HQ Console (Counsel NAV) — End-to-End Specifications

This document details the navigation, widgets, fields, actions, and workflows for each page in the HQ Console (aka *Counsel NAV*). It reflects your "Right Track / Stay on Track" operating model, three-system architecture (HQ Console, CFO App, Partner App), and governance rules.

Global Navigation (Left Sidebar)

1. **Dashboard**
2. **Plan Builder**
3. **Plan Monitor**
4. **Assignments**
5. **Partners**
6. **Calendar**
7. **Billing**
8. **CRM**

Global Controls (top bar): Search, Date Range filter, Org/Region filter, Currency, Notifications, User Menu.

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1) Dashboard

Purpose: Executive overview of plans and partner footprint, with quick trend charts.

KPIs (Cards)

- **Total Plans Initiated** *(count)*
- **Total Open Plans** *(status = Open/In Progress)*
- **Total Closed Plans** *(status = Closed/Completed)*
- **Total Partners** *(active partners)*

Charts

- **Clients by Region (Map/Bar)**
    - X: Region (e.g., GCC, MENA, APAC, EU)
    - Y: # Clients
    - Filters: Industry, Partner Tier, Date Created
- **Plans: Total vs Closed (Trend)**
    - Lines/bars for *Plans Initiated* vs *Plans Closed* per month/quarter
    - Overlay: Conversion rate (% closed / initiated)

Filters (panel)

- Date Range (This month / QTD / YTD / Custom)
- Region / Country
- Industry
- Partner Tier
- Plan Type (Right Track, Stay on Track)
- Status (Open, In Progress, Closed)

Actions

- **Create Plan** (CTA → Plan Builder)
- **Invite Partner** (CTA → Partners > New)
- **Export Dashboard** (PDF/PNG)

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2) Plan Builder

Purpose: Guided wizard to create an approved plan with targets, milestones, assignments, pricing, and governance.

Stages (wizard with progress at the top):

Stage 1 — Client & Scope

Fields

- Client (Lookup)
- Branch QTY
- Plan Period (Duration Type, start date, end date; or choose Quarter)
- Session (Weekly, Monthly, Meeting hours Per month), Present (Online, Visit)
- Plan Type (Right Track / Performance Monitoring)
- Objectives (multi-line summary)
- User Details: Option to add multiple users for the app, including fields for each user's name and phone number.

Actions: Save Draft, Next

Stage 2 — Baseline & Data Sources

Fields

- ERP Connection Status (Connected / Not Connected)

- ERP Type (Odoo, Zoho, SAP, Other)
- Data Domains (checklist): AR/AP, GL, Sales, Inventory, Purchases
- Mapping Health (%) [read-only when connected]

Actions: Connect ERP, Test Sync, Import CSV (fallback), Next

Stage 3 — KPIs & Targets

Fields

- KPI Catalogue (select KPIs to include; star defaults)
- For each selected KPI:
  - Target Value (numeric + unit)
  - Thresholds (Green/Amber/Red)
  - Weight (%) for overall plan status score
  - Calculation Source (formula/data source)
  - Effective Dates (validity)
- Overall Status Rule (weighted score → G/A/R)

Actions: Add KPI, Bulk Edit Thresholds, Next

Stage 4 — Milestones & Timeline

Fields

- Add Milestone:
- Milestone title
- Partner Assigned (ERP, Accounting, Stock count,..etc)
- Deliverables (Test)
- Dependencies
- Duration (select Date from to)
- Milestone Dashboard
  - Milestone Title
  - Due Date
  - Owner (HQ/Partner/Client)

Actions: Add Milestone, Next

Stage 5 — Workflow & Governance

Fields

- Approval Policy:
  - Mode A: **Client Approval Required** for target/milestone edits
  - Mode B: Notify client only (no approval)
  - Mode C: HQ-only (no client notification)
- Notification Channels (in-app/email) and recipients
- Report Cadence (weekly/monthly/quarterly) & recipients (CFO App roles)
- SLA Settings (exception response, task resolution)

Actions: Save Policy, Next

Stage 6 — Pricing & Commercials

Fields

- Package (Tiered package selection)
- Add-ons (credits, managed CFO meetings)
- Price (auto from package; editable if allowed)
- Commission Model (default platform commission %, partner share)
- Payout Delay (e.g., 30 days post-collection)
- Refund Handling (deductions from partner & platform shares)
- Contract Start/End
- Payment Terms

