WorkSync - Functional Design Document

1. Overview

WorkSync is a personal productivity and client engagement tracking application designed for professionals who need to manage multiple client engagements, track daily tasks, capture ideas, and maintain visibility into their work activities.

1.1 Purpose

Provide a unified workspace where users can:

- Track client engagement progress and status
- Manage daily and weekly tasks with priorities
- Capture monthly highlights and achievements
- Manage internal projects with research notes
- Log and prioritize improvement ideas
- Schedule and track meetings with notes
- Organize useful reference links

1.2 Target Users

- **Primary**: Customer Success Managers, Technical Account Managers, Project Managers
- **Secondary**: Consultants, Sales Engineers, Support Engineers

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2. Modules & Features

2.1 Homepage (Daily Overview)

Purpose: Provide an at-a-glance view of the current day's activities and key metrics.

Feature	Description
Greeting	Personalized greeting based on time of day
Today's Meetings	List of all calendar events for today with time, title, and status
Open Tasks	Daily tasks that are not yet completed, sorted by priority
Engagement Pulse	Count of active and at-risk engagements
Internal Projects	Count of projects currently in progress
Quick Links	3 most recently added useful links
Recent Highlight	Most recent captured highlight
Idea Spark	Quick access to Idea Board with idea count

2.2 Engagements (Client Tracking)

Purpose: Track and manage client engagements with timeline, files, and AI-generated summaries.

Feature	Description
Engagement List	Searchable, sortable table with status filters
Bulk Actions	Multi-select for bulk delete operations
Status Management	Active, On Hold, Completed, At Risk statuses
Engagement Detail	Full view with timeline, files, and summary
Timeline	Chronological log of updates, milestones, issues, meetings
File Attachments	Upload and manage engagement-related files
AI Summary	Auto-generated engagement summary (Gemini integration)

Data Fields:

- Engagement Number (unique identifier)
- Org ID
- Account Name
- Project Name
- Status
- Timeline Entries
- Files

2.3 Task Tracker

Purpose: Manage daily plans and weekly goals with engagement/project linking.

Feature	Description
Daily Plan	Tasks for specific dates with completion tracking
Weekly Goals	Longer-term goals for the week
Priority Flag	Mark tasks as priority (red highlight)
Subtasks	Break down tasks into smaller items
Engagement Link	Associate tasks with specific engagements
Project Link	Associate tasks with internal projects
Calendar Navigation	View tasks for different dates

2.4 Monthly Highlights

Purpose: Capture and track monthly achievements and accomplishments.

Feature	Description
Monthly View	Navigate between months
Highlight Entry	Content, impact description, date

Follow-up Flag	Mark highlights needing follow-up
Follow-up Context	Additional notes for follow-up items

2.5 Internal Projects

Purpose: Manage personal/team projects with research notes and task tracking.

Feature	Description
Project List	Grid view of all projects with status badges
Project Creation	Name, description, status, dates
Status Tracking	Not Started, In Progress, Completed, On Hold
Project Tasks	Checklist of tasks within project
Research Notes	Timestamped notes for research/documentation
Due Date	Track project deadlines

2.6 Idea Board

Purpose: Capture improvement ideas, enhancements, and innovations.

Feature	Description
Idea Cards	Visual card-based display
Categories	Team, Product, Process, General
Priority Levels	Low, Medium, High
Status Tracking	New, Planned, In Progress, Implemented, Discarded
Category Filter	Filter ideas by category
Add/Edit/Delete	Full CRUD operations

2.7 Calendar

Purpose: Schedule and track meetings with notes and MoM status.

Feature	Description
Calendar Grid	Visual day/week view of events
Agenda Sidebar	List view of day's events
Event Types	Meeting, Work, Personal
Meeting Notes	Add context and notes to meetings
MoM Sent	Track if meeting minutes were sent

Date Navigation	Switch between dates
Add/Edit/Delete	Full event management

2.8 Useful Links

Purpose: Organize and access frequently used reference links.

Feature	Description
Link Categories	Group links by category
Category Columns	Visual column layout per category
Favicon Display	Auto-fetch website favicons
Quick Access	Click to open in new tab
Add/Delete	Manage links

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3. User Interface

3.1 Navigation

- **Sidebar**: Fixed left sidebar with module icons and labels
- **Dark Mode**: Toggle between light and dark themes
- **World Clock**: Display multiple timezone clocks

3.2 Visual Design

- Modern, clean interface with rounded corners
- Color-coded status badges
- Hover effects and smooth transitions
- Responsive grid layouts
- Modal dialogs for forms

3.3 Interactions

- Inline editing where appropriate
- Drag/click for navigation
- Confirmation dialogs for destructive actions
- Toast notifications for feedback

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4. User Workflows

4.1 Daily Workflow

1. Open Homepage to see daily overview
2. Review today's meetings
3. Check and update daily tasks
4. Log any highlights during the day
5. Capture ideas as they come up

4.2 Engagement Workflow

1. Create new engagement from Dashboard
2. Add timeline entries as work progresses
3. Upload relevant files
4. Update status as engagement evolves
5. Generate AI summary for quick reference

4.3 Project Workflow

1. Create internal project with description
2. Add tasks and break into subtasks
3. Log research notes during investigation
4. Update status and track completion
5. Link daily tasks to project