# **ClientFocus - Complete Feature Documentation**

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## **1. Platform Overview**

ClientFocus is a multi-tenant coaching platform that enables coaching companies to operate as isolated SaaS platforms with their own branding, users, and billing systems. Each company gets:

* **White-label URLs:** yourdomain.com/company-slug
* **Custom branding:** Logo, colors, and company name
* **Isolated data:** Complete separation between companies
* **Role-based access:** Different permissions for different user types
* **Integrated billing:** Stripe Connect for payment processing
* **Interactive onboarding:** Guided tours for all user types

## **2. User Roles & Permissions**

### **2.1 Super Admin (Platform Admin)**

* **Purpose:** Platform-wide administration and company management
* **Access:** Full platform access across all companies
* **Created by:** Developer directly in database (cannot be created through signup)
* **Login URL:** /login (platform login only)
* **Special Permissions:**
  + Create, edit, and delete companies
  + Manage users across all companies
  + Access global analytics and metrics
  + Platform-level billing and settings

### **2.2 Admin (Company Admin)**

* **Purpose:** Company-level administration and management
* **Access:** Full access within their assigned company only
* **Created by:** Super admin assignment or company signup with matching admin email
* **Login URL:** /company-slug/login or /login
* **Special Permissions:**
  + Manage company coaches and sessions
  + Set up Stripe Connect billing
  + Configure company branding
  + Review and approve sessions

### **2.3 Coach**

* **Purpose:** Coaching professionals who conduct sessions
* **Access:** Coach features within their assigned company only
* **Created by:** Company signup process
* **Login URL:** /company-slug/login
* **Requirements:** Must belong to a company (enforced by business rules)
* **Special Permissions:**
  + Log coaching sessions
  + Manage assigned clients
  + View personal performance metrics

### **2.4 Client**

* **Purpose:** Individuals receiving coaching services
* **Access:** Client features and session history within their company
* **Created by:** Company signup process (must select a coach)
* **Login URL:** /company-slug/login
* **Requirements:** Must have an assigned coach (enforced by business rules)
* **Special Permissions:**
  + View session history and notes
  + Access coach information

## **3. Authentication & Signup Flows**

### **3.1 Platform Administrator Access**

#### **Platform Login (/login)**

* **URL:** https://yourdomain.com/login
* **Access:** Super admins only
* **Features:**
  + Email and password authentication
  + Email validation for admin access
  + Automatic redirect to /admin/dashboard
  + Restricted to pre-approved admin emails

#### **Platform Signup (/signup)**

* **URL:** https://yourdomain.com/signup
* **Access:** Super admins only (highly restricted)
* **Purpose:** Platform administrator account creation
* **Features:**
  + Full name and email registration
  + Password creation with confirmation
  + Automatic super-admin role assignment
  + Immediate redirect to admin dashboard

### **3.2 Company-Specific Access**

#### **Company Landing Page (/company-slug)**

* **URL:** https://yourdomain.com/company-slug
* **Access:** Public (anyone can view)
* **Features:**
  + **Company Branding:** Logo, colors, and custom styling
  + **Hero Section:** Professional company presentation
  + **Feature Showcase:** Platform capabilities and benefits
  + **Navigation Header:** Sign in and signup buttons
  + **Call-to-Action Sections:** Encouraging user registration
  + **Responsive Design:** Optimized for all device sizes

## **4. Platform Administrator Features**

### **4.1 Platform Admin Dashboard (/admin/dashboard)**

* **Purpose:** High-level platform oversight and management
* **Key Features:**
  + **Global Metrics:** Sessions across all companies, total active coaches, platform-wide pending reviews
  + **Cross-Company Analytics:** Monthly session trends with company filtering
  + **Performance Charts:** Visual representation of platform growth
  + **Quick Actions:** Direct access to company and user management
  + **Real-Time Data:** Live updates of platform statistics

