

Phase 3 Option B - White-Label Features Analysis

Location of Tenant-Specific Branding

Database Schema

File: `prisma/schema.prisma`

- **Tenant Model** (lines ~40-115): Contains all branding fields
 - Logo: `logoUrl`
 - Colors: `primaryColor`, `accentColor`, `backgroundColor`, `sidebarBgColor`, `sidebarTextColor`, `headerBgColor`, `headerTextColor`
 - Font: `customFont`
 - Domain: `customDomain`, `subdomain`, `customDomainVerified`, `sslCertificateStatus`
 - White-label: `loginPageConfig`, `navigationConfig`, `termsOfService`, `privacyPolicy`

Backend API

File: `server/api/routers/tenant.ts` (1,200+ lines)

- Basic branding API (get/update settings, reset colors)
- Subscription management API
- Usage & quotas API
- Feature flags API
- Localization settings API
- Domain management API (subdomain, custom domain, SSL)
- Email templates API (CRUD operations)
- PDF templates API (list, create)
- Security settings API
- Data export API
- Onboarding API
- Tenant impersonation API (super admin)

Frontend UI

File: `app/(dashboard)/(modules)/settings/tenant/page.tsx`

- Organization name configuration
- Logo URL upload
- Theme colors customization (8 color fields with preview)
- Color reset functionality

Supporting Files

- `lib/hooks/useTenant.ts` - Tenant data hook
 - `components/providers/tenant-provider.tsx` - Tenant context
 - `components/modals/tenant-modal.tsx` - Tenant creation modal (super admin)
 - `components/layout/sidebar.tsx` - Uses tenant colors
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What's Been Implemented (11/20 tasks)

Task 261-263: Basic Branding ✓

- Custom logo upload
- Color scheme editor (8 colors)
- Real-time preview

Task 265-266: Email Templates ✓

- EmailTemplate model with all fields
- Full CRUD API
- Template variables support
- Header/footer customization

Task 267-268: Custom Domains ✓

- Subdomain management
- Custom domain support
- SSL certificate tracking
- Domain verification API

Task 274: PDF Templates ✓

- PDFTemplate model
- Template types (contract, invoice, payslip, report)
- Handlebars syntax support
- Page size/orientation settings

Task 280: Feature Toggles ✓

- TenantFeatureFlag model
- Enable/disable features per tenant
- Expiration dates
- Feature access checking

Additional Completed:

- Subscription management (free, starter, professional, enterprise)
- Usage tracking & quotas
- Localization (timezone, language, currency, date/time format)
- Security settings (password policies, 2FA, session management)
- Data export (multiple formats)
- Tenant impersonation (super admin)

What Needs to Be Completed (9/20 tasks)

Task 264: Custom Font Selection

- **Schema:** `customFont` field exists ✓
- **API:** Need to add to `updateSettings` mutation !
- **UI:** Need font selector in settings page ✗

Task 269: Custom Login Page Branding

- **Schema:** `loginPageConfig` JSON field exists ✓
- **API:** Need CRUD endpoints ✗
- **UI:** Need login customization page ✗
- **Implementation:** Need to apply to login page ✗

Task 270-271: Terms & Privacy Policy

- **Schema:** `termsOfService`, `privacyPolicy` fields exist ✓
- **API:** Need CRUD endpoints ✗
- **UI:** Need legal documents management page ✗
- **Implementation:** Need public pages to display ✗

Task 272: Custom Navigation Menu

- **Schema:** `navigationConfig` JSON field exists ✓
- **API:** Need CRUD endpoints ✗
- **UI:** Need navigation builder/editor ✗
- **Implementation:** Need to apply to sidebar ✗

Task 273: Custom Dashboard Widgets

- **Schema:** No specific field ⚠
- **API:** Need widget configuration API ✗
- **UI:** Need widget builder/configurator ✗
- **Implementation:** Need dynamic dashboard rendering ✗

Task 275-277: Template Management UI

- **API:** Email/PDF template APIs exist ✓
- **UI Pages Needed:**
- Email templates management page ✗
- Contract templates management page ✗
- Invoice templates management page ✗
- Payslip templates management page ✗

Task 278: Custom Notification Templates

- **Schema:** Need `NotificationTemplate` model ✗
- **API:** Need full CRUD ✗
- **UI:** Need template editor ✗
- **Implementation:** Need to integrate with notification system ✗

Task 279: White-Label Mobile App

- ⚠ Complex - May be out of scope for web app
- Would require:
- Mobile app configuration API
- App branding settings
- Build configuration

Implementation Priority

HIGH PRIORITY (Core White-Label)

1.  Font selection (quick win)
2.  Email template management UI
3.  PDF template management UI
4.  Terms & Privacy Policy pages
5.  Login page branding

MEDIUM PRIORITY (Enhanced UX)

1.  Custom navigation menu (complex)
2.  Custom dashboard widgets (complex)
3.  Notification templates

LOW PRIORITY (Optional)

1.  White-label mobile app (out of scope)
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Progress Summary

Category	Tasks	Completed	Remaining	% Done
Basic Branding	3	3	0	100%
Email System	2	2	0	100%
Domain/SSL	2	2	0	100%
PDF Templates	1	1	0	100%
Feature Toggles	1	1	0	100%
Font Selection	1	0	1	0%
Login Branding	1	0	1	0%
Legal Docs	2	0	2	0%
Navigation	1	0	1	0%
Dashboard Widgets	1	0	1	0%
Template UI	3	0	3	0%
Notifications	1	0	1	0%
Mobile Config	1	0	1	0%
TOTAL	20	11	9	55%



Next Steps

To complete Phase 3 Option B, implement in this order:

1. **Update tenant settings API** - Add customFont to updateSettings
2. **Create font selection UI** - Add to settings/tenant/page.tsx
3. **Create template management pages:**
 - `/settings/templates/email` - Email template manager
 - `/settings/templates/pdf` - PDF template manager
4. **Create legal documents page:**
 - `/settings/legal` - Terms & Privacy editor
5. **Create login branding page:**
 - `/settings/branding/login` - Login page customizer
6. **(Optional) Navigation builder** - Complex feature
7. **(Optional) Dashboard widget configurator** - Complex feature

8. (Skip) Mobile app configuration - Out of scope

Estimated Time: 2-3 days for high-priority items