Seamless Landlord:

Tenant Management: Creating and Editing and Deleting

- This section details the process of creating and subsequently editing a tenant within the landlord system. The system automates several aspects of tenant setup to streamline the onboarding process.

1. Tenant Creation

- Navigate to Tenant Creation: Access the "Create Tenant" form, typically found under a "Tenants" or "Landlord" section within the system's dashboard.
- Company Information:
- Company Name: Enter the full legal name of the tenant's company. (e.g., "Acme Corp")
- Sub-Domain Generation: Upon entering the company name, the system automatically generates a unique sub-domain for the tenant. This sub-domain forms part of their dedicated URL within the platform (e.g., your-subdomain.seamless.test). Manual input for the sub-domain is not required, minimizing potential errors and ensuring consistency.
- Address Details:
- Address Line 1: Input the primary street address of the tenant. (e.g., "123 Main Street")
- Address Line 2: Provide any additional address information, such as apartment, suite, or unit numbers. This field is optional. (e.g., "Apartment, suite, unit, etc.")
- Country, State, City, and Zip Code: Select the appropriate country from the drop down list. The system will then dynamically populate available states and cities based on the selected country. Finally, enter the corresponding zip or postal code.
- Primary Contact Information:
- First Name & Last Name: Enter the first and last name of the primary contact person for the tenant.
- Email: Provide the professional email address of the primary contact. This will typically be used for system notifications and communication.
- Password & Confirm Password: Set a secure password for the primary contact's access to the tenant's portal. The password must be confirmed to ensure accuracy.
- Phone Type & Phone Number: Select the type of phone number (e.g., Mobile, Work) from the drop down and enter the complete phone number, including the country code.
- Submission: After all required fields are accurately completed, click the "Create" button to register the new tenant. The system will then confirm successful creation, often with a notification like "Created."

2. Tenant Editing

- Access Tenant Edit Page: Once a tenant is created, the system may automatically redirect to the "Edit Tenant" page, or it can be accessed from a list of existing tenants.
- Company Name: The previously entered company name is displayed and can be modified if necessary. (e.g., "Schmidt Sargent Co")
- Sub-Domain: The automatically generated sub-domain is visible and reflects the tenant's unique identifier. While the initial generation is automatic, some systems may allow for manual sub-domain modifications on this page, though it's typically tied to the company name. (e.g., schmidt-sargent-co.seamless.test)
- All previously entered address details (Address Line 1, Address Line 2, Country, State, City, Zip code) are displayed and are editable.
- Domain Management (If Applicable):
- A "Domains" section may be present, showcasing the sub-domain and full domain associated with the tenant. This section often allows for the addition of new domains or management of existing ones if the tenant requires custom domain configurations.

- Saving Changes: After making any necessary modifications, click the "Save Changes" button to update the tenant's information. A confirmation message, such as "Created," will indicate successful update. The "Delete" button is available for removing the tenant, and "Cancel" allows discarding unsaved changes.

3. Tenant Deletion (Soft Delete and Force Delete)

The system provides a two-tiered approach to tenant deletion to prevent accidental data loss and offer greater control over tenant records.

Soft Delete:

- When the "Delete" button is clicked on the "Edit Tenant" page, the tenant's record is not immediately removed from the database. Instead, it is marked as "deleted" but remains recoverable.
- Purpose: This acts as a safety net. If a tenant is mistakenly deleted, an administrator can restore the tenant's record, bringing it back to an active state with all its associated data intact. This is crucial for maintaining data integrity and business continuity.
- Restoration: (Further documentation would detail the restoration process, typically found in a "Trash" or "Archived Tenants" section.)

Force Delete (Permanent Deletion):

- For situations requiring irreversible removal of tenant data (e.g., due to data retention policies or complete termination of relationship), a "Force Delete" option is available. This is typically accessed from a "soft-deleted" tenant's record or through an administrative interface.
- Purpose: Force deletion permanently erases all tenant data from the database, making it irrecoverable. This action should be performed with extreme caution.
- Confirmation: Due to its irreversible nature, force deletion usually requires multiple confirmation steps to prevent accidental data loss.

Seamless Tenant:

Tenant Admin Dashboard Overview

The Tenant Admin Dashboard is a dedicated control panel accessible for each tenant created within the **Landlord Panel**. Once a tenant is added from the landlord system, a unique subdomain or domain is automatically generated for that tenant. Using this domain, the tenant administrator can log in and access their isolated dashboard that displays data specific to their organization.

This separation ensures that all records, including events, orders, memberships, donations, and users, are fully scoped to each tenant's database and environment — maintaining data privacy and organizational independence.

Dashboard Overview

Upon logging in, the tenant administrator is greeted with a comprehensive dashboard view summarizing key performance metrics and actionable insights.

