

SAFCHA

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Internal Company Dashboard

Technical Specification & Development Brief

Platform: React / Next.js Web Application

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EXECUTIVE SUMMARY

1. Executive Summary

This document provides the complete technical specification for the Safcha Internal Company Dashboard — a centralized web application that consolidates all business operations, data tracking, team management, and strategic planning into a single, role-based platform.

1.1 Purpose

Safcha currently manages operations through a Notion workspace with 15+ disconnected sections, external spreadsheets (CRM, pricing), PDFs, and manual processes. This creates fragmented visibility, duplicated data entry, and difficulty tracking real-time business metrics across sales, inventory, production, and finance.

The new dashboard will replace and consolidate all of these into a unified system that provides real-time business intelligence, streamlined workflows, and role-based access for every team member.

1.2 Key Objectives

- Centralize all company data into one platform with a single source of truth
- Provide real-time KPI tracking across sales, inventory, production, and finance
- Automate interconnected workflows (e.g., new order → inventory deduction → production queue → financial update)
- Enable role-based access so each team member sees exactly what they need
- Replace fragmented Notion pages, spreadsheets, and PDFs with structured, searchable databases
- Support both Arabic and English for internal operations

1.3 Current Pain Points Being Solved

Pain Point	Current State	Dashboard Solution
Data fragmentation	Notion + Excel + PDFs + Zoho scattered	Single unified platform
No real-time visibility	Manual updates, outdated numbers	Auto-calculated live KPIs
Inventory blind spots	Separate Notion page, no alerts	Real-time stock with auto-deduction
Financial tracking	Separate tracker + pricing doc	Integrated P&L with margin analysis

CRM scattered	Zoho + Excel + Notion lists	Built-in CRM with pipeline stages
Team coordination	Tasks spread across pages	Centralized task system with assignments
Onboarding difficulty	Multiple PDFs and docs	Guided workflows within dashboard

TECHNICAL ARCHITECTURE

2. Technical Architecture & Stack

2.1 Recommended Tech Stack

Layer	Technology	Rationale
Frontend	Next.js 14+ (App Router)	SSR, file-based routing, React Server Components
UI Library	Tailwind CSS + shadcn/ui	Consistent design system, accessible components
State Management	Zustand or React Query	Lightweight, server-state caching
Charts / Data Viz	Recharts or Tremor	Dashboard-optimized chart components
Authentication	NextAuth.js or Clerk	Role-based auth, session management
Database	PostgreSQL (via Supabase or Neon)	Relational data, real-time subscriptions
ORM	Prisma	Type-safe database access, migrations
File Storage	Supabase Storage or AWS S3	Documents, contracts, images
Hosting	Vercel	Optimized for Next.js, global CDN
Notifications	Resend (email) + in-app system	Order alerts, low stock, task reminders

2.2 Database Architecture

The database should be relational (PostgreSQL) with the following core entity groups. Each module described later in this document maps to one or more database tables.

Entity Group	Core Tables	Key Relationships
Users & Auth	users, roles, permissions, teams	users → roles (many-to-many)
Sales & Orders	orders, order_items, clients, invoices	orders → clients, order_items → products
Inventory	raw_materials, finished_products, stock_movements	stock_movements → orders, production_batches
Production	production_batches, batch_items, quality_checks	batches → products, raw_materials
Finance	transactions, expenses, revenue_entries	transactions → orders, expenses

Products	products, product_variants, pricing_tiers	products → variants, pricing_tiers
CRM	contacts, companies, deals, activities	deals → contacts, companies
Tasks	tasks, projects, comments	tasks → users, projects
Events	events, event_inventory, event_leads	events → event_inventory, leads
Documents	documents, document_categories	documents → categories, modules

2.3 Authentication & Role-Based Access

Every page and API route must check user permissions. The system should support granular, section-level access control.

Role	Dashboard Access	Permissions
CEO / Admin (Aziz)	Full access to everything	Read/Write/Delete all modules, manage users and roles
Operations Manager (Malik)	Operations, Inventory, Tasks, CRM	Read/Write assigned modules, no financial admin
Factory Office (Fay)	Inventory, Production, Tasks	Read/Write inventory and production, read-only finance
Manufacturing (Father)	Production, R&D, Quality Control	Full R&D access, read-only sales and finance
Marketing Team	Marketing, Events, CRM (leads only)	Read/Write marketing, read-only sales data
Viewer / Guest	Configurable read-only sections	View-only, no edit or delete permissions

Each module section in the sidebar should show/hide based on the logged-in user's role. Within a module, specific actions (create, edit, delete, export) should also be permission-gated.

UX/UI DESIGN GUIDELINES

3. UX/UI Design Guidelines

The dashboard must feel premium, clean, and intuitive. The target aesthetic is a modern SaaS dashboard with warm, earthy tones that reflect Safcha’s brand identity (palm, sand, nature). Below are detailed design directives.

3.1 Design Principles

- **Clarity over decoration:** Every element must earn its place. No decorative clutter.
- **Progressive disclosure:** Show summary first, let users drill into details. Don’t overwhelm with data upfront.
- **Consistent patterns:** Same layout patterns for similar data types (all list views, all detail views, all forms).
- **Mobile-aware:** While primarily desktop, the layout should not break on tablets. Key metrics should be viewable on mobile.
- **Bilingual-ready:** Support RTL layout for Arabic. All text should be translatable. Keep UI labels short.