Actions: Calculate, Download Proposal, Next

Stage 7 — Assignments & Partner Selection

Fields

- Assignment Items (auto-generated from KPIs/milestones; editable)
- Partner Selection (match by type: ERP / Accounting Firm / etc.)
- Assignment Owner (Partner team / HQ team)
- SLA / Due Dates
- Notes & Attachments

Actions: Create Assignments, Notify Partner, Next

Stage 8 — Review & Approval

Review Panel

- Summary of Scope, KPIs/Targets, Milestones, Governance, Pricing, Assignments

- Risk checklist (data readiness, partner availability)
- Legal/Terms checkbox

Actions: Save as Draft, **Submit for Approval**, **Approve & Activate Plan**

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3) Plan Monitor

Purpose: Post-approval control center to track performance, manage exceptions, publish reports to CFO App, and govern changes.

Header Context: Client • Plan Name • Period • Status (G/A/R) • ERP Status • Last Sync • Mapping Health

Primary CTAs: **Sync Now**, **Generate Report ▼**, **Publish to CFO App**, **Export ▼ (PDF/PPT/Excel)**, **Reforecast**, **Escalate**, **Book Meeting**

Tabs & Fields

Tab: Overview

- Top KPI Cards (6): value, variance, trend, status
- Timeline (Milestones: planned vs actual)
- Budget vs Actual (Rev/COGS/Opex) chart
- Key Alerts (exceptions summary)
- Notes & @Mentions (rich text, attachments)

Tab: KPIs

- KPI Table: KPI • Target • Actual • Variance • Status • Owner • Last Update
- Drill-down view: trend chart, dimension filters (BU, region, channel, SKU category)
- Edit Targets (opens governed change drawer)

Tab: Tasks & Risks

- Kanban or Table: Backlog | In Progress | Blocked | Done
- Fields: Title • Linked KPI/Milestone • Owner • SLA • Due Date • Priority • Status • Attachments • Comments
- Create Risk: Impact • Likelihood • Mitigation • Trigger • Watchers

Tab: Exceptions

- Auto-detected issues list
- Fields: Type • Description • Severity • Detected On • Owner • Due • Status
- Actions: Assign Owner, Create Task, Mute, Add Note

Tab: Integration

- ERP Connection: Type, Auth, Status, Last Sync, Schedule
- Field Mapping coverage (%): COA, Customers, Suppliers, SKUs, Taxes
- Logs: Errors, Warnings, Resolutions
- Actions: Connect ERP, Fix Mappings, Test Sync

Tab: Activity Log

- Audit Trail: Who • What • Before/After • Reason • Timestamp • Attachments

Tab: Reports

- As-of Date (calendar)
- Templates (Executive, CFO Deep-Dive, Operations, Exceptions Only)
- Include commentary (toggle)
- Recipients (CFO App roles, internal, partner)
- Schedule (one-off/weekly/monthly)
- **Actions:** Generate Preview, Publish to CFO App, Download (PDF/PPT/Excel)

Governed Changes (targets/milestones)

- Drawer fields: Change Type • Before/After • Reason (required) • Impacted KPIs (auto) • Effective Date
- Submit behavior per policy Mode A/B/C (client approval / notify only / HQ-only)

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4) Assignments

Purpose: Operational view for all partner and internal assignments.

Mini-Dashboard (top)

- Open Assignments (count)
- In Progress (count)
- Closed (count)
- Overdue (count) with red badge

Filters

- Status (Open, In Progress, Closed)
- Region / Location
- Partner
- Client
- Plan (lookup)
- Due Date (range)

- Owner (HQ/Partner)

Table Columns

- **Assignment No.** (auto ID)
- **Plan Builder No.** (plan ID/reference)
- **Client Name**
- **Assignment Name**
- **Location**
- **Partner Name**
- **Status** (Open, In Progress, Closed)
- **Owner** (HQ / Partner)
- **SLA / Due Date**
- **Priority** (Low/Med/High)
- **Last Update**
- **Actions**: View • Edit • Reassign • Close • Add Note

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5) Partners List

Purpose: Manage the partner network and tiers.

