

CA Services - Admin Panel UI Documentation

Overview

This document describes the Admin Panel UI structure for managing the CA Services 3-level hierarchy (Categories → Subcategories → Sub-subcategories) and their associated Form Schemas.

UI Structure

Main Dashboard

| | |
|--|--|
| CA Services Management | |
| └── Categories (Level 1) | |
| └── [Add Category] button | |
| └── Subcategories (Level 2) | |
| └── [Add Subcategory] button (requires parent category) | |
| └── Sub-subcategories (Level 3) | |
| └── [Add Sub-subcategory] button (requires parent subcategory) | |

1. Categories Management (Level 1)

UI Components

Categories List Page:

| | |
|--------------------------------------|--|
| CA Services - Categories | |
| [+ Add New Category] | |
| GST | |
| [Edit] [Delete] [View Subcategories] | |
| Income Tax | |
| [Edit] [Delete] [View Subcategories] | |
| Company Registration | |
| [Edit] [Delete] [View Subcategories] | |

Add/Edit Category Form:

| |
|-----------------------------|
| Add/Edit Category |
| Category Name: [_____] |
| Category Image URL: [_____] |
| Description: [_____] |
| Display Order: [_____] |
| Status: [Active ▼] |
| [Cancel] [Save Category] |

API Endpoints Needed

- GET /api/v1/admin/ca/categories - List all categories
- POST /api/v1/admin/ca/categories - Create category
- PUT /api/v1/admin/ca/categories/:id - Update category
- DELETE /api/v1/admin/ca/categories/:id - Delete category

Form Fields

- cat_name (required) - Category name
- cat_img (required) - Image URL
- description (optional) - Description
- order (required) - Display order (number)
- status (required) - Active/Inactive (1/0)

2. Subcategories Management (Level 2)

UI Components

Subcategories List Page:

| |
|--|
| Subcategories - GST |
| [← Back to Categories] |
| [+ Add New Subcategory] |
| GST Registration |
| [Edit] [Delete] [View Sub-subcategories] |
| GST Filing |
| [Edit] [Delete] [View Sub-subcategories] |
| GST Cancellation |
| [Edit] [Delete] [View Sub-subcategories] |

Add/Edit Subcategory Form:

| | |
|--------------------------------|--|
| Add/Edit Subcategory | |
| Parent Category: GST [▼] | |
| | |
| Subcategory Name: [_____] | |
| Subcategory Image URL: [_____] | |
| Description: [_____] | |
| Display Order: [_____] | |
| Status: [Active ▼] | |
| | |
| [Cancel] [Save Subcategory] | |

API Endpoints Needed

- GET /api/v1/admin/ca/categories/:categoryId/subcategories - List subcategories
- POST /api/v1/admin/ca/subcategories - Create subcategory
- PUT /api/v1/admin/ca/subcategories/:id - Update subcategory
- DELETE /api/v1/admin/ca/subcategories/:id - Delete subcategory

Form Fields

- parentCategoryId (required) - Parent category ID
- cat_name (required) - Subcategory name
- cat_img (required) - Image URL
- description (optional) - Description
- order (required) - Display order
- status (required) - Active/Inactive (1/0)
- level (auto-set) - Always "subcategory"

3. Sub-subcategories Management (Level 3)

UI Components

Sub-subcategories List Page:

| | |
|--------------------------------------|--|
| Sub-subcategories - GST Registration | |
| [← Back to Subcategories] | |
| [+ Add New Sub-subcategory] | |
| | |
| Proprietorship | |
| [Edit] [Delete] [Manage Form Schema] | |
| | |
| Partnership Firm | |
| [Edit] [Delete] [Manage Form Schema] | |
| | |
| Private Limited Company | |
| [Edit] [Delete] [Manage Form Schema] | |

Add/Edit Sub-subcategory Form:

| | |
|--|--|
| Add/Edit Sub-subcategory | |
| Parent Subcategory: GST Registration [▼] | |
| Sub-subcategory Name: [_____] | |
| Sub-subcategory Image URL: [_____] | |
| Description: [_____] | |
| Display Order: [_____] | |
| Status: [Active ▼] | |
| [Cancel] [Save Sub-subcategory] | |

API Endpoints Needed

- GET /api/v1/admin/ca/subcategories/:subcategoryid/sub-subcategories - List sub-subcategories
- POST /api/v1/admin/ca/sub-subcategories - Create sub-subcategory
- PUT /api/v1/admin/ca/sub-subcategories/:id - Update sub-subcategory
- DELETE /api/v1/admin/ca/sub-subcategories/:id - Delete sub-subcategory

Form Fields

- parentCategoryId (required) - Parent subcategory ID
- cat_name (required) - Sub-subcategory name
- cat_img (required) - Image URL
- description (optional) - Description
- order (required) - Display order
- status (required) - Active/Inactive (1/0)
- level (auto-set) - Always "sub_subcategory"

