team]

Sorting Options:

1. Time Left (Urgent-Least Urgent)

2. Request Date (Recent-Old)

3. Verification Status (Pending > Approved > Denied)

Filtering Options:

1. Reason: Medical, Legal, Financial

2. Verification Method: OTP, ID Proof, Manual Review

3. Status: Pending, Approved, Denied

4. SLA: <15 min, 15-30 min, >30 min

Table Entries:

Request ID	Requestor Name	User Name	Reason	Time Left	Status
EA001	Sanjay Gupta	Ramesh Gupta	Medical	14 min	Pending
EA002	Anita Sharma	Raj Sharma	Financial	28 min	Pending
EA003	Meera Patel	Vikram Patel	Legal	1h 12min	Pending

Table: Access Logs

text



[Pending Requests] [Access Logs] [Protocol Settings]

+-----+
+-----+-----+-----+
| Total Accesses: 24 | Most Accessed: Health Docs | Last Access: Apr 28 |
+-----+-----+-----+

[Filter by Date Range] [Search by User/Requestor] [Export Logs] [View Details]

Sorting Options:

- 1. Access Date (Recent-Old)
- 2. Data Accessed (A-Z/Z-A)
- 3. Duration (Longest-Shortest)

Filtering Options:

- 1. Approving Admin: Select by name
- 2. Access Type: Emergency, Standard
- 3. Data Category: Health, Financial, Legal

Table Entries:

Log ID	Requestor Name	User Name	Data Accessed	Approved By
Date & Time				
AL001	Priya Mehta	Anil Mehta	Insurance Documents	S. Kumar
Apr 28, 2025, 10:15 AM				
AL002	Rahul Verma	Sunil Verma	Health Records	P. Singh
Apr 27, 2025, 03:45 PM				

Table: Protocol Settings

text

[Pending Requests] [Access Logs] [Protocol Settings]

+-----+

+-----+

| Last Updated: Apr 20 | Escalation Timer: 15m | Verification: OTP+ID |

+-----+

[Edit Verification Rules] [Update Approval Workflow] [Set Escalation Timers]

[Customize Notifications]

Sorting Options:

1. Setting Name (A-Z/Z-A)

2. Last Updated (Recent-Old)

Filtering Options:

1. Setting Type: Verification, Workflow, Notification, Escalation

2. Last Updated: Last 7 days, Last 30 days

Table Entries:

Setting Name

| Current Value

| Last Updated

Verification Method

| OTP + ID Verification

| Apr 20, 2025

Approval Workflow

| Single Admin Approval

| Apr 18, 2025

Escalation Timer

| 15 minutes

| Apr 15, 2025

Notifications

| Email + SMS Alerts

| Apr 10, 2025

Pending Requests

Queue of active emergency access requests with verification status, request details, and countdown timers for SLA compliance. Include verification tools, communication templates, and approval workflows.

Access Logs

Comprehensive audit trail of all emergency access grants, including requestor information, verification methods used, data accessed, and approving administrator. Include filtering and export capabilities for compliance reporting.

Protocol Settings

Configuration interface for emergency access rules, verification requirements, and approval workflows. Include customization of notification settings, documentation requirements, and escalation procedures.

7. Reports

- Executive Summary
- User Analytics
- Team Performance

text

```
+-----+
|          SUPER ADMIN DASHBOARD          |
+-----+
| Sidebar Options                          |
|-----|
| 7. Reports                              |
|   - Executive Summary                   |
|   - User Analytics                      |
|   - Team Performance                    |
+-----+
```

Reports Dashboard Cards

text



```
+-----+
+-----+-----+-----+
| Total Users: 1,245   | MRR: ₹1,30,000   | Churn Rate: 5%   |
+-----+-----+-----+
+-----+-----+-----+
| Avg Engagement: 78%  | Support CSAT: 4.7 | Affiliate Conv.: 28%|
+-----+-----+-----+
```

Table: Executive Summary

text



[Executive Summary] [User Analytics] [Team Performance]

+-----+			
+-----+-----+-----+			
ARR (This Year): ₹15L	Growth: 12% YoY	Top Plan: Basic	
+-----+-----+-----+			

[Generate Report] [Export to PDF/Excel] [Schedule Auto-Reports] [Share with Stakeholders]

- Sorting Options:
- 1. Metric Name (A-Z/Z-A)
 - 2. Current Value (High-Low)
 - 3. Growth Rate (High-Low)

- Filtering Options:
- 1. Metric Type: Revenue, Users, Churn
 - 2. Time Period: Weekly, Monthly, Quarterly, Yearly

Table Entries:

Metric	Current Value	Change (MoM)	Change (YoY)

Total Revenue	₹1,30,000	▲ 4%	▲ 12%
Total Users	1,245	▲ 8%	▲ 25%
Active Trials	83	▼ 3%	▲ 15%

Table: User Analytics

text

[Executive Summary] [User Analytics] [Team Performance]

+-----+

+-----+

| Active Users: 1,000 | Avg Retention: 91%| Churn Risk: 5% |

+-----+

[Filter by Plan Type] [Segment Users] [Export Data] [Run Churn Prediction]

Sorting Options:

1. Retention Rate (High-Low)

2. Feature Adoption (High-Low)

3. Cohort Size (Large-Small)

Filtering Options:

1. Cohort: Trial Users, Paid Users, Inactive Users

2. Feature: Document Upload, Nominee Setup, Emergency Access

3. Geography: Metro, Tier 2/3 Cities

Table Entries:

User ID | Name | Plan Type | Engagement | Last Active |

Churn Probability

U001 | Priya Sharma | Advanced Plan | High (85%) | Apr 28, 2025| Low (5%)

U002 | Rahul Verma | Basic Plan | Medium(65%)| Apr 27, 2025|

Medium (25%)

U003 | Ananya Patel | Trial | Low (40%) | Apr 25, 2025|

Table: Team Performance

text

[Executive Summary] [User Analytics] [Team Performance]

+-----+

+-----+-----+-----+

| Support SLA: 95% | Ops Efficiency: 90%| Affiliate Conv.: 28%|

+-----+-----+-----+

[Compare Teams] [View Individual Metrics] [Set Performance Benchmarks] [Export Team Data]

Sorting Options:

1. Team Name (A-Z/Z-A)

2. Avg Resolution Time (Fastest-Slowest)

3. CSAT Score (High-Low)

4. Efficiency (%) (High-Low)

Filtering Options:

1. Team: Support, Operations, Affiliate

2. Role: Agent, Manager, Affiliate Tier

3. Time Period: Weekly, Monthly, Quarterly

Table Entries:

+-----+

Team Name | Member Count | Avg Resolution | CSAT Score | Efficiency

+-----+

Support Team | 10 | 3.5 hrs | 4.7/5 | 95%

Operations Team | 5 | N/A | N/A | 90%

Affiliate Team | 50 | N/A | N/A | 28% Conv.

Executive Summary

High-level business performance reports designed for stakeholder presentations. Include key metrics, growth trends, and strategic insights with exportable formats and presentation-ready visualizations.

User Analytics

In-depth analysis of user behavior, engagement patterns, and feature adoption. Include cohort analysis, retention metrics, and predictive models for churn prevention.

Team Performance

Comparative analysis of team efficiency metrics across support, operations, and affiliate channels. Include goal tracking, historical trends, and resource utilization insights.