3.2 Color System

Token	Hex Value	Usage
--primary	#1A1A2E	Sidebar, headers, primary buttons
--accent-gold	#E8A838	CTAs, highlights, active states, Safcha brand
--accent-green	#2D6A4F	Success states, positive metrics, inventory OK
--accent-red	#D32F2F	Alerts, negative metrics, low stock warnings
--bg-main	#F5F5F0	Main content background (warm off-white)
--bg-card	#FFFFFF	Card backgrounds
--bg-sidebar	#1A1A2E	Sidebar background (dark)
--text-primary	#333333	Body text
--text-secondary	#757575	Labels, captions, secondary info
--border	#E0E0E0	Card borders, dividers

3.3 Layout Structure

The application layout follows a standard dashboard pattern with three zones:

- **Left Sidebar (240px fixed):** Dark background (#1A1A2E). Contains Safcha logo, navigation grouped by module category, user avatar and role at the bottom. Collapsible to icon-only (64px) mode.
- **Top Header Bar (64px fixed):** Contains page title/breadcrumbs, global search bar, notification bell with badge count, language toggle (EN/AR), and user menu dropdown.
- **Main Content Area (fluid):** Scrollable. Uses a max-width container (1400px) centered with padding. Content is arranged in responsive card grids.

3.4 Sidebar Navigation Structure

The sidebar should group navigation items by business function. Each group is collapsible. Active item gets a gold accent bar on the left edge. Navigation groups:

Nav Group	Icon	Sub-items
Overview	LayoutDashboard	CEO Dashboard, Company Profile
Sales & Orders	ShoppingCart	Orders, Clients, Wholesale, Export, Invoices
Inventory	Package	Raw Materials, Finished Products, Stock Movements
Production	Factory	Production Batches, Quality Control, R&D
Products	Coffee	Product Catalog, Pricing Tiers, Formulations
Finance	DollarSign	Revenue, Expenses, P&L, Financial Statements, Subscriptions
CRM	Users	Contacts, Companies, Deals Pipeline, Event Leads
Marketing	Megaphone	Campaigns, Ad Budget & ROI, Content Calendar
Events & Expos	Calendar	Event Calendar, Booth Planning, Event Inventory
Team & Tasks	CheckSquare	Task Board, Projects, Team Directory, Onboarding
Documents	FileText	Legal Docs, Contracts, SOPs, Templates
Strategy	Target	Business Plan, OKRs, Goals, Roadmap
Settings	Settings	Users & Roles, Company Settings, Integrations

3.5 Component Library

Build a shared component library in /components/ui that is reused across all modules. This ensures visual consistency and speeds development. Core components:

Component	Description	States
KPICard	Metric card with value, trend arrow, comparison %	Loading, normal, positive, negative, neutral

DataTable	Sortable, filterable, paginated table with bulk actions	Loading skeleton, empty, populated, selected
DetailDrawer	Slide-in panel for viewing/editing records	Open, closed, edit mode, read mode
StatusBadge	Color-coded pill for order/task/production status	Per status type (configurable)
MetricChart	Line/bar/area chart for trends	Loading, no-data, populated
FormModal	Modal dialog for create/edit forms	Pristine, dirty, validating, submitting
EmptyState	Illustration + CTA for empty module sections	Per module type
SearchBar	Global search with result categories	Focused, suggestions, results
FilterBar	Horizontal filter chips with active state	Active filters, clear all
Timeline	Vertical timeline for activity/history logs	Loading, populated

3.6 Interaction Patterns

- **Click row to open detail:** All table rows are clickable. Opens a slide-in drawer (not a new page) for quick viewing. Full page available via “Open” button in drawer.
- **Inline editing:** Status changes, quick notes, and simple fields should be editable inline without opening a form.
- **Keyboard shortcuts:** Cmd+K for global search, Cmd+N for new record, Escape to close drawers/modals.
- **Toast notifications:** Bottom-right corner. Auto-dismiss after 4 seconds. Types: success (green), error (red), warning (gold), info (blue).
- **Loading states:** Skeleton screens for initial loads, inline spinners for actions, optimistic UI for quick updates.
- **Confirmation dialogs:** Required for any delete action. Use a clear destructive-action button (red) with explicit confirmation text.

MODULE SPECIFICATIONS

4. Module Specifications

Each module below maps directly to a section in the sidebar. For each module, we define: the purpose, what it replaces from the current Notion setup, the data fields, the views/pages needed, the KPIs displayed, and how it connects to other modules.

4.1 CEO Dashboard (Overview)

Attribute	Detail
Purpose	High-level snapshot of the entire business at a glance
Replaces	Notion: 00. Company Home, Company Dashboard
Access	CEO / Admin only (configurable to share specific widgets)
Default View	Grid of KPI cards + trend charts + activity feed

4.1.1 KPI Cards (Top Row)

Display 6-8 KPI cards in a responsive grid. Each card shows: metric name, current value, comparison to previous period (% , arrow), and a sparkline mini-chart.

KPI	Source Module	Calculation	Update Frequency
Total Revenue (MTD)	Finance	Sum of all revenue entries this month	Real-time
Total Orders (MTD)	Sales & Orders	Count of orders this month	Real-time
Avg. Order Value	Sales & Orders	Revenue / Order count	Real-time
Inventory Value	Inventory	Sum (qty × unit cost) all finished products	Real-time
Production Output (MTD)	Production	Total kg produced this month	Daily
Gross Margin %	Finance	(Revenue - COGS) / Revenue × 100	Real-time
Open Tasks	Tasks	Count of tasks with status ≠ Done	Real-time
Active Clients	CRM	Clients with orders in last 90 days	Daily

4.1.2 Charts Section

Below the KPI cards, display 2-3 charts in a 2-column grid:

- **Revenue Trend:** Line chart showing daily/weekly/monthly revenue for the selected period. Toggle between periods.
- **Sales by Channel:** Donut chart breaking down B2B vs B2C vs Events vs Export revenue.
- **Inventory Status:** Horizontal stacked bar showing stock levels by product vs. reorder thresholds.

