CA Services - Admin Panel UI Guide

Overview

This document describes the Admin Panel UI for managing CA Services with a 3-level hierarchy (Categories → Subcategories → Sub-subcategories) and bulk import functionality.

Main Navigation Structure

```
CA Services Management
├──── Categories (Level 1)
│       └──── [+ Add Category] button
├──── Subcategories (Level 2)
│       └──── [+ Add Subcategory] button
├──── Sub-subcategories (Level 3)
│       └──── [+ Add Sub-subcategory] button
└──── Bulk Import
      ├──── [Import Categories] button
      └──── [Import Subcategories] button
```

1. Categories Page

UI Layout

```
┌──────────────────────────────────────────────────────┐
│  CA Services - Categories            │                │
│  [+ Add Category]  [    Bulk Import]      │           │
├──────────────────────────────────────────────────────┤
│  GST                       │                          │
│  [Edit] [Delete] [View Subcategories]     │           │
├──────────────────────────────────────────────────────┤
│  Income Tax                   │                        │
│  [Edit] [Delete] [View Subcategories]     │           │
├──────────────────────────────────────────────────────┤
│  Company Registration             │                    │
│  [Edit] [Delete] [View Subcategories]     │           │
└──────────────────────────────────────────────────────┘
```

Add Category Modal

```
┌──────────────────────────────────────────────────────┐
│ │ Add New Category            │                       │
│ │ [×]                    │                            │
│ ├────────────────────────────────────────────────    │
│ │ Category Name: *            │                       │
│ │ [_____]        │                      │
│ │                      │                              │
│ │ Category Image URL: *          │                    │
│ │ [_____]        │                      │
│ │                      │                              │
│ │ Description:          │                             │
│ │ [_____]        │                      │
│ │                      │                              │
│ │ Display Order:          │                           │
│ │ [___] (default: 0)          │                       │
│ │                      │                              │
│ │ Status: [Active ▼]          │                       │
│ │                      │                              │
│ │ [Cancel]  [Save Category]          │               │
└──────────────────────────────────────────────────────┘
```

Required Fields: Category Name, Category Image URL

2. Subcategories Page

UI Layout

```
┌──────────────────────────────────────────────────────┐
│ │ Subcategories - GST            │                    │
│ │ [← Back to Categories]            │                 │
│ │ [+ Add Subcategory] [     Bulk Import]     │        │
│ ├────────────────────────────────────────────────    │
│ │ GST Registration            │                       │
│ │ [Edit] [Delete] [View Sub-subcategories]    │       │
│ ├────────────────────────────────────────────────    │
│ │ GST Filing            │                             │
│ │ [Edit] [Delete] [View Sub-subcategories]    │       │
│ ├────────────────────────────────────────────────    │
│ │ GST Cancellation            │                       │
│ │ [Edit] [Delete] [View Sub-subcategories]    │       │
└──────────────────────────────────────────────────────┘
```

Add Subcategory Modal

```
┌─────────────────────────────────────────────┐
│  ┌──────────────────────────────────────┐  │
│  │ Add New Subcategory            │      │  │
│  │ [×]                      │           │  │
│  ├──────────────────────────────────────┤  │
│  │ Parent Category: *            │      │  │
│  │ [GST ▼]                    │        │  │
│  │                         │           │  │
│  │ Subcategory Name: *           │      │  │
│  │ [_____]          │  │  │
│  │                         │           │  │
│  │ Subcategory Image URL: *       │     │  │
│  │ [_____]          │  │  │
│  │                         │           │  │
│  │ Description:             │          │  │
│  │ [_____]         │   │  │
│  │                         │           │  │
│  │ Display Order:             │        │  │
│  │ [___] (default: 0)          │       │  │
│  │                         │           │  │
│  │ Status: [Active ▼]          │       │  │
│  │                         │           │  │
│  │ [Cancel]  [Save Subcategory]      │   │  │
│  └──────────────────────────────────────┘  │
└─────────────────────────────────────────────┘
```

Required Fields: Parent Category, Subcategory Name, Subcategory Image URL

3. Sub-subcategories Page

UI Layout

```
┌─────────────────────────────────────────────┐
│  ┌──────────────────────────────────────┐  │
│  │ Sub-subcategories - GST Registration  │  │
│  │ [← Back to Subcategories]        │    │  │
│  │ [+ Add Sub-subcategory]         │     │  │
│  ├──────────────────────────────────────┤  │
│  │ Proprietorship            │         │  │
│  │ [Edit] [Delete] [Manage Form Schema]  │  │
│  ├──────────────────────────────────────┤  │
│  │ Partnership Firm            │        │  │
│  │ [Edit] [Delete] [Manage Form Schema]  │  │
│  ├──────────────────────────────────────┤  │
│  │ Private Limited Company         │     │  │
│  │ [Edit] [Delete] [Manage Form Schema]  │  │
│  └──────────────────────────────────────┘  │
└─────────────────────────────────────────────┘
```