Table Columns

- **Partner No.**
- **Partner Name**
- **Partner Type** (ERP, Accounting Firm, Implementation, Training, Compliance, Other)
- **Status** (Active, Inactive)
- **Location** (Country/City)
- **Tier** (Gold, Silver, Basic)
- **Actions**: **Edit • Remove • Block (Inactive)**

Actions

- **Create New Partner** (primary button)

Create / Edit Partner Form

Fields

- Basic Info: Partner Name, Legal Entity, Tax ID (optional), Website
- Partner Type (select: ERP, Accounting Firm, Implementation, Training, Compliance, Other)
- Tier (Gold/Silver/Basic)
- Active Status (toggle)

- Locations (Country, City; multi-site supported)
- Contacts (primary contact, email, phone)
- Attachments (agreements, certificates)
- Capabilities (tags: e.g., Odoo, Zoho, SAP, FMCG)
- Notes

Actions: Save, Save & Invite (sends portal access), Cancel

Safety:

- Remove → soft delete with dependency check
- Block → sets Status = Inactive; revokes new assignments

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6) Calendar

Purpose: Outlook-style calendar with all booked meetings and the ability to create new ones.

Views

- Month, Week, Day, Agenda

Features

- Display all plan-related events (report reviews, governance approvals, partner syncs)
- Color-coding by client or plan
- Drag-and-drop reschedule (with permission)

Create Meeting Modal

Fields

- Title (default: Client – Plan – Review)
- Date & Time, Duration
- Participants (Client CFO, Ops Admin, Finance Lead, Partner)
- Location (link/physical)
- Agenda (rich text; pre-filled template)
- Attachments (snapshot/report)
- Reminder (15/30/60 min)

Actions: Send Invites, Save Draft, Cancel

Integrations: O365/Google Calendar (two-way sync), Notifications to CFO App & Partner App.

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7) Billing

Purpose: Financial view of transactions, paid plans, and partner commissions, with export.

Dashboard Cards

- **Total Billed** (period)
- **Total Collected**
- **Outstanding AR**
- **Partner Commissions (Accrued)**
- **Refunds/Adjustments**
- **Payouts Due (Next 30 days)**

Charts

- Collections Trend (monthly)
- Commissions by Partner (top 10)
- Refunds vs Charges (stacked)

Filters

- Date Range
- Client
- Partner
- Plan Type (Right Track / Stay on Track)
- Status (Paid, Partially Paid, Unpaid)

Transactions Table

- **Transaction ID**
- **Client**
- **Plan**
- **Invoice No.**
- **Date**
- **Amount** (currency)
- **Status** (Paid/Unpaid/Partial/Refunded)
- **Commission (Partner)**
- **Platform Share**
- **Payout Date** (respecting payout delay, e.g., 30 days)
- **Adjustments** (refunds/credits)
- **Notes**
- **Actions**: View Invoice • Record Payment • Issue Refund • Export Row

Partner Commission Rules (defaults)

- Platform Commission % (e.g., 40%)

- Partner Share after refunds (refunds deducted proportionally)
- Payout Cycle (e.g., 30 days post-collection)

Exports

- **Export as Excel (.xlsx)** — transactions, commissions, payouts
- **Export as PDF** — billing dashboard snapshot

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8) CRM

Purpose: Manage customer details and related documents.

Features

- Create, edit, and view customer profiles
- Attach documents (Trade License, VAT Certificate, Agreements)
- Capture industry and company size
- Add multiple contacts (Name, Phone, Email, Role)
- Fields for VAT Number, Tax ID, Billing Address, Shipping Address
- Notes & Tags (e.g., priority client, region)

Table Columns

- **Customer ID**
- **Customer Name**
- **Industry**
- **Location**
- **VAT Number**
- **Status** (Active/Inactive)
- **Actions**: View • Edit • Remove • Attach Docs

Create Customer Form

Fields

- Customer Name
- Industry
- Company Size
- VAT Number
- Tax ID
- Contacts (Name, Phone, Email, Role)
- Attachments (Trade License, VAT Certificate)
- Notes

Actions: Save, Save & Invite (for CFO App access), Cancel

Permissions Summary

- **Ops Admin (HQ):** Full access; create/edit plans; publish; billing ops; manage CRM.
- **Finance Lead (HQ):** Approve governance & pricing; manage billing.
- **Partner/Agent:** View assignments; update status; upload evidence.
- **Client (CFO App):** View reports; approvals per policy; book meetings.

Eventing & Notifications (Key Triggers)

- plan.created, plan.approved, plan.snapshot.published
- target.updated, milestone.updated (approval requested/decision recorded)
- assignment.created|updated|overdue
- meeting.created|updated|cancelled
- invoice.issued|paid|refunded, commission.accrued|paid
- customer.created|updated|document.attached