# 📱 UI Specification: General Admin Profile (Role ID: 2)

Role: General Admin (Operations Manager / COO)
Target Device: Desktop (Primary - High Resolution)
Frontend Framework Context: React/Angular components using Tailwind CSS grid layouts.

## 1. Global Shell & Navigation

**Database Context:** staff (Role 2), activity_log.

**Canvas Regions:**

- **Left Sidebar (Navigation):**
  1. 👥 **Administrar Usuarios** (Teams, Staff, Client Access).
  2. 🏢 **Clientes** (Directory, Onboarding, Certs).
  3. 💵 **Finanzas** (Verification, Collections, AP).
  4. 📈 **Estadisticas** (Operational Metrics) *[NEW]*.
  5. 💬 **Comunicacion** (Templates, Logs, Calendar).
- **Top Bar:**
  - **Global Search:** Async Typeahead.
    - *Query:* SELECT legal_name, tax_id FROM entities UNION SELECT email FROM staff.
  - **Notifications:**
    - *Badge:* Count client_payment_proofs WHERE status = 'pending_verification'.
    - *Click:* Navigates directly to *Finanzas* > *Verificar Pagos*.

## 2. Section: Administrar Usuarios (The Hierarchy Engine)

### Tab A: Estructura de Equipos (Kanban Board)

*Frontend Component: Drag-and-Drop Board (e.g., React Beautiful DnD).*

**1. Group Column (Parent Container)**

- **Header Data:** client_groups.group_name, staff.first_name (Chief).
- **Header Action:** "Edit Group" (Modal to change Chief).

**2. Accountant Card (Draggable Item)**

- **Visuals:** Avatar, Name, Pill Badge ("15 Clients").
- **Color Coding:**
  - Green Border: < 15 Clients.
  - Orange Border: 15-25 Clients.

    - Red Border: > 25 Clients.
- **Data Attribute:** data-staff-id="{staff_id}".

**3. Orphan Client Sidebar (Draggable Item)**

- **List Source:** Clients with assigned_accountant_id = NULL.
- **Interaction:** User drags Orphan Client -> Drops on Accountant Card -> Triggers API PATCH /entities/{id}.

## Tab B: Gestión de Staff (Data Grid)

*Frontend Component: Editable Table.*

**Columns & Input Types:**

1. **Full Name:** Text Display.
2. **Role:** Select Dropdown (staff_roles).
3. **Base Commission:**
    - *Input:* Number (Percentage).
    - *Format:* 0.10 displays as 10%.
    - *Val:* Min 0, Max 1.
4. **Contact:**
    - *Field:* email (Read Only).
    - *Field:* telegram_chat_id (Text Input + "Test Message" button).
5. **Actions:** Toggle Switch (is_active).

## Tab C: Accesos de Cliente (Bridge Table Manager)

*Goal: Manage client_user_access. One login -> Multiple Companies.*

**Master-Detail View:**

- **Master (Left):** List of Users (Role = 'Client').
- **Detail (Right):** "Linked Entities" Card List.
    - **Add Button:** Opens "Link Entity Modal".
    - **Modal Fields:**
        - **Select Entity:** Async Select (Search entities).
        - **Permission:** Radio Group (OWNER, VIEW_ONLY).
        - **Is Primary:** Checkbox.

# 3. Section: Clientes (Deep CRM & Onboarding)

## Tab A: Directorio (CRM Table)

*Frontend Component: Data Table with Advanced Filtering.*

**Filters (Top Bar):**

- **Group:** Multi-select (Medical, Construction).

- **Debt Status:** Select (Clean, Overdue > 30, Overdue > 60).

**Table Fields:**

1. **Legal Name / RFC:** Double line text.
2. **Contact:** entity_contacts.value (Primary Email).
3. **Sales Rep:** staff.first_name (Brought By).
4. **Contract:** Status Chip (Green: Active, Gray: No Contract).
5. **Action:** "360 View" Button (Opens Profile Modal).

## Tab B: Nuevo Cliente (The Wizard) 💡 *Critical for Data Integrity*

*Frontend Component: Multi-step Stepper Form.*

### Step 1: Fiscal Identity (entities)

- **Legal Name:** Text Input (Required).
- **RFC:** Text Input (Uppercase, Regex Validation: ^[A-ZÑ&]{3,4}\d{6}[A-V1-9][A-Z\d]{2}$).
- **Tax System:** Select Dropdown (SAT Catalog).
- **Zip Code:** Number Input (5 digits).