Key Dashboard Metrics

1. **Total Events** - Displays the total number of events created by the tenant, along with the count of upcoming events.
2. **Total Group Events**– Shows cumulative group event statistics managed under the tenant.
3. **Total Users** – Lists the total number of registered users under the tenant's instance.
4. **This Week's Orders** – Displays the number of new orders received in the past seven days.
5. **Revenue (This Month)** – Indicates the total monthly revenue generated through successful transactions
6. **Donations (This Month)**– Shows the total donation amount received in the current month.
7. **Refunds (This Month)** – Tracks the total amount refunded to customers.

Each card dynamically updates based on real-time tenant-specific records, offering clear visibility into operational performance.

Quick Actions

The **Quick Actions** section provides shortcuts for frequently performed administrative tasks:

- **Create Event** – Quickly initiate a new event setup.
- **Create Promo Code** – Add promotional codes for discounts or campaigns.
- **Add Venue** – Register a new event venue.
- **View Orders** – Instantly navigate to the orders management page.

This section streamlines common workflows and enhances administrative efficiency.

Recent Orders

The **Recent Orders** section lists the most recent transactions processed within the tenant's platform. Each entry includes:

- Customer Name, Email, and Phone
- Order Amount
- **Payment Status** (e.g., pending, completed)
- Updated Timestamp

This allows administrators to monitor order activity and quickly review payment progress or issues.

Live Events

The *Live Events* section displays all events that are currently active in real time. It includes essential details such as the event name, start and end dates, current status, and attendance count, allowing users or administrators to monitor ongoing events efficiently.

Top Performing Promo Codes

This section highlights active and high-performing promo codes with details such as:

- Code and Label
- Times Used
- End Date

It helps track the effectiveness of marketing campaigns and promotional activities.

Latest Customer Reviews

The **Customer Reviews** panel displays feedback submitted by participants or members regarding events or services. If no reviews are yet available, a placeholder message is shown indicating that user reviews will appear once submitted.

Multitenant Functionality

Each tenant's dashboard operates independently, ensuring that:

- Data is **isolated per tenant** (no cross-tenant visibility).
- Analytics and reports reflect **tenant-specific records only**.
- Each tenant's admin interface maintains a **consistent design and functionality** while using their own branding and domain.

User Management Module

The **User Management** module under the Tenant Panel allows tenant administrators to efficiently manage all user accounts specific to their organization. Each tenant operates within their own isolated environment, ensuring that user data, roles, and permissions are tenant-specific and securely contained.

1. Navigation Path

- **Create User** – For adding new users.
- **User List** – For viewing, filtering, editing, and managing existing users.

2. Create User Form

The **Create User** page is divided into three primary sections for better data organization and usability:

A. User Details Section

This section captures the core personal and account information of the user.
Fields:

1. **First Name** – Required field for the user’s first name.
2. **Last Name** – Required field for the user’s last name.
3. **Role** – Selectable from predefined user roles (e.g., Admin,User).
4. **Email** – Unique email address used for login and notifications.
5. **Phone** – User’s contact number.
6. **Phone Type** – Enum field with predefined options:(Office, Home , Mobile, Business)
7. Password - Field for setting the user’s login password. Includes the following features:
    - **Generate Password:** Automatically generates a secure random password which can be changed.
    - **Copy Password:** Allows the administrator to copy the generated password to clipboard for easy sharing

Address Section

This section captures the user’s physical or mailing address.
Fields:

1. Address Line 1
2. Address Line 2
3. **Country** – Selectable from a predefined list of countries.
4. **State** – Conditional dropdown list:
    a) The **State** field becomes active **only after** selecting a Country.
    b) The list of available states is dynamically populated **based on the selected Country**.
5. **City** – Text input for the user’s city name.
6. **Zip Code** – Numeric field for the postal code.

B. Profile Section

This section allows uploading a **profile image** for the user.

- Accepts standard image file formats (JPG, PNG, etc.).
- Uploaded image is stored in the tenant’s media storage and linked to the user profile.

3. User List Page

The **User List** page displays all users associated with the currently logged-in tenant.
Displayed Columns:

- First Name
- Last Name
- Email etc

And also we show this fields according to user convenience through toggle columns.

Actions Available:

1. **Edit User** – Opens the edit form with all user details pre-filled for updating.
2. **Update Password** – Allows administrators to reset or change the user's password.
3. **Send Password Reset Link** – Triggers a password reset email to the user.
4. **Soft Delete** – Marks the user as deleted while retaining data for potential recovery.
5. **Force Delete** – Permanently removes the user record from the tenant's database.