8. Settings

Super Admin Sidebar (Settings Section)

text

+-----+

| SUPER ADMIN DASHBOARD |

+-----+

| Sidebar Options |

|-----|

| 8. Settings |

| - Personal Account Settings |

| - Notification Preferences |

| - Interface Customization |

| - Security Settings |

| - Session Controls |

+-----+

Settings Dashboard Cards

text

+-----+

+-----+-----+

| Profile Complete: 100%| 2FA: Enabled | Active Sessions: 3 |

+-----+

+-----+

| Last Login: Apr 28 | Notifications: On | Theme: Dark |

+-----+

Table: Personal Account Settings

text

[Personal Account] [Notifications] [Interface] [Security] [Sessions]

+-----+

+-----+-----+-----+

| Name: John Doe | Email: john@ex.com | Role: Super Admin |

+-----+-----+-----+

[Edit Profile] [Change Password] [Configure 2FA] [Deactivate Account]

Sorting Options:

1. Field Name (A-Z/Z-A)

2. Last Updated (Recent-Old)

Filtering Options:

1. Completion Status: Complete, Incomplete

2. 2FA Status: Enabled, Disabled

Table Entries:

+-----+

Field Name | Current Value | Last Updated | Actions

+-----+

Name | John Doe | Apr 10, 2025 | [Edit]

Email | john@ex.com | Apr 10, 2025 | [Edit]

Role | Super Admin | N/A | N/A

Two-Factor Auth | Enabled | Apr 15, 2025 | [Disable]

+-----+

Table: Notification Preferences

text

[Personal Account] [Notifications] [Interface] [Security] [Sessions]

+-----+

+-----+

| System Alerts: On | Weekly Summary: On | Emergency: On |

+-----+

[Enable/Disable Notifications] [Customize Channels] [Set Frequency]

[Test Settings]

Sorting Options:

1. Notification Type (A-Z/Z-A)

2. Status (Enabled > Disabled)

3. Frequency (Immediate > Weekly)

Filtering Options:

1. Channel: Email, SMS, Push

2. Status: Enabled, Disabled

3. Frequency: Immediate, Daily, Weekly

Table Entries:

Notification Type

| Status

| Channel

| Frequency

| Actions

System Alerts

| Enabled

| Email + SMS

| Immediate

| [Edit]

Weekly Summary

| Enabled

| Email

| Weekly

| [Edit]

Emergency Requests

| Enabled

| Push

| Immediate

| [Edit]

Marketing Updates

| Disabled

| N/A

| N/A

| [Enable]

Table: Interface Customization

text

[Personal Account] [Notifications] [Interface] [Security] [Sessions]

+-----+

+-----+-----+-----+

| Theme: Dark | Layout: Default | Sidebar: Expanded |

+-----+-----+-----+

[Select Layout] [Change Theme] [Customize Sidebar] [Reset to Default]

Sorting Options:

1. Setting Name (A-Z/Z-A)

2. Last Updated (Recent-Old)

Filtering Options:

1. Theme: Light, Dark

2. Layout: Default, Compact, Custom

Table Entries:

Setting Name | Current Value | Last Updated | Actions

Theme | Dark | Apr 20, 2025 | [Change]

Layout | Default | Apr 20, 2025 | [Edit]

Sidebar | Expanded | Apr 20, 2025 | [Collapse]

Table: Security Settings

text

[Personal Account] [Notifications] [Interface] [Security] [Sessions]

+-----+

+-----+-----+-----+

| 2FA: Enabled | Security Logs: 0 | IP Whitelist: Set |

+-----+-----+-----+

[Update Security Qs] [Enable IP Whitelist] [View Logs] [Set Password Policy]

Sorting Options:

1. Setting Name (A-Z/Z-A)

2. Last Updated (Recent-Old)

Filtering Options:

1. 2FA Status: Enabled, Disabled

2. IP Whitelist: Set, Not Set

Table Entries:

Setting Name | Current Value | Last Updated | Actions

2FA | Enabled | Apr 15, 2025 | [Disable]

Security Questions | Set | Apr 10, 2025 | [Update]

IP Whitelist | Set | Apr 18, 2025 | [Edit]

Password Policy | Strong | Apr 10, 2025 | [Edit]

Table: Session Controls

text

[Personal Account] [Notifications] [Interface] [Security] [Sessions]

+-----+

+-----+-----+-----+

| Active Sessions: 3 | Last Login: Apr 28 | Force Logout: No |

+-----+-----+-----+

[View Active Sessions] [Terminate Session] [Force Logout All]

Sorting Options:
1. Session Start (Newest-Oldest)
2. Location (A-Z/Z-A)

Filtering Options:
1. Device Type: Desktop, Mobile
2. Location: City/Country

Table Entries:

Session ID	Device	Location	Start Time	Actions
S001	Desktop	Chennai, India	Apr 28, 2025 9:00	[Terminate]
S002	Mobile	Delhi, India	Apr 28, 2025 8:30	[Terminate]
S003	Desktop	Mumbai, India	Apr 27, 2025 19:10	[Terminate]

Personal account settings, notification preferences, and interface customization options. Include security settings, two-factor authentication management, and session controls.

Operations Interface

1. Dashboard (Home)

Operational overview showing user acquisition metrics, campaign performance, and affiliate activity. Include task prioritization widgets and goal tracking visualizations.

Operations Sidebar (Dashboard Section)

text



```
+-----+
|                OPERATIONS DASHBOARD                |
+-----+
| Sidebar Options                                     |
|-----|
| 1. Dashboard                                       |
|   - Home                                           |
|                                                     |
| 2. User Management                                 |
|   - New Users                                     |
|   - Trial Users                                    |
|   - Conversion Tracking                           |
|                                                     |
| 3. Affiliate Program                               |
|   - Affiliate Directory                           |
|   - Referral Codes                               |
|   - Commission Management                         |
|   - Marketing Materials                           |
|                                                     |
| 4. Campaigns                                       |
|   - Active Campaigns                             |
|   - Campaign Builder                             |
|   - Schedule Manager                             |
|   - Performance Analytics                         |
|                                                     |
| 5. Trustee & Nominee                               |
|   - Conversion Opportunities                       |
|   - Relationship Analytics                         |
|                                                     |
| 6. Reports                                         |
|   - User Growth                                   |
|   - Affiliate Performance                         |
|   - Campaign Effectiveness                       |
|                                                     |
| 7. Settings                                       |
+-----+
```

Dashboard Cards

text

+-----+

+-----+-----+-----+

| New Users: 150 | Active Trials: 83 | Conversion Rate: 25% |

+-----+-----+-----+

+-----+-----+-----+

| Affiliates: 50 | Campaigns Running: 6 | Storage Used: 68% |

+-----+-----+-----+

User Acquisition Table

text

[User Acquisition] [Affiliate Performance] [Campaign Performance] [Storage & System Health]

+-----+

+-----+

| New Users: 150 | Trials: 83 | Paid Conversions: 42 |

+-----+

[Send Welcome Email] [Assign Onboarding Campaign] [Export User Data]

Sorting Options:

1. Name (A-Z/Z-A)

2. Sign-up Date (Newest-Oldest)

3. Referral Source (Affiliate > Organic > Paid Ads)

Filtering Options:

1. Referral Source: Affiliate, Organic, Paid Ads

2. Onboarding Status: Completed, In Progress, Not Started

3. Sign-up Date: Last 7 days, Last 30 days

Table Entries:

User ID	Name	Email	Referral Source	Onboarding Status
U001	Priya Sharma	priya@example.com	Affiliate	Completed
U002	Rahul Verma	rahul@example.com	Organic	In Progress

Affiliate Performance Table

```
text
[User Acquisition] [Affiliate Performance] [Campaign Performance] [Storage &
System Health]

+-----+
+-----+-----+-----+
| Affiliates: 50   | Active: 40       | Avg Conv. Rate: 28% |
+-----+-----+-----+

[Add New Affiliate] [View Performance Metrics] [Export Affiliate Data]

Sorting Options:
1. Total Sign-ups (High-Low)
2. Conversion Rate (High-Low)
3. Commission Earned (High-Low)

Filtering Options:
1. Status: Active, Pending, Suspended
2. Tier: Gold, Silver, Bronze

Table Entries:
-----
Affiliate ID | Name           | Total Sign-ups | Conversion Rate (%) | Status
-----
A001         | Priya Sharma   | 28              | 32.1%                | Active
A002         | Rahul Verma    | 23              | 28.7%                | Active
-----
```

Campaign Performance Table

text



[User Acquisition] [Affiliate Performance] [Campaign Performance] [Storage & System Health]

+-----+
+-----+-----+-----+
| Campaigns: 6 | Best CTR: 28% | Avg Conv.: 12% |
+-----+-----+-----+

[Create New Campaign] [Edit Campaign] [Pause Campaign] [Export Performance Data]

- Sorting Options:
- 1. Start Date (Newest-Oldest)
 - 2. CTR (High-Low)
 - 3. Conversions (High-Low)

- Filtering Options:
- 1. Channel: Email, Social Media, Paid Ads
 - 2. Status: Active, Paused, Ended

Table Entries:

Campaign ID	Name	Channel	CTR	Conversions	Status

C001	Family Security Plan	Email	28%	12.5%	Active
C002	Emergency Planning	Social Media	22%	10.2%	Active