4.1.3 Activity Feed

Right column (or below charts on smaller screens): a real-time activity feed showing the last 20 actions across all modules. Each entry shows: timestamp, user avatar, action type (icon), description, and a link to the relevant record. Examples: "Aziz created Order #1042", "Fay updated Inventory: Palm Leaf Powder -50kg", "Malik completed Task: SIGEP booth layout".

4.2 Sales & Orders

Attribute	Detail
Purpose	Track all B2B and B2C orders, wholesale accounts, export deals, and invoicing
Replaces	Notion: Wholesale section, Export section, Safcha_CRM_v2.xlsx, Zoho Event Leads, Wholesale Inquiry Handling
Access	CEO (full), Operations (read/write), Marketing (read-only)

4.2.1 Orders List View

A filterable, sortable table of all orders with the following columns:

Field	Type	Description
Order ID	Auto-generated	Sequential ID with prefix: ORD-2026-0001
Date	DateTime	Order creation date
Client Name	Relation → CRM	Linked to client record
Channel	Select	B2B Wholesale B2C Direct Event Export
Products	Multi-relation → Products	List of products in order with quantities
Total Amount (SAR)	Calculated	Sum of line items
Status	Select	Draft Confirmed Processing Shipped Delivered Cancelled
Payment Status	Select	Pending Partial Paid Overdue
Fulfillment	Select	Pending Packed Shipped Delivered
Notes	Rich Text	Internal notes on order
Assigned To	Relation → Users	Team member handling the order
Created By	Auto	User who created the record

4.2.2 Order Detail View

Slide-in drawer or full page showing complete order details:

- **Header:** Order ID, status badge, client name (linked), channel badge, dates.
- **Line Items Table:** Product name, variant, quantity (kg), unit price (SAR), line total, discount applied.
- **Pricing Summary:** Subtotal, discount, VAT (15%), shipping, total.
- **Payment Timeline:** Visual timeline of payment events (invoice sent, payment received, etc.).

- **Activity Log:** Timestamped history of all changes to this order.
- **Actions:** Generate Invoice (PDF), Duplicate Order, Change Status, Add Note, Cancel Order.

4.2.3 Wholesale Management

A sub-section specifically for B2B wholesale operations:

- **Wholesale Client List:** Table of all wholesale accounts with: company name, contact person, email, phone, city, pricing tier (Standard/Silver/Gold/Strategic), contract status, last order date, total lifetime value.
- **Pricing Tier Reference:** Display the wholesale pricing structure (500 SAR/kg base down to 175 SAR/kg strategic) so the team can quickly reference tier pricing when processing orders.
- **Wholesale Inquiry Pipeline:** Kanban board with stages: New Inquiry → Qualified → Sample Sent → Negotiation → Contract → Active Account → Churned.

4.2.4 Export Management

Track international sales and export operations:

- **Export Orders:** Filtered view of orders where channel = Export, with additional fields: destination country, shipping method (air/sea), customs docs status, export license reference.
- **Export Client Directory:** International distributors and importers with country, import regulations notes, preferred shipping terms.

4.2.5 Sales KPIs

KPI	Calculation
Monthly Revenue	Sum of delivered order totals this month
Orders This Month	Count of orders created this month
Average Order Value	Revenue / Order count
Conversion Rate	Confirmed orders / Total inquiries
Revenue by Channel	Breakdown: B2B, B2C, Events, Export
Top 5 Clients by Revenue	Ranked by total order value (trailing 12 months)
New Clients This Month	Count of first-time buyers
Repeat Order Rate	Clients with 2+ orders / Total clients

4.2.6 Workflow: New Order Flow

When a new order is created, the system should trigger the following automated sequence:

1. Order created with status “Draft”

2. On status change to “Confirmed”: automatically deduct reserved inventory quantities
3. If stock insufficient: flag order with “Low Stock Warning” and create a production task
4. Generate invoice (auto-populated with client details and pricing tier)
5. On status change to “Shipped”: update fulfillment status, send notification
6. On status change to “Delivered”: update financial records with revenue entry
7. If payment overdue > 7 days: auto-notify assigned team member

4.3 Inventory & Stock Management

Attribute	Detail
Purpose	Track raw materials, finished products, stock movements, and reorder alerts
Replaces	Notion: Inventory Management page, manual tracking
Access	CEO (full), Operations (full), Factory (read/write), Production (read)

4.3.1 Raw Materials Inventory

Field	Type	Description
Material Name	Text	e.g., Palm Leaf Powder, Matcha Powder, Vanilla Extract
SKU	Auto-generated	RM-001, RM-002, etc.
Category	Select	Base Powder Flavoring Packaging Other
Current Stock (kg)	Number	Current quantity in warehouse
Unit Cost (SAR)	Number	Cost per kg
Reorder Threshold	Number	Minimum stock before alert triggers
Reorder Quantity	Number	Standard reorder amount
Supplier	Relation → Suppliers	Linked supplier record
Location	Select	Al-Ahsa Warehouse Khobar Office
Last Restocked	Date	Most recent stock-in date
Expiry Date	Date	For perishable materials

4.3.2 Finished Products Inventory

Field	Type	Description
Product Name	Relation → Products	Linked to product catalog
Variant	Text	e.g., 30g pouch, 100g tin, 1kg bulk
SKU	Auto-generated	FP-SAF-001
Current Stock (units)	Number	Finished units ready to ship
Reserved Stock	Number	Units allocated to confirmed orders
Available Stock	Calculated	Current - Reserved
Unit Cost (SAR)	Number	COGS per unit
Retail Price (SAR)	Number	Standard retail price

Location	Select	Al-Ahsa Warehouse Khobar Office
Batch Number	Relation → Production	Which batch produced this stock
Expiry Date	Date	Product expiry

4.3.3 Stock Movements Log

Every inventory change is logged as a stock movement record. This creates a complete audit trail.

