Admin Panel Document:

1. Personna Roles:
   1. Super Admin (Manager, Admins)
   2. Merchant
   3. Partner
   4. Corporate.

### Super Admin:

* List Of Left side menus:
  + Manage Users
  + Manage Partner
  + Manage Corporate
  + Manage Merchant
  + Manage Client
  + Subscription Plan
  + Manage Merchant Products
  + Reports: (Partner, Corporate and Merchant Subscriptions)
  + Wellness Report

#### Manage System Users:

* Super Admin can create managers and sub admins.
* Super Admin can Edit/Delete Managers and Sub Admins.
* Super Admin assign roles (Modules) to Managers and Sub Admins.
* Once managers and sub admins are created, they can also login from our platform.
* Fields for user creation:
  + First Name
  + Last Name
  + Email
  + Password
  + Roles (Manager , Admin)

**Questions:**

* Do we require any additional fields for user creation? (We have only above fields in User creation Form—----------------Listed fields are enough)
* What are the menus for Manager and Admins? (**Managers**: Manage Merchant Product, Wellness Report, **Admin** : Manage Partner, Manage Corporate, Manage Merchant, Manage Client, Subscription Plan—--------we have shared documents on the functionalities, those should show the menus)
* What are the roles Super admin can create? (Manager and Admin, and also clients )

#### Manage Partners:

* Super admin can see the list of partners in our platform.
* SA(Super Admin) can create partners.
* SA can Edit/Delete partners
* SA can search the partners based on Name, Email, Mobile Number.
* SA can filter the partners based on onboarding dates.
* SA can see the details of partners.
* SA can see the purchased subscription plan details in the partner detail screen.
* **Fields For Partner Creation:**
  + Company name
  + Company email
  + Company registration number
  + Company Address
  + Years of trading
  + Contact Person Designation
  + Bank account details
  + Description of business activity and services provided
  + Upload company registration documentation (e.g., certificate of incorporation).

**Questions:**

* What are the user roles for a partner? (Res : Managers, Admins, Wellness Officers)
* Do we require Subscription license histories for partners?
* RESPONSE: Yes , we require subscriptions license history to track when next payment will be made by partner

#### Manage Merchant:

* Super admin can see the list of merchants on our platform.
* SA(Super Admin) can create merchants.
* SA can Edit/Delete merchants
* SA can search the merchants based on Name, Email, Mobile Number.
* SA can filter the merchants based on onboarding dates.
* SA can see the details of merchants.
* SA can see the purchased subscription plan details in the merchant detail screen.
* **Fields For Merchant Creation:**  
    
  Company name
* Company email
* Company registration number
* Company Address
* Years of trading
* Contact Person Designation
* Bank account details
* Description of business activity and services provided
* Upload company registration documentation (e.g., certificate of incorporation).

**Questions:**

* What are the user roles for a merchant?, Merchant creates products , tracks translation history of redeemed products from their store, calculated how much revenue they get from products redeemed using pulse coins
* Do we require Subscription license histories for merchants?
* **RESPONSE: No , we dont require licence or licence history**

#### Manage Corporate:

* Super admin can see the list of Corporates on our platform.
* SA(Super Admin) can create Corporates.
* SA can Edit/Delete Corporates
* SA can search the Corporates based on Name, Email, Mobile Number.
* SA can filter the Corporates based on onboarding dates.
* SA can see the details of Corporates.
* SA can see the purchased subscription plan details in the Corporate detail screen.
* **Fields for Corporate Creation:**
* Company name
* Company email
* Company registration number
* Company Address
* Years of trading
* Contact Person Designation
* Bank account details
* Description of business activity and services provided
* Upload company registration documentation (e.g., certificate of incorporation)

**Questions:**

* What are the user roles for a Corporate? Corporate user roles are specified in the documents sent , corporate is reseller, that, means, they add clients, view client profile, wellness plans, activity reports and can sent broadcast feed to users registered with corporate
* Do we require Subscription license histories for merchants?
* **RESPONSE: No , we dont require licence or licence history**

#### Manage Users: (Application Users)

* Super admin can see the list of Clients on our platform.
* SA can search the Clients based on Name, Email, Mobile Number.
* SA can delete users
* SA can activate/inactivate users
* SA can add users from admin panel

#### Subscription Plan: (Mobile Application plans)

* SA can see the list of plans
* SA can create the subscription plan
* SA can Edit/Delete subscription plans
* SA can Activate/DeActivate plans
* Fields for Subscription Plan:
  + Plan Name
  + Plan Description
  + Plan Price
  + Start Date
  + End Date

Questions:

* How to manage Subscription for partner, merchant and corporate users?