Storage & System Health Table

text



[User Acquisition] [Affiliate Performance] [Campaign Performance] [Storage & System Health]

+-----+			
+-----+-----+-----+			
Storage Used: 68%	Uptime: 99.98%	Alerts: 1	
+-----+-----+-----+			

[View Storage Details] [Optimize Storage] [View System Logs]

- Sorting Options:
- 1. Storage Used (High-Low)
 - 2. Uptime (High-Low)
 - 3. Alerts (Most Recent)

- Filtering Options:
- 1. Alert Type: Storage, Security, Performance
 - 2. Status: Active, Resolved

Table Entries:

Metric	Value	Status	Last Updated

Storage Used	68%	Warning	Apr 28, 2025
Uptime	99.98%	Normal	Apr 28, 2025
Security Alert	1	Active	Apr 28, 2025

2. User Management

- New Users
- Trial Users
- Conversion Tracking

User Management Tab

Sidebar

text

2. User Management

- New Users
- Trial Users
- Conversion Tracking

Cards

text

+-----+-----+-----+
| New Users: 150 | Trials: 83 | Paid Converts: 42 |
+-----+-----+-----+

[New Users] [Trial Users] [Conversion Tracking]

New Users Table

text

[New Users] [Trial Users] [Conversion Tracking]

+-----+

| Total New Users: 150 | Avg Engagement: 75% | Top Source: Affiliate |

+-----+

[Send Welcome Email] [Assign Onboarding Campaign] [Export User Data]

Sorting Options:

- Name (A-Z/Z-A)
- Sign-up Date (Newest-Oldest)
- Referral Source (Affiliate > Organic > Paid Ads)

Filtering Options:

- Referral Source: Affiliate, Organic, Paid Ads
- Onboarding Status: Completed, In Progress, Not Started
- Sign-up Date: Last 7/30 days

Table Entries:

+-----+

User ID	Name	Email	Referral Source	Onboarding Status
U001	Priya Sharma	priya@example.com	Affiliate	Completed
U002	Rahul Verma	rahul@example.com	Organic	In Progress

+-----+

Trial Users Table

text



[New Users] [Trial Users] [Conversion Tracking]

+-----+
| Active Trials: 83 | Expiring Soon: 12 | Conversion Rate: 25% |
+-----+

[Send Trial Expiry Reminder] [Extend Trial Period] [Assign Conversion Campaign]
[Export Trial Data]

- Sorting Options:
- Trial Expiry Date (Soonest-Latest)
 - Conversion Probability (High > Medium > Low)
 - Engagement Score (High-Low)

- Filtering Options:
- Days Left: 1-3, 4-7, >7
 - Feature Usage: Document Uploads, Nominee Setup
 - Conversion Probability: High (>60%), Medium (30-60%), Low (<30%)

Table Entries:

User ID	Name	Trial Expiry Date	Conversion Probability

T001	Vikram Singh	Apr 3, 2025	High (75%)
T002	Neha Sharma	Apr 5, 2025	Medium (50%)

Conversion Tracking Table

text

[New Users] [Trial Users] [Conversion Tracking]

+-----+

| Funnel: 1200 Visits > 150 Sign-ups > 83 Trials > 42 Paid |

+-----+

[View Funnel Report] [Export Conversion Data] [Run Optimization Analysis]

Sorting Options:

- Funnel Stage (Visitors > Sign-ups > Trials > Paid)

- Drop-off Rate (High-Low)

Filtering Options:

- Segment: By Source, By Campaign, By Plan

Table Entries:

+-----+

Stage | Users Count | Drop-off Rate

+-----+

Visitors | 1,200 | N/A

Sign-ups | 150 | 87.5%

Active Trials | 83 | 44.7%

Paid Converts | 42 | 49.4%

+-----+

New Users

Detailed view of recently registered users with onboarding completion status, referral source, and initial engagement metrics. Include tools for welcome communications, onboarding assistance, and early engagement boosting.

Trial Users

Management interface for users in trial period with expiration tracking, feature usage analysis, and conversion opportunity scoring. Include segmentation tools for targeted communications and conversion incentives.

Conversion Tracking

Analytics dashboard for monitoring conversion rates across different user segments, referral sources, and campaign touchpoints. Include funnel visualization, drop-off analysis, and optimization recommendations.

3. Affiliate Program

- Affiliate Directory
- Referral Codes
- Commission Management
- Marketing Materials

Affiliate Program Tab

Sidebar

text

3. Affiliate Program

- Affiliate Directory
- Referral Codes
- Commission Management
- Marketing Materials

Cards

text

+-----+-----+-----+

| Affiliates: 50 | Active: 40 | Avg Conv. Rate: 28% |

+-----+-----+-----+

Affiliate Directory Table

text



[Affiliate Directory] [Referral Codes] [Commission Management]
[Marketing Materials]

+-----+
| Affiliates: 50 | Active: 40 | Top Performer: Priya Sharma |
+-----+

[Add New Affiliate] [Approve Application] [Deactivate Affiliate] [Export
Affiliate Data]

- Sorting Options:
- Total Sign-ups (High-Low)
 - Conversion Rate (High-Low)
 - Commission Earned (High-Low)

- Filtering Options:
- Status: Active, Pending, Suspended
 - Tier: Gold, Silver, Bronze

Table Entries:

Affiliate ID	Name	Total Sign-ups	Conversion Rate (%)	Status

A001	Priya Sharma	28	32.1%	Active
A002	Rahul Verma	23	28.7%	Active

Referral Codes Table

text

[Affiliate Directory] [Referral Codes] [Commission Management]
[Marketing Materials]

+-----+
| Codes Issued: 120 | Active Codes: 80 | Top Code: PRIYA25 |
+-----+

[Generate New Code] [Track Code Usage] [Deactivate Code] [Export Referral Data]

Sorting Options:
- Sign-ups Generated (High-Low)
- Conversion Rate (%) (High-Low)

Filtering Options:
- Status: Active, Expired, Pending

Table Entries:

+-----+
Code | Assigned To | Sign-ups | Conversion Rate (%) | Status
+-----+
PRIYA25 | Priya Sharma | 28 | 32.1% | Active
RAHUL50 | Rahul Verma | 23 | 28.7% | Active
+-----+

Commission Management Table

text

[Affiliate Directory] [Referral Codes] [Commission Management]

[Marketing Materials]

+-----+

| Total Paid: ₹24,000 | Pending: ₹6,200 | Affiliates Paid: 38 |

+-----+

[Approve Payout] [Adjust Commission] [Export Payment History] [Schedule Payment]

Sorting Options:

- Payout Date (Soonest-Latest)

- Commission Amount (High-Low)

Filtering Options:

- Payment Status: Paid, Pending, Failed

- Affiliate Tier: Bronze, Silver, Gold

Table Entries:

Affiliate ID | Name | Commission (₹) | Payment Status

A001 | Priya Sharma | ₹8,400 | Paid (Mar 29)

A002 | Rahul Verma | ₹6,200 | Pending

Affiliate Directory

Comprehensive directory of all active and pending affiliates with performance metrics, communication history, and account status. Include profile management, direct messaging, and performance review tools.

Referral Codes

Management system for creating, distributing, and tracking referral codes. Include usage analytics, fraud detection, and code deactivation capabilities with batch operations for efficiency.

Commission Management

Interface for reviewing commission calculations, approving payouts, and managing payment schedules. Include adjustment tools for special cases, commission dispute resolution, and payment verification workflows.

Marketing Materials

Library of approved marketing assets, templates, and guidelines for affiliate use. Include approval workflows for custom materials, usage tracking, and performance analytics by material type.

