

Problem Statement:

The CRM application requires a comprehensive task management feature that allows users to create, assign, and track tasks across different types, such as general service, brand-related, event-related, and inventory-related tasks. The system should provide role-based access control, allowing different user groups (Admin, Management, Team Owners, Project Owners, and Brand Owners) to view and manage tasks based on their permissions. Additionally, the system should provide advanced filtering and analytics capabilities to help users and management monitor task progress and performance.

Requirement Document:

1. Task Management:
 - Users should be able to create tasks and assign them to anyone in the system.
 - There should be four types of tasks: 'All tasks,' 'Your tasks,' 'Team tasks,' and 'Delegated to others.'
 - Depending on the selected task type, an additional dropdown for 'Brand,' 'Event,' or 'Inventory' should appear.
2. Role-based Access Control:
 - Admin and Management roles can view all tasks in the platform without any restrictions.
 - Team Owners can see their team members' tasks.
 - Admin and Management roles can see 'All tasks,' 'Your tasks,' and 'Delegated to others.'
 - Team Owners can see 'All tasks,' 'Your tasks,' 'Team tasks,' and 'Delegated to others.'
 - Project Owners and Brand Owners can see 'All tasks,' 'Your tasks,' and 'Delegated to others.'
3. Filtering and Sorting:
 - Users should be able to filter tasks based on the following criteria:
 - Task Type
 - Assigned By
 - Assigned To
 - Team Owner (Multilevel TO visibility)
 - Due Date Passed Tasks
 - Brand Name
 - Inventory Name
 - Event Name
 - Users should be able to sort tasks based on the above filters.
4. Task Creation and Notification:
 - Users should be able to create tasks with a title, optional description, task type, due date, and assignee.
 - Depending on the selected task type, a dropdown for the respective brand, event, or inventory should appear.
 - Once a task is created, the assignee should receive a notification, handle in-app notifications.

- Both the creator and assignee should be able to comment on the task.
 - Only the assignee can mark the task as completed, and only the creator can edit or delete the task.
 - If the task is brand-related, it should appear on the brand info page for the assignee.
5. Analytics and Reporting:
- The system should provide analytics and reporting capabilities for task management.
 - The analytics section should be accessible only to Management roles and Admin.
 - The analytics section should include the following filters:
 - Today
 - Last 3 Days
 - Last 7 days
 - Last 15 Days
 - Last month
 - This month
 - All Time
 - The analytics section should display the following metrics:
 - Total Tasks Created
 - Open Tasks
 - Completed Tasks
 - Overdue Tasks
6. SLA and Notifications:
- The system should apply an SLA to all tasks.
 - A trigger in-app notification should be sent to the creator and assignee once the due date is near (12 hours) and if it has passed.
7. Task Comments and Visibility:
- Both the creator and assignee should be able to comment on the task.
 - Management roles and Admin should be able to view all tasks and their comments, and they should also be able to comment on them.
8. Task History and Comments:
- The system should maintain a complete history of all actions performed on a task, including:
 - Task creation
 - Task assignment
 - Task status changes (e.g., completed, overdue)
 - Task comments
 - Users should be able to view the task history and comments.

Possible User Roles for this Module:

Admin, MG, BO, PO, TO(only he can have team tasks section)

User Stories:

1. As a Team Owner, I want to be able to see all tasks assigned to my team members, so that I can ensure the team's workload is balanced and tasks are being completed on time.
2. As a user, I want to be able to create tasks and assign them to anyone in the system, so that I can delegate work and collaborate effectively.
3. As a user, I want to be able to filter and sort tasks based on various criteria, such as task type, assigned to, due date, and more, so that I can easily find and prioritize the tasks I need to work on.
4. As a user, I want to be able to attach multiple files to a task, so that I can provide all the necessary information and resources to the assignee.
5. As a user, I want to be able to view the complete history of a task, including all actions and comments, so that I can understand the context and progress of the task.
6. As a Management role user, I want to be able to view and comment on all tasks in the system, so that I can provide oversight and guidance as needed.
7. As a user, I want to receive notifications when a task is assigned to me or when the due date is approaching, so that I can stay informed and take action in a timely manner.
8. As a user, I want to be able to mark a task as completed, so that the task creator and other stakeholders can see the progress and status of the task.
9. As an Admin, I want to be able to see all tasks in the system, so that I can monitor and manage the overall task management activities.
10. As an Admin, I want to be able to access the analytics and reporting for tasks, so that I can analyze the performance and trends of the task management feature.