1. Overall Product Overview

SupportSync is a SaaS platform aimed at foster care agencies. It combines client management, live AI transcription with summary/action plan generation, and an integrated chatbot that allows users to search through training materials and past session data. Although future versions will include full CRM workflows and task calendars, the first version focuses on three primary modules:

- **Client Management Dashboard**
- **AI Transcription Service (with summary, notes, and action/treatment plan generation)**
- **Chatbot for searching training materials and historical records**

Each agency will have its own isolated data—including training materials and client records—so that no agency can access another's data. The product is designed with a multi-tenant architecture in mind, and this instruction set includes a dedicated settings area for agency-level configuration and user management. Our customers will have to pay for the service on a monthly or annual basis.

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2. User Roles and Data Separation

- **Agency Administrator:** Manages users, training material, billing, and system settings.
- **Case Worker / Regular User:** Accesses client records, runs transcriptions, views AI-generated summaries, and interacts with the chatbot.
- **Data Isolation:** Every data element (client record, transcription session, training material) is tagged with the agency ID. For example, "case status" in a client record is stored as a field in the client database and is only visible to users from that agency.

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3. Navigation and Global Layout

- **Navigation Bar (persistent):**
  - **Logo/Brand:** Top left (clickable to return to Dashboard).
  - **Main Menu Items:** Dashboard, Clients, Transcription, Chatbot, Settings.
  - **User Menu:** Profile, Logout.
- **Breadcrumbs:** On screens deeper than the main dashboard for clear hierarchy.
- **Responsiveness:** All screens should adjust gracefully for mobile and tablet views.
- **Consistency:** Use consistent typography, spacing, and color schemes across modules.

4. Detailed Screen Flow & UI Storyboard

A. Login / Authentication Screen

- **Purpose:** Authenticate users before accessing any part of SupportSync.
- **Elements:**
    - **Fields:** Email, Password.
    - **Buttons:** “Log In”, “Forgot Password?” (link to password reset).
    - **Design Note:** Clean, minimal layout with emphasis on secure access.
- **Data Source:** User authentication is handled via the user database; no sensitive technical details needed here, but the UI should visually reassure users.

B. Dashboard / Home Screen

- **Purpose:** Provide an overview and quick access to the main modules.
- **Components:**
    - **Summary Widgets:**
        - Total number of clients (pulled from the client management database).
        - Recent transcription sessions (list the last 5 sessions with timestamps and a snippet of the generated summary).
        - Notifications or alerts (e.g., pending tasks, new messages from the chatbot module).
    - **Quick Action Buttons:** “Add New Client,” “Start New Transcription,” and “Open Chatbot.”
    - **Recent Activity Feed:** A chronological list of recent activities (e.g., client updates, new transcriptions, chatbot interactions).
- **Data Source:** Client records, transcription session logs, system notifications.
- **UI Note:** The dashboard should be designed in a card-based layout for clarity, with clear icons and minimal text.

C. Clients Management Screen

- **Purpose:** Allow agencies to view, search, filter, and manage client records.
- **Layout:**
    - **Header:** “Clients” with a button “Add New Client.”
    - **Filters/Search Bar:** Allow filtering by name, case status, and last updated date.
    - **Client List/Table:**

        - **Columns:** Client Name, Case ID, Age, Assigned Case Worker, Case Status, Last Updated.
        - **Case Status:** The value comes directly from the client record stored in the database. (E.g., "Active," "Pending Review," "Closed".)
        - **Actions per row:** "View Details" (navigates to Client Detail Screen), "Edit," and optionally "Archive."
- **Data Source:** Client management database table.
- **UI Note:** Use a sortable and paginated table. Each action button should be clearly labeled and offer hover tooltips.

D. Client Detail Screen

- **Purpose:** Show complete information for a single client.
- **Layout:**
    - **Header:** Client's Name, Basic Info (age, case ID, status).
    - **Tabbed Interface or Side Sections:**
        - **Profile & Contact Info:** Detailed information (address, phone, emergency contacts).
        - **Session History:** A timeline of transcription sessions.
            - Each session displays a timestamp, session duration, and a summary snippet.
            - Clicking on a session opens a detailed view with the full transcription, AI-generated summary, notes, and action/treatment plan.
        - **Notes/Action Items:** List manually added notes and to-do items by case workers.
- **Data Source:** Client record, associated transcription session records, and notes database.
- **UI Note:** Ensure that data is presented clearly in a timeline or card format for easy navigation through historical data.