4. Campaigns

- Active Campaigns
- Campaign Builder
- Schedule Manager
- Performance Analytics

Campaigns Tab

Sidebar

text



4. Campaigns

- Active Campaigns
- Campaign Builder
- Schedule Manager
- Performance Analytics

Cards

text

+-----+-----+-----+

| Campaigns: 6 | Best CTR: 28% | Avg Conv.: 12% |

+-----+-----+-----+

[Active Campaigns] [Campaign Builder] [Schedule Manager] [Performance Analytics]

Active Campaigns Table

text

[Active Campaigns] [Campaign Builder] [Schedule Manager] [Performance Analytics]

+-----+

| Campaigns Running: 6 | Avg CTR: 22% | Top: Family Security Plan |

+-----+

[Create New Campaign] [Edit Campaign] [Pause Campaign] [Export Performance Data]

Sorting Options:

- Start Date (Newest-Oldest)

- CTR (High-Low)

- Conversions (High-Low)

Filtering Options:

- Channel: Email, Social Media, Paid Ads

- Status: Active, Paused, Ended

Table Entries:

+-----+

Campaign ID | Name | Channel | CTR | Conversions | Status

+-----+

C001 | Family Security Plan | Email | 28% | 12.5% | Active

C002 | Emergency Planning | Social Media | 22% | 10.2% | Active

+-----+

Schedule Manager Table

text



[Active Campaigns] [Campaign Builder] [Schedule Manager] [Performance Analytics]

+-----+
| Scheduled: 8 | Conflicts: 0 | Next Launch: Apr 30 |
+-----+

[Add to Calendar] [Edit Schedule] [Export Calendar]

Sorting Options:

- Launch Date (Soonest-Latest)
- Channel (A-Z/Z-A)

Filtering Options:

- Status: Scheduled, In Progress, Completed

Table Entries:

Campaign ID	Name	Launch Date	Channel	Status

C001	Family Security Plan	Apr 30, 2025	Email	Scheduled
C002	Emergency Planning	May 5, 2025	Social Media	Scheduled

Active Campaigns

Overview of all running campaigns with real-time performance metrics, audience reach, and conversion tracking. Include campaign adjustment tools, A/B test monitoring, and early termination options for underperforming initiatives.

Campaign Builder

Comprehensive tool for creating new marketing campaigns with audience targeting, messaging templates, delivery scheduling, and success metric definition. Include preview functionality and approval workflows.

Schedule Manager

Calendar interface for planning and coordinating campaign launches, follow-up communications, and promotional events. Include conflict detection, resource allocation, and automated scheduling tools.

Performance Analytics

In-depth analysis of campaign effectiveness with conversion attribution, ROI calculations, and comparative performance metrics. Include segmentation analysis and optimization recommendations.

5. Trustee & Nominee

- Conversion Opportunities
- Relationship Analytics

Trustee & Nominee Tab

Sidebar

text

5. Trustee & Nominee

- Conversion Opportunities
- Relationship Analytics

Cards

text

+-----+-----+-----+			
Trustees: 342	Nominees: 586	Verified: 200	
+-----+-----+-----+			

Conversion Opportunities Table

text



[Conversion Opportunities] [Relationship Analytics]

+-----+
| High Potential: 48 | Avg Conversion: 38% | Last Campaign: Apr 25 |
+-----+

[Send Invitation] [Assign Campaign] [Export Data]

- Sorting Options:
- Conversion Probability (High > Medium > Low)
 - Verification Status (Verified > Pending)
 - Age (Youngest-Oldest)

- Filtering Options:
- Relationship: Spouse, Child, Parent, Other
 - Age Group: <25, 26-40, >40
 - Verification: Verified, Pending, Not Started

Table Entries:

Trustee ID	Name	Relationship	Age	Verification	Conversion Prob.

T001	Priya Sharma	Spouse	35	Verified	High (75%)
T002	Rahul Verma	Child	25	Not Verified	Medium (50%)

Relationship Analytics Table

text



[Conversion Opportunities] [Relationship Analytics]

+-----+

| Most Common: Spouse | Avg Age: 38 | Weekly Contacts: 22 |

+-----+

[Filter by Relationship] [Export Insights] [View Network]

- Sorting Options:
- Relationship Type (A-Z/Z-A)
 - Age (Youngest-Oldest)
 - Communication Frequency (High-Low)

- Filtering Options:
- Relationship: Spouse, Child, Parent, Other
 - Frequency: Weekly, Monthly, Quarterly

Table Entries:

User ID	Trustee/Nominee Name	Relationship	Age	Frequency

U001	Priya Sharma	Spouse	35	Weekly
U002	Rahul Verma	Child	25	Monthly

Conversion Opportunities

Targeted view of high-potential trustees and nominees who could become primary users. Include demographic analysis, relationship context, and conversion probability scoring with campaign assignment capabilities.

Relationship Analytics

Visualization and analysis of relationship networks between users, trustees, and nominees. Include relationship type distribution, verification completion rates, and communication pattern insights.

6. Reports

- User Growth
- Affiliate Performance
- Campaign Effectiveness

Reports Tab

Sidebar

text

6. Reports

- User Growth
- Affiliate Performance
- Campaign Effectiveness

Cards

text

+-----+-----+-----+

| New Users: 150 | Retention: 91% | Top Channel: Affiliate |

+-----+-----+-----+

[User Growth] [Affiliate Performance] [Campaign Effectiveness]

User Growth Table

text

[User Growth] [Affiliate Performance] [Campaign Effectiveness]

+-----+

| New Users: 150 | Growth Rate: 8% | Retention: 91% |

+-----+

[Generate Report] [Export Data] [Segment by Channel]

Sorting Options:

- Month (Chronological)

- New Users (High-Low)

- Retention Rate (High-Low)

Filtering Options:

- Channel: Affiliate, Organic, Paid Ads

- Time Period: Weekly, Monthly, Quarterly

Table Entries:

+-----+

Month | New Users | Retention | Top Channel

+-----+

January | 150 | 85% | Organic

February | 160 | 87% | Affiliate

March | 170 | 90% | Paid Ads

+-----+

Affiliate Performance Table

text



[User Growth] [Affiliate Performance] [Campaign Effectiveness]

+-----+
| Affiliates: 50 | Top Earner: Priya Sharma | Avg Conv.: 28% |
+-----+

[Generate Affiliate Report] [Export Data] [View Top Performers]

Sorting Options:

- Total Sign-ups (High-Low)
- Conversion Rate (High-Low)
- Commission Earned (High-Low)

Filtering Options:

- Status: Active, Pending, Suspended
- Tier: Gold, Silver, Bronze

Table Entries:

Affiliate ID	Name	Sign-ups	Conv. Rate	Commission (₹)

A001	Priya Sharma	28	32.1%	₹8,400
A002	Rahul Verma	23	28.7%	₹6,200

Campaign Effectiveness Table

text



[User Growth] [Affiliate Performance] [Campaign Effectiveness]

+-----+
| Campaigns: 6 | Avg ROI: 145% | Top: Family Security Plan |
+-----+

[Generate Campaign Report] [Export Data] [Run ROI Analysis]

- Sorting Options:
- ROI (High-Low)
 - CTR (High-Low)
 - Conversions (High-Low)

- Filtering Options:
- Channel: Email, Social Media, Paid Ads
 - Status: Active, Completed

Table Entries:

Campaign ID	Name	Channel	ROI	CTR	Conversions

C001	Family Security Plan	Email	145%	28%	12.5%
C002	Emergency Planning	Social Media	120%	22%	10.2%

User Growth

Detailed analysis of user acquisition trends, growth rate by channel, and projection modeling. Include cohort retention analysis, geographic distribution, and seasonal pattern identification.

Affiliate Performance

Comprehensive reporting on affiliate program effectiveness, top performer analysis, and commission liability projections. Include comparative metrics, trend analysis, and optimization opportunities.

Campaign Effectiveness

Performance analysis of all marketing initiatives with ROI calculations, audience response metrics, and conversion attribution. Include multi-touch attribution modeling and campaign comparison tools.

7. Settings

Settings Tab

Sidebar

text

7. Settings

- Workflow Configuration
- Notification Preferences
- Dashboard Customization
- Collaboration Settings

Cards

text

+-----+-----+-----+
| Workflows: 4 | Notifications: On | Layout: Default |
+-----+-----+-----+

[Workflow Config] [Notifications] [Dashboard Customization] [Collaboration]

Workflow Configuration Table

text

[Workflow Config] [Notifications] [Dashboard Customization] [Collaboration]

+-----+

| Workflows: 4 | Active: 3 | Last Updated: Apr 20 |

+-----+

[Edit Workflow] [Add New Workflow] [Export Workflow Settings]

Sorting Options:

- Workflow Name (A-Z/Z-A)

- Last Updated (Recent-Old)

Filtering Options:

- Status: Enabled, Disabled

Table Entries:

+-----+

Workflow Name | Status | Last Updated

+-----+

Trial Conversion Workflow | Enabled | Apr 20, 2025

Campaign Approval | Enabled | Apr 18, 2025

Affiliate Onboarding | Disabled | Apr 15, 2025

+-----+

Configuration options for operational workflows, notification preferences, and default parameters. Include report export formats, dashboard customization, and collaboration settings.