RESPONSE: Merchants dont pay subscriptions, Partners and Corporates can pay a monthly or yearly licence fee

* What happens when the license expires for corporate, partner, merchant?
* Ex: Corporate total license = 10, Total Emp = 15, How will the license be divided across the users?
* RESPONSE: If licence expires , notifications should be sent to either corporate or merchant to remind them to renew licence.

#### Manage Products:

* SA can see the list of Product list.
* SA can search products by Name, Description.
* SA can filter products based on “Product Added date” and “Merchant”.
* SA can Approve/Reject the products from the list, For product, SA has to provide reason to the merchant. Merchant will get a notification of rejection.
* SA can activate/deactivate products from the list.
* SA can add/Edit/Delete own products for all the users and these products are not associated with merchants.

Questions:

* Do we require Approval for the product and Should we have to ask for a reason for any product rejection?Approval for product could be dialogue modal message asking merchant or admin if they are sure they want to add the product or not.

#### Reports (Subscription reports)

* SA can see the revenue reports from the subscription plan of Partner, Merchant, Corporate.
* Revenue reports will be presented by Graphs.
* SA can filter the data based on user type and Time Duration.
* List of Subscription purchased by Partner, Merchant, Corporate

Notes:

* Should we have to give activity logs in SA login?
* RESPONSE : Yes, we should have logs on SA

### **Merchant:**

* List Of Left side menus:
  + Manage Products
  + Manage Product Stock
  + Product Purchase History

#### Manage Products:

* Merchant can see the list of products.
* Merchant can search the product by name,description.
* Merchant can add/edit product
* Merchant can delete the product.
* Merchants can import / Export product files.

**Fields for Product:**

* Product Name
* Description
* Product Image
* Product Prices (System will convert price value into coins)

**Questions:**

* Do we have to give prices / coins for products? (We give the coin value that translates to the money value )

#### Manage Stock:

* Merchant can see the products stock
* Merchants can search the product by name.
* Merchants can add / Edit stock for each product.

#### Product Purchase history:

* Merchant can see the list of purchased products.
* Merchants can see the list of purchased history based on the Date Range filter.
* Merchants can filter the list based on Redeemed Status. Status will be like Requested, Redeemed, Expired.
* Merchants can export the data into file(.xls,)

#### Subscription: (is this required for Merchant? If yes, how is it required?)

* Merchants can see the Subscription details like start and End Date.
* RESPONSE : Subscription is not required for merchants

**Questions:**

* What are the roles for Merchant? - Merchant adds products , manages products in stock, tracks transaction history for products redeemed from their store
* Do we have features like, merchants can add their managers?
* RESPONSE: Merchant should have universal account that all merchant users should use
* Here we have only one subscription plan activated for each Merchant. No customisation required for Subscription plan for merchant
* RESPONSE: Merchant don't pay subscription or have subscription plans , they register to sell products

### **Partners:**

* List of Left side Menus:
  + Manage System users (Managers, Admins, Wellness Officers)
  + Manage Users
  + Subscriptions
  + Revenue Report
  + Activity Logs : Report on system usage , who has accessed the system , who performed what task, system errors

#### Manage System Users:

* Partners can see the List of system users.
* Partners can search users by name, Email.
* Partners can add/Edit System users
* Partners can delete system users/
* Partners can assign roles to system users. (Manager, Admin, Wellness officer)
* Partners can see the details of System users like Subscription, Roles, etc.
* Partners can activate/deactivate system users.

Questions:

* What are roles for Managers, Admin Officers and Wellness officers)
* What features are accessible to individual role users? -
  + **Managers** - Manage Users
  + **Admin** - Manage users and subscription.

#### Manage Users:

* Partners can see the list of client users. (Application users)
* Partners can search the users by name, Email.
* Partners can filter the list by dates.
* Partner can Export the data into xls file.
* Partners can activate/deactivate users.
* Partners can delete the users.
* Partners can see the Wellness data history into detail page,

Questions:

* Manage users wellness data : Will partners assign wellness plans to client users? Because we have an auto generated wellness plan feature into application.

