**Application Wireframe Plan**

**Page 1: Login Page**

* **Purpose:** To provide secure access to the application.
* **Key Components:**
  + Kilowatt Logo
  + Username/Email Input Field
  + Password Input Field
  + "Login" Button
  + "Forgot Password?" Link

**Page 2: Home Page / Main Dashboard**

* **Purpose:** To serve as the central landing page, providing a high-level, actionable overview of the business and system status.
* **Key Components:**
  + **Top Navigation Bar (Persistent across all pages):**
    - Links to: Home, Task Queue, Accounts, Managers, Management Co., Commissions, Providers, System Health.
    - Global Search Bar (for finding accounts, managers, etc.).
    - User Profile Icon (with link to settings and logout).
  + **"My Tasks" Widget:**
    - Displays tasks assigned specifically to the logged-in user.
    - Shows a numerical count for different task types:
      * "Accounts Needing Provider Selection" (links to the Task Queue, filtered)
      * "Super Flagged Contracts" (links to the Task Queue, filtered)
      * "Drafted Emails to Review" (links to the Email Draft Dashboard)
      * "New Accounts for Verification" (links to the Task Queue, filtered)
  + **"Team Tasks" Widget:**
    - Displays all unassigned tasks for the entire team, with similar counts and links as the "My Tasks" widget.
  + **"System Automation Health" Widget:**
    - A snapshot from the full health dashboard.
    - Shows a list of key bot processes (e.g., "Email Monitoring," "Centerpoint Usage Retrieval," "Daily Pricing Imports").
    - Each process has a green (OK) or red (ERROR) status indicator and a "Last Run" timestamp.
  + **"Recent Activity" Feed:**
    - A chronological, scrolling list of the most recent significant automated and manual actions.
    - Examples: "Bot: Contract sent to ABC Corp.", "User A: Updated manager for XYZ Inc.", "Bot: New account 'Main Street Plaza' created from email."

**Page 3: Master Task & Action Queue**

* **Purpose:** To act as the central, filterable "to-do list" for all items requiring manual intervention.
* **Key Components:**
  + **Tabbed Interface:** To quickly filter tasks by category. Tabs include:
    - All Tasks
    - Super Flagged Contracts
    - Needs Provider Selection
    - New Account Verification
  + **Task Table:** A sortable and filterable table with the following columns:
    - Account Name (links to the Account Dashboard)
    - Task Type (e.g., "Super Flag," "Provider Selection")
    - Date Created (to see how old the task is)
    - Assigned To (shows user or "Unassigned")
    - Actions (a button or dropdown to "Assign to Me" or "Go to Account")

**Page 4: Account Dashboard (Single Account View)**

* **Purpose:** The single source of truth for all information and actions related to one specific account. This is the most detail-rich page.
* **Key Components:**
  + **Header Section:**
    - Account Name (large font)
    - Account Status (e.g., "Active," "Needs Pricing," "Pending Contract," "Super Flagged")
    - Key Info: Manager Name (links to Manager Dashboard), Management Company (links to Mgmt. Co. Dashboard).
  + **"Required Action" Banner (Conditional):**
    - A prominent banner that only appears if the account is in a state needing action (e.g., "This account needs providers selected before a pricing sheet can be generated.").
  + **Tabbed Interface for Details:**
    - **Tab 1: Overview:**
      * Contact Information (Address, etc.).
      * Management and Manager details with a button to "Change Manager." Clicking this opens a pop-up to select a new manager and asks the "Did the manager leave the company?" question.
    - **Tab 2: Contracts & Pricing:**
      * Current contract details: Provider, Start/End Dates.
      * Links to contract documents (e.g., signed contract PDF, docusign link).
      * History of all past pricing sheets sent, with links to the PDFs.
      * Action Buttons: "Draft New Contract," "Generate New Pricing Sheet."
    - **Tab 3: ESIIDs & Usage:**
      * A table listing all ESIIDs associated with the account.
      * Columns: ESIID Number, Zone, Load Profile, Last Usage Update Timestamp.
      * A button to "Manually Refresh Usage Data" from Centerpoint if needed.
    - **Tab 4: Commissions:**
      * A mini-dashboard showing Projected vs. Realized commission data for *only this account*.
      * A summary table of monthly commissions.
    - **Tab 5: Activity History:**
      * A detailed, timestamped log of every action related to this account, both manual and automated.