Support Interface

1. Dashboard (Home)

Support-focused overview showing ticket queue status, personal performance metrics, and priority items requiring immediate attention. Include quick access to common tools and recent user interactions.

Dashboard Cards

text



```
+-----+-----+-----+
| Open Tickets: 24 | SLA Breaches: 2 | My CSAT: 4.8/5 |
+-----+-----+-----+
| Resolved Today: 15| Avg Res. Time: 3.5h| Escalated: 4 |
+-----+-----+-----+
```

2. Ticket Management

- Open Tickets
- My Assigned Tickets
- Resolved Tickets
- Escalated Tickets

Ticket Management Tab

[Open Tickets] [My Assigned Tickets] [Resolved Tickets] [Escalated Tickets]

Cards

text



```
+-----+-----+-----+
| Open: 24 | High Priority: 5 | SLA Breach: 2 |
+-----+-----+-----+
```

Open Tickets Table

text



[Open Tickets] [My Assigned Tickets] [Resolved Tickets] [Escalated Tickets]

[Assign to Self] [Escalate Ticket] [Add Internal Notes]

Sorting Options:

- Priority (High > Medium > Low)
- SLA Timer (Urgent-Least Urgent)
- Created Date (Newest-Oldest)

Filtering Options:

- Issue Type: Account Access, Payment, Document Upload
- Priority: Critical, High, Medium, Low
- SLA Status: Breached, On Track

Table Entries:

Ticket ID	User Name	Issue Type	Priority	SLA Timer	Status

T001	Priya Sharma	Account Access	High	14 min	Open
T002	Rahul Verma	Payment Failed	Medium	45 min	Open

My Assigned Tickets Table

text



[Open Tickets] [My Assigned Tickets] [Resolved Tickets] [Escalated Tickets]

[Update Status] [Send User Response] [Request Info] [Resolve Ticket]

Sorting Options:

- Priority (High > Low)
- SLA Timer (Urgent-Least Urgent)
- Assigned Date (Newest-Oldest)

Filtering Options:

- Status: In Progress, Awaiting Response
- Issue Type: All categories

Table Entries:

Ticket ID	User Name	Issue Type	Priority	SLA Timer	Status

T003	Neha Sharma	Nominee Add	High	1 hr	Awaiting Response
T004	Vikram Singh	Trial Extension	Medium	3 hrs	

Resolved Tickets Table

text

[Open Tickets] [My Assigned Tickets] [Resolved Tickets] [Escalated Tickets]

[View Details] [Export Resolved Tickets] [Reopen Ticket]

- Sorting Options:
- Resolved Date (Newest-Oldest)
 - Resolution Time (Fastest-Slowest)
 - CSAT Score (High-Low)

- Filtering Options:
- Issue Type
 - CSAT Rating

Table Entries:

Ticket ID	User Name	Issue Type	Resolved Date	CSAT

T005	Rakesh Gupta	Password Reset	Apr 25, 2025	5
T006	Meera Patel	Subscription	Apr 24, 2025	4

Escalated Tickets Table

text



[Open Tickets] [My Assigned Tickets] [Resolved Tickets] [Escalated Tickets]

[View Escalation Reason] [Contact Escalation Point] [Resolve and Close]

Sorting Options:

- Escalation Reason (A-Z)
- Created Date (Newest-Oldest)

Filtering Options:

- Priority: Critical, High

Table Entries:

Ticket ID	User Name	Escalation Reason	Priority	Status

E001	Sanjay Gupta	Verification Delay	Critical	Escalated
E002	Anita Sharma	Complex Issue	High	Escalated

Open Tickets

Queue management interface displaying all unresolved tickets with priority indicators, SLA timers, and category tags. Include batch assignment tools, priority adjustment, and filtering by multiple parameters.

My Assigned Tickets

Personalized view of tickets assigned to the current agent with status tracking, response deadlines, and user context information. Include quick action tools for common resolutions and template responses.

Resolved Tickets

Archive of completed support interactions with resolution details, time metrics, and satisfaction ratings. Include search functionality, trend analysis, and reopening capabilities for follow-up issues.

Escalated Tickets

Specialized queue for high-priority or complex issues requiring additional attention. Include escalation reason tracking, stakeholder notification tools, and resolution protocol guidance.

3. User Support

- User Lookup
- Quick Actions
- Help Resources

User Support Tab

[User Lookup] [Quick Actions] [Help Resources]

Cards

text

+-----+-----+-----+
| Users Searched: 32| Most Used Action: Reset Password | Avg Res. Time: 12m |
+-----+-----+-----+

User Lookup Table

text

[User Lookup] [Quick Actions] [Help Resources]

[Search User] [View Profile] [Access Subscription Details] [Send Communication]

Sorting Options:

- Name (A-Z/Z-A)
- Last Active (Recent-Least Recent)
- Plan Type (A-Z/Z-A)

Filtering Options:

- Plan Type: Trial, Basic, Advanced
- Status: Active, Inactive

Table Entries:

User ID	Name	Email	Plan Type	Last Active
U001	Priya Sharma	priya@example.com	Advanced	Apr 28, 2025
U002	Rahul Verma	rahul@example.com	Basic	Apr 27, 2025

Quick Actions Table

text



[User Lookup] [Quick Actions] [Help Resources]

[Reset Password] [Extend Trial] [Resend Verification] [Upgrade Plan]

Sorting Options:

- Action Type (A-Z/Z-A)
- Frequency (High-Low)

Filtering Options:

- Action Type
- Date

Table Entries:

Action Type	Description	Frequency (Today)

Password Reset	Reset user password	12
Trial Extension	Extend trial period	8
Verification Resend	Resend verification	15
Plan Changes	Upgrade/Downgrade plan	5

Help Resources Table

text



[User Lookup] [Quick Actions] [Help Resources]

[Search Resource] [Share Resource] [Generate Guide]

Sorting Options:

- Resource Name (A-Z/Z-A)
- Usage Count (High-Low)

Filtering Options:

- Category: Account, Billing, Troubleshooting

Table Entries:

Resource Name	Category	Usage Count	Last Shared

Add a Trustee	Account Setup	25	Apr 28, 2025
Document Upload Guide	Troubleshooting	18	Apr 27, 2025

User Lookup

Comprehensive search tool for finding user accounts with instant access to profile details, subscription status, and interaction history. Include quick action buttons for common support tasks.

Quick Actions

Library of one-click support actions for common requests such as password resets, trial extensions, and verification resends. Include usage tracking and customization options for individual support agents.

Help Resources

Curated collection of support articles, video tutorials, and guided workflows for assisting users with common questions. Include search functionality and the ability to share resources directly with users.

4. Emergency Handling

- Verification Queue
- Contact Templates
- Escalation Protocols

Emergency Handling Tab

[Verification Queue] [Contact Templates] [Escalation Protocols]

Cards

text

+-----+-----+-----+

| Pending: 3 | Urgent: 1 | Avg Approval: 18m |

+-----+-----+-----+

Verification Queue Table

text



[Verification Queue] [Contact Templates] [Escalation Protocols]

[Verify Request] [Approve Access] [Deny Access] [Request Info] [Escalate]

Sorting Options:

- Time Left (Urgent-Least Urgent)
- Request Date (Newest-Oldest)

Filtering Options:

- Reason: Medical, Legal, Financial
- Status: Pending, Approved, Denied

Table Entries:

Request ID	Requestor Name	User Name	Reason	Time Left	Status

E001	Priya Sharma	Ramesh Gupta	Medical	14 min	Pending
E002	Rahul Verma	Sunil Verma	Financial	28 min	Pending

Contact Templates Table

text

[Verification Queue] [Contact Templates] [Escalation Protocols]

[Select Template] [Customize Template] [Send Notification]

Sorting Options:

- Template Name (A-Z/Z-A)
- Usage Count (High-Low)

Filtering Options:

- Purpose: Approve, Request Info, Deny

Table Entries:

Template Name	Purpose	Last Used	Usage Count
Emergency Access Grant	Approve	Apr 28, 2025	25
Info Request	Request Info	Apr 27, 2025	18

Escalation Protocols Table

text



[Verification Queue] [Contact Templates] [Escalation Protocols]

[View Protocol] [Contact Escalation Point] [Mark as Resolved]

Sorting Options:

- Protocol Name (A-Z/Z-A)
- Last Updated (Recent-Old)

Filtering Options:

- Trigger: SLA Breach, Verification Delay

Table Entries:

Protocol Name	Trigger Condition	Last Updated
---------------	-------------------	--------------

Critical SLA Breach	SLA < 15 min	Apr 20, 2025
---------------------	--------------	--------------

High-Priority Escalation	Verification > 1 hr	Apr 15, 2025
--------------------------	---------------------	--------------

Verification Queue

Specialized interface for processing emergency access requests with verification checklists, identity confirmation tools, and guided decision-making protocols. Include escalation paths and documentation tools.

