

# 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 pe
- 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