

## VISION (re-stated cleanly)

You want a **complete hierarchical dealer management ecosystem** where:

- **Super Admin** is absolute head of the company
- **Technical Admin** manages permissions
- **Regional Admin** manages all users + dealers inside their region
- **Managers (Area, Territory, Regional Manager)** each manage a slice of the hierarchy
- **Dealer Admin + Dealer Staff** form the lowest operational layer
- Workflows like:
  - Sales Orders
  - Invoices
  - Payments
  - Inventory updates
  - Campaigns & Promotions
  - Reportsfollow this hierarchy elegantly.

You also want **teams, roles, permissions, region/area/territory scoping, and regional dashboards, and map-level filtering**.

Perfect. Let's translate this into a structured feature plan.

---

### THE FEATURES YOU SHOULD PROCEED WITH

the **exact features**, grouped into modules, no confusion, no vagueness.

---

#### 1. SUPER ADMIN MODULE

Super Admin

##### 1.1 User Creation (All Roles)

- Create any user:  
Super Admin → Technical Admin / Regional Admin / Sales Manager / Dealer Admin / Staff
- Assign region, area, territory, dealer during creation

- Assign manager for hierarchy
- Assign to sales team

## **1.2 Team Management**

- Create *Sales Teams*
- Add *Sales Managers* to teams
- Add Dealer Admins / Dealer Staff under managers
- View team performance (sales, orders, payments, invoices)

## **1.3 Campaigns & Promotions**

- Create campaigns
- Assign campaigns to:
  - All dealers
  - Dealers by region/territory
  - Individual dealer
- Track campaign performance
- Campaign analytics dashboard

## **1.4 Region-Wise Reports**

Super Admin sees:

- Region → Area → Territory → Dealer → Staff
- Region-wise sales volume
- Region-wise outstanding payments
- Region-wise orders
- Region-wise invoices
- Region-wise heatmap on map view
- Manager performance
- Dealer performance

## **1.5 Full Visibility**

Super Admin can view:

- Every order

- Every invoice
  - Every payment
  - Every dealer
  - Every document
  - Every pricing approval
  - Every stock/inventory movement
  - Every user activity
- 

## **2. TECHNICAL ADMIN MODULE**

Technical Admin = **permissions authority**

### **2.1 Permission Assignment**

- Assign permissions role-wise
- Assign permissions user-wise
- Create custom permission bundles
- Update global permissions
- Disable or restrict dangerous permissions
- Manage API-level restrictions

### **2.2 Feature Toggles**

Toggle features like:

- Pricing approvals
- Order flow
- Campaigns
- Manager hierarchy
- Geo-location dealer validation
- Inventory auto adjustment

### **2.3 System Management**

- Maintain logs
- Maintain system config

- Maintain scheduled jobs
- Manage imports & data corrections

(This role is already partly built in your repo. Just needs extension.)

---

### 3. REGIONAL ADMIN MODULE

Regional Admin = **mini super admin for ONE region**

#### 3.1 Region-Specific User Management

Regional admin can:

- Create users **ONLY inside their region**
- Assign area & territory managers
- Assign dealers to managers
- Create dealer admins & dealer staff
- Control permissions for users inside the region (except super admin)

#### 3.2 Regional Reports

Regional admin sees:

- Region sales
- Region outstanding
- Region invoices
- Dealers in the region
- Managers in the region
- Territory performance
- Region map (pins only for that region)
- Region campaign performance
- Region inventory availability
- Region overdue tasks/payments
- Region-level order pipelines

#### 3.3 Regional Approvals

Regional admin can approve:

- Pricing (stage 2 of pricing)
  - Orders (stage 3 of approval)
  - Payments
  - Invoices if required
- 

## **4. MANAGER MODULES (Area, Territory, Regional Manager)**

Managers have progressively smaller slice of the hierarchy.

