



The Art Of Living Trust

Apex Admin Portal

Central APEX DIRECTORY & ADMIN Portal

Version Control : 1.0

18 MAY 2022


Objective

This document establishes process mapping and developing the portal to maintain entire asset controls and registry in shape, state and form on records under one central accessing & HQ controlled portal.

User Roles & Accessibilities

Sr	User	Role Accessibility
1	Center Admin	Incharge of the designated center Only records of his/her own centre. Add/Edit/View/Consolidate/Report/Create Transfers/Purchase Request
2	Apex Login	Incharge of assigned state Only records of his/her assigned State. Add/Edit/View/Consolidate/Report/Approvals/Transfers
3	HQ Admin	Incharge of ALL state functions All Data Access

4 Trustess Super Admin All Access



This document outlines the overall requirements for a proposed solution. In this project, we require a design and develop an online and centralized portal for apex admin to manage and maintain members directory, service request and MIS reports.

There will be four types of users who will be using this application

1. Center Admin- He is in incharge of the designated center. He can manage and maintain the records of his own center. He can add, edit, view, consolidate, report, create transfers and generate purchase requests of all the assets from his designated center .
2. Apex Login- He is in incharge of the assigned state. He can manage and maintain the records of his/her assigned State. He can add, Edit, View, Consolidate, Report, Approvals, and Transfers of all the assets from his assigned state.
3. HQ Admin- He is Incharge of ALL state functions and has access to all the data.
4. Auditor- He is incharge of Assigned Areas of Audit by HQ. Access to assigned State with Additional module of his/her record verification & comments for CTA with Deadline.

Goals

1. Vendor IT Company will design and set the UI of the entire Samruddhi Inventory portal.

2

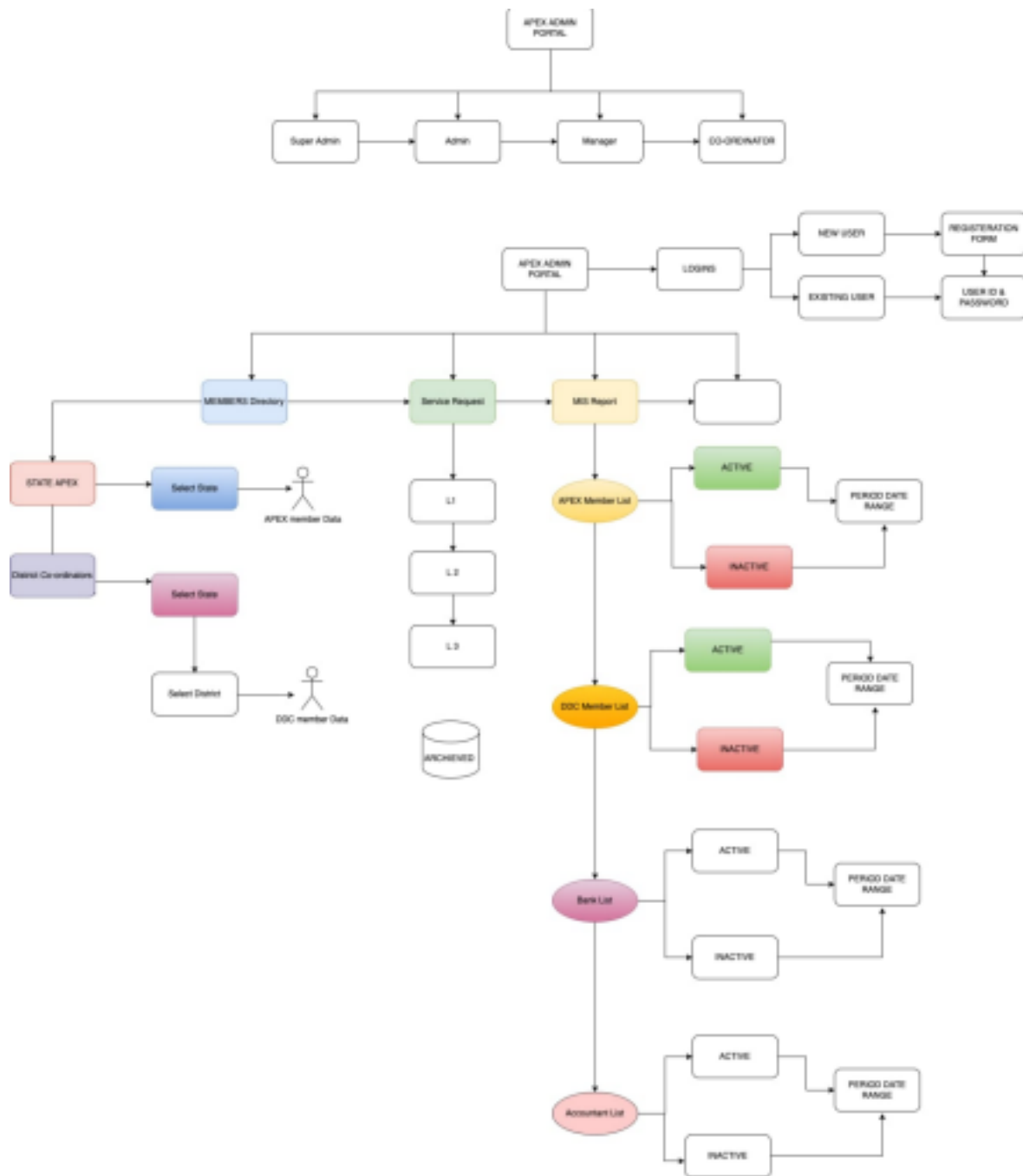
- 
2. Vendor IT Company will code the apps from scratch. 3.

