This document outlines the initial proposal for the development of a Document Processing System. The goal of the software is to assist admins and salespersons/employees in managing documents and receiving timely notifications via email/preferred platform. The system will generate reports for both admins and salespersons on a regular basis, with an option for status updates for their clients

Development Requirement

Should this system be developed as a Desktop application or Web application?
We prefer a web application (In this way all your staff and admin can have an exclusive access to the dashboard from anywhere anytime)

Functional Requirements

1. User Roles and Access

- **Admin Access**:
    - Admins will have full access to all data, including the ability to view and manage data for all salespersons.
    - Admins can update the status of clients (e.g.,cancelled, in progress, on hold).
    - Admins can generate and view reports that provide insights into upcoming expiration dates for documents across all clients and salespersons.
- **Salesperson Access**:
    - Salespersons will only have access to data relevant to their clients.
    - Salespersons can update the status of their own clients.
    - Salespersons will receive email alerts and reports for their clients' documents only.

The users also have an option to import the documents from the centralized drive

2. Document Parsing and Data Extraction

- The system will parse uploaded documents to extract key information, including:
    - Document name
    - Document type
    - Expiration or renewal date
    - Salesperson and client/company name
- This data will be used to trigger notifications and reports.

3. Automated Email Notifications

- **Monthly Alerts**:
    - At the start of every month, the system will generate alerts for all upcoming expiration dates in that month to the salesperson.

    - These alerts will be sent to the relevant salesperson, and a report will be sent to the admin about all the upcoming expirations .
- **Daily Alerts (TBD)**:
    - Every 24 hours (tentative), the system will send email notifications about any expiring documents to both the salesperson and the admin and generate report
- **On-Demand Alerts**:
    - Users (both admin and salespersons) can request on-demand reports

4. Report Generation

- The system will generate Excel reports that summarize:
    - Upcoming document expirations
    - Client statuses (e.g.,cancelled, in progress, on hold)
- **Admin Reports**: A complete overview of all salespersons and clients, highlighting the documents nearing expiration.
- **Salesperson Reports**: Reports tailored to the salesperson's clients and their upcoming document expiration dates.

The report can be downloaded locally or can be exported to the centralized drive where all the documents are present

5. Client Status Updates

Both admins and salespersons will have the ability to update the status of clients regarding document follow-ups, allowing for better tracking of communication and action steps.

6. User Authentication

- Both admins and salespersons will have separate logins
- Admins will have broader access, while salespersons are limited to their own client data.

Tentative Project Timeline

- Project Structure Initiation (2-3 days)
- Document Parsing and Data Extraction (2-3 days)
- Automated Email Notifications (2-3 days)
- Report Generation (2 days)
- Client Status Updates (1 day)
- User Authentication (1-2 days)
- Quality Assurance (QA) (2-3 days)