RESPONSE: Wellness plans will automatically be generated on user sign-up.

#### Subscriptions:

* Partners can see the analytics of Subscription licenses. (Purchased licenses, Activated license.)
* Partner can filter the analytics data based on Time Duration like (Day, Week, Month)
* Partners can see the List of subscription licenses with associated client users data.

Questions:

* If a partner purchases bulk subscriptions from super admin, What will be the start date and Expired date of all the licenses? -   
  All the license start date and expiry date will be calculated once the license will be activated.
* Partner can change the subscription price after he/she purchased licenses from Super Admin? - It is possible (Partner purchase licenses at 5$ cost and he can provide the license to their client users at 10$)
* Do we have the same price of subscription for all the users? - it is possible, Price can differ based on users and license.
* What is the renewal process? Because, Partners purchase first time subscription licenses manually from Super Admin. Will Super admin insert the data for the first time subscription licenses. - Munashe Will share Merchant account Payment gateway details, so when any partners do transactions via PG, our platform will be notified with the transaction details. Please share
* How Partners share the license key to client users? Do we have to integrate any share feature into admin panel
* RESPONSE:Partners pay for their own monthly or yearly licence fees that allows then to onboard subscribed clients. Licence for partner cannot be shared with client

#### Revenue Reports:

* Partners can see the report of revenue generation from subscription.
* Reports will be represented into the graphs.
* Partners can filter the data based on time duration like (Day, Week, Month, Year)

Questions:

* Need to understand the revenue model. Because it is completely based on subscription plan questions. - Done

Application Changes:

* We have to give partner selection in profile screen for first time users
* There will be some changes in subscription plans for Partner’s Client users.
* Is there any chances, Same user will be in Partners, Corporate and Individual users?
* Should we have to give features like change theProfile like Partner users to Corporate users? If yes then what we have to do with the subscription plan?

### Corporate Users:

* List of left side menus:
  + Manage users
  + Wellness data
  + Subscriptions
  + Feeds
  + Revenue Report

#### Manage Users:

* Corporate user can see the list of users
* Corporate user can import bulk users data via xls file
* Corporate users can add/edit users.
* Corporate users can delete the users. Client users will receive a notification for deletion of Profile.
* Corporate users can activate/deactivate users. Client users will receive a notification for activation or deactivation of Profile.
* Corporate users can see the users details like Wellness plan, Subscription details, etc.

#### Wellness Data:

* Corporate users can see the list of users with current wellness data.
* Corporate users can see the wellness data history into the user detail page.
* Corporate users can search the users via name,email,mobile number.

#### Subscriptions:

* Corporate users can see the analytics purchased and activated subscription plan.
* He/she can see the analytics data based on time duration.
* Corporate users can see the list of Subscription licenses with assigned users data.
* Corporate users can filter the data based on Date range.

**Questions:**

* Will corporate users purchase bulk subscription plans the same as Partner users? - Same as a Partner
* If a Corporate user purchases bulk subscriptions from super admin, What will be the start date and Expired date of all the licenses? Same as a Partner
* Can Corporate users change the subscription price after he/she purchased licenses from Super Admin? Same as a Partner
* Do we have the same price of subscription for all the client users? Same as a Partner
* What is the renewal process? Because, Corporate users purchase first time subscription licenses manually from Super Admin. Will Super admin insert the data for the first time subscription licenses. Same as a Partner
* How Corporate users share the license key to client users? Do we have to integrate any share feature into admin panel Same as a Partner

#### Feeds:

* Corporate users can see the list of feeds.
* Corporate users can search the feeds
* Corporate users can Add/Edit the feeds
* Corporate users can delete the feeds
* Corporate users can activate/deactivate feeds
* **Fields for feed creation.**
  + Feed title,
  + Description
  + Image of Feed

**Question:**

* Do we have any changes into the Community Module(App) for Corporate users? Like Client users can add only friends inside the corporations. - No Corporate users can add any friends from our platform.

#### Revenue Report:

* Corporate users can see the revenue generated from subscription plans.
* Reports will be represented as a graph
* Corporate users can filter the report data based on time duration.