Perform UX (User Experience) QA Testing.

4. Perform further testing with the client.

5. Launch the applications.

Dashboard View: (Based on user accessibility controls)



Login and Register


Existing members can login using their email and password. The new users will be provided with a registration form. After successfully filling that form they can also login and use this application.

Members Directory

- An entire directory of members will be maintained in this portal from where admin can fetch and view their details.
- Now there are Trustees and each trustee will be assigned various states. Now the apex members of those states will report to their assigned trustees. Similarly under states there are districts also maintained.
- Searching of the member can be done-
 - By State
 - By District
 - By Status
 - By Profession.
- Bank details of each apex member can also be seen from here including the bank details of the CA and other administrative people under them. ●
Also, the data of Advisory members will also be maintained. These are basically those people previously worked here but are currently inactive.

Service Request

- To generate a service request, a form will be provided.
- After the form is filled and submitted, the admin will review it and can approve or reject it.

- 
- If the admin approves it then he also needs to upload a letter of approval as an attachment containing all the information like who and when this request is generated etc..
 - Any edit right of change in address, bank details etc request to be captured but final approve by HQ

Bulk Upload

- Upload load for all the uniform segments of the database for eg:

Apex Members call be upload in bulk and only HQ can activate them on portal by approval from Status segment (Active/Inactive/OnHold) from the list view of the members directly.

All segments are All Apex members, Districts members, Accountants and dedicated bank details.

Note: Template for bulk upload has been shared for the segments. They will be the same from new user registration.

All Template :

<https://docs.google.com/spreadsheets/d/16gdl03VZhFEbcpX8xr0VMROpIPqF5Rfo/edit?usp=sharing&ouid=104878557427871780781&rtpof=true&sd=true>

Reports :

- 1) Query based reports
- 2) State wise consolidated
- 3) District wise
- 4) Active , Inactive



5) Profession wise

6) Post wise

To be exported into XLS, CSV, PDF

FORUM/CHAT

Discussion forum APEX can only chat/communicate to their dedicated districts members only.

APEX can chat with inter-state

HQ /Trustee can track chat/discussion for internal compliance purposes

Map View

A Google map will also be maintained on which apex or district members can be pinned and On click of the pin their data can be represented in tabular format- Our Information Centre/GKS (Gyan Kshetras) / Ashrams

Suggested Technology Stack

Vendor IT company to mention the technical platform used with all necessary coding language along with time frame and estimated cost.

UI/UX

Quicksand Font to be used

Corporate theme based color palettes can be used.

India MAP can be zoomed with different pin signs

Signs of Ashrams

Signs of IC

6

Signs of GKs

Signs only contact

