EV Portal – MVP Draft (Short Version)

1) Goal & Users

Goal: A lean portal for adult guardians (EV) to view clients, view/download invoices, submit requests, and book appointments.
Login: at firm (Kanzlei) level (one access per EV organization). No 2FA in the MVP.
Visibility: A firm sees only its own clients (court-appointed/assigned).

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2) Modules / Tabs

- Dashboard
- Clients
- Finance (Invoices)
- Requests / Tickets
- Appointments
- Settings

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3) Content per Module (no frills)

3.1 Dashboard

- Cards: Number of clients, open invoices, new documents (7 days).
- Lists: Next appointments (5), open requests/tickets (5).

3.2 Clients

- List (columns): Client number · Name · Date of birth · Last visit · Status (new/active/paused).
- Search/Filters: Name, date of birth; filters: status, cash handover (yes/no).
- Detail (tabs):
  - Overview: Basic personal data, last visit
  - Finance: Issued invoices with PDF; expense receipts/cash outlays only within the respective invoice
  - Documents: Download of existing documents only
  - History: Shared events; no internal notes
- New client: "New client form" (short), incl. upload court order/certificate (required). After creation: internal notification.

3.3 Finance (Invoices)

- Page: List of issued invoices (open & paid) with PDF download.
- Expense receipts/cash outlays: no separate area — shown per invoice as attachment/line item.
- No payment history; no advance (akonto) for now.

3.4 Requests / Tickets

- Create ticket (types): Change master data · Document request · Appointment/service request · Complaint/question.
- Ticket list: Number · Type · Client · Status · Last update.
- Detail: Conversation/attachments · Status history. Closure email to the firm.

3.5 Appointments

- Book: Client · Service type · Location · Preferred time window · Notes.
- My appointments: Date/time · Client · Service type · Status; reschedule/cancel per rules.

3.6 Settings

- Firm profile: Name, email, phone.
- Notifications: Email updates for ticket status/invoices/documents.
- Language: German (default), English optional.

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4) Files & Uploads (simple)

- No separate upload module.
- Uploads only inside flows:
  - New client: court order/certificate (required).
  - Appointment: optional attachments.
- On upload, choose a category (e.g., Court order/Finance/Medical/Misc.) for correct filing in the client folder.

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5) Roles & Security (MVP)

- Firm access: read, add (new client, ticket, appointment; uploads in those flows), no editing/deleting existing data/documents.
- Internal (admin/support): full access.
- Audit: logins, downloads, uploads, ticket closures, invoice views.
- Privacy: Only shared fields/documents visible; internal notes/histories are hidden.

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6) Core Flows (step sequence)

1. New client: fill the new client form → upload court order/certificate → internal notification → client appears in list.
2. Change request: create ticket → status updates → closure info.
3. Book appointment: submit form → confirmation/status visible.
4. Open invoice: list → download PDF.
5. View document: under “Documents” in the client.

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7) Out of scope (MVP)

2FA, payment history, advance (akonto) display, free edit/delete by firm, global document-upload module, separate area for expense receipts.

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8) To decide (for refinement)
Final document categories for upload mapping.
Field whitelist for “Clients > Overview”.
Rules for rescheduling/canceling appointments.
Languages: English just for programming, ist German in the end
Thanks! ☺

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