Field	Type	Description
Movement ID	Auto-generated	SM-2026-0001
Date	DateTime	When the movement occurred
Type	Select	Stock In Stock Out Adjustment Transfer Return
Material/Product	Relation	Which item was affected
Quantity	Number	Amount (+/-) in kg or units
Reason	Select	Purchase Production Input Order Fulfillment Damage Sample Event
Reference	Relation	Link to related Order, Batch, or Event
Performed By	Relation → Users	Who executed the movement
Notes	Text	Additional context

4.3.4 Inventory KPIs & Alerts

KPI / Alert	Description
Total Inventory Value	Sum of (qty × unit cost) for all items
Low Stock Alerts	Items below reorder threshold (displayed as red badges)
Days of Stock Remaining	Current stock / average daily consumption
Stock Turnover Rate	COGS / Average inventory value
Expiring Soon	Items expiring within 30 days
Top Moving Products	Ranked by outbound stock movements in period

4.3.5 Workflow: Automated Inventory

- When order status changes to “Confirmed”: reserve finished product stock
- When order status changes to “Shipped”: deduct reserved stock, create Stock Out movement

10. When production batch completes: add finished product stock, create Stock In movement, deduct raw material stock
11. When any item drops below reorder threshold: create alert notification, optionally auto-create purchase order draft
12. When stock adjustment is made: require a reason code and notes

4.4 Production & Manufacturing

Attribute	Detail
Purpose	Track production batches, quality control, R&D formulations, and manufacturing capacity
Replaces	Notion: Product Formulation, New Product Development (Raw Powder Supplier, New Flavor Ideas, Palm Dye, Date Pit Hojicha)
Access	CEO (full), Manufacturing/Father (full), Factory/Fay (read/write production), Operations (read)

4.4.1 Production Batches

Field	Type	Description
Batch ID	Auto-generated	BATCH-2026-0001
Product	Relation → Products	Which product is being produced
Target Quantity (kg)	Number	Planned production amount
Actual Quantity (kg)	Number	Actual output (filled post-production)
Yield %	Calculated	$(\text{Actual} / \text{Target}) \times 100$
Status	Select	Planned In Progress Quality Check Completed Failed
Start Date	DateTime	Production start
End Date	DateTime	Production end
Raw Materials Used	Multi-relation	List of materials with quantities consumed
Quality Score	Number	QC rating (1-10)
Produced By	Relation → Users	Production manager
Notes	Rich Text	Production notes, issues encountered

4.4.2 R&D / Product Development

Track new product formulations and experimental batches:

Field	Type	Description
Project Name	Text	e.g., Yuzu Lemon Blend, Palm Dye, Date Pit Hojicha
Category	Select	New Flavor New Product Line Improvement Research
Status	Select	Ideation Formulation Testing SFDA Submission Approved Archived

Lead	Relation → Users	Who is leading this R&D project
Formulation Details	Rich Text	Ingredients, ratios, process steps
Test Results	Rich Text	Taste tests, lab results, feedback
Cost Estimate	Number	Projected COGS per kg
Target Launch Date	Date	When this should be market-ready
Related Suppliers	Multi-relation	Suppliers for new ingredients
Attachments	File	Lab reports, photos, research PDFs

4.4.3 Quality Control

Every completed production batch should go through a QC checklist:

- **Visual inspection:** Color consistency, powder fineness, packaging integrity
- **Weight verification:** Sample units weighed against target
- **Taste/aroma test:** Subjective quality rating
- **Lab analysis:** If applicable, nutritional content verification
- **SFDA compliance:** Labeling, batch number, expiry date check

QC results are stored on the batch record. Failed batches cannot be moved to inventory.

4.4.4 Production KPIs

KPI	Calculation
Monthly Output (kg)	Sum of actual quantity for completed batches this month
Capacity Utilization %	Actual output / Max capacity (target: 2-3 tons)
Average Yield %	Mean yield across batches
QC Pass Rate	Batches passed / Total batches
Production Cost per kg	Total raw material cost / Total output kg
R&D Pipeline Count	Active R&D projects by status

4.5 Product Catalog

Attribute	Detail
Purpose	Central catalog of all Safcha products, variants, pricing tiers, and formulations
Replaces	Notion: Product Formulation section, Safcha_Pricing_Strategy doc, Cafe Add-Ons / Menu Options
Access	CEO (full), all team (read), Marketing (read/write for content fields)

4.5.1 Product Records

Field	Type	Description
Product Name	Text	e.g., Safcha Ceremonial Blend, Safcha Vanilla, Safcha Karak
Category	Select	Pure Safcha Ceremonial Blend Flavored Blend Karak Palm Dye Specialty
SKU Prefix	Text	Used for generating variant SKUs
Description	Rich Text	Product description for internal reference
Key Ingredients	Text	Ingredient list summary
Caffeine Free	Checkbox	Always true for Safcha core, may vary for ceremonial blends
SFDA Status	Select	Approved Pending Not Submitted
SFDA Reference	Text	Approval document reference number
Base Cost (SAR/kg)	Number	Production COGS
Base Retail Price (SAR)	Number	Standard consumer price
Image	File	Product photo for reference
Status	Select	Active In Development Discontinued
Launch Date	Date	Market launch date

4.5.2 Pricing Tiers

Each product should have linked pricing tier records for wholesale:

Tier	Min. Order (kg)	Price (SAR/kg)	Discount %	Margin %
Retail (Base)	0	500	0%	97%
Standard Wholesale	10	375	25%	95%
Silver Partner	50	300	40%	94%

Gold Partner	100	250	50%	92%
Strategic Partner	500+	175	65%	88%

Note: These are reference values based on current pricing strategy. The system should allow editing these tiers per product.