E. AI Transcription Service Screen

- **Purpose:** Allow users to record and transcribe live sessions with additional AI-powered post-processing.
- **Layout:**
    - **Recording Interface:**
        - **Controls:** "Start Recording," "Pause," "Stop."
        - **Live Transcription Area:** Real-time display of the transcription (editable text area for corrections).
    - **Post-Recording Actions:**

        - **Buttons:** “Generate Summary,” “Generate Notes,” “Generate Action/Treatment Plan.”
        - **Status Indicator:** Display progress (e.g., “Processing…” after hitting a generation button).
    - **Session List/History (Optional Pane):**
        - Shows a list of recorded sessions (with timestamps and summary preview) for the current client.
- **Data Flow:**
    - Recording data is captured in real time and sent to an AI transcription engine (like Whisper-based services).
    - Once processed, the transcription is stored under the client’s record along with AI-generated outputs.
- **UI Note:** Use a clear visual timeline and progress indicators. Include tooltips that explain what each AI generation function does.

F. Chatbot Interface Screen

- **Purpose:** Provide a conversational interface to search training materials, past transcriptions, summaries, and notes.
- **Layout:**
    - **Chat Window:**
        - **Input Field:** For user queries.
        - **Conversation History:** Display previous questions and responses.
    - **Search Options:**
        - Toggle or filter to choose between “Training Material” and “Session Data.”
        - A button for “New Query” that resets the conversation.
    - **Sidebar (Optional):**
        - Quick access to frequently asked questions or top queries.
- **Data Source & Data Isolation:**
    - The chatbot searches only within the data associated with the agency’s account. For training material, data is retrieved from files uploaded on the Settings page. For session data, it accesses transcriptions, summaries, and notes linked to the client records.
- **UI Note:** The design should mimic popular messaging apps with clear conversation bubbles and timestamps. Also, provide a small “Info” icon that explains the scope of the chatbot’s search.

G. Settings / Agency Dashboard Screen

- **Purpose:** Manage agency-specific configurations including training material uploads, billing, and integrations.

- **Sections:**
  1. **Training Material Management:**
     - **Upload Module:** File upload (supporting PDFs, DOCs, videos, etc.).
     - **List of Files:** Display file name, upload date, and a brief description.
     - **Actions:** “View,” “Edit Description,” “Delete.”
     - **Note:** These documents are used to train the agency’s chatbot. Data is stored with an agency identifier.
  2. **User Management:**
     - **Overview Panel:** List of all users associated with the agency (Name, Email, Role).
     - **Actions:** “Invite New User,” “Edit Role,” “Deactivate.”
     - **Data Source:** User management table linked to the agency.
  3. **Billing & Subscription:**
     - Display current plan, usage statistics, and payment history.
     - Provide a link/button for “Manage Billing.”
  4. **Integration Settings:**
     - API keys/configuration for integrating third-party transcription tools (e.g., Whisper AI).
     - Option to toggle features on/off.
- **UI Note:** Organize settings in a tabbed or accordion layout. Each section should have clear headers and actionable buttons.

H. User Management Screen (Detailed)

- **Purpose:** Provide administrators a detailed view and management tool for agency users.
- **Layout:**
  - **Header:** “User Management” with a button “Invite User.”
  - **Table of Users:**
    - **Columns:** Name, Email, Role (Admin/Case Worker), Status (Active/Inactive), Date Joined.
    - **Actions per User:** “Edit” (opens a modal to change role, update details), “Deactivate/Activate.”
- **Data Source:** User records with agency linkage.
- **UI Note:** Make sure actions like editing are done in modals with clear “Save” and “Cancel” buttons. Include validation messages where needed.

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5. Data Flow & Integration Considerations

- **Client Data:** Sourced from a central client management database. Every client record includes fields such as name, ID, age, case status, and assigned worker.
- **Transcription Sessions:** Each recording is linked to a specific client and time-stamped. The transcription text, AI-generated summary, notes, and action plans are stored as part of that session's record.
- **Training Materials:** Uploaded by the agency in the Settings page, stored with metadata (file name, description, upload date, and agency ID).
- **Chatbot Data Isolation:** The chatbot is designed to query only within the scope of the agency's data—both training materials and session history—ensuring strict data isolation.

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6. UI/UX Style Guidelines

- **Consistency:** Use Atlassian design system
- **Clarity:** Labels, tooltips, and helper text should be unambiguous. For example, "Case Status" in the Clients table should include a tooltip that explains the status is updated based on client interactions and case reviews.
- **Feedback:** Every action (e.g., saving a transcription, uploading a file, inviting a user) should include visual feedback (e.g., loading spinners, success/error notifications).
- **Responsiveness:** Ensure that all screens are optimized for both desktop and mobile devices, with key actions (like "Start Recording") easily accessible on smaller screens.

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7. Other aspects of the website

- We will need a homepage and other informational pages as per industry standards.
- We will need a pricing page from where they can make a purchase for a subscription.
- Their access to our platform will be determined by their subscription status.