Upgrade the existing Recurrer platform with 16 new functionalities focused on enhanced dashboard analytics, intelligent playbooks, collaboration, automation, real-time alerts, and gamified UX. Ensure seamless integration with existing project structure and data sources (MySQL + Chargebee).

**🔐 Use Credentials from Environment Secrets**

* **MySQL Credentials**:
  + MYSQL\_HOST
  + MYSQL\_USERNAME
  + MYSQL\_PASSWORD
  + MYSQL\_DATABASE
  + MYSQL\_PORT
* **Chargebee Credentials**:
  + CHARGEBEE\_API\_KEY
  + CHARGEBEE\_SITE
* Use from Replit secret store (process.env) in backend services

**🔧 Features to Implement**

**1. Dashboard – Customer Health Distribution (Area Chart with Filters)**

* Replace current visualization with a **gradient area chart**
* Use Chart.js or Recharts with animated transitions
* Timeline should be dynamic (weekly, monthly, quarterly)
* Pull data from customer.health\_score and syncs with MySQL + Chargebee usage
* Show segment-wise health: Good, Average, Risk, Critical

**2. Gamified User Engagement Tracker with Achievement Badges**

* Track:
  + Logins, task completion, playbook initiations, RedZone resolutions
* Assign achievements:
  + Explorer, Taskmaster, Resolver, etc.
* Show on Dashboard header or Profile
* DB Schema: user\_achievements table with badge\_id, user\_id, unlocked\_at

**3. Real-Time Collaboration Annotations**

* Enable annotations on:
  + Customer pages
  + Dashboard widgets
  + Playbooks
* Allow team-level access with live sync via WebSocket or polling
* DB: annotations table with type, entity\_id, comment, user\_id

**4. Customizable Notification Center**

* Panel to show alerts categorized by:
  + info, warning, critical
* Examples:
  + “Campaign not sent in 30 days”
  + “Customer health dropped by 30%”
* Allow Admin to configure thresholds in settings

**5. Gmail & Google Calendar Auth Integration**

* OAuth2 login and permission sync
* Fetch Gmail events, meetings for customer context
* Sync scheduled meetings to tasks
* Dependencies: googleapis, passport-google-oauth
* Allow users to sign-up if their domain is reelo.io
* Allow Admin to create a unique sign-up link for users to register on the platform

**6. Personalized Dashboard Greeting**

* Greet logged-in user with name and emoji:
  + “👋 Welcome back, Ayesha! Let’s drive success today.”
* Use auth.user.first\_name and store emoji trends based on activity

**7. Contextual Help Tooltips with Mascot**

* Floating help icon with mascot illustrations (SVG)
* Tooltips:
  + What is RedZone?
  + How do Playbooks work?
* Controlled by help\_content JSON object and customizable in Admin panel

**8. Micro-Interactions for Data Refresh**

* On refresh button or sync:
  + Animate the button
  + Show success or error toast: Data synced!
* Animate with framer-motion

**9. Animated Spinners with Playful Designs**

* Replace default spinners with SVG/mascot animations
* Use during:
  + Loading data
  + Syncing
  + Task saving

**10. Advanced Reporting with Custom Metrics & Filters**

* /reports page:
  + Add metric selector (dropdown)
  + Filter by date, customer segment, plan, region
  + Export as CSV
* API route: /api/reports/custom → fetch data from MySQL + Chargebee

**11. Deep Workflow Automation with Conditional Logic**

* Task and playbook actions based on conditions like:
  + Usage < 300
  + Campaign count = 0
  + Revenue drop > 10%
* Logic builder: AND/OR combinations
* UI: JSON-style or tag-style builder with validation
* DB: workflow\_conditions field (JSONB) per task/playbook

**12. Enhanced Playbooks System**

**12a. Playbook Creation**

* Visual Playbook Builder:
  + Name, Description
  + Trigger Type (manual, usage\_threshold, renewal\_due, scheduled (recurring or time specific once) etc.)
  + Segment filter (select segment from DB or MySQL mapping)
  + Active/Inactive toggle
  + Task needs to be mapped to a customer account and platform user else it cannot be saved or shown.
  + When clicking on a task, it should open the task details and give open to update the tasks as per requirements shared in the statues
* Add multiple **Tasks**:
  + Delay in days
  + Action: Send Email, Schedule Call, Reminder, Alert
  + **Condition Field** (with AND/OR logic)
    - Example: usage < 300 AND campaign\_sent = 0
  + Meeting tasks require **recording link** to mark as completed
  + Document upload task requires the document to be uploaded to be closed by the user. The uploaded file should be saved on the DB/server and can be opened/retrieved with an option to do so on the completed task -from task page view.
  + Define Task Owner from – CSM of the account, TL of a CSM, a specific user
* **Task Statuses**:
  + Incomplete, Completed (for meetings type task – a meeting recording link is mandatory field to complete), Delayed, Cancelled (TL approval), Deferred (reschedule & TL approval)
* **Task Logs**:
  + All activity to be logged in task\_logs and account\_logs
* **Admin Configs**:
  + If delay > X days → notify TL
  + If delay > Y days → move to RedZone
  + Use any of the metrics mapped as trigger too.
* Delete Options:
  + Only delete playbook
  + Delete playbook + tasks
  + Delete only tasks and deactivate playbook

**12b. Playbook Execution**

* Admin/CSM can start playbook manually
* Or auto-trigger via field-based conditions
* Show status:
  + Progress (percentage), current task, completed tasks
* Add internal comments, notes
* Log each execution in playbook\_runs

**13. Fix Task Completion Graph Hover**

* Fix tooltip renderer to use correct labelIndex
* Avoid repeating legends on hover
* Library: likely Recharts or Chart.js

**14. Improve Graph Colors & Animations**

* Replace grey with theme-compatible color (e.g., indigo, blue-gray)
* Add entry/load/transition animations to:
  + Line charts
  + Pie charts
  + Area graphs

**15. RedZone Configuration + Resolution Framework**

* Add Configure RedZone button in /admin/redzone-settings
* Visual condition builder:
  + Metric conditions (AND/OR)
  + Triggers based on usage drop, campaign inactivity, churn signals
* When match found:
  + Auto-create RedZone task for TL
  + Notify CSM
  + CSM can escalate manually to TL
* Resolution Criteria:
  + Customer status updated
  + RedZone task updated
  + Metrics improved (set in config)
* When all conditions met:
  + Auto-close RedZone case
  + Log with timestamp in redzone\_logs
* NavBar Counter Logic:
  + CSMs see only their count
  + TLs see sum of their team
  + Admin sees all
* RedZone list page must support filters by owner, age, metric breached

**🔁 Project Integration Notes**

1. Update Backend Routes:
   * /api/dashboard
   * /api/playbooks
   * /api/redzone
   * /api/google-auth
   * /api/reports/custom
   * /api/notifications
   * /api/badges
2. Update Shared Schema:
   * users → add achievements, greeting\_emoji
   * playbooks, playbook\_tasks, playbook\_runs
   * task\_logs, account\_logs
   * redzone\_rules, redzone\_logs
   * notifications, annotations, badge\_unlocked
3. Update Frontend Pages:
   * dashboard.tsx
   * reports.tsx
   * playbooks/
   * admin/redzone-settings.tsx
   * components/notifications, components/badges, etc.

**🛠️ Tech Stack Assumptions:**

* Frontend: React (likely with Tailwind), using Vite
* Charts: Recharts or Chart.js
* Auth: Supabase or custom JWT auth
* Data: MySQL + Chargebee + Internal API