Filter Options

The list page includes a dynamic **Filter Panel** that allows administrators to filter users based on different criteria:
Available Filters:

1. **Active Status** – Enum filter to view either Active or Inactive users.
2. **Country** – Drop down filter for selecting users from a specific country.
3. **State** – Dynamic drop down filter based on the selected country.
4. **City** – Smart drop down with auto complete capability — the drop down automatically suggests cities based on the entered name.

Event Management Module

The **Event Management** module enables tenant administrators to manage all aspects of events — from creation and scheduling to categorization and attendee management.
It is designed to give tenants complete flexibility in organizing, categorizing, and presenting their events, while maintaining full control over related entities such as venues, organizers, categories, and tickets.

1. Navigation Path

This section includes two primary resources: (Events and Group event)

Under the **Events** resource, the following **child navigations** are available:

- Categories
- Tags
- Organizers
- Organizer Types
- Venues
- Tickets
- Attendee Types
- Reviews

Each of these supports event-specific configurations and relationships, allowing a highly modular and scalable event structure.

2. Event Resource

The **Event** resource is the central entity within Event Management. It manages the creation, editing, and display of all individual event records.

A. Create Event Page

The event creation form is divided into multiple logical sections, each handling a specific aspect of the event setup.

1. Basic Information

This section captures the foundational details of the event.
Fields Include:

- Event Title- The official title of the event.
- **Slug** – Auto-generated URL-friendly identifier (can be customized manually).
- **Start Date & End Date** – Defines the event's duration and scheduling.
- **Event Status** – Enum field representing the event's current status (e.g., Draft, Published, Completed, Cancelled).

2. Venue Details

Tenants can either:

- **Select an existing venue** from the list of pre-created venues, or
- **Create a new venue** directly while creating the event.

Additional Fields:

- **Venue Virtual Link** – For virtual or hybrid events, an online meeting or webinar link can be added.
- **Excerpt**-The **Excerpt** field allows the user to provide a short summary or highlight about the event. This concise description is typically used in listings, previews, and

promotional areas where a full event description is not required. It helps users quickly understand the key details of the event at a glance. When the **Excerpt** toggle is enabled, a text field appears for entering this brief summary. If the toggle remains disabled, the excerpt field is hidden to keep the interface clean and focused.
- **Description** – Detailed description of the event, outlining its purpose, highlights, and structure.

3. Organizer Section

This section allows adding one or multiple organizers for the event.

- Implemented as a **Repeater Field**, meaning multiple organizer entries can be added.
- Each organizer can have an associated **Organizer Type** (e.g., Host, Co-Host, Sponsor, Speaker).

Users can:

- **Select existing organizers and organizer types**, or
- **Create new ones inline**, directly from the event form.

4. Schedule (Agenda) Section

The **Schedule Section** allows managing the event agenda in a structured format.
Capabilities Include:

- Add multiple sessions or activities with time slots.
- Provide a **description** for each agenda item.
- Write **additional details** or special notes related to the schedule.

5. Categories $ Tags

To support event classification and filtering, the system allows:

- **Category Selection** – Choose or create new event categories.
- **Tag Selection** – Assign relevant tags to the event.

Both **Category** and **Tag** entities are managed through their dedicated resources but can also be **created directly from the event form**.
6. Gallery Section

This section allows uploading event images.
Options Include:

- **Featured Image** – Single image representing the main event banner or thumbnail.
- **Additional Images** – Multiple image uploads representing galleries, posters, or highlights.

7. Payment & Invoice Configuration

Events can be configured with payment and invoicing preferences.
Fields Include:

- **Payment Gateway** – Select the preferred gateway (e.g., Stripe, PayPal, or other configured gateways).
- **Invoice Template** – Choose the invoice layout to be used for this event's transactions.

B. Event List Page

The **Event List** displays all events created within the tenant's system.
Available Actions

1. **Edit Event** – Open event details for modification.
2. **Delete Event (Soft Delete)** – Temporarily remove the event while keeping the record for recovery.
3. **Force Delete** – Permanently delete the event from the tenant's database.
4. **Clone Event** – Duplicate an existing event (including schedules, organizers, categories, and other linked data) to quickly create a new similar event.

Filters

The list page includes a robust filtering system for better data management.

Available Filters:

- **Event Status** – Filter by Published, Draft, Cancelled, etc.
- **Created By** – Filter based on the event creator or admin.
- **Start Date / End Date** – Filter events within a specific date range.
- **Invoice Template** – Filter events using a particular invoice format.

Category Module
The **Category Resource** is an integral part of the **Event Management** module.
It allows tenant administrators to create, organize, and manage categories that help classify and group events effectively.