### **4.2 Company Management (/admin/companies)**

* **Purpose:** Complete company lifecycle management
* **Features:**
  + **Company Creation:**
    - Company name and URL slug configuration
    - Admin email assignment
    - Initial branding setup (logo, colors)
    - Automatic database record creation
  + **Company Editing:**
    - Update all company information
    - Modify branding elements (logo upload, color picker)
    - Change admin email assignments
    - Real-time preview of changes
  + **Company Deletion:**
    - Safe deletion with confirmation dialogs
    - Associated data cleanup
    - User notification handling

## **5. Company Administrator Features**

### **5.1 Company Admin Dashboard (/admin/dashboard)**

* **Purpose:** Company-specific management and oversight
* **Key Features:**
  + **Company Information Card:**
    - Company name, slug, and public URL
    - Admin email and contact information
    - Direct link to company landing page
    - Company branding preview
  + **Company Metrics:**
    - Sessions this month with growth percentage
    - Active coaches and client count
    - Pending sessions requiring review
    - Revenue and billing statistics

### **5.2 Coach Management (/admin/coaches)**

* **Purpose:** Company coach administration and oversight
* **Features:**
  + **Coach Directory:** All coaches within the company
  + **Performance Metrics:** Sessions, clients, and productivity per coach
  + **Coach Details:** Individual coach profiles and statistics
  + **Client Assignments:** Manage coach-client relationships
  + **Activity Tracking:** Coach login and session activity
  + **Performance Analytics:** Coach comparison and trends

## **6. Coach Features**

### **6.1 Coach Dashboard (/coach/dashboard)**

* **Purpose:** Personal coaching performance and quick session management
* **Key Features:**
  + **Company Connection Display:**
    - Company name and branding
    - Company public URL for easy sharing
    - Coach role confirmation
    - Company contact information
  + **Personal Performance Metrics:**
    - Sessions completed this month with growth trends
    - Active client count and engagement levels
    - Personal performance compared to previous months
    - Achievement indicators and milestones

### **6.2 Session Logging (/coach/log-session)**

* **Purpose:** Comprehensive session documentation and management
* **Features:**
  + **Session Creation Form:**
    - Client selection from assigned clients
    - Session date and time selection
    - Session type (Full Session, Half Session, Consultation)
    - Session duration tracking
  + **Session Documentation:**
    - Detailed session notes with rich text editing
    - Goals and objectives tracking
    - Client progress observations
    - Action items and follow-up tasks

## **7. Client Features**

### **7.1 Client Dashboard (/client/dashboard)**

* **Purpose:** Personal coaching journey overview and navigation
* **Key Features:**
  + **Welcome & Personalization:**
    - Personalized greeting with client name
    - Coaching journey overview
    - Progress indicators and milestones
    - Motivational messaging and encouragement
  + **Quick Access Navigation:**
    - **Session History:** Direct access to all past sessions
    - **Upcoming Features Preview:** Information about planned functionality
    - **Coach Information:** Details about assigned coach
    - **Progress Tracking:** Visual representation of coaching journey

### **7.2 Session History (/client/history)**

* **Purpose:** Complete access to coaching session records and progress
* **Features:**
  + **Session Chronicle:**
    - Chronological list of all coaching sessions
    - Session details including date, duration, and type
    - Coach notes and session summaries
    - Session outcomes and progress indicators
  + **Progress Visualization:**
    - Visual timeline of coaching journey
    - Goal achievement tracking
    - Progress charts and metrics
    - Milestone celebration and recognition

## **8. White-Label & Multi-Tenant Features**

### **8.1 Complete Brand Isolation**

* **Custom URLs:** Each company operates under /company-slug structure
* **Dynamic Branding:** Automatic application of company colors, logos, and styling
* **Page Title Customization:** Company name in browser tabs and bookmarks
* **Favicon Integration:** Company logo as browser icon
* **Default Theme Fallback:** Professional default styling when custom branding isn't set

### **8.2 Multi-Tenant Architecture**

* **Data Isolation:** Complete separation of company data in Firestore
* **Role-Based Security:** Users can only access their company's information
* **Business Rule Enforcement:** Database-level validation of company associations
* **Cross-Company Prevention:** Middleware and security rules prevent data leakage