Contact Templates

Library of pre-approved communication templates for different emergency scenarios, ensuring consistent, compliant responses. Include customization fields and approval workflows for new templates.

Escalation Protocols

Step-by-step guidance for handling various emergency situations with decision trees, contact information for key stakeholders, and documentation requirements. Include time-sensitive notification tools.

5. Knowledge Base

- Common Solutions
- Template Library
- Feature Guides

Knowledge Base Tab

[Common Solutions] [Template Library] [Feature Guides]

Cards

text 

+-----+-----+-----+			
Solutions: 120	Templates: 30	Guides: 15	
+-----+-----+-----+			

Common Solutions Table

text



[Common Solutions] [Template Library] [Feature Guides]

[Add Solution] [Edit Solution] [Mark as Used]

Sorting Options:

- Title (A-Z/Z-A)
- Usage Count (High-Low)
- Effectiveness (High-Low)

Filtering Options:

- Category: Troubleshooting, Billing, Account

Table Entries:

Solution ID	Title	Category	Usage	Effectiveness

CS001	Password Reset Guide	Troubleshooting	120	95%
CS002	Add a Trustee	Account Setup	85	90%

Template Library Table

text



[Common Solutions] [Template Library] [Feature Guides]

[Add Template] [Edit Template] [Duplicate Template]

Sorting Options:

- Title (A-Z/Z-A)
- Usage Count (High-Low)

Filtering Options:

- Purpose: Onboarding, Retention, Billing

Table Entries:

Template ID	Title	Purpose	Usage	Last Used

TL001	Welcome Email	Onboarding	150	Apr 28, 2025
TL002	Trial Expiry Reminder	Retention	120	Apr 27, 2025

Feature Guides Table

text



[Common Solutions] [Template Library] [Feature Guides]

[Add Guide] [Update Guide] [Share Guide]

Sorting Options:

- Title (A-Z/Z-A)
- Usage Count (High-Low)

Filtering Options:

- Category: Troubleshooting, Features

Table Entries:

Guide ID	Title	Category	Usage	Last Shared
FG001	Upload Documents Guide	Troubleshooting	110	Apr 28, 2025
FG002	Subscription Management	Features	75	Apr 27, 2025

Common Solutions

Repository of verified solutions to frequent issues, organized by category and searchable by keywords. Include usage statistics, effectiveness ratings, and continuous improvement workflows.

Template Library

Collection of response templates for various support scenarios, categorized by issue type and tone. Include personalization variables, usage tracking, and effectiveness metrics.

Feature Guides

Detailed documentation of platform features with troubleshooting tips, limitation notes, and use case examples. Include visual aids, step-by-step instructions, and frequently asked questions.

6. Reports

- My Performance
- Team Metrics
- User Satisfaction

Reports Tab

[My Performance] [Team Metrics] [User Satisfaction]

Cards

text

+-----+-----+-----+

| Tickets Resolved: 45 | Avg Res. Time: 3.5h | CSAT: 4.8/5 |

+-----+-----+-----+

My Performance Table

text



[My Performance] [Team Metrics] [User Satisfaction]

[Generate Report] [Export Data] [Set Personal Goals]

Sorting Options:

- Tickets Resolved (High-Low)
- Avg Resolution Time (Fastest-Slowest)
- CSAT Score (High-Low)

Filtering Options:

- Time Period: This Week, This Month
- Issue Type

Table Entries:

Metric	Value	Change (WoW)	Change (MoM)
Tickets Resolved	45	▲ 12%	▲ 8%
Avg Res. Time	3.5 hrs	▼ 10%	▼ 5%
CSAT Score	4.8/5	▲ 0.2	▲ 0.1

Team Metrics Table

text



[My Performance] [Team Metrics] [User Satisfaction]

[View Team Comparison] [Export Data] [Send Feedback]

Sorting Options:

- Tickets Resolved (High-Low)
- Avg Resolution Time (Fastest-Slowest)
- CSAT Score (High-Low)

Filtering Options:

- Team Member
- Time Period

Table Entries:

Team Member	Tickets Resolved	Avg Res. Time	CSAT Score

Priya Sharma	50	3.2 hrs	4.9/5
Rahul Verma	40	3.8 hrs	4.7/5

User Satisfaction Table

text



[My Performance] [Team Metrics] [User Satisfaction]

[View Feedback] [Export Data] [Generate Sentiment Analysis]

Sorting Options:

- Feedback Rating (High-Low)
- Issue Type (A-Z/Z-A)

Filtering Options:

- Issue Type
- Rating: Positive, Neutral, Negative

Table Entries:

Ticket ID	User Name	Issue Type	Feedback	Comments

T001	Priya Sharma	Account Access	5	"Quick and helpful!"
T002	Rahul Verma	Payment Failed	4	"Resolved but delayed."

My Performance

Personal productivity and quality metrics with historical trends, goal tracking, and peer benchmarking. Include areas for improvement, recognition of achievements, and skill development recommendations.

Team Metrics

Collaborative performance dashboard showing team-wide efficiency, quality, and workload distribution. Include shift coverage analysis, peak time identification, and resource allocation insights.

User Satisfaction

Analysis of customer feedback, satisfaction scores, and sentiment trends across different issue types and resolution approaches. Include verbatim feedback and improvement recommendations.

7. Settings

Settings Tab

[Personal Preferences] [Notification Settings] [Workflow Customization]
[Interface Personalization]

Cards

text

+-----+-----+-----+

| 2FA: Enabled | Last Login: Apr 28| Notifications: On |

+-----+-----+-----+

Personal Preferences Table

text

[Personal Preferences] [Notification Settings] [Workflow Customization]
[Interface Personalization]

[Edit Profile] [Change Password] [Configure 2FA]

Sorting Options:
- Field Name (A-Z/Z-A)
- Last Updated (Recent-Old)

Filtering Options:
- 2FA Status: Enabled, Disabled

Table Entries:

Field Name | Current Value | Last Updated

Name | Priya Sharma | Apr 10, 2025
Email | priya@example.com | Apr 10, 2025
2FA | Enabled | Apr 15, 2025

Notification Settings Table

text

[Personal Preferences] [Notification Settings] [Workflow Customization]

[Interface Personalization]

[Enable/Disable Notifications] [Customize Channels] [Set Frequency]

Sorting Options:

- Notification Type (A-Z/Z-A)
- Status (Enabled > Disabled)

Filtering Options:

- Channel: Email, SMS, Push

Table Entries:

Notification Type	Status	Channel	Frequency
Ticket Updates	Enabled	Email + SMS	Immediate
Weekly Summary	Enabled	Email	Weekly

Workflow Customization Table

text



[Personal Preferences] [Notification Settings] [Workflow Customization]
[Interface Personalization]

[Add Workflow] [Edit Workflow] [Set Priority]

Sorting Options:

- Workflow Name (A-Z/Z-A)
- Last Updated (Recent-Old)

Filtering Options:

- Status: Enabled, Disabled

Table Entries:

Workflow Name	Status	Last Updated
---------------	--------	--------------

Ticket Assignment	Enabled	Apr 20, 2025
-------------------	---------	--------------

SLA Breach Escalation	Enabled	Apr 18, 2025
-----------------------	---------	--------------

Affiliate Interface

1. Dashboard (Home)

Performance-focused overview showing earnings, conversion rates, and sign-up trends. Include goal progress, payout schedule, and quick access to marketing resources.