1. Purpose
The Category Resource provides a structured taxonomy for event classification.
Each event can be assigned to one or more categories, allowing hierarchical grouping (Parent → Child) and improving user navigation and event organization.
2. Navigation Path
This section lists all categories created under the current tenant and allows administrators to create, edit, or delete category records.
3. Create Category Form

The category creation form is simple and user-friendly, designed to maintain consistency and prevent duplicate entries.

Fields:

1. Category Name
   a) The display name of the category (e.g., “Workshops”, “Medical Conferences”, “Online Training”).
   b) This field is required and unique per tenant.
2. Slug
   a) Automatically generated from the **Category Name**.
   b) Used internally for clean URLs and database reference.
   c) Can be customized manually if needed.
3. Parent Category
   a) Optional field that allows creating hierarchical relationships.
   b) If selected, the current category becomes a **child category** of the chosen parent.
   c) Supports **nested categories** for multi-level organization.
4. Category Hierarchy
   a) The resource supports **parent-child relationships** between categories.
   b) These relationships are displayed in a structured hierarchy both in the category list view and in drop downs when selecting categories for events.
5. Integration with Event Resource
   a) Parent and child categories appear visually nested in the drop down list for easier selection.
   b) Events can be assigned to either a **parent category** or a **child category**, depending on the event’s scope and specificity.
   c) Inline category creation is also supported from the Event form — allowing users to add a new category without leaving the Event creation page.
6. Category List Page
   a) **Edit** – Modify existing category details.
   b) **Soft Delete** – Temporarily remove a category while keeping data recoverable.
   c) **Force Delete** – Permanently delete a category record.

Also in Edit category Page wee see that which events are associate for this particular category using event relation manager.

Tag Module

The **Tag Resource** is used to assign labels to events, improving searchability and categorization beyond the structured hierarchy of categories.

Tags offer a more flexible, keyword-based approach for identifying event topics, audiences, or special attributes.

1. Purpose
   a) Tags allow event creators to apply custom identifiers to events, helping attendees and admins quickly find related events through search or filters. They complement categories by providing additional descriptive metadata.
2. Navigation Path

    a) This section lists all tags created under the current tenant and allows administrators to create, edit, and manage them.
3. Create Tag Form
    a) Tag Label : The display name of the tag
    b) Slug : Automatically generated from the **Tag Label** for clean URLs and database identification.
4. Integration with Event Resource
    a) Tags can be assigned when **creating or editing an event**.
    b) The **Tag field** supports multiple selections and inline creation, allowing new tags to be added directly during event creation.
    c) This makes it convenient to apply contextual or campaign-based tags to events.
5. Tag Edit & View Page
    a) On the **Edit Page** of a tag, users can view the **associated events** where this tag is applied.
6. Tag List Page
    a) Edit
    b) Delete
    c) Force Delete

Organizer Module

The **Organizer Resource** manages individuals or entities responsible for organizing events.
It stores organizer contact information and allows linking them to multiple events and organizer types.

1. Purpose

Organizers help identify the main point of contact or managing entity for each event. Multiple organizers can be assigned to an event, each with their respective details and roles.
2. Create Organizer Form
Fields:
1. First Name
2. Last Name
3. Email
4. Phone
5. Phone Type (Enum)
    a) Office
    b) Home
    c) Mobile
    d) Business
6. Organizer Type (Multi-Select)
    a) The organizer can be linked to one or more **Organizer Types** (defined in a separate resource).
    b) Supports multiple selections.

c) Inline creation is enabled for convenience.

4. Integration with Event Resource

In the **Event Create/Edit Form**, there's a dedicated section for **Organizers**, allowing:

- Selection of existing organizers.
- Creation of new organizers directly.
- Assigning multiple organizers to the same event.

5. Organizer List Page

   Actions are visible: Edit, Delete.

   And also able to filter with phone type in organizer.

Organizer Type Module

The **Organizer Type Resource** defines the classification of organizers.
Examples include "Main Organizer", "Co-Organizer", "Sponsor Partner", etc.

1. Purpose

To categorize and differentiate organizers by their roles or involvement in the event. This enables structured reporting and clarity when multiple organizers are associated with the same event.

2. Create Organizer Type Form

- Organizer Type Name
- Slug : automatically generated.

Venue Module

The **Venue Resource** manages physical and virtual locations where events are hosted.
Venues can be created independently or directly during event creation, providing flexibility for both recurring and one-time event locations.