## **9. Billing & Stripe Integration**

### **9.1 Stripe Connect Architecture**

* **Multi-Tenant Payment Processing:** Each company has independent Stripe account
* **Platform Integration:** Seamless connection to main platform account
* **OAuth-Based Setup:** Secure account linking through Stripe OAuth
* **Test/Live Mode Support:** Complete development and production workflow

### **9.2 Company Account Setup**

1. **Initial Connection:**
   * Admin initiates Stripe Connect OAuth flow
   * Secure authorization through Stripe's interface
   * Automatic account creation and linking
   * Return to platform with connection confirmation
2. **Account Onboarding:**
   * Complete Stripe Express account setup
   * Business information and verification
   * Banking details and tax information
   * Account activation and approval

## **10. Onboarding Tours**

### **10.1 Custom Onboarding System**

* **World-Class UI/UX:** Beautiful gradient backgrounds, smooth animations, and micro-interactions
* **Advanced Functionality:** Auto-scroll to targets, keyboard navigation, progress tracking
* **Role-Specific Content:** Customized tours for different user types (Admin, Coach, Client)
* **Persistent State:** Automatic saving of tour completion status in localStorage
* **Accessibility Features:** Full keyboard navigation, screen reader support, focus management
* **Responsive Design:** Works seamlessly on all devices and screen sizes

### **10.2 Key Features**

* **Smart Positioning:** Auto-scroll to target elements with smooth animations
* **Keyboard Shortcuts:** →/Enter/Space (next), ← (previous), Esc (close), Ctrl+S (skip)
* **Visual Feedback:** Animated spotlight effects, progress bars, and smooth transitions
* **Flexible Placement:** Top, bottom, left, right positioning with smart viewport adjustment
* **Custom Styling:** Beautiful CSS animations with dark mode support

## **11. Settings & Configuration**

### **11.1 Global Platform Settings (Super Admin)**

* **System Configuration:** Platform-wide operational parameters
* **Security Policies:** Authentication rules and access controls
* **Feature Management:** Enable/disable platform capabilities
* **Integration Settings:** Third-party service configuration and API management

### **11.2 Company-Level Settings (Company Admin)**

* **Branding Management:**
  + Logo upload and positioning
  + Color scheme configuration (primary, secondary, background, text)
  + Typography and font selections
  + Custom CSS and styling overrides
* **Operational Settings:**
  + Default user roles and permissions
  + Session approval workflows
  + Billing and payment configurations
  + Communication and notification rules

## **12. Navigation & URL Structure**

### **12.1 Platform Administrator URLs**

/login - Platform administrator login

/signup - Platform administrator registration

/admin/dashboard - Platform overview and metrics

/admin/companies - Company management and creation

/admin/users - Global user management

/admin/sessions - Cross-company session review

/admin/settings - Platform configuration

### **12.2 Company Administrator URLs**

/admin/dashboard - Company overview and metrics

/admin/coaches - Company coach management

/admin/sessions - Company session review

/admin/billing - Stripe Connect and pricing

/admin/settings - Company configuration

### **12.3 Coach URLs**

/coach/dashboard - Coach performance and overview

/coach/log-session - Session creation and logging

/coach/my-sessions - Session history and management

/coach/my-clients - Client relationship management

/coach/settings - Coach preferences and profile

### **12.4 Client URLs**

/client/dashboard - Client journey overview

/client/history - Session history and records

/client/settings - Client preferences and account

## **13. Security Features**

### **13.1 Authentication & Authorization**

* **Firebase Authentication:** Industry-standard user authentication
* **Role-Based Access Control:** Granular permission system with four distinct roles
* **Session Management:** Secure session handling and automatic expiration
* **Password Security:** Strong password requirements and secure storage

### **13.2 Multi-Tenant Data Security**

* **Complete Data Isolation:** Firestore security rules prevent cross-company access
* **Business Rule Enforcement:** Database-level validation of user-company associations
* **Query-Level Security:** Company-scoped data queries for all operations
* **Audit Logging:** Comprehensive activity tracking and monitoring