Add Sub-subcategory Modal

```
┌─────────────────────────────────────────────────────────┐
│ ┌─────────────────────────────────────────────────────┐ │
│ │ Add New Sub-subcategory          |                  │ │
│ │ [×]                         |                       │ │
│ ├─────────────────────────────────────────────────────┤ │
│ │ Parent Subcategory: *            |                  │ │
│ │ [GST Registration ▼]             |                  │ │
│ │                                  |                  │ │
│ │ Sub-subcategory Name: *          |                  │ │
│ │ [_____]              |                │ │
│ │                                  |                  │ │
│ │ Sub-subcategory Image URL: *        |               │ │
│ │ [_____]              |                │ │
│ │                                  |                  │ │
│ │ Description:                     |                  │ │
│ │ [_____]              |                │ │
│ │                                  |                  │ │
│ │ Display Order:                   |                  │ │
│ │ [___] (default: 0)               |                  │ │
│ │                                  |                  │ │
│ │ Status: [Active ▼]               |                  │ │
│ │                                  |                  │ │
│ │ [Cancel]  [Save Sub-subcategory]       |            │ │
│ └─────────────────────────────────────────────────────┘ │
└─────────────────────────────────────────────────────────┘
```

Required Fields: Parent Subcategory, Sub-subcategory Name, Sub-subcategory Image URL

4. Bulk Import Feature

Bulk Import Button

Located in the top-right corner of Categories and Subcategories pages:

```
[     Bulk Import]
```

Bulk Import Modal

```
┌─────────────────────────────────────────────────────────┐
│ ┌─────────────────────────────────────────────────────┐ │
│ │ Bulk Import Categories           |                  │ │
│ │ [×]                         |                       │ │
│ ├─────────────────────────────────────────────────────┤ │
│ │ Select File:                     |                  │ │
│ │ [Choose File] No file chosen          |             │ │
│ │                                  |                  │ │
│ │ Supported formats: .xlsx, .xls, .csv     |          │ │
│ │ Max file size: 10MB              |                  │ │
│ │                                  |                  │ │
│ │ [     Download Template]              |             │ │
│ │                                  |                  │ │
│ │ [Cancel]  [Upload & Import]           |             │ │
│ └─────────────────────────────────────────────────────┘ │
└─────────────────────────────────────────────────────────┘
```

Import Results Modal

```
| Import Results              |
| [×]                         |
|─────────────────────────────────────────|
|     Successfully imported: 5        |
|     Failed: 1                 |
|                       |
| Errors:                  |
| • Row 3: Category name is required    |
|                       |
| [    Download Error Report]  [Close]   |
```

5. Form Schema Management

Form Schema Editor Page

```
| Form Schema - Proprietorship        |
| [← Back to Sub-subcategories]        |
| [Save Schema] [Preview Form]         |
|─────────────────────────────────────────|
| Sections:                |
|  ┌────────────────────────────────────┐ |
|  | Section 1: Business Details     | | |
|  | [+ Add Field]            | | |
|  |                  | | |
|  | Field 1: Business Name        | | |
|  |  Type: Text [▼]  Required: [✓]   | | |
|  |  [Edit] [Delete]          | | |
|  |                  | | |
|  | Field 2: Owner Name         | | |
|  |  Type: Text [▼]  Required: [✓]   | | |
|  |  [Edit] [Delete]          | | |
|  └────────────────────────────────────┘ |
|                       |
| [+ Add New Section]           |
```

Add Field Modal

```
┌──────────────────────────────────────────────┐
│ ┌──────────────────────────────┐             │
│ │ Add Field              │     │             │
│ │ [×]                    │     │             │
│ ├────────────────────────────────────────────┤
│ │ Field Name: *          │                   │
│ │ [businessName]           │                 │
│ │                        │                   │
│ │ Field Label: *          │                  │
│ │ [Business Name]          │                 │
│ │                        │                   │
│ │ Field Type: *           │                  │
│ │ [Text ▼]               │                   │
│ │ Options: text, email, phone, number,   │   │
│ │      date, select, textarea, file,   │     │
│ │      checkbox          │                   │
│ │                        │                   │
│ │ Placeholder:           │                   │
│ │ [Enter business name]          │           │
│ │                        │                   │
│ │ Required: [✓]          │                   │
│ │                        │                   │
│ │ Validation:            │                   │
│ │  Min Length: [__]        │                 │
│ │  Max Length: [__]          │               │
│ │  Pattern: [_____]          │            │
│ │                        │                   │
│ │ Help Text:             │                   │
│ │ [Optional helper text]       │             │
│ │                        │                   │
│ │ Section: [business_details ▼]       │      │
│ │ Display Order: [1]          │              │
│ │                        │                   │
│ │ (If Select/Checkbox)        │              │
│ │ Options:               │                   │
│ │  [+ Add Option]          │                 │
│ │  Value: [retail] Label: [Retail]     │     │
│ │                        │                   │
│ │ [Cancel]  [Save Field]       │             │
└──────────────────────────────────────────────┘
```