+-----+ AFFILIATE DASHBOARD +-----+	
1. Dashboard	
2. My Referrals	
- Active Referral Codes	
- Sign-up Tracking	
- Conversion Analytics	
3. Earnings	
- Commission History	
- Payment Schedule	
- Commission Calculator	
4. Marketing Center	
- Marketing Materials	
- Email Templates	
- Social Media Assets	
- Landing Page Links	
5. Reports	
- Performance Analytics	
- Payout History	
6. Community	
- Success Stories	
- Strategy Tips	
- Announcements	
7. Settings	
+-----+	

Dashboard (Home)

Cards

text

+-----+-----+-----+

| Earnings (MTD): ₹8,400 | Conversion Rate: 28% | Paid Sign-ups: 24 |

+-----+-----+-----+

| Next Payout: Apr 30 | Active Codes: 3 | Goal Progress: 80% |

+-----+-----+-----+

2. My Referrals

- Active Referral Codes
- Sign-up Tracking
- Conversion Analytics

My Referrals Tab

[Active Referral Codes] [Sign-up Tracking] [Conversion Analytics]

Cards

text

+-----+-----+-----+

| Active Codes: 3 | Total Sign-ups: 51| Avg Conv. Rate: 28%|

+-----+-----+-----+

Active Referral Codes Table

text

[Active Referral Codes] [Sign-up Tracking] [Conversion Analytics]

[Generate New Code] [Track Code Usage] [Deactivate Code] [Export Referral Data]

Sorting Options:

- Sign-ups Generated (High-Low)
- Conversion Rate (%) (High-Low)
- Status (Active > Expired > Pending)

Filtering Options:

- Status: Active, Expired, Pending
- Assigned To

Table Entries:

Code	Assigned To	Sign-ups	Conv. Rate (%)	Status
PRIYA25	Priya Sharma	28	32.1%	Active
RAHUL50	Rahul Verma	23	28.7%	Active

Sign-up Tracking Table

text

[Active Referral Codes] [Sign-up Tracking] [Conversion Analytics]

[Filter by Date] [Export Sign-up Data] [Analyze Conversion Trends]

Sorting Options:

- Sign-up Date (Newest-Oldest)
- Plan Type (Trial > Basic > Advanced)
- Conversion Status (Converted > Not Converted)

Filtering Options:

- Plan Type: Trial, Basic, Advanced
- Conversion Status: Converted, Not Converted
- Date Range

Table Entries:

User ID	Name	Email	Plan Type	Sign-up Date	Status
U001	Priya Sharma	priya@example.com	Advanced	Apr 25, 2025	Converted
U002	Rahul Verma	rahul@example.com	Basic	Apr 24, 2025	Converted
U003	Ananya Patel	ananya@example.com	Trial	Apr 22, 2025	Not Converted

Conversion Analytics Table

text



[Active Referral Codes] [Sign-up Tracking] [Conversion Analytics]

[Generate Funnel Report] [Export Conversion Data] [Optimize Referral Strategy]

Sorting Options:

- Funnel Stage (Clicks > Sign-ups > Trials > Paid)
- Drop-off Rate (High-Low)

Filtering Options:

- Code
- Campaign
- Time Period

Table Entries:

Stage	Users Count	Drop-off Rate
-------	-------------	---------------

Link Clicks	1,200	N/A
Sign-ups	150	87.5%
Active Trials	83	44.7%
Paid Converts	42	49.4%

Active Referral Codes

Management interface for all assigned referral codes with usage statistics, conversion rates, and expiration dates. Include code regeneration tools, tracking link creation, and performance comparison.

Sign-up Tracking

Detailed view of all users who registered using affiliate's referral codes, showing sign-up date, plan selection, and conversion status. Include filtering options and aggregate statistics.

Conversion Analytics

In-depth analysis of conversion funnel from link click to paid subscription, with drop-off points, conversion time analysis, and comparison against platform averages. Include optimization suggestions.

3. Earnings

- Commission History
- Payment Schedule
- Commission Calculator

Earnings Tab

[Commission History] [Payment Schedule] [Commission Calculator]

Cards

text

+-----+-----+-----+

| Total Earnings: ₹24,000 | Pending Payouts: ₹6,200 | Avg Commission: ₹350 |

+-----+-----+-----+

| Next Payment: Apr 30 | Last Paid: Mar 29 | Earnings Goal: 80% |

+-----+-----+-----+

Commission History Table

text



[Commission History] [Payment Schedule] [Commission Calculator]

[Filter by Date] [Export Commission Data] [Request Payout]

Sorting Options:

- Date (Newest-Oldest)
- Amount (High-Low)
- Status (Paid > Pending > Failed)

Filtering Options:

- Status: Paid, Pending, Failed
- Referral Code
- Date Range

Table Entries:

Date	Code	Plan Type	Sign-ups	Commission (₹)	Status
Apr 29, 2025	PRIYA25	Advanced	5	₹2,500	Paid
Apr 28, 2025	RAHUL50	Basic	3	₹900	Pending

Payment Schedule Table

text

[Commission History] [Payment Schedule] [Commission Calculator]

[View Upcoming Payments] [Update Payment Method] [Download Tax Docs]

Sorting Options:

- Payment Date (Soonest-Latest)

- Amount (High-Low)

- Status (Scheduled > Paid)

Filtering Options:

- Status: Scheduled, Paid

- Payment Method: UPI, Bank Transfer, PayPal

Table Entries:

Payment Date	Amount (₹)	Status	Method	Actions
Apr 30, 2025	₹6,200	Scheduled	UPI	[Update]
Mar 29, 2025	₹8,400	Paid	Bank Transfer	[Download]

Commission Calculator Table

text

[Commission History] [Payment Schedule] [Commission Calculator]

[Estimate Earnings] [Set Target Goals] [Save Calculation]

Sorting Options:

- Scenario (Current > Improved > Aggressive)
- Projected Earnings (High-Low)

Filtering Options:

- Conversion Rate (%)
- Plan Type

Table Entries:

Scenario	Conv. Rate (%)	Est. Sign-ups	Projected Earnings (₹)
Current Performance	25	50	₹12,500
Improved	30	60	₹15,000
Aggressive Target	35	70	₹17,500

Commission History

Comprehensive record of all commission earnings with calculation breakdowns, status updates, and payment confirmations. Include filtering by date range, payment status, and referral source.

Payment Schedule

Calendar view of upcoming commission payments with amount projections, processing status, and historical payment reliability metrics. Include payment method management and tax documentation.

Commission Calculator

Interactive tool for estimating potential earnings based on different conversion scenarios, plan types, and volume projections. Include goal setting functionality and strategy recommendations.

4. Marketing Center

- Marketing Materials
- Email Templates
- Social Media Assets
- Landing Page Links

Marketing Center Tab

[Marketing Materials] [Email Templates] [Social Media Assets] [Landing Page Links]

Cards

text

+-----+-----+-----+

| Materials: 12 | Email Templates: 5| Social Assets: 8 |

+-----+-----+-----+

| Top Performer: Banner1 | Avg CTR: 18% | Last Updated: Apr 25|

+-----+-----+-----+

Marketing Materials Table

text

[Marketing Materials] [Email Templates] [Social Media Assets] [Landing Page Links]

[Download Material] [View Usage Stats] [Request Custom Asset]

Sorting Options:

- Material Name (A-Z/Z-A)
- Usage Count (High-Low)
- Performance (CTR High-Low)

Filtering Options:

- Type: Banner, Video, Guide
- Status: Approved, Pending

Table Entries:

Material Name	Type	Usage Count	CTR	Status
Banner1	Banner	50	22%	Approved
Video1	Video	30	18%	Approved

Email Templates Table

text



[Marketing Materials] [Email Templates] [Social Media Assets] [Landing Page Links]

[Use Template] [Customize] [Export Performance]

Sorting Options:

- Template Name (A-Z/Z-A)
- Usage Count (High-Low)
- Open Rate (High-Low)

Filtering Options:

- Status: Approved, Pending

Table Entries:

Template Name	Usage Count	Open Rate	Status

Welcome Series	120	45%	Approved
Trial Reminder	90	38%	Approved

Social Media Assets Table

text



[Marketing Materials] [Email Templates] [Social Media Assets] [Landing Page Links]

[Download Asset] [View Usage] [Request Custom Asset]

Sorting Options:

- Asset Name (A-Z/Z-A)
- Usage Count (High-Low)

Filtering Options:

- Platform: Facebook, Instagram, Twitter

Table Entries:

Asset Name	Platform	Usage Count	Status

FB Banner	Facebook	30	Approved
IG Story	Instagram	20	Approved

Landing Page Links Table

text



[Marketing Materials] [Email Templates] [Social Media Assets] [Landing Page Links]

[Copy Link] [View Performance] [A/B Test]

- Sorting Options:
- Link Name (A-Z/Z-A)
 - Conversion Rate (High-Low)

- Filtering Options:
- Status: Active, Inactive

Table Entries:

Link Name	URL	Conversion Rate	Status
PRIYA25 Landing	/lp/priya25	28.5%	Active
SpringPromo	/lp/spring	24.2%	Active

Marketing Materials

Library of approved promotional assets including banners, email templates, social media graphics, and video content. Include usage guidelines, performance data, and customization options.