### **13.3 Payment & Financial Security**

* **Stripe PCI Compliance:** All payment processing through Stripe's secure infrastructure
* **Webhook Verification:** Cryptographic signature validation for all webhook events
* **Financial Data Protection:** No sensitive financial information stored locally
* **Fraud Prevention:** Integration with Stripe's advanced fraud detection

### **13.4 Role Creation Summary Table**

| **Role** | **Where to Create** | **Who Can Create** | **Requirements** | **Login URL** |
| --- | --- | --- | --- | --- |
| **Super Admin** | Firestore Console | Developer Only | Manual DB entry | /login |
| **Company Admin** | /company-slug/signup | Self-registration | Email matches company adminEmail | /login or /company-slug/login |
| **Coach** | /company-slug/signup | Self-registration | Company must exist | /company-slug/login |
| **Client** | /company-slug/signup | Self-registration | Must select coach | /company-slug/login |

## **Quick Start Guide**

### **For Platform Administrators**

1. **Initial Setup:** Log in at /login with super-admin credentials
2. **Create First Company:** Use /admin/companies to set up the first coaching company
3. **Configure Branding:** Upload logo and set company colors
4. **Create Company Admin:** Assign admin email and notify company administrator
5. **Monitor Platform:** Use dashboard analytics to track platform growth

### **For Company Administrators**

1. **First Login:** Access company login at /company-slug/login
2. **Complete Profile:** Update company information and branding
3. **Set Up Billing:** Connect Stripe account via /admin/billing
4. **Create Services:** Define coaching offerings and pricing
5. **Invite Team:** Share signup link for coaches to join company

### **For Coaches**

1. **Join Company:** Sign up at /company-slug/signup and select "Coach" role
2. **Complete Profile:** Add professional information and credentials
3. **Take Onboarding Tour:** Follow interactive guide for platform familiarization
4. **Log First Session:** Use quick action to create initial session record
5. **Monitor Performance:** Track metrics and client engagement

### **For Clients**

1. **Sign Up:** Register at /company-slug/signup and select your coach
2. **Explore Dashboard:** Familiarize yourself with available features
3. **Review Sessions:** Access session history and coach notes
4. **Update Profile:** Customize preferences and notification settings
5. **Track Progress:** Monitor coaching journey and goal achievement

## **How to Create Each Role - Step-by-Step Guide**

### **1. Creating Super Admin (Platform Admin)**

**⚠️ IMPORTANT:** Super Admin accounts can ONLY be created by developers directly in the database. This is a security feature.

#### **Method: Direct Database Creation**

1. **Access Firestore Console:**
   * Go to Firebase Console
   * Select your project
   * Navigate to "Firestore Database"
2. **Create User Document:**
   * Go to the users collection
   * Click "Add Document"
   * Use the user's Firebase Auth UID as the Document ID
   * Add the following fields:

{

"email": "admin@yourdomain.com",

"displayName": "Platform Administrator",

"role": "super-admin",

"createdAt": [Current Timestamp],

"companyId": null

}

1. **Verify Creation:**
   * User can now log in at /login
   * Will be automatically redirected to /admin/dashboard
   * Has access to all platform features

#### **Criteria for Super Admin:**

* ✅ Must be manually created by developer
* ✅ Email must be pre-approved
* ✅ No company association required
* ✅ Cannot be created through any signup process
* ✅ Full platform access across all companies

### **2. Creating Company Admin**

#### **Method A: Super Admin Assignment (Recommended)**

1. **Login as Super Admin:**
   * Go to /login
   * Enter super admin credentials
2. **Navigate to Companies:**
   * Go to /admin/companies
   * Click "Create New Company" or edit existing company
3. **Set Admin Email:**
   * In the company form, set the "Admin Email" field
   * This email becomes authorized to register as admin
   * Save the company
4. **Admin Registration:**
   * Share the company signup URL: /company-slug/signup
   * Admin user visits signup page
   * Enters the exact email address set in company settings
   * Selects "Admin" role (only visible if email matches)
   * Completes registration