1. Create Venue Form
   a) **Title** – The name of the venue
   b) **Email** – Contact email for venue-related communication.
   c) **Phone** – Contact phone number.
   d) **Phone Type (Enum)** – Type of contact number:
      i. Office
      ii. Home
      iii. Mobile
      iv. Business
   e) **Address Line 1** – Primary address.
   f) **Address Line 2** – Secondary address or suite number.
   g) **Country** – Dropdown list of countries.
   h) **State** – Becomes active once a country is selected; dynamically loads states for the selected country.
   i) **City** – City name.
   j) **Zip Code** – Postal or PIN code.
   k) **Description** – Additional notes or details about the venue.
   l) **Google map ur**l- Add venue link
2. Integration with Event Resource
   a) Selected from existing records, or
   b) Created inline directly from the **Event Create/Edit** page.

3. Venue List Page
    a) Edit
    b) Soft Delete
    c) Force Delete

Ticket Module

The **Ticket Resource** manages ticket configurations for events, including pricing, availability, and scheduling.
It ensures accurate control of inventory, pricing variations, and guest management per event.

1. Create Ticket Form
    a) **Label** – Ticket name (e.g., "VIP Pass", "General Admission").
    b) **SKU** – Auto-generated unique code identifying the ticket.
    c) **Accounting GL Code** – General ledger reference for accounting integrations.
    d) **Account Class Code** – Classification code for ticket accounting grouping.
    e) **Price** – Standard price of the ticket.
    f) **Inventory** – Total number of tickets available.
        i. Automatically decreases as tickets are sold through the order system.
    g) **Description** – Details about the ticket, inclusions, or policies.
    h) **Registration Start date** - Date for registration start
    i) **Registration End Date** - Date for registration end
2. Scheduled Ticket Pricing
    a) When enabled, a **Repeater Field** appears to manage multiple pricing schedules.
    b) Each repeater entry includes:
        i. Start Date & End Date Range
        ii. Price During This Range
3. Accompanying Guest Feature
    a) The **Accompanying Guest** section defines how many guests can attend with a single ticket.
        i. Example: "1 Main Attendee + 2 Guests"
4. Event Association
    a) Each ticket must be **linked to an Event**.
    This ensures ticket sales, pricing, and inventory are scoped to the specific event.

Attendee Type Module

The **Attendee Type Resource** defines categories of attendees for better event segmentation and ticket linking.

1. Create Attendee Type Form
    a) Fields:
        i. **Name / Label** – Type of attendee (e.g., "Student", "Professional", "VIP").
        ii. **Description** – Optional notes or eligibility criteria
    b) Actions:
        i. **Force Delete** – Permanently remove the attendee type.

Review Module

The **Review Resource** collects and displays user feedback and ratings for events.
It helps administrators monitor audience satisfaction and identify opportunities for improvement.

Group Event Module

The **Group Event Resource** allows tenants to create and manage collections of multiple events under a unified theme or umbrella.
It is ideal for multi-day conferences, festival series, or grouped activities that share common attributes.

1. Create Group Event Form
    a) Fields:
        i. **Title** – Name of the group event (e.g., "Annual Tech Summit 2025").
        ii. **Slug** – Automatically generated from the title for SEO-friendly URLs.
        iii. **Description** – Detailed overview of the group event.
        iv. **Additional Details** – Optional section for extra notes, rules, or content.
        v. **Payment Gateway (Multi-Select)** – Select one or more configured gateways for this group event.
        vi. **Upload Image** – Add a banner or representative image for the group event.

Promotions Module

The **Promotions** module provides flexible tools to configure, manage, and apply discounts or promotional offers across events and tickets.
It includes two key resources:

1. **Discount Rules** – for system-defined automatic discounts based on attendee type, ticket, or membership.
2. **Promo Codes** – for user-entered coupon codes offering flat or percentage-based discounts.

Discount rule Module

The **Discount Rule Resource** allows administrators to define and manage automatic discounts applied to tickets or memberships.
Discounts can be restricted by attendee types, membership plans, date ranges, and usage limits.

1. Create Discount Rule Form
    a) Fields:
        i. **Is Active (Toggle)** –
            1. Enables or disables the discount rule.
            2. Only *active* rules are considered during checkout or price calculation.
        ii. **Applicable Attendee Types (Multi-Select)** –
            1. Select one or more attendee types that this rule applies to.
            2. If an attendee type is selected, the **Membership Plan** field becomes disabled.

iii. **Applicable Membership Plans (Multi-Select)** –
    1. Select one or more membership plans eligible for this rule.
    2. If a membership plan is selected, the **Attendee Type** field becomes disabled.

iv. **Applicable Tickets (Multi-Select)** –
    1. Choose which tickets the discount applies to.

v. **Start Date / End Date** –
    1. Define the validity period for the discount rule.
    2. The discount applies only within this date range.

vi. **Usage Limit per User** –
    1. Specifies how many times a single user can use this discount rule.

vii. **Discount Type (Enum)**
    1. Select between:
        a) **Percentage (%)** – discount is calculated as a percentage of ticket price.
        b) **Flat (₹ / $)** – discount is a fixed monetary value.

viii. **Discount Value** –
    1. The value based on the type selected (percentage or flat).

