2nd Functionality and page-level prototype ideas

Customer (Importer)

Pages:

1. **Login Page**
   - Secure login with OTP-based verification.
2. **OTP Verification Page**
   - One-time password sent via email or phone.
3. **Change Password Page**
   - Mandatory password change on first login.
4. **Dashboard**
   - Overview of services, notifications, and latest updates.
5. **Service Request List**
   - Card view of all requested services with quick status indicators.
6. **Service Request Detail**
   - Full workflow timeline with progress tracking and stage details.
7. **Tax Information Page**
   - Searchable and filterable list of goods and associated taxes with release date.
8. **Notification Center**
   - View all system messages, alerts, and updates (categorized by type).
9. **Contact Us Page**
   - Full contact information of MOT (email, phone, location, hours, etc.).
10. **Profile Management Page** *(New)*
    - View and update personal profile, contact details, company info, etc.
11. **Request a New Service Page** *(New)*
    - Submit a new service request form and upload related documents.
12. **Message Center (Support Chat)** *(New)*
    - Send inquiries or feedback to support or specific staff (e.g., Case Executor).
13. **Documents Page** *(New)*
    - View/download all related documents (invoices, receipts, inspection reports, etc.) in one place.

Core Functionalities:

- **Authentication & Security**
  - Login via one-time password → Enforced password change.
  - Secure session management.

- **Dashboard Summary**
  - Quick insights:
    - Number of ongoing, pending, and completed services.
    - Notifications.
    - Latest activity or service update.
- **Service Tracking**
  - View all services requested.
  - See a detailed timeline of service progress.
  - Every stage includes:
    - Status (`Not Started`, `Pending`, `Completed`)
    - Timestamp of update
    - Case Executor profile tag
    - Attached documents/images/messages

Service Workflow (Multimodal & Unimodal Stages):

Stage	Customer Actions / Views
Prepayment Invoice	View invoice, upload bank receipt
Drop Risk	View risk label: `Blue`, `Green`, `Yellow`, `Red`
Delivery Order (DO)	View the attached documents from the Case Executor
Inspection	View assessor comments/messages, attached documents, agree to continue, upload 2nd invoice
Emergency	Read messages received from Customs via MOT
Exit	View the store payment receipt
Transportation	View transporter info: Driver name, Plate number, License document
Clearance	Request and view clearance documents
Local Permission	(Unimodal) View transport details
Arrival	(Unimodal) View the arrival photo proof of goods at the dry port
Store Settlement	View store-related updates and alerts for long queues

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Notification System:

- Receive alerts via:
  - SMS
  - Email
  - In-app notification page
- Triggered by:
  - Tax payment reminder
  - Status updates
  - Arrival confirmations
  - Clearance document availability
  - Inspection results or actions needed

Tax Information System:

- Search and filter goods by:
  - Keyword
  - Tax rate
  - Country of origin
  - Item type
- Each item includes:
  - Name
  - Category
  - Tax rate
  - Currency type
  - Last updated date

Manager (Admin) Role

Pages:

1. **Login Page**
   - Secure login with OTP-based authentication.
2. **OTP Verification Page**
   - One-time password validation via email or phone.
3. **Change Password Page**
   - Enforced password update on first login.
4. **Dashboard**
   - Overview of key analytics and service stats.
5. **Staff Management Page**

- View, create, update, block, or delete staff users (Admin, Case Executor, Assessor, Data Encoder).

6. **Staff Detail Page**
   - View profile, role, assigned services, and activity history of each staff member.
7. **Customer Management Page**
   - View, search, filter, block, or delete customer accounts.
8. **Customer Detail Page**
   - View service requests, contact info, logs, and verification status of each customer.
9. **Service Management Page**
   - Full list of service requests (filterable by status, type, customer, etc.).
10. **Service Detail Page**
    - Track each service timeline, updates, documents, executor actions, and attached files.
11. **Chat Section – Group Messaging**
    - Group chat to broadcast important notices to staff members.
12. **Chat Section – Direct Messaging**
    - 1-on-1 messaging with specific staff or customers.
13. **Notification Center**
    - All system alerts and updates for managers.
14. **Reports & Analytics Page** *(New)*
    - View detailed charts and summaries of service metrics.
15. **Activity Log Page** *(New)*
    - System-wide audit trail showing user activity across roles.
16. **Document Control Center** *(New)*
    - Manage, review, and audit all uploaded documents across services.
17. **Support Request Review Page** *(New)*
    - View customer feedback, issues, or support messages for escalation.
18. **Profile Settings Page**
    - Update the manager's account details and preferences.