4. Form Schema Management

UI Components

Form Schema Editor:

| | | |
|-------------------------------|--|--|
| 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/Edit Field Modal:

| | |
|---|--|
| Add/Edit 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] | |

Add Section Modal:

| | |
|------------------------------------|--|
| Add Section | |
| Section ID: [business_details] | |
| Section Title: [Business Details] | |
| Description: [Enter business info] | |
| Display Order: [1] | |
| [Cancel] [Add Section] | |

API Endpoints Needed

- GET /api/v1/admin/ca/forms/schema/:subSubcategoryId - Get form schema
- POST /api/v1/admin/ca/forms/schema - Create/update form schema
- DELETE /api/v1/admin/ca/forms/schema/:id - Delete form schema

Field Types Supported

1. **text** - Single line text input

- 2. **email** - Email input with validation
- 3. **phone** - Phone number input
- 4. **number** - Numeric input
- 5. **date** - Date picker
- 6. **select** - Dropdown select (requires options)
- 7. **textarea** - Multi-line text input
- 8. **file** - File upload
- 9. **checkbox** - Checkbox (requires options)

5. Form Entries Management

UI Components

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 | | |

Form Entry Details:

Form Entry Details - ENTRY000001

[\[← Back\]](#)

User: Test User

Status: Submitted

Submitted: Dec 6, 2024 11:00 AM

Form Data:

Business Name: Test Business

Owner Name: Test User

Business Type: Service

Address: 123 Main St, Mumbai

Pincode: 400001

Mobile: 9876543210

Email: test@example.com

PAN: ABCDE1234F

Documents:

Aadhar Card [Download]

Address Proof [Download]

Actions:

[\[Approve\]](#) [\[Reject\]](#) [\[Request Info\]](#)

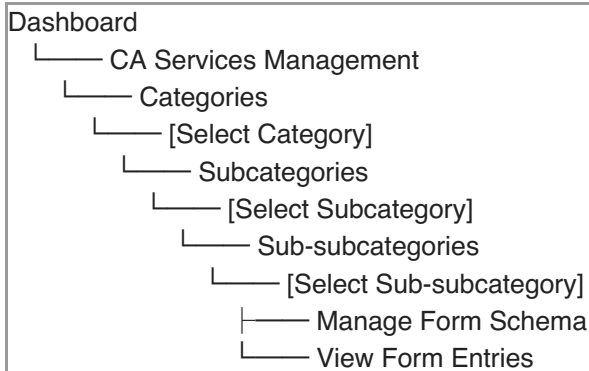
Review Notes:

[\[Save Notes\]](#)

API Endpoints Needed

- GET /api/v1/admin/ca/forms/entries - List all form entries
- GET /api/v1/admin/ca/forms/entries/:entryId - Get entry details
- PUT /api/v1/admin/ca/forms/entries/:entryId/status - Update entry status
- POST /api/v1/admin/ca/forms/entries/:entryId/notes - Add review notes

Navigation Flow



Key UI Features

1. Breadcrumb Navigation

Home > CA Services > GST > GST Registration > Proprietorship

2. Quick Actions

- **Add buttons** at each level
- **Edit/Delete** buttons for each item
- **View children** buttons to navigate deeper

3. Status Indicators

- Active/Inactive badges
- Form entry status badges (Draft, Submitted, In Review, Approved, Rejected)

4. Search & Filter

- Search categories/subcategories by name
- Filter form entries by status
- Filter by date range

5. Drag & Drop (Optional)

- Reorder categories/subcategories
- Reorder form fields in schema editor

Implementation Notes

1. **Validation:** Ensure parent-child relationships are maintained
2. **Deletion:** Prevent deletion if children exist (show warning)
3. **Form Preview:** Show live preview of form as admin builds it
4. **Version Control:** Track form schema versions when updated
5. **Permissions:** Ensure only admin users can access these pages

Example API Request Bodies

Create Category

```
{
  "cat_name": "GST",
  "cat_img": "https://example.com/images/gst.jpg",
  "description": "GST Services",
  "order": 1,
  "status": 1
}
```

Create Subcategory

```
{
  "parentCategoryId": "category_id_here",
  "cat_name": "GST Registration",
  "cat_img": "https://example.com/images/gst-reg.jpg",
  "description": "Register for GST",
  "order": 1,
  "status": 1,
  "level": "subcategory"
}
```

Create Form Schema

```
{
  "subSubcategoryId": "sub_subcategory_id_here",
  "fields": [
    {
      "name": "businessName",
      "label": "Business Name",
      "type": "text",
      "placeholder": "Enter business name",
      "isRequired": true,
      "validation": {
        "minLength": 3,
        "maxLength": 100
      },
      "section": "business_details",
      "order": 1
    }
  ],
  "sections": [
    {
      "id": "business_details",
      "title": "Business Details",
      "order": 1
    }
  ]
}
```