Promo Code Module
The **Promo Code Resource** enables the creation and management of user-applied promotional codes that grant discounts during checkout.
Promo codes can be configured for limited usage, specific tickets, attendee types, and validity periods.

1. Create Promo Code Form
    a) **Is Active (Toggle)** –
        i. Determines whether the promo code is currently usable.
    b) **Label** –
        i. Descriptive name for the promo code (e.g., “SUMMER2025 Offer”).
    c) **SKU** –
        i. Auto-generated unique code (can also be manually overridden).
        ii. This code is what users enter during checkout.
    d) **Discount Type (Enum)** –
        i. Percentage (%)
        ii. Flat (₹ / $)
    e) **Discount Value** –
        i. The numerical value depending on discount type.
    f) **Applicable Tickets (Multi-Select)** –
        i. Tickets eligible for this promo code.
    g) **Applicable Attendee Types (Multi-Select)** –
        i. Attendee types allowed to use this promo.
    h) **Max Usage per User** –
        i. Defines how many times a single user can use this promo code.
    i) **Max Total Usage** –
        i. Total number of times this promo code can be used globally.
    j) **Start Date / End Date** –

i. Validity period for this promo code.

Donation Module

The **Donation Resource** provides administrators with a structured interface to configure, manage, and customize donation campaigns within the system.
This feature supports flexible donation configurations — allowing multiple payment gateways, predefined or custom donation amounts, donation frequency options, and associated custom fields.
Each donation record defines essential parameters that determine how it appears to donors on the frontend and how transactions are processed in the backend.

Donation Form Structure

1. Label
   a) Specifies the name or title of the donation campaign (e.g., *General Fund*, *Education Support*).
2. SKU
   a) Represents a unique slug or system-friendly identifier for the donation campaign.
3. Accounting GL Code
   a) Allows entry of the General Ledger (GL) code for accounting purposes.
4. Accounting Class Code
   a) Specifies the accounting class or category associated with this donation.
5. Predefined Donation Amounts
   a) Enables administrators to define a list of fixed donation amount options that will be visible to donors.
6. Allow Custom Amount
   a) Defines whether donors are permitted to enter a custom donation amount.
7. Type of Donation
   a) Options: One time and Monthly
8. Payment Gateway Selection
   a) Allows administrators to associate one or more payment gateways with a donation campaign.
9. Detailed Description
   a) Provides a comprehensive description of the donation campaign, including its purpose, objectives, and impact.
10. Custom Fields
    a) Displays all **custom fields** that are specifically associated with the selected donation.

Settings

Organizer Settings

The **Organizer Settings** section, accessible under the **Settings → Cluster** module, enables tenant administrators to configure and manage key organizational details that define their tenant's identity, branding, and contact information. This configuration ensures that all communications, transactions, and site branding remain consistent across the platform.

Organization Information

The **Organization Information** section captures the essential profile details of the tenant's organizer entity. These details represent the core business or organization managing events, donations, or other tenant-level operations. The following fields are available for configuration:

1. **Company Name** – Specifies the legal or brand name of the organizing entity.
2. **Website Name** – Defines the organization's official website or online presence.
3. **Country & State** – Identifies the geographical region where the organization operates.
4. **City & ZIP Code** – Provides the specific location and postal code for accurate address representation.
5. **Email** – The official contact email for administrative or customer correspondence.
6. **Phone** – The primary contact number used for customer support or inquiries.
7. **Phone Type** – Allows categorization of the contact number (e.g., mobile, landline, or business line).

Site Details

The **Site Details** subsection manages branding and visibility configurations that define how the organization appears on the tenant's platform. These elements enhance brand identity and provide a professional interface for end users.

1. **Site Logo** – Upload the organization's logo to be displayed across the platform, ensuring consistent brand representation.
2. **Site Name** – Defines the visible name of the tenant's site or platform.
3. **Site Active (Toggle)** – Enables or disables the site's active status. When toggled off, the tenant's front-facing site or related functionalities may become temporarily inaccessible to users.

General Settings Overview

The **General Settings** module, located within the **Settings** section, enables tenant administrators to configure foundational system preferences that govern the overall appearance, functionality, and operational rules of the tenant's platform. These settings ensure a unified experience across all modules, enhancing usability, consistency, and organizational control.

Date and Time Settings

The **Date and Time Settings** section allows administrators to define custom date and time formats used consistently throughout the platform. By standardizing how dates and times appear across reports, invoices, dashboards, and user interfaces, organizations ensure a coherent and localized experience for all users.