Core Functionalities:

- **User Management**
  - Create staff accounts with specific roles and email invitations.
  - Assign or reassign service responsibilities.
  - Block, delete, or reset passwords for staff or customers.
- **Service Oversight**
  - View all requested services.
  - Filter by status: `Pending`, `Ongoing`, `Completed`, `Blocked`.
  - Categorize by service type: `Multimodal`, `Unimodal`.
  - Drill into service details to track updates and case executor performance.

    - Approve urgent escalations or override statuses when needed.
- **Data Visibility**
    - Access all service documents at each stage.
    - Review risk assessments, invoices, inspection reports, etc.
- **Analytics & Reporting**
    - View stats such as:
        - Weekly, monthly, and yearly service trends.
        - Completion rates.
        - Time taken per stage (average, min, max).
        - Service performance by the staff member.
        - Multimodal vs. Unimodal distribution.
- **Communication & Notifications**
    - Send announcements via in-app messages.
    - Chat with team members or customers.
    - Review all system notifications (e.g., service updates, issues flagged).

Suggested KPIs on Dashboard:

Metric	Details
Total Services (Month/Year)	Line & bar charts showing service volume.
Service Completion Rate	Percentage of completed services.
Stage Duration Averages	Avg.. time per stage (prepayment, inspection, etc.).
Staff Activity Snapshot	Active vs inactive accounts, number of tasks handled.
Top Performing Case Executors	Based on time and service quality.
Customer Satisfaction Index *(Optional)*	Based on feedback or rating features.

Case Executor Role

Pages:

1. **Login Page**
    - Secure sign-in using a temporary password with OTP verification.
2. **OTP Verification Page**
    - Confirm access via SMS/email-based code.
3. **Change Password Page**

    - Required password reset on first login.
4. **Dashboard**
    - Overview of assigned services, pending updates, and service statuses.
5. **Service Category Page**
    - Switch between `Multimodal` and `Unimodal` service categories.
6. **Service List Page**
    - View all assigned services categorized by status: `Not Started`, `Pending`, `Completed`.
7. **Service Detail Page**
    - Complete visibility into the stages of a selected service, with attached files, messages, and updates.
8. **Stage Execution Page**
    - An interactive interface for updating individual stages with attachments, comments, and flags.
9. **Messaging – Group Chat Page**
    - Participate in discussions with staff teams and management.
10. **Messaging – Direct Chat Page**
- Message customers, managers, or individual staff members.
11. **Notification Page**
- View all system-generated alerts and assigned updates.
12. **Profile Settings Page**
- Manage personal profile, photo, contact details, and availability.
13. **My Activity Log Page** *(New)*
- Track the history of actions taken on assigned services.
14. **Document Review & Upload Page** *(New)*
- Upload, preview, and tag documents across all service stages.
15. **Risk & Compliance Panel** *(New)*
- Set, view, and modify risk labels and flags for regulatory compliance.

Core Functionalities:

Account & Profile Management

- Sign in using temporary credentials and change the password.
- Update profile details, availability status, and communication preferences.

Service Execution (Multimodal & Unimodal)

Each service follows stage-based workflows. Case Executor is responsible for updating stages with time-stamped actions, documents, and comments.

Service Stages – Common Across Both Modes

1. Prepayment Invoice

- View the invoice attached by the customer.
- Upload proof of receipt (bank-verified).
- Add comments if discrepancies exist.

2. Drop Risk

- Set a risk level (Blue, Green, Yellow, Red).
- Add reasons/comments if needed.

3. Delivery Order (DO)

- Upload DO-related documents.
- Tag missing or incorrect customer-provided documents.
- Mark the stage as `Completed` or `Needs Review`.

4. Store Settlement

- Add a photo of the item in the store (taken on-site).
- Provide a summary of settlement notes (e.g., store ID, delays).
- Flag large queue situations.

5. Inspection

- Add summary copied from Ethiopian Customs Logistics System.
- Attach official inspection documents.
- Allow the customer to confirm ("Agree") and upload the second tax invoice.

6. Emergency

- Add critical updates/comments from customs authorities.
- Mark the stage as `Released` if applicable.
- Urgently notify the manager via system alert.