Email Templates

Collection of pre-approved email campaigns with customization fields, performance metrics, and compliance guidelines. Include A/B testing capabilities and delivery scheduling.

Social Media Assets

Gallery of platform-approved social media content with caption suggestions, hashtag recommendations, and posting guidelines. Include size variations for different platforms and engagement analytics.

Landing Page Links

Management of personalized landing pages with customization options, performance tracking, and A/B testing capabilities. Include conversion optimization tips and traffic source analysis.

5. Reports

- Performance Analytics
- Payout History

Reports Tab

[Performance Analytics] [Payout History]

Cards

text

+-----+-----+-----+

| Sign-ups (MTD): 51| Conv. Rate: 28% | Earnings: ₹8,400 |

+-----+-----+-----+

| Top Code: PRIYA25 | Last Payout: Mar 29| Pending: ₹6,200 |

+-----+-----+-----+

Performance Analytics Table

text



[Performance Analytics] [Payout History]

[Generate Report] [Export Data] [Compare Trends]

Sorting Options:

- Total Sign-ups (High-Low)
- Conversion Rate (High-Low)
- Earnings (High-Low)

Filtering Options:

- Date Range
- Referral Code

Table Entries:

Metric	Current Value	Change (MoM)	Change (YoY)
Total Sign-ups	51	▲ 8%	▲ 15%
Conversion Rate	28.5%	▲ 2.5%	▲ 3.0%
Total Earnings (₹)	₹8,400	▲ 18%	▲ 25%

Payout History Table

text



[Performance Analytics] [Payout History]

[Download Receipt] [Export Payout Data] [Filter by Status]

- Sorting Options:
- Payment Date (Newest-Oldest)
 - Amount (High-Low)
 - Status (Paid > Pending)

- Filtering Options:
- Status: Paid, Pending
 - Payment Method

Table Entries:

Payment Date	Amount (₹)	Status	Method	Actions
Apr 30, 2025	₹6,200	Scheduled	UPI	[Download]
Mar 29, 2025	₹8,400	Paid	Bank Transfer	[Download]

Performance Analytics

Comprehensive analysis of affiliate marketing effectiveness with trend identification, audience insights, and competitive benchmarking. Include channel effectiveness comparison and ROI calculations.

Payout History

Detailed financial records of all commission payments with transaction IDs, payment methods, and tax information. Include exportable reports for accounting purposes and historical earnings visualization.

6. Community

- Success Stories
- Strategy Tips
- Announcements

Community Tab

[Success Stories] [Strategy Tips] [Announcements]

Cards

text

+-----+-----+-----+		
Stories: 12	Tips: 8	Announcements: 3
+-----+-----+-----+		
Featured: 2	Most Used Tip: Email Campaigns	Upcoming: Webinar
+-----+-----+-----+		

Success Stories Table

text

[Success Stories] [Strategy Tips] [Announcements]

[Submit Story] [Share Story] [Request Feedback]

Sorting Options:

- Title (A-Z/Z-A)

- Featured Status (Featured > Not Featured)

Filtering Options:

- Status: Featured, Submitted

Table Entries:

Story ID	Title	Submitted By	Featured
SS001	How I Increased CTR by 20%	Priya Sharma	Yes
SS002	My Journey to Top Affiliate	Rahul Verma	No

Strategy Tips Table

text



[Success Stories] [Strategy Tips] [Announcements]

[Save Tip] [Request Advice] [Export Tips]

Sorting Options:

- Title (A-Z/Z-A)
- Usage Count (High-Low)

Filtering Options:

- Category: Email, Social Media

Table Entries:

Tip ID	Title	Category	Usage

ST001	Best Practices for Email	Email Marketing	120
ST002	Optimize Social Ads	Social Media	85

Announcements Table

text



[Success Stories] [Strategy Tips] [Announcements]

[Mark as Read] [Export Announcements]

Sorting Options:

- Date (Newest-Oldest)
- Status (Unread > Read)

Filtering Options:

- Status: Unread, Read

Table Entries:

Announcement ID	Title	Date	Status

AN001	New Referral Features	Apr 28, 2025	Unread
AN002	Upcoming Webinar	Apr 25, 2025	Read

Success Stories

Collection of case studies and testimonials from successful affiliates with strategy insights, best practices, and achievement recognition. Include submission tools for sharing personal success stories.

Strategy Tips

Curated advice from top-performing affiliates and the operations team on effective promotion strategies, target audience identification, and conversion optimization. Include seasonal recommendations.

Announcements


Official communications about program changes, new features, promotional opportunities, and important deadlines. Include notification settings and archival search functionality.

7. Settings

Settings Tab

[Account Settings] [Notification Preferences] [Interface Customization] [Privacy Settings]

Cards

text 

+-----+-----+-----+		
2FA: Enabled	Payment: UPI	Notifications: On
+-----+-----+-----+		
Last Login: Apr 28	Data Sharing: On	Theme: Dark
+-----+-----+-----+		

Account Settings Table

text

[Account Settings] [Notification Preferences] [Interface Customization]
[Privacy Settings]

[Edit Profile] [Change Password] [Update Payment Preferences]

Sorting Options:

- Field Name (A-Z/Z-A)
- Last Updated (Recent-Old)

Filtering Options:

- 2FA Status: Enabled, Disabled

Table Entries:

Field Name	Current Value	Last Updated	Actions
Name	Priya Sharma	Apr 10, 2025	[Edit]
Email	priya@example.com	Apr 10, 2025	[Edit]
Payment Method	UPI	Apr 15, 2025	[Update]
2FA	Enabled	Apr 20, 2025	[Disable]

Notification Preferences Table

text



[Account Settings] [Notification Preferences] [Interface Customization]
[Privacy Settings]

[Enable/Disable Notifications] [Customize Channels] [Set Frequency]

Sorting Options:

- Notification Type (A-Z/Z-A)
- Status (Enabled > Disabled)

Filtering Options:

- Channel: Email, SMS, Push

Table Entries:

Notification Type	Status	Channel	Frequency

Campaign Updates	Enabled	Email + SMS	Immediate
Weekly Summary	Enabled	Email	Weekly
Payout Alerts	Enabled	Push	Immediate

Interface Customization Table

text



[Account Settings] [Notification Preferences] [Interface Customization]
[Privacy Settings]

[Change Theme] [Customize Layout] [Reset to Default]

Sorting Options:

- Setting Name (A-Z/Z-A)
- Last Updated (Recent-Old)

Filtering Options:

- Theme: Light, Dark

Table Entries:

Setting Name	Current Value	Last Updated	Actions

Theme	Dark	Apr 20, 2025	[Change]
Layout	Default	Apr 20, 2025	[Edit]

Privacy Settings Table

text



[Account Settings] [Notification Preferences] [Interface Customization]
[Privacy Settings]

[Manage Data Sharing] [Export Data] [Delete Account]

Sorting Options:

- Setting Name (A-Z/Z-A)
- Last Updated (Recent-Old)

Filtering Options:

- Data Sharing: Enabled, Disabled

Table Entries:

Setting Name	Current Value	Last Updated

Data Sharing with Partners	Enabled	Apr 15, 2025
Data Retention Policy	12 Months	Apr 10, 2025
Personalized Ads	Enabled	Apr 12, 2025

Account management interface for personal details, payment preferences, and communication settings. Include notification frequency controls, two-factor authentication, and privacy preferences.

This detailed breakdown provides comprehensive guidance for designers to understand the purpose, content requirements, and functional needs of each sidebar section and subsection across all user interfaces.