**Green Lines – Agent/Partner Platform Specification**

*Version 1.0 | 15 Oct 2025 | Mobile (iOS/Android) + Web | EN/AR | Offline‑first*

# 1. Product Goals

* Provide agents with a clean, offline-capable workspace to execute all CFO services.
* Ensure SLA reliability, evidence quality, QA gates, and transparent earnings & payout visibility.
* Integrate tightly with HQ Console orchestration and Odoo billing state.

# 2. Roles & IA

* Roles: Field Agent, Bookkeeper, VAT Specialist, ERP Tech Partner, Reviewer/QA, Manager/Partner Admin.
* Global Tabs: Home, Jobs, Calendar, Messages, More (Earnings, Certifications, Documents, Profile, Settings, Help).

# 3. Authentication & Onboarding

* Sign‑in via Entra ID (B2E) or B2B/B2C for external partners.
* Device binding, biometric unlock, permissions (Camera, Location, Files).
* Profile: skills, certifications, cities served, languages; annual fee status gating.

# 4. Home (Dashboard)

|  |  |  |
| --- | --- | --- |
| Widget | Details | Actions |
| Today | Jobs due today / Overdue | Filter Jobs |
| SLA at Risk | Tasks due <24h | Open list |
| Next Visit | Time, location, contact | Start navigation |
| Announcements | Policies, exams | Open |
| Earnings Snapshot | This cycle / Scheduled / Paid | Open Earnings |

# 5. Jobs

5.1 Queue

* Filters: Status, Due, City, Service, Engagement.
* Card: Engagement, Service, SLA chip, Due, Location, Evidence badge.
* Batch: Acknowledge, Plan route.

5.2 Job Detail

|  |  |  |
| --- | --- | --- |
| Tab | Contents | Validations |
| Overview | Scope, acceptance criteria, milestones | — |
| Checklist | Guided steps per service template | Blocking on required steps |
| Evidence | Photos (min, geotag), docs, signature | Block if rules unmet |
| Notes | Internal vs Shared | Shared visible to customer |
| Time & Expenses | Timers, manual logs, receipts | Policy hints/limits |
| Submit | QA handoff or direct accept | Require evidence complete |

# 6. Checklist Templates (Examples)

|  |  |  |  |
| --- | --- | --- | --- |
| Service | Key Steps | Evidence | QA |
| Bookkeeping (Monthly) | Bank rec, AP/AR rec, journals, TB | Reconciliations, report files | Reviewer first 2 cycles |
| CFO Pack (Monthly) | Variance analysis, commentary draft | Pack PDF/Excel | Peer review |
| VAT Filing | Txn review, VAT report, file proof | TRN check, filing receipt | Reviewer required |
| Inventory/Assets | Scan/count, variances, photos, sign-off | ≥3 photos/loc, geotag, signature | QA if variance > threshold |
| Cashflow Forecast | Model refresh, Custom Curve, scenarios | Model file, notes | Optional |
| ERP Integration | Discovery→Config→Migration→UAT→Go-Live | Mappings, test cases, go-live checklist | Ops approval |

# 7. Evidence Capture

* Photos: min count, geotag + timestamp mandatory.
* Customer signature pad; tamper-evident file hash; metadata (device, time, GPS).
* Offline buffer with background retry and conflict resolution.

# 8. Calendar & Scheduling

* Week/Month views; propose visit slots; join Teams for remote sessions; map navigation.

# 9. Time & Expenses

* Timers per job; manual entries with receipt photos; policy limits and approvals; CSV export.

# 10. Messages

* Channels per engagement/service; @mentions; internal vs shared; attachments; notifications.

# 11. Earnings & Payouts

* Views: This Cycle, Eligible, Scheduled (T+30), Paid; statement CSV/PDF; refund adjustments displayed.

# 12. Certifications (LMS)

* Show required certs per service; expiry reminders; gating on assignments.

# 13. Documents

* Per‑engagement folders; versioning; tags; quick camera upload.

# 14. Offline & Sync

* Local cache for jobs, checklists, evidence; queued submissions; conflict handling (append-only evidence).

# 15. Notifications

|  |  |  |
| --- | --- | --- |
| Event | Channel | Message |
| Assignment received | Push/Email | Acknowledge within 4h |
| SLA due | Push/WhatsApp | Task due in {h} hours |
| QA decision | Push | Approved/Rejected with notes |
| Payout scheduled | Email | Scheduled on {date} |

# 16. Acceptance Criteria (Key)

* Acknowledge within 4h else escalation to HQ.
* Evidence rules block submission if unmet (min photos, geotag, signature).
* Offline submission queues and auto-syncs without data loss.
* Payouts visible as Eligible → Scheduled (T+30) → Paid; refunds reduce amounts.
* Certification gating prevents acknowledgment if expired.