4.5.3 Cafe Add-Ons / Menu Builder

For cafe partnerships, maintain a menu options reference showing: suggested drink preparations, recommended serving sizes, pricing recommendations for cafe menus, and pairing suggestions. This helps the sales team when onboarding new cafe partners.

4.6 Finance & Accounting

Attribute	Detail
Purpose	Track all revenue, expenses, P&L, margins, financial statements, and team subscriptions
Replaces	Notion: Financial Tracker, Financial Statement, Team Subscription Tracker, Safcha_Pricing_Strategy doc
Access	CEO (full), Finance role (full), Operations (read limited summary), others (no access)

4.6.1 Revenue Tracking

Automatically populated from delivered orders. Each revenue entry includes: date, order reference, client, channel, product breakdown, gross amount, VAT, net amount, payment method, and payment status.

4.6.2 Expense Tracking

Field	Type	Description
Expense ID	Auto	EXP-2026-0001
Date	Date	When expense was incurred
Category	Select	Raw Materials Packaging Shipping Marketing Salaries Rent Equipment Subscriptions Events Travel Other
Amount (SAR)	Number	Expense amount
VAT (SAR)	Number	VAT paid if applicable
Vendor	Text	Who was paid
Payment Method	Select	Bank Transfer Cash Credit Card
Receipt	File	Upload receipt/invoice image
Recurring	Checkbox	Is this a recurring monthly expense?
Approved By	Relation → Users	Approval chain for expenses above threshold
Notes	Text	Additional context

4.6.3 P&L Dashboard

Auto-generated profit & loss view with configurable time periods (monthly, quarterly, yearly):

- **Revenue:** Total revenue by channel, product line, and client segment
- **COGS:** Raw material costs, production labor, packaging costs

- **Gross Profit:** Revenue - COGS
- **Operating Expenses:** Marketing, salaries, rent, subscriptions, travel
- **Net Profit:** Gross Profit - Operating Expenses
- **Margin Analysis:** Per-product margins, per-channel margins, trend over time

4.6.4 Team Subscription Tracker

Track all SaaS and tool subscriptions the company pays for: tool name, monthly/annual cost, billing date, category (design, dev, marketing, operations), who uses it, renewal date, and cancellation status. This replaces the existing Notion subscription tracker.

4.6.5 Financial KPIs

KPI	Calculation
Gross Margin %	$(\text{Revenue} - \text{COGS}) / \text{Revenue} \times 100$
Net Margin %	$\text{Net Profit} / \text{Revenue} \times 100$
Monthly Burn Rate	Total operating expenses per month
Revenue Growth %	$(\text{This month revenue} - \text{Last month}) / \text{Last month} \times 100$
Average Revenue per Client	Total revenue / Active client count
Expense by Category	Breakdown pie chart of spending categories
Cash Flow	Revenue received - Expenses paid (actual cash movement)

4.7 CRM (Customer Relationship Management)

Attribute	Detail
Purpose	Central database of all contacts, companies, deals, and relationship management
Replaces	Notion: CRM under Operations, Safcha_CRM_v2.xlsx, Zoho Event Leads, wholesale list
Access	CEO (full), Sales/Operations (read/write), Marketing (read + lead creation)

4.7.1 Contact Records

Field	Type	Description
Name	Text	Full name of the contact
Email	Email	Primary email
Phone	Phone	Primary phone (with country code)
Company	Relation → Companies	Which company they belong to
Role/Title	Text	Their position
Type	Select	Client Lead Supplier Partner Investor Other
Source	Select	Website Event Referral Cold Outreach Social Media Zoho Import
Tags	Multi-select	Cafe Owner, Distributor, Retailer, International, etc.
City / Region	Text	Location
Last Contacted	Date	Most recent interaction
Notes	Rich Text	Relationship notes, preferences
Assigned To	Relation → Users	Team member managing this contact

4.7.2 Companies

Company records for B2B relationships: company name, industry (Cafe, Retail, Distribution, Hotel, etc.), city, website, pricing tier assigned, contract status, total lifetime value (auto-calculated), and linked contacts.

4.7.3 Deals Pipeline

Visual Kanban board for tracking deal progression:

Stage	Description	Actions Available
New Lead	Initial inquiry or contact made	Qualify, assign, add notes

Qualified	Confirmed interest and budget fit	Send samples, schedule call
Sample Sent	Product samples shipped for evaluation	Track delivery, follow up
Proposal	Pricing and terms sent	Negotiate, adjust pricing tier
Negotiation	Active back-and-forth on terms	Update terms, involve CEO if needed
Closed Won	Deal signed, first order placed	Create order, set up recurring schedule
Closed Lost	Deal fell through	Record reason, set follow-up reminder

4.7.4 Event Leads

Leads captured at events (SIGEP, Global Village, local expos) flow into the CRM with event source tagged. This replaces the Zoho Event Leads system and the current manual wholesale inquiry handling process.