### **4.1 Data Scoping**

Each manager sees:

- ONLY dealers assigned to them
- ONLY staff under their assigned dealers
- Only orders/payments/invoices of their assigned dealers
- Only their territory/area on the map
- Only territory-level reports

### **4.2 Manager Dashboard**

Includes:

- Sales performance of dealers under them
  - Pending orders & payments
  - Campaign performance in their territory
  - Heatmap for their territory
  - Inventory alerts for dealers under them
  - Dealer activity logs
  - Staff performance (orders created, invoices generated)
- 

## **5. DEALER ADMIN MODULE**

### **5.1 Dealer User Management**

Dealer Admin can:

- Create dealer staff

- Assign dealer staff to specific sub-areas
- Track staff performance
- See only own dealer's invoices, orders, payments
- Approve orders generated by staff

## 5.2 Dealer Reports

- Dealer-wise sales
  - Outstanding
  - Pending payments
  - Order trend
  - Product mix
  - Campaign performance (for campaigns assigned to their dealer)
- 

## 6. DEALER STAFF MODULE

### 6.1 Operational Layer

Dealer Staff can:

- Create sales orders
- Create payment requests
- Track own orders
- Track own payments

The simplest role.

---

## 7. SALES, ORDER, PAYMENT, INVOICE, INVENTORY WORKFLOW

### 7.1 Sales Order Workflow

**Dealer Staff → Dealer Admin → Regional Manager → Regional Admin → Super Admin**

(Your backend already has partial code for this.)

### 7.2 Invoice Workflow

Triggered after final approval:

- Automatically generate invoice

- Update inventory
- Notify finance/admin

### **7.3 Payment Request Workflow**

Dealer Staff → Dealer Admin → Finance → Accounts → Super Admin (optional)

### **7.4 Inventory Workflow**

- Sales order reduces available stock
  - Invoice finalization reduces stock
  - Alerts for reorder level
  - Region level stock reports
  - Territory level stock
  - Dealer level stock
- 

## **8. CAMPAIGN & PROMOTION WORKFLOW**

### **8.1 Campaign Targets**

- Region
- Territory
- Dealer
- Team
- Individual staff

### **8.2 Analytics**

- Participation tracking
  - Lead conversion
  - Dealer engagement
  - Region-wise response
  - Territory-wise performance
  - Campaign heatmap
  - Revenue attribution
-

## 9. MAP WORKFLOW (VERY IMPORTANT FOR YOU)

### 9.1 Regional Admin Map

- Show only dealers in their region
- Show region boundaries
- Show sales heatmap for their region

### 9.2 Manager Map

- Show only managers assigned territory
- Dealer pins only inside manager's area

### 9.3 Dealer Admin Map

- Only their dealer location

### 9.4 Super Admin Map

- Global-level map
- All dealers
- All regions
- Cluster heatmap
- Region-level sales intensity
- Territory color-coded zones

---

## 10. REPORTS WORKFLOW

Reports will change based on role:

### Super Admin

All global reports

### Regional Admin

Region-only reports

### Managers

Territory/area reports

### Dealer Admin

Dealer-only reports

## **Dealer Staff**

Own orders/payments only

---

## **11. EXTRA SYSTEM FEATURES TO ADD**

To make this truly enterprise-ready:

### **11.1 Hierarchical RBAC Engine**

Middleware:

- role-based
- permission-based
- region/territory scoped
- dealer-level scoped

### **11.2 Dynamic Permission Binding**

Permissions like:

- create\_user
- approve\_order
- mark\_invoice\_paid
- access\_region\_map
- export\_reports
- manage\_inventory
- manage\_campaigns
- etc.

### **11.3 Workflow Engine**

A pipeline engine that defines:

- who approves what
- how many levels
- what happens if role changes
- retry logic
- escalation logic

## **11.4 Task & SLA Management**

- Pending approvals
  - Delayed orders
  - Escalation to upper level
  - Notification engine
  - Email/SMS/PWA notifications
- 

## **Final Summary — (Clean Blueprint)**

We are building:

**A multinational-level Dealer Management & Sales Force Automation Platform**