#### **Method B: Direct Company Signup**

1. **Company Must Exist:**
   * Company must be created by super admin first
   * Admin email must be set in company settings
2. **Admin Signup Process:**
   * Visit /company-slug/signup
   * Fill out registration form:
   * **Full Name:** Required
   * **Email:** Must match company's adminEmail exactly
   * **Role:** Select "Admin" (only appears if email matches)
   * **Password:** Create secure password
   * **Confirm Password:** Must match
   * Submit form
3. **Automatic Assignment:**
   * System validates email against company admin email
   * User gets admin role and company assignment
   * Redirected to /admin/dashboard

#### **Criteria for Company Admin:**

* ✅ Email must match company's adminEmail field exactly
* ✅ Company must exist before admin can be created
* ✅ Can use either platform login /login or company login /company-slug/login
* ✅ Automatically assigned to specific company
* ✅ Admin role only appears in dropdown if email matches

### **3. Creating Coach**

#### **Method: Company Signup Process**

1. **Company Must Exist:**
   * Company must be created by super admin
   * Company must have active signup enabled
2. **Coach Registration:**
   * Visit company signup: /company-slug/signup
   * Fill out registration form:
   * **Full Name:** Coach's professional name
   * **Email:** Unique email address
   * **Role:** Select "Coach"
   * **Password:** Create secure password
   * **Confirm Password:** Must match
   * Submit form
3. **Automatic Assignment:**
   * Coach is automatically assigned to the company
   * Redirected to /coach/dashboard
   * Can immediately start logging sessions
4. **Post-Creation Setup:**
   * Coach should complete profile in /coach/settings
   * Add professional credentials and bio
   * Set coaching preferences
   * Upload professional photo

#### **Criteria for Coach:**

* ✅ Any email address (no restrictions)
* ✅ Must belong to a company (automatically assigned during signup)
* ✅ No coach selection required (coaches don't need coaches)
* ✅ Immediately active after registration
* ✅ Can start logging sessions right away

### **4. Creating Client**

#### **Method: Company Signup with Coach Selection**

1. **Prerequisites:**
   * Company must exist
   * At least one coach must be registered in the company
   * Company signup must be enabled
2. **Client Registration:**
   * Visit company signup: /company-slug/signup
   * Fill out registration form:
   * **Full Name:** Client's name
   * **Email:** Unique email address
   * **Role:** Select "Client"
   * **Select Your Coach:** Choose from available coaches in the company
   * **Password:** Create secure password
   * **Confirm Password:** Must match
   * Submit form
3. **Coach Selection Process:**
   * Dropdown shows all active coaches in the company
   * Client must select a coach (required field)
   * Coach assignment is permanent (admin can change later)
4. **Automatic Assignment:**
   * Client assigned to selected coach
   * Client assigned to company
   * Redirected to /client/dashboard
5. **Post-Creation:**
   * Client can view session history as coach adds sessions
   * Can update profile and preferences
   * Can access coaching materials and notes

#### **Coach Assignment Rules:**

* **Required:** Client must have a coach (enforced by system)
* **Selection:** Client chooses during signup
* **Visibility:** Only coaches from the same company appear
* **Changes:** Only company admin can reassign coaches later

#### **Criteria for Client:**

* ✅ Any email address (no restrictions)
* ✅ Must select an available coach during signup
* ✅ Coach must exist in the same company
* ✅ Automatically assigned to company through coach relationship
* ✅ Cannot signup without selecting a coach

## **Business Rules Enforcement**

### **Automatic Validations**

* ✅ **Clients must have coaches:** System prevents client creation without coach selection
* ✅ **Coaches must have companies:** System automatically assigns company during signup
* ✅ **Admins must match email:** Only matching emails can select admin role
* ✅ **Super admins cannot be created via signup:** Blocked at system level
* ✅ **Company isolation:** Users can only access their assigned company data

### **Database-Level Rules**

* ✅ **Firestore security rules** enforce all business logic
* ✅ **Cross-company access prevention** at query level
* ✅ **Role validation** on all data operations
* ✅ **Company assignment validation** for coaches and admins

*This comprehensive documentation covers all implemented features, user flows, and system capabilities in the ClientFocus platform. Each section provides detailed information about access patterns, functionality, and user experience for all roles and components.*