4.8 Marketing

Attribute	Detail
Purpose	Manage marketing campaigns, ad spend tracking, content planning, and ROI analysis
Replaces	Notion: Marketing page, Ads Budget Planner & ROI Calculator, Benchmark: Perfect Ted
Access	CEO (full), Marketing (read/write), Operations (read)

4.8.1 Campaign Tracker

Field	Type	Description
Campaign Name	Text	e.g., Ramadan 2026 Push, SIGEP Follow-up
Channel	Select	Instagram TikTok Google Ads Influencer Email Event PR
Status	Select	Planning Active Paused Completed
Start Date / End Date	Date Range	Campaign duration
Budget (SAR)	Number	Allocated spend
Actual Spend (SAR)	Number	Actual spend to date
Impressions	Number	Total reach
Clicks / Engagement	Number	Click-throughs or engagement actions
Conversions	Number	Orders attributable to this campaign
Revenue Generated	Number	Total revenue from campaign conversions
ROI %	Calculated	$(\text{Revenue} - \text{Spend}) / \text{Spend} \times 100$
Notes	Rich Text	Learnings, screenshots, performance notes

4.8.2 Ad Budget & ROI Dashboard

Visual dashboard showing: monthly ad spend by channel (stacked bar chart), ROI by channel (bar chart), spend vs. budget progress (gauge chart), and a running comparison to competitor benchmarks.

4.8.3 Content Calendar

Monthly calendar view of planned content posts: date, platform, content type (image, video, story, reel), topic, status (draft, approved, published), assigned creator, and link to published post. Filterable by platform.

4.9 Events & Expos

Attribute	Detail
Purpose	Plan, execute, and track ROI for trade shows, exhibitions, and events
Replaces	Notion: Events section (Booth Designs, Event Inventory Need Plan, Event Leads), Global Village Strategy
Access	CEO (full), Operations (full), Marketing (read/write)

4.9.1 Event Records

Field	Type	Description
Event Name	Text	e.g., SIGEP 2026, Global Village 2026
Type	Select	Trade Show Exhibition Pop-up Festival Conference
Location	Text	Venue, city, country
Dates	Date Range	Start and end dates
Status	Select	Planning Confirmed Active Completed Cancelled
Budget (SAR)	Number	Total allocated budget
Actual Cost (SAR)	Number	Total actual spend
Booth Number / Size	Text	Assigned booth details
Team Attending	Multi-relation → Users	Who is going
Objectives	Rich Text	What we aim to achieve
Results Summary	Rich Text	Post-event: leads collected, sales, learnings

4.9.2 Event Inventory Planning

For each event, create an inventory plan listing: products to bring (linked to product catalog), quantities, packaging type, display materials, booth equipment, marketing collateral (brochures, business cards, banners), and shipping logistics. This should auto-check against current finished product inventory and flag any shortages.

4.9.3 Event Lead Capture

Leads collected at events should auto-flow into the CRM with the event tagged as the source. Track: name, company, email, phone, interest level (hot/warm/cold), products interested in, and follow-up notes. After the event, these leads enter the Deals Pipeline for follow-up.

4.10 Team & Tasks

Attribute	Detail
Purpose	Task management, project tracking, team directory, onboarding, and SOPs
Replaces	Notion: Tasks Dashboard, Project Dashboard, Team Directory, Feedback & Roadmap, Hiring Plan, Employee Onboarding
Access	All team members (own tasks read/write), Managers (team tasks), CEO (all)

4.10.1 Task Board

Kanban board view with columns: To Do, In Progress, In Review, Done. Each task card shows:

Field	Type	Description
Task Title	Text	Clear, action-oriented task name
Description	Rich Text	Detailed instructions
Status	Select	To Do In Progress In Review Done Blocked
Priority	Select	Urgent High Medium Low
Assigned To	Relation → Users	Responsible person
Due Date	Date	Deadline
Project	Relation → Projects	Parent project if applicable
Related Module	Select	Sales Inventory Production Marketing Event General
Tags	Multi-select	Custom tags for filtering
Attachments	File	Supporting files
Comments	Rich Text Thread	Discussion thread on the task

4.10.2 Projects

Group related tasks into projects: project name, description, owner, start/end dates, status (Planning, Active, On Hold, Completed), progress % (auto-calculated from task completion), and linked tasks. Replaces the current Project Dashboard in Notion.

4.10.3 Team Directory

Internal team directory showing: name, role, department, email, phone, profile photo, start date, and access role in the dashboard. Links to their assigned tasks and activity history.

4.10.4 Employee Onboarding

When a new team member is added, generate an onboarding checklist from a template. This replaces the current Safcha_Employee_Onboarding and Safcha_Onboarding_Malik docs. Checklist items include: account setup, tool access, reading materials, training schedule, and role-specific tasks.

4.11 Document Vault

Attribute	Detail
Purpose	Centralized storage for all company documents with categorization and version tracking
Replaces	Notion: Legal Docs section, all scattered PDFs and uploaded files, Packing Partnership docs, contracts
Access	CEO (full), per-document permissions configurable

4.11.1 Document Categories

Category	Examples from Current Notion	Access Default
Legal & Contracts	AL HALA AL MUKHTAS.pdf, Safcha Contract Strategy, Wholesale Contract	CEO + Legal
SFDA & Compliance	SFDA approval documents, product certifications	CEO + Production
Business Plans	Business Plan, One-Pager, Value Proposition Canvas, Portfolio Map	CEO only
Financial Docs	Financial Statements, Pricing Strategy doc	CEO + Finance
HR & Onboarding	Hiring doc, Employee Needs, Onboarding docs	CEO + HR
Research	SafchaStudy.pdf, Palm Tree Tea Research	CEO + R&D
Marketing	Brand guidelines, campaign assets, competitor benchmarks	CEO + Marketing
SOPs & Templates	Process documents, reusable templates	All team
Strategy	B2B Strategy Guide, Global Village Strategy, Ithra Strategy	CEO only

Each document record should track: file name, category, upload date, uploaded by, version number, description, related module, and access permissions. Support PDF preview within the dashboard.