Key Configurations:

1. **Custom Date Format** – Enables selection or creation of a preferred date display format (e.g., DD/MM/YYYY or MM/DD/YYYY) for all system modules.

2. **Time Format** – Allows administrators to choose between 12-hour or 24-hour display preferences.
3. **Custom Timezone settings** -Enables users to select preferred timezone for whole application

Font Customization

The **Font Settings** subsection provides control over the typography used across the entire project interface. Administrators can select and apply a consistent font family, ensuring visual harmony and brand alignment throughout the tenant's platform.

Invoice Settings

The **Invoice Settings** module enables administrators to define and manage the tenant's invoice generation and numbering patterns. It ensures uniformity in financial documentation and compliance with internal or regulatory standards.
Key Configurations:

1. **Invoice Pattern** – Define a structured numbering or labeling pattern (e.g., INV-0001, DON-2025-01) to maintain a systematic and traceable invoice sequence.

Donation Settings

The **Donation Settings** section governs system-wide controls for managing donations and refund capabilities across all supported modules. This configuration ensures flexibility in donation management while maintaining accountability and security.
Key Configurations:

1. **Active Donation Feature** – Enables or disables the donation functionality across the tenant's environment.
2. **Allow Donation Refunds** – Grants administrators the ability to process refunds for eligible donations.
3. **Where Can Donations Be Accepted?** – Allows selection of modules or sections where donations are permitted (e.g., events, campaigns, or general fundraisers).

QuickBooks Integration

The **QuickBooks Settings** section facilitates seamless integration between the tenant's platform and **QuickBooks**, enabling synchronized financial management, accounting, and reporting.
Key Functionalities:

1. **Connect QuickBooks Account** – Securely link one or more QuickBooks accounts to the tenant's instance for real-time financial synchronization.
2. **Multiple Connections Support** – Allows administrators to manage and switch between multiple QuickBooks connections simultaneously.
3. **Disconnect Account** – Provides the ability to selectively disconnect a specific QuickBooks account without affecting other integrations.

Custom Fields Overview

The **Custom Fields** module empowers tenant administrators to extend platform flexibility by creating and managing dynamic, user-defined fields. These fields allow the collection of additional data beyond the system's default structure and can be associated with multiple resources such as tickets and donations.
This feature is designed to enhance customization, streamline data entry, and provide more contextually relevant information capture across various modules within the tenant environment.

Creating a Custom Field

Administrators can create a new custom field through the **Create Custom Field** interface. The process includes defining field details and associating it with specific system resources for contextual visibility.
Custom Field Details:

1. **Title** – Specifies the name or label of the custom field (e.g., *Emergency Contact*, *Member ID*, *Alternate Email*). This is a required field.
2. **Slug** – A unique identifier for the field, automatically generated if left blank. The slug is used internally for data referencing and integration.
3. **Custom Fields Repeater** – Allows administrators to add multiple custom fields dynamically. Each entry within the repeater can represent a different data input type or field configuration with visibility condition.

Linked Resource Association

The **Linked Resource** section enables administrators to associate a custom field with specific system entities such as **Tickets** and **Donations**. This ensures that the created custom fields appear only within the selected modules, providing a contextual and relevant user experience.
Association Details:

1. **Type** – Defines the type of resource to associate with (e.g., Ticket, Donation, or other supported models).
2. **Records** – Allows selection of one or multiple records under the chosen type to which the custom field should apply.

Field Visibility and Usage

Once the custom field is created and associated, it becomes visible in the selected modules (e.g., Ticket and Donation). Users interacting with those modules will be able to view and input values for the associated custom fields as part of the record creation or editing process.

This ensures:

1. **Dynamic Data Capture** – Collect specific information relevant to each resource type.
2. **Improved Flexibility** – Adapt system data structures to evolving business or organizational requirements without requiring code-level changes.
3. **Consistent User Experience** – Maintain a uniform and intuitive form layout across associated resources.

Forms Overview

The **Forms** module provides a flexible and dynamic way for tenant administrators to design and configure custom forms without requiring any code modifications. This functionality allows the creation of complex, interactive data collection forms by defining **custom fields**, **sections**, **visibility rules**, and **field order** — all within an intuitive interface.