6. Form Entries Management

Form Entries List

```
┌─────────────────────────────────────────────────────────────────┐
│ ┌───────────────────────────────────────────────────────┐       │
│ │  Form Entries - Proprietorship        |                │       │
│ │  [← Back]  [Filter: All ▼]            |                 │       │
│ ├───────────────────────────────────────────────────────┤       │
│ │  Entry ID: ENTRY000001                |                │       │
│ │  User: Test User              |                        │       │
│ │  Status: [Submitted]          |                        │       │
│ │  Submitted: Dec 6, 2024           |                    │       │
│ │  [View Details] [Approve] [Reject]       |             │       │
│ ├───────────────────────────────────────────────────────┤       │
│ │  Entry ID: ENTRY000002                |                │       │
│ │  User: John Doe               |                        │       │
│ │  Status: [In Review]          |                        │       │
│ │  Submitted: Dec 5, 2024           |                    │       │
│ │  [View Details] [Approve] [Reject]        |            │       │
│ └───────────────────────────────────────────────────────┘       │
└─────────────────────────────────────────────────────────────────┘
```

Key UI Components

1. Add Buttons

- **Location:** Top-right of each list page
- **Style:** Primary button with "+" icon
- **Action:** Opens add modal for that level

2. Bulk Import Button

- **Location:** Next to Add button
- **Icon:**   (upload icon)
- **Action:** Opens bulk import modal

3. Action Buttons (per item)

- **Edit:** Opens edit modal with pre-filled data
- **Delete:** Shows confirmation dialog before deletion
- **View Children:** Navigates to next level (e.g., View Subcategories)

4. Breadcrumb Navigation

Home > CA Services > GST > GST Registration > Proprietorship

5. Status Badges

- **Active:** Green badge
- **Inactive:** Gray badge
- **Form Entry Status:** Color-coded badges (Draft, Submitted, In Review, Approved, Rejected)

API Integration

Add Category

```
POST /api/v1/admin/ca/categories
Body: {
 cat_name: "GST",
 cat_img: "https://example.com/gst.jpg",
 description: "GST Services",
 order: 1,
 status: 1
}
```

Add Subcategory

```
POST /api/v1/admin/ca/subcategories
Body: {
 parentCategoryId: "category_id",
 cat_name: "GST Registration",
 cat_img: "https://example.com/gst-reg.jpg",
 description: "Register for GST",
 order: 1,
 status: 1,
 level: "subcategory"
}
```

Add Sub-subcategory

```
POST /api/v1/admin/ca/sub-subcategories
Body: {
 parentCategoryId: "subcategory_id",
 cat_name: "Proprietorship",
 cat_img: "https://example.com/proprietorship.jpg",
 description: "GST Registration for Proprietorship",
 order: 1,
 status: 1,
 level: "sub_subcategory"
}
```

Bulk Import

```
POST /api/v1/ca/bulk-import/categories
Content-Type: multipart/form-data
Body: FormData with 'file' field
```

UI Best Practices

1. **Confirmation Dialogs:** Show confirmation before deleting items
2. **Loading States:** Show loading spinner during API calls
3. **Success Messages:** Display success toast after successful operations
4. **Error Handling:** Show error messages for failed operations
5. **Form Validation:** Validate forms before submission
6. **Responsive Design:** Ensure UI works on mobile devices
7. **Search & Filter:** Add search and filter options for large lists

Quick Actions Summary

Action	Button Location	Modal/Page
Add Category	Categories page	Add Category Modal
Add Subcategory	Subcategories page	Add Subcategory Modal
Add Sub-subcategory	Sub-subcategories page	Add Sub-subcategory Modal
Bulk Import Categories	Categories page	Bulk Import Modal
Bulk Import Subcategories	Subcategories page	Bulk Import Modal
Manage Form Schema	Sub-subcategory item	Form Schema Editor
View Form Entries	Sub-subcategory item	Form Entries List