4.12 Strategy & Planning

Attribute	Detail
Purpose	OKRs, goals tracking, business plan references, roadmap, and growth planning
Replaces	Notion: Plan section (Goals & Objectives, Company OKRs, Team Alignment Map, Culture Map), Launch section (Strategic Plan, Project Plan), Grow section (Capital, Investors Relationship Management)
Access	CEO (full), Managers (read + own OKRs), Team (own goals only)

4.12.1 OKRs (Objectives & Key Results)

Quarterly OKR tracker with: Objective name, owner, quarter, key results (each with target metric, current value, progress %), status (on track, at risk, behind), and linked tasks/projects that contribute to this OKR.

4.12.2 Roadmap

Visual timeline (Gantt-style) showing major initiatives plotted across quarters. Categories: Product Development, Market Expansion, Operations, Hiring, Technology. Replaces the current Feedback & Roadmap page.

4.12.3 Investor Relations

Track investor contacts, meeting history, pitch deck versions, funding rounds, and cap table. This is CEO-only access and replaces the Investors Relationship Management page under the Grow section.

4.13 Settings & Administration

The settings module is CEO/Admin only and includes:

- **User Management:** Add/remove users, assign roles, reset passwords, set section-level permissions.
- **Company Profile:** Company name, logo, address, CR number, VAT number, SFDA license info. This data auto-populates into invoices and contracts.
- **Notification Settings:** Configure which events trigger email/in-app notifications per role.
- **Integration Settings:** Future: connect to accounting software (Qoyod, Wafeq), shipping APIs (Aramex, SMSA), payment gateways.
- **Data Export:** Export any module's data as CSV/Excel for external reporting.
- **Audit Log:** Complete log of all user actions across the system for accountability.
- **Backup & Data:** Database backup schedule, data retention policies.

CROSS-MODULE WORKFLOWS

5. Cross-Module Workflows

The power of this dashboard comes from interconnected modules. Below are the key automated workflows that connect multiple modules:

5.1 Order-to-Cash Flow

13. New inquiry comes in (CRM: New Lead created)
14. Lead qualified, samples sent (CRM: stage update, Inventory: sample stock deduction)
15. Deal closed (CRM: Closed Won, Order: new order created)
16. Order confirmed (Inventory: stock reserved)
17. Order fulfilled (Inventory: stock deducted, Finance: revenue entry created)
18. Invoice generated (Finance: invoice PDF with company details)
19. Payment received (Finance: payment recorded, Order: payment status updated)

5.2 Production-to-Inventory Flow

20. Low stock alert triggers (Inventory: finished product below threshold)
21. Production batch planned (Production: new batch with target quantity)
22. Raw materials allocated (Inventory: raw materials reserved for batch)
23. Production completed (Production: batch status = completed)
24. QC passed (Production: quality check approved)
25. Inventory updated (Inventory: finished product stock increased, raw materials deducted)

5.3 Event Lifecycle Flow

26. Event created (Events: new event record with dates and budget)
27. Inventory planned (Events: product list created, cross-checked with Inventory)
28. Production order if needed (Production: batch created for event stock)
29. Event executed (Events: status = Active)
30. Leads captured (CRM: new contacts with event source tag)
31. Post-event (Events: results summary, Finance: actual costs recorded, CRM: leads enter pipeline)

5.4 Employee Onboarding Flow

- 32. New hire added (Team: new user record with role)
- 33. Onboarding checklist generated from template (Tasks: task list created)
- 34. Dashboard access provisioned based on role (Settings: permissions assigned)
- 35. Onboarding tasks completed over first 2 weeks (Tasks: progress tracked)
- 36. Manager review (Tasks: onboarding marked complete)

MIGRATION & DATA MAPPING

6. Notion to Dashboard Migration Map

This section maps every item from the current Notion workspace to its new home in the dashboard, ensuring nothing is lost during migration.

Current Notion Section	Migrates To	Data Action
Home > Company Home	Settings > Company Profile	Migrate company info
Home > Company Dashboard	CEO Dashboard	Rebuild as live KPI dashboard
Home > Tasks Dashboard	Team & Tasks > Task Board	Migrate all tasks
Home > Project Dashboard	Team & Tasks > Projects	Migrate projects
Home > Team Directory	Team & Tasks > Team Directory	Migrate team records
Home > Feedback & Roadmap	Strategy > Roadmap	Migrate roadmap items
Plan > Business Plan	Documents > Business Plans	Upload as document
Plan > Goals & Objectives	Strategy > OKRs	Convert to OKR format
Plan > Company Profile	Settings > Company Profile	Merge with company info
Plan > Business Plan One-Pager	Documents > Business Plans	Upload as document
Plan > Value Proposition Canvas	Documents > Strategy	Upload as document
Plan > Business Portfolio Map	Documents > Strategy	Upload as document
Plan > Company OKRs	Strategy > OKRs	Migrate to OKR tracker
Plan > Company Culture Map	Documents > HR & Onboarding	Upload as document
Plan > Team Alignment Map	Documents > Strategy	Upload as document
Launch > Product Launch Plan	Strategy > Roadmap	Convert to roadmap items
Launch > Website Launch Checklist	Team & Tasks > Projects	Convert to project + tasks
Launch > Strategic Plan	Strategy > Roadmap	Merge into roadmap
Launch > Project Plan	Team & Tasks > Projects	Convert to project
Events > Booth Designs	Events > Event Records (attachments)	Attach to event records
Events > Event Inventory Plan	Events > Event Inventory Planning	Migrate to event inventory
Events > Event Leads - Zoho	CRM > Event Leads	Import all leads

