Beneficiary Management App Documentation

Overview

The Beneficiary Management App is designed to help Saylani Welfare efficiently manage and track beneficiaries seeking help. This CNIC-based system ensures that beneficiaries' information is recorded, tracked, and updated across departments while providing seamless user management for all stakeholders.

Stakeholders

1. **Admin**:
   - Full access to the system.
   - Manage users, departments, and reports.
   - Configure dashboard metrics and system settings.
   - Generate reports for operational insights.
2. **Receptionist**:
   - Registers beneficiaries, capturing CNIC, name, contact details, address, and purpose.
   - Assigns tokens based on the purpose and department.
   - Manages initial data entry and verification.
3. **Department Staff**:
   - Scans tokens to retrieve detailed beneficiary information.
   - Updates assistance status (e.g., In Progress, Completed).
   - Notes remarks or actions taken during assistance.
4. **Beneficiary (Seeker)**:
   - Provides CNIC and purpose of visit.
   - Uses tokens to access relevant departments.
   - Receives status updates on their requests.

User Flow

1. Registration at Reception

- **Arrival**: Beneficiary arrives at the reception desk.
- **Information Collection**: Receptionist collects details including:
  - CNIC (unique identifier).
  - Name, phone number, address.
  - Purpose of visit (e.g., financial aid, medical assistance).
- **Token Assignment**: A unique token is generated for the specific department.
- **Confirmation**: Token details are printed or sent via SMS.

2. Department Interaction

- **Token Presentation**: Beneficiary presents their token at the assigned department.
- **Scan and Retrieve**: Department staff scans the token to view:
  - Beneficiary's details.
  - Purpose of visit and history.
- **Assistance Provided**: Staff provides the required help and updates the system with actions taken and remarks.

3. Admin Dashboard

- **Daily Insights**:
  - Total visitors categorized by new and returning beneficiaries.
  - Department-wise activity statistics.
- **Search Records**:
  - Search by CNIC, phone number, or name.
- **Reports and Logs**:
  - Access detailed logs for operational audits and efficiency tracking.

4. Completion of Help

- **Status Update**: Once the assistance is complete, the status is updated in the system.
- **History Logging**: All actions are recorded against the beneficiary's CNIC for future reference.

Core Features

1. User Management

- **Role-Based Access**:
  - Admin: Full permissions.
  - Receptionist: Limited to beneficiary registration and token assignment.
  - Department Staff: Limited to viewing and updating status.
- **Add/Edit/Delete Users**: Admin can manage system users and roles.

2. Token System

- **Unique Token Generation**: Every token is unique and tied to the beneficiary's request and department.
- **Token Scanning**: Department staff scans tokens to instantly retrieve beneficiary details.

3. Dashboard

- **Metrics**:
    - Daily visitor count.
    - New vs. returning beneficiaries.
    - Department-wise activity.
- **Visualizations**:
    - Bar charts for daily activity.
    - Pie charts for department contributions.

4. Search Functionality

- **Search Criteria**:
    - CNIC (primary identifier).
    - Phone number.
    - Name.
- **Instant Results**: Filters return precise data with minimal delay.

5. History Tracking

- **Comprehensive Logs**:
    - Every interaction recorded with timestamps.
    - Details of purpose, departments visited, and status.
- **Easy Access**: Searchable history for audits and reporting.

Tech Stack

- **Frontend**: React.js with Material UI or Tailwind CSS for responsive and interactive user interfaces.
- **Backend**: Node.js with Express for scalable API development.
- **Database**: MongoDB for flexible and efficient data storage.
- **Authentication**: JWT for secure, role-based access control.
- **Deployment**:
    - Vercel for the frontend.
    - Render or Heroku for the backend.

Example Data Flow

Registration:

- **Input**:
  - CNIC, Name, Phone, Address, Purpose.
- **Process**:
  - Data saved in the database.
  - Unique token generated and assigned.
- **Output**:
  - Token printed or sent to the beneficiary.

Token Scanning:

- **Input**: Token ID.
- **Process**: Retrieve data tied to the token.
- **Output**: Display beneficiary details, purpose, and history.

Dashboard Metrics:

- **Input**: Date range or department filter.
- **Process**: Fetch relevant data from the database.
- **Output**: Display statistics via visual charts and tables.

This document provides a comprehensive guide to the Beneficiary Management App, ensuring clarity for all participants and enabling a streamlined workflow.