7. Exit

- Upload the receipt of storage fees paid.
- Mark the service as `Ready for Transport`.

8. Transportation

- Enter transporter details:
  - Driver Full Name

    - Car Plate Number
    - Driver License Attachment
- Set the actual departure time.

9. Clearance

- Verify if the customer requested clearance documents.
- Upload Goomrook-cleared documents.
- Tag the responsible transporter for clearance delivery.

🚚 Unimodal-Specific Stages

1. Local Permission

- Enter transporter details (Driver + Car Info).
- Attach permission slips or local documents.

2. Arrival

- Attach the arrival confirmation photo at the dry port (e.g., Mojo).
- Timestamp the arrival.

Enhanced Functionalities

Risk Management Panel *(New)*

- Define and update stage-specific risks.
- Add regulatory notes, violations, or compliance comments.

Document & Attachment Center *(New)*

- Unified interface to view, upload, and replace documents by stage.
- Tag document types (invoice, DO, inspection, etc.)

Work Summary Page *(New)*

- Track:
    - Total services assigned
    - Services completed
    - Time spent per stage
    - Issues raised by customers or flagged by the manager

Quick Notes & Templates *(New)*

- Use pre-filled text templates for common customs updates (inspection messages, emergency notices).
- Saves time and ensures consistency.

Messaging Enhancements

- Notify manager if stage is blocked due to missing documents.
- Receive real-time alerts when customer responds to a service stage.

Service Stage Queueing *(Optional)*

- Queue stages that can't proceed without customer input.
- Manager can view bottlenecks caused by delay on customer side.

Smart Dashboard Widgets

Widget	Description
Assigned Services	Count by status and category.
Today's Tasks	Stages awaiting update today.
Service Alerts	Blockers, delays, or flagged risks.
Message Notifications	New chats, direct or group.
Document Upload Reminders	Unattached but required documents.

Assessor Role

Pages:

1. **Login Page**
   - Secure login using a temporary password and OTP (SMS/email).
2. **OTP Verification Page**
   - Enter verification code for secure access.
3. **Change Password Page**
   - Prompted at first login.
4. **Dashboard**

    - Summary of service requests, pending customer approvals, and feedback requests.
5. **Customer Approval Page**
    - View newly registered customers submitted by the Data Encoder.
    - Approve/reject after reviewing the customer information.
6. **Service Request Review Page**
    - View and assess new service initiation requests created by Data Encoders (multimodal & unimodal).
    - Approve, return for revision, or reject with a reason.
7. **Service List Page**
    - List of initiated services under the Assessor's oversight.
    - Filters: `Category`, `Status`, `Customer`, `Date`.
8. **Service Detail Page**
    - Stage-by-stage breakdown.
    - Review inputs from Data Encoders and Case Executors.
    - Provide high-level remarks or compliance suggestions.
9. **Group Messaging Page**
    - Collaborate with staff across roles.
10. **Direct Messaging Page**
- Chat privately with specific staff (manager, data encoder, CE).
11. **Notification Page**
- View updates about services, customer accounts, and internal tasks.
12. **Profile Page**
- Update name, contact, department, and photo.
13. **Compliance Feedback Page** *(New)*
- Provide structured feedback on non-compliant service documents (inspection mismatches, customs data errors, etc.).
14. **Document Viewer Page** *(New)*
- View and verify uploaded documents stage-by-stage.
- Flag issues or missing documentation.
15. **My Assessment Logs** *(New)*
- Track previous approvals, rejections, and comments added to customer accounts or service workflows.

Functionalities:

Account & Profile

- Sign in with a temporary password and update it on first use.
- OTP verification for enhanced security.
- Update personal profile and credentials.

Customer Onboarding & Approval

- View the list of newly created customer accounts by Data Encoders.
- Review KYC documents and business credentials.
- Approve, request revision, or reject with feedback.
- Auto-notify customer and encoder of status.

Service Request Assessment

- View pending service initiation forms submitted by Data Encoders.
- Validate:
  - Item description
  - Route category (unimodal/multimodal)
  - Documents attached
  - Declared value and tax category
- Approve or return to encoder with reasons for correction.

Compliance Review & Quality Control *(New)*

- Verify:
  - Tax category accuracy
  - Customs stage documentation (DO, inspection, clearance, etc.)
- Cross-check:
  - Inspection stage summaries
  - Attached customs correspondence
- Flag inconsistencies or errors for manager/CE review.