Events > Wholesale Inquiry Handling	CRM > Deals Pipeline	Convert to pipeline process
Wholesale > strategy + list + CRM.xlsx	Sales > Wholesale Management	Import all clients and data
Wholesale > B2B Strategy Guide	Documents > Strategy	Upload as document
Export > strategy + list	Sales > Export Management	Import export clients
NPD > Raw Powder Supplier	Production > R&D (supplier records)	Create supplier records
NPD > New Flavor Ideas	Production > R&D	Create R&D project records
NPD > Palm Dye Development	Production > R&D	Create R&D project
NPD > Date Pit Hojicha	Production > R&D	Create R&D project
Product Formulation	Products > Product Catalog (formulations)	Migrate to product records
Cafe Add-Ons > Menu Options	Products > Cafe Menu Builder	Migrate menu options
Palm Tree Tea Research	Documents > Research	Upload as document
Global Village Strategy	Documents > Strategy	Upload as document
Ithra Gets Creative	Documents > Strategy	Upload as document
Inventory > Inventory Management	Inventory module	Migrate all data to new schema
Financials > Financial Tracker	Finance > Revenue + Expenses	Migrate data
Financials > Financial Statement	Documents > Financial Docs	Upload as document
Financials > Team Subscription Tracker	Finance > Subscription Tracker	Migrate subscriptions
Financials > Pricing Strategy doc	Products > Pricing Tiers	Convert to pricing records
Grow > Capital	Strategy > Investor Relations	Migrate funding data
Grow > Investors Relationship	Strategy > Investor Relations	Migrate investor contacts
Marketing > all items	Marketing module	Migrate campaigns and budgets
Legal Docs > all items	Documents > Legal & Contracts	Upload all documents
Hiring Plan > all items	Team & Tasks > Onboarding	Migrate hiring data
Operations > CRM	CRM module	Full CRM data migration
Resources > Tools list	Settings > Integrations (reference)	Reference only
Databases > raw databases	Backend database (PostgreSQL)	Data migration scripts
Archive	Documents > Archive subfolder	Bulk upload

DEVELOPMENT ROADMAP

7. Development Roadmap

Recommended phased approach to building the dashboard:

7.1 Phase 1: Foundation + Sales & Inventory (Weeks 1-4)

- **Week 1:** Project setup (Next.js, Prisma, PostgreSQL, Auth), sidebar navigation, layout shell, user roles
- **Week 2:** Sales & Orders module (order CRUD, list view, detail drawer, status workflow)
- **Week 3:** Inventory module (raw materials, finished products, stock movements, alerts)
- **Week 4:** Connect Sales → Inventory flow, basic CEO Dashboard KPIs

7.2 Phase 2: Finance + Production (Weeks 5-7)

- **Week 5:** Finance module (revenue from orders, expense tracking, P&L view)
- **Week 6:** Production module (batches, QC, R&D tracker)
- **Week 7:** Connect Production → Inventory flow, Finance auto-population, CEO Dashboard charts

7.3 Phase 3: CRM + Products + Team (Weeks 8-10)

- **Week 8:** CRM (contacts, companies, deals pipeline Kanban)
- **Week 9:** Product Catalog (products, variants, pricing tiers), Team & Tasks (task board, projects)
- **Week 10:** Connect CRM → Sales flow, wholesale/export management sub-views

7.4 Phase 4: Marketing + Events + Docs + Strategy (Weeks 11-13)

- **Week 11:** Marketing (campaigns, ad budget, content calendar)
- **Week 12:** Events & Expos (event records, event inventory, lead capture)
- **Week 13:** Document Vault, Strategy & OKRs, Settings & Admin, data migration from Notion

7.5 Phase 5: Polish & Launch (Weeks 14-16)

- **Week 14:** Full CEO Dashboard with all data sources connected, global search, notifications system

- **Week 15:** Arabic language support (RTL), mobile responsiveness, performance optimization
- **Week 16:** User acceptance testing, data migration verification, team training, go-live

7.6 Estimated Total Timeline

Approximately 16 weeks (4 months) for a single developer. This can be compressed to 10-12 weeks with parallel development or by using a low-code backend like Supabase with pre-built UI components.

APPENDIX

8. Appendix

8.1 Glossary

Term	Definition
COGS	Cost of Goods Sold — direct costs of producing Safcha products
CRUD	Create, Read, Update, Delete — basic data operations
CRM	Customer Relationship Management
DXA	Document XML Architecture units (1440 DXA = 1 inch)
KPI	Key Performance Indicator
MTD	Month to Date
OKR	Objectives and Key Results
P&L	Profit & Loss statement
QC	Quality Control
R&D	Research & Development
ROI	Return on Investment
RTL	Right-to-Left (Arabic text direction)
SAR	Saudi Riyal
SFDA	Saudi Food and Drug Authority
SKU	Stock Keeping Unit — unique product identifier
SOP	Standard Operating Procedure
SSR	Server-Side Rendering
VAT	Value Added Tax (15% in Saudi Arabia)

8.2 Open Questions for Ameen

37. Hosting preference: Vercel (recommended for Next.js) or self-hosted?
38. Database preference: Supabase (PostgreSQL + auth + storage + real-time) or separate services?
39. Email service: Resend, SendGrid, or existing provider?
40. Domain for the dashboard: e.g., app.safcha.com or dashboard.safcha.com?

41. Existing design system or Figma files to reference for brand consistency?
42. Any existing API integrations to consider (Zoho, payment gateways, shipping)?
43. Preferred deployment pipeline: GitHub Actions, Vercel CI/CD?
44. Budget for third-party services (Supabase, Vercel, email, file storage)?

8.3 Success Criteria

The dashboard will be considered successful when:

- All team members can access their relevant modules without confusion
- Order-to-cash flow is fully automated end-to-end
- CEO can view real-time business metrics without asking anyone
- Inventory alerts prevent stockouts before they happen
- Financial data is accurate and auto-generated from operations
- All current Notion data has been migrated with zero data loss
- Page load times are under 2 seconds on standard connection
- The team voluntarily stops using Notion for day-to-day operations