

Reports

Files

- No Numbers in the front of name. EX: "11734047633746_Mike's Party Night.pdf"
- "**Action**" change to "**Download**"
- Dates for all uploads Month / Day / Year (Company Start Date, Uploaded Date)

Company Documents ONLY

Admin:

- When adding data no need for File Type. Only **File Name & Download**
- When uploading Company Documents they come for ALL USERS. Need to be able to select ONE USER ONLY.

User Interface:

- Only One Drop Down Menu that says **Documents**, No Need to list by upload date
- All uploaded documents can be listed here, Only **File Name & Download**
- Menu should expanded all the time

Additional

- When I sort any of the fields under add Company Name tab a company name comes to the top but the edit button is not linked to that company name

Admin Layout

Dashboard

Clients (Company Name renamed to Clients)

User Access

File Upload

User Permissions (User Types renamed to User Permissions)

Report Types (Reports renamed to Report Types)

Activity (Username Log In, Date, Time, Download)

Account Settings

CPA Layout

Dashboard

Clients

Reports

Firm Details

Firm Documents

Account Settings

Notes:

- When creating user access, Admin should be able to select with clients the CPA can view
- When adjusting user access, Admin should be able to select what reports the CPA can view
- Firm documents same as Company documents with only one drop down for upload

Same as creating profile for new company with fewer categories:

Firm Name	
Address	
Phone Number	
E-mail	