

Project Title: Campaign Approval Workflow - POC

Overview

Build a lightweight web app to automate social media campaign approvals among Customer Success (CS), customers, and agencies. The POC excludes Salesforce but must be fully functional with passwordless email authentication, stage-based notifications, and three web interfaces.

Scope

- End-to-end workflow for one campaign at a time
- Asset uploads, draft reviews, approvals/changes, and go-live
- Real-time status visibility and audit trail

Workflow Stages

1. CS creates campaign and sets deadlines
2. Customer uploads assets
3. Agency receives assets and creates draft
4. Customer reviews and approves or requests changes
5. Campaign goes live

Web Interfaces

- CS Dashboard (internal):
 - Campaign table with status filters and overdue flag
 - Detail view with timeline and activity log
 - Manual reminder sending
- Customer Portal (external):
 - Status and deadlines view
 - Asset upload
 - Draft review with approve/request changes and feedback form
 - Activity timeline
- Agency Portal (external):
 - View assigned campaigns and current status

- Download customer assets
- Upload drafts
- See customer feedback on revisions
- Activity timeline

Technical Requirements

- Authentication: Magic link via email (passwordless) for CS, customers, and agencies
- Email Automation:
 - Stage-based notifications to relevant parties
 - Deadline reminders and escalations
 - Emails include magic links to the exact portal page
- Campaign Creation (CS form):
 - Customer name and email, campaign type, asset deadline, agency assignment, go-live target date
- Storage: Simple file storage for assets and drafts
- Logging: Activity logging and audit trail
- Real-time Status: Live updates across both interfaces

Key Features

- Automated emails per stage
- Deadline tracking with visual countdown
- File upload for assets and drafts
- Structured approval/revision loop
- Activity log with timestamps and actors

Not Included in POC

- Salesforce integration
- Advanced storage (versioning, CDN)
- Complex user management or teams
- Mobile apps

Deliverables

- Working web application (CS dashboard, customer portal, and agency portal)
- Email notification system with magic links
- Basic file storage for assets and drafts
- Setup and testing documentation

Success Criteria

- One campaign runs end-to-end without manual coordination
- All stakeholders receive timely notifications
- CS, customers, and agencies see real-time status
- Approval/revision loop functions smoothly

Timeline

- To be agreed with freelancer based on scope and milestones

Tech Stack

- Freelancer to propose a stack prioritizing speed and simplicity for POC