Key Features

1. Dynamic Form Builder
   a) Administrators can create fully customized forms by adding multiple sections and fields. Each form can be structured according to organizational requirements, supporting a wide variety of input types and logical groupings.
2. Custom Fields Integration
   a) The Forms module seamlessly integrates with the **Custom Field** functionality, allowing administrators to insert previously created custom fields directly into forms. This ensures consistent data structure across different modules while maintaining flexibility.
3. Section Management
   a) Each form can contain one or more **sections**, allowing logical organization of fields. Sections can represent different topics or steps within a form, improving readability and user flow.
4. Field Ordering and Layout Control
   a) The order of fields within each section can be easily managed using drag-and-drop controls. This gives administrators precise control over how the form appears to end users, ensuring an optimized and user-friendly experience.
5. Conditional Visibility
   a) The system supports **visibility conditions**, allowing fields or sections to appear or hide dynamically based on user input or other predefined criteria.
6. Form-Specific Enums Using Collections
   a) A unique feature of the Forms module is the ability to define **form-specific enums (enumerations)** using **collections**.

Email Templates Overview
The **Email Templates** feature provides administrators with a centralized platform for managing all system-generated emails. This includes built-in templates for notifications, confirmations, and transactional communications that can be customized as needed.
Key Features

1. Predefined System Templates
   a) The module includes a set of preconfigured templates for common communication types such as:
      i. Event Registration Confirmation
      ii. Donation Receipt
      iii. Payment Confirmation or Failure Notification
2. Template Customization
   a) Administrators can edit email subjects, body content, and styles directly through a rich-text editor. The system supports both **plain text** and **HTML formatting**, allowing visually appealing, branded email layouts.
3. Dynamic Variables (Placeholders)
   a) Each template supports **dynamic variables** that can be embedded into the content. These variables are replaced with real-time data when the email is sent.

Order Resource Overview

The **Order Resource** provides a centralized and structured way to manage all user orders across the tenant platform. It is designed with a **wizard-based workflow**, allowing administrators to review and process each order step-by-step — from user information to itemized details, payments, and refunds.
This approach ensures clear visibility into every aspect of an order, including user details, purchased items, transaction records, and financial actions such as invoice generation and refunds.

Wizard Flow Structure

The Order Resource is organized into **three sequential steps**, ensuring an intuitive and structured order management process.

Step 1: Order Information

In the **Order Information** step, administrators can review and confirm the user-related details associated with the order. This section captures essential information about the customer who placed the order.

User Details Include:

1. **First Name** – The customer’s first name.

2. **Last Name** – The customer's last name.
3. **Email** – The registered email address of the user.
4. **Phone** – The primary contact number provided during order creation.
5. **Phone Type** – Specifies the category of phone (e.g., mobile, work, or home).
6. **Order Status** – Displays the current state of the order (e.g., *Pending*, *Completed*, *Refunded*).

Step 2: Order Items

The **Order Items** step displays a detailed list of all items purchased within the order. Each entry corresponds to a product, ticket, or donation that the user has selected during checkout.

Key Features:

1. **Itemized Listing:** Displays all associated order items (e.g., event tickets, donations, products).
2. **Associated Custom Fields:** Shows any **custom fields** linked with the order item or donation. These may include user-specific data such as participant names, membership details, or additional form inputs collected during checkout.
3. **Clear Categorization:** Each order item entry provides clarity on what the user has purchased and its corresponding quantity and price.

Step 3: Order Transactions

In the **Order Transactions** step, administrators can review and manage all financial details related to the order.
Displayed Details Include:

1. T**otal Amount Paid:** Shows the cumulative payment amount received for this order.
2. **Notes:** Allows internal comments or remarks to be recorded for tracking and auditing purposes.
3. **Payment Gateway:** Identifies which payment gateway (e.g., Stripe, PayPal, or Test Account) was used to process the transaction.

Invoice Generation

Once the order status is marked as **Completed**, the system automatically generates a **paid invoice** for the transaction.

- The list of purchased **items** (tickets, donations, etc.)
- The **donation amount** (if applicable)
- Any applied **discount rules** or **promo codes**

Refund Management

The **Refund Order** functionality enables administrators to manage full or partial refunds based on predefined refund policies.
Refund Options:

1. Full Order Refund:
   a) Refunds the entire order, including all associated items.
   b) Automatically references the **event's refund rule** from the Refund Rule Relation Manager.
2. Item-Level Refund:
   a) Allows administrators to refund individual order items independently.
   b) The refund amount is **pre-calculated** based on the applicable refund rule.
   c) Administrators can enter a **custom refund amount**, provided it does not exceed the allowed refund limit.

API Clients

The **API Clients** section allows administrators to manage OAuth clients that are authorized to interact with the system programmatically. Each client is assigned a unique Client ID and credentials, enabling secure access to protected API endpoints.
From this interface, you can:
Create and update API clients - Define a **Client Name** for identification
Select the Grant Type - Choose the authentication flow (e.g., *Client Credentials*, *Authorization Code*, etc.)
Configure Redirect URIs - Required when using the Authorization Code grant type; supports multiple URIs separated by commas
Manage Client Status - Enable or revoke a client to control access and invalidate issued tokens if needed