

PROJECT: AGENT MANAGEMENT CRM – EDUCATION INDUSTRY

(FULL DETAILED EXPLANATION – MANAGER READY)

1 PROJECT OVERVIEW (VERY CLEAR)

Problem in Market

- Education agents handle students manually
- Applications track Excel / WhatsApp etc.
- Commission disputes
- No transparency
- No audit trail
- Payments messy

Solution

We are building a **centralized CRM platform** where:

- Agents onboard themselves
- Admin approves & controls
- Students apply via tracked links
- Universities & courses are managed
- Commission is auto-calculated
- Payouts are controlled & auditable

👉 **Single source of truth system**

2 USER ROLES & RESPONSIBILITIES (VERY IMPORTANT)

SUPER ADMIN (OWNER LEVEL)

Power: 100%

Can:

- Create / manage admins
- Define commission rules
- Approve high-value payouts
- Configure payment gateways
- View full audit logs
- Freeze agents
- Override system data

Cannot:

- Do daily operations (by policy)

ADMIN (OPERATIONS TEAM)

Power: 70%

Can:

- Approve agents
- Manage universities & courses
- Track applications
- Approve commissions
- Create payouts
- Upload payment proofs

Cannot:

- Change system rules
- Override payouts

- Delete audit logs

AGENT (BUSINESS PARTNER)

Power: 30%

Can:

- Register & manage profile
- View universities & courses
- See commission per course
- Apply students
- Track applications
- View payouts

Cannot:

- Edit commission
- Trigger payout
- See other agents' data

STUDENT

Power: Limited

Can:

- Fill application form
- Upload documents

Cannot:

- Login
- View commission
- Edit application after submit

3 AGENT REGISTRATION & APPROVAL FLOW

Agent Side

1. Agent opens registration page
2. Fills:
 - a. Company details
 - b. Contact details
 - c. Industry experience
 - d. Uploads documents
 - e. Bank details
3. Submits form
4. Status = Under Review

Admin Side

1. Admin views pending agents
2. Verifies:
 - a. Documents
 - b. Contact
 - c. Business legitimacy
3. Admin action:
 - a. Approve → Agent Active
 - b. Reject → Reason mandatory
4. Agent notified via email

 **Agent cannot login until approved**

UNIVERSITY & COURSE MANAGEMENT

University Module

Admin can:

- Add university
- Upload logo
- Set country, intakes
- Set default commission
- Enable / disable university

Course Module

Each course has:

- University ID
- Course name
- Level (UG/PG)
- Duration
- Tuition fee
- Intake
- Eligibility
- Commission (default)

Agents can:

- View courses
- See **their commission only**

5 COMMISSION LOGIC (CORE BRAIN)

Priority-Based Commission Engine

System checks in this order:

1. Agent + Course commission
2. Agent + University commission
3. Course default commission
4. University default commission

- ✓ First match wins
- ✓ Locked at enrollment
- ✓ Stored permanently

Why?

- Flexible deals
- No confusion
- Scalable

6 STUDENT APPLICATION FLOW

Two Entry Points

1. Agent fills application
2. Student fills via agent link

Unique Link Example

apply.crm.com/form?agent_id=AG123

System auto-tags:

- Agent ID
- Source
- Timestamp

Application Steps

1. Personal details
2. Academic history
3. Course selection
4. Document upload
5. Submit

After submit:

- Application locked
- Status = Submitted

7 APPLICATION STATUS PIPELINE

Fixed & Controlled States

Submitted
→ Documents Verified
→ University Applied
→ Offer Received
→ Accepted
→ Visa Applied
→ Enrolled
→ Commission Eligible
→ Paid

Rules:

- Only admin can change status

- Every change logged
- Agent sees read-only

8 PAYOUT SYSTEM (MOST CRITICAL)

Commission ≠ Payout

Commission is **potential money**

Payout is **actual money**

Payout Flow

1. Student status = Enrolled
2. System creates commission record
3. Admin reviews & approves
4. Approved commissions grouped
5. Admin initiates payment
6. Uploads proof
7. Status = Paid

Payment Access

Role	Can Pay
Agent	✗
Admin	✓
Super Admin	✓ (final override)

9 AUDIT LOG (SYSTEM CCTV)

Audit log stores:

- Who did action
- What action
- Old value
- New value
- Time
- IP address

Used for:

- Disputes
- Legal proof
- Accountability

Cannot be edited or deleted.

10 DASHBOARDS & REPORTS

Agent Dashboard

- Applications count
- Offer letters
- Enrollments
- Commission earned
- Paid / pending

Admin Dashboard

- Total agents
- Conversion rate
- Revenue
- Pending payouts
- Top agents

1 1 SECURITY & PERMISSIONS

- Role-based access
- JWT authentication
- OTP for payout
- File validation
- Rate limiting
- Audit logging

1 2 TECH ARCHITECTURE

Frontend

- Next.js
- Tailwind CSS

Backend

- Node.js + NestJS
- REST APIs

Database

- PostgreSQL

Storage

- AWS S3

Payments

- Razorpay / Wise / Stripe

1 3 DEVELOPMENT PHASES (REALISTIC)

Phase 1 – Foundation

- Auth
- Roles
- Agent onboarding

Phase 2 – Core Business

- Universities
- Courses
- Applications

Phase 3 – Money

- Commission
- Payout

Phase 4 – Safety

- Audit logs
- Reports

Phase 5 – Scale

- Automation
- Analytics
- Performance