**Page 5: Manager / Management Company Dashboards**

* **Purpose:** To provide an aggregated view of all accounts associated with a specific manager or management company.
* **Key Components:**
  + **Header:** Manager or Company Name and contact info.
  + **Summary Statistics:** Key metric cards:
    - Total Active Accounts
    - Total ESIIDs
    - Total YTD Realized Commissions
    - Total Pending Contracts
  + **Account List Table:**
    - A searchable, sortable list of all associated accounts.
    - Columns: Account Name, Status, Contract End Date.
    - Each account name links to its full Account Dashboard.
  + **Activity History Tab:** A log of actions specific to that manager/company (e.g., when accounts were added/removed).

**Page 6: Email Draft Dashboard**

* **Purpose:** To allow the Kilowatt team to efficiently review, edit, and send all bot-drafted communications.
* **Key Components:**
  + **Filter/Sort Options:**
    - Filter by email type: Pricing Sheet, Contract, Manager Change Notification.
    - Sort by date or account name.
  + **Email Queue:** A list of all pending emails, showing Recipient, Account, Email Type, and Date Drafted.
  + **Preview Pane:** Clicking an email in the queue displays its full content (To, From, Subject, Body) in a preview pane.
  + **Action Buttons:**
    - Within the Preview Pane: "Edit & Send" (opens a full editor), "Send Now," "Delete Draft."
    - Above the Queue: Bulk actions like "Approve and Send All Selected Standard Emails."

**Page 7: Commission Dashboard**

* **Purpose:** To provide powerful financial reporting and analysis of projected and realized commissions.
* **Key Components:**
  + **Global Filters:**
    - Date Range Selector (required).
    - Dropdown filters for: Provider, Management Company, Manager.
  + **Data Visualization Chart:**
    - A line or bar chart comparing "Projected Commissions" vs. "Realized Commissions" over the selected time period.
  + **Detailed Data Table:**
    - A table showing the raw data that feeds the chart, with drill-down capabilities.
    - Top-level view: Aggregated by month.
    - Drill-down: Click a month to see data by Management Company -> by Account -> by ESIID.
  + **Action Buttons:**
    - "Export to CSV"
    - "Go to Commission Data Entry" (opens a form/page for manual entry or corrections).

**Page 8: Provider & Pricing Management Dashboard**

* **Purpose:** To manage provider data, monitor automated imports, and configure commission structures.
* **Key Components:**
  + **Provider List Table:**
    - Columns: Provider Name, Last Pricing Import Status (Success/Fail with timestamp), Mils Structure.
    - Actions: A button for "Manually Upload Pricing Sheet" which opens a file dialog.
  + **Mils Configuration Section:**
    - A form or interface to view and edit the commission (Mils) calculation for each provider.

**Page 9: System Automation Health Dashboard**

* **Purpose:** A technical dashboard for monitoring the status and health of all background bots.
* **Key Components:**
  + **Status Cards:** A dedicated card for each major automation:
    - New Account Email Monitor
    - Centerpoint Usage Retrieval Bot
    - Daily Pricing Import Bot
    - Contract Follow-up Bot
  + Each card displays:
    - Large Green/Red status light.
    - Last Successful Run timestamp.
    - Next Scheduled Run timestamp.
  + **Error Log:** A chronological, filterable log of detailed error messages generated by the bots.

**Page 10: Data Entry (New Account / Commission) - Modal/Page**

* **Purpose:** A single, intelligent form for all manual data creation. This would likely be a modal pop-up triggered from various locations.
* **Key Components (displays fields based on context):**
  + **"New Account" Mode (triggered from Account list page):**
    - Fields: Account Name, Address, Management Company (dropdown), Manager (dropdown, filtered by Mgmt Co.).
    - File Upload component for the bill pay PDF.
  + **"Commission Entry" Mode (triggered from Commission Dashboard):**
    - Fields: Account (search/select), ESIID (select), Contract Booked Date, Provider (select), Projected Monthly Commission ($).