### Step 2: Hierarchy & Sales (entities relations)

- **Client Group:** Select (Triggers Chief assignment).
- **Assigned Accountant:** Select (Filtered by Group).
- **Brought By (Sales Rep):** Select staff. **IMPORTANT.**
- **Agreed Commission %:** Number Input.
  - *Default:* Pre-fill with Sales Rep's base rate.
  - *Override:* Allow Admin to change it for *this specific deal*.

### Step 3: Revenue (service_contracts)

- **Service Name:** Text Input (e.g., "Monthly Retainer").
- **Billing Amount:** Currency Input.
- **Frequency:** Select (MONTHLY, ANNUAL).
- **First Bill Date:** Date Picker.
- **Commissionable:** Toggle Switch (True/False).

### Step 4: User Access

- **Search Existing User:** Search Bar (Email).
  - *Result:* "Juan Perez found. Link to this new entity?"
- **Create New User:** (If not found) -> Inputs: Name, Email, Temp Password.

## Tab C: Certificados SAT

*Frontend Component: File Uploader Card.*

**Upload Form:**

1. **Client:** Read-only label.

2. **Certificate (.cer):** File Input (Accept .cer).
3. **Private Key (.key):** File Input (Accept .key).
4. **Password:** Password Input (Masked).
5. **Action:** "Encrypt & Store" Button.
   - *Frontend Logic:* Do not store .key in local storage. Send as multipart/form-data immediately to secure endpoint.

# 4. Section: Finanzas (Operations)

## Tab A: Verificar Pagos (Split Screen)

*Goal: Link client_payment_proofs to cfdis.*

#### Left Pane: The Proof

- **Image Canvas:** Zoom/Pan controls.
- **Metadata:**
  - **Amount:** Display $10,000 (Editable in case OCR failed).
  - **Date:** Display 2023-10-15.
  - **Reference:** Text Input.

#### Right Pane: The Allocation

- **Bank Matcher:** List of bank_transactions (± $1.00 tolerance).
  - *Interaction:* Radio select to link "Real Money".
- **Invoice Selector:** List of Unpaid cfdis.
  - *Field:* **Allocate Amount**. (Input field per invoice).
  - *Logic:* User enters $5,000 for Invoice A and $5,000 for Invoice B.
  - *Validation:* Sum of Allocations must <= Proof Amount.

#### Footer Actions:

- **Reject:** Opens text area for reason -> Sends Email.
- **Verify:** Triggers DB Transaction.

## Tab B: Cobranza (Collections)

#### Data Table:

1. **Client:** Name.
2. **Total Debt:** Sum of unpaid expired contracts.
3. **Oldest Invoice:** Date.
4. **Action:** "Send Statement".
   - *Frontend:* Generates PDF preview of "Estado de Cuenta" before sending.

# 5. Section: Estadisticas (Operational Metrics)

*Focus: Efficiency of the Firm's machine, not just profit.*

### Tab A: Onboarding Velocity

**Charts:**

1. **New Clients per Month:** Bar Chart.
2. **Avg Setup Time:** Number (Days between "Created" and "First Bill").
3. **Sales Source Leaderboard:**
   - *Table:* Staff Name | Clients Brought | Total Contract Value.

### Tab B: Collection Efficiency

**Charts:**

1. **DSO (Days Sales Outstanding):** Line Chart (Trend).
2. **Payment Method Mix:** Pie Chart (SPEI vs Check vs Cash).
3. **Top Debtors:** List of clients causing the most cashflow drag.

### Tab C: Support Load

**Charts:**

1. **Messages Volume:** Line Chart (Messages per day).
2. **Template Usage:** Bar Chart (Which templates are used most? e.g., "Tax Reminder").

## 6. Section: Comunicacion

### Tab A: Plantillas (Rich Text)

*Frontend Component: WYSIWYG Editor (e.g., Quill, TinyMCE).*

**Fields:**

- **Template Name:** Text.
- **Subject:** Text.
- **Body:** Editor.
- **Variable Sidebar:** Clickable Chips ({{client_name}}, {{balance}}, {{month}}).

### Tab B: Calendario

*Frontend Component: FullCalendar.*

**Event Sources (Color Coded):**

- 🔴 **Tax Deadlines:** tax_types configuration.
- 🟢 **Billing:** service_contracts.next_billing_date.
- 🔵 **Certs Expiring:** digital_certificates.valid_to.
- **Interaction:** Click event -> Opens context modal (e.g., list of clients expiring that day).