Service Monitoring

- Track the progress of services under their oversight.
- Monitor whether Case Executors are correctly updating inspection and customs-related stages.
- Add observations if:
  - The risk level does not match the item category
  - Customs instructions are not implemented

Messaging & Collaboration

- Group message all staff or a filtered group (e.g., all Case Executors).
- Direct message:
  - Data Encoders about revisions
  - Case Executives about customs issues
  - Manager for escalations

Notifications

- New customer awaiting approval
- New service request to review
- Comments or flags by Case Executors
- Manager instructions
- Document mismatches

Dashboard Widgets

Widget	Description
Pending Customer Approvals	Number awaiting review
Service Review Requests	Service forms needing approval
Compliance Issues Flagged	Services flagged for missing or incorrect info
Services Approved (Today/Week)	Quick stats of work done
Internal Messages	Number of unread group or direct messages

Data Encoder Role – Refined & Expanded

Pages:

1. **Login Page**
   - Secure login with a temporary password and OTP.
2. **OTP Verification Page**
   - Enter the code sent via email/SMS.
3. **Change Password Page**
   - Required on first login.
4. **Dashboard Page**
   - Overview of:
     - Pending customer registrations
     - Draft and submitted service forms
     - Messages and notifications
5. **Customer Creation Page**
   - Register new customer accounts.
   - Upload KYC documents.
   - Assign service category (multimodal/unimodal).
6. **Customer List Page**

    - View and manage all registered customers.
    - Filter by status: Approved / Pending / Rejected.
7. **Customer Detail Page**
    - View full customer profile and document history.
    - Edit/update before approval.
8. **Service Request Creation Page**
    - Fill out service request forms.
    - Upload supporting documents (e.g., invoice, delivery instructions, etc.).
9. **Service Request Drafts Page** *(New)*
    - View, update, or delete draft service requests before submitting to the assessor.
10. **Submitted Services Page**
    - Track services awaiting approval by the assessor.
    - View status and receive feedback or revision notes.
11. **Service Detail Page**
    - View submitted service content and attached files.
12. **Group Messaging Page**
    - Internal communication with all MOT staff.
13. **Direct Messaging Page**
    - Send private messages to:
        - Assessor (for follow-up)
        - Manager (if escalation needed)
14. **Notification Page**
    - Alerts for:
        - Feedback from assessors
        - Service status updates
        - Account issues
15. **Profile Page**
    - Update name, department, profile picture, and contact info.
16. **Revision History Page** *(New)*
    - View change logs for service requests and customer data prior to approval.
17. **Bulk Upload Page** *(New)*
    - Import multiple customers or services via Excel or CSV (with proper validation)
18. **Document Templates Page** *(New)*
    - Download standard MOT document templates (invoice format, delivery instructions, etc.).

Functionalities:

Authentication & Security

- Log in with temporary credentials, OTP required.
- Must change password on first login.
- Can reset password via email/SMS confirmation.

Customer Management

- Create new importer/customer accounts.
- Fill in:
  - Full name, TIN number, contact, business info.
  - Upload required documents (license, ID, tax documents).
- View all customers created.
- Edit, update, or delete *before approval* by the assessor.
- Receive feedback on rejected customers and resubmit.

Service Request Management

- Select a customer and initiate a new service (multimodal or unimodal).
- Fill in:
  - Item details
  - Route & logistics preferences
  - Preliminary documents (e.g., invoice)
- Save as a **draft** or **submit** to the assessor.
- Upload multiple files securely.
- View and revise if returned by the assessor.

Service & Customer Audit Trails *(New)*

- Track what changes were made to service forms.

Communication

- Group chat with all team members.
- Direct messages to the manager, assessor, or CE.
- Ask for clarification on service document feedback or rejection.

Notifications

- New feedback from the assessor
- Service status updates
- Missing or invalid documents
- Chat messages from staff

Profile & Activity Monitoring

- Update profile info.
- View:
  - Total services submitted
  - Pending vs. approved count

- Rejected customer count

Dashboard Highlights

Widget	Details
Pending Customer Approvals	Awaiting Assessor
Draft Service Requests	Can be edited/deleted
Submitted Services	Awaiting approval
Returned Services	Need revision
Chat Messages	Unread messages
Approval Ratio	% of services approved vs. rejected