

## Company Module

**Company Management**

Search by Name  Type company name... ADD COMPANY

| # | Name        | PAN        | GST             | MCA           | Address      | Documents    | Actions |
|---|-------------|------------|-----------------|---------------|--------------|--------------|---------|
| 1 | Test        | DTKPA3245R | 11AAAAA0000A1Z5 | 2727836292936 | Test address | No documents |         |
| 2 | iGen Rental | AYCPS2315J | 22AYCPS2315J1ZD | abhay         | Ad1          | No documents |         |

Rows per page: 5 ▾ 1–2 of 2 < >

A green circle highlights the "Documents" column header.

1. Active/Inactive through that delete button is not a good UI standard.
  - a. Move option to activate or inactivate inside edit page
  - b. Differentiate Active /Inactive rows with a colour code

## User Management Module

**User Management**

Search User  Enter name to search ADD USER

| # | Full Name | User ID        | Role   | Companies   | Actions |
|---|-----------|----------------|--|-------------|---------|
| 1 | akash     | Akash          | SUPER_USER <span style="background-color: #c8e6c9; border-radius: 15px; padding: 2px 5px;">Active</span> | Test        |         |
| 2 | Igen test | Igenproperties | SUPER_USER <span style="background-color: #c8e6c9; border-radius: 15px; padding: 2px 5px;">Active</span> | iGen Rental |         |

1. Active/Inactive through that delete button is not a good UI standard.
  - a. Move option to activate or inactivate inside edit page and use colour code while listing

## Cost Centre

**Cost Centre Management**

Search User  Enter Account Name to search ADD COST CENTRE

| ID | Company     | Name     | Direction | Notes | Active | Actions |
|----|-------------|----------|-----------|-------|--------|---------|
| 1  | iGen Rental | Internal | Debit     |       | Yes    |         |

Rows per page: 5 ▾ 1–1 of 1 < < > >

1. There should be two Search boxes in the top. Search should be for
  - a. Company
  - b. Cost Centre

## Transaction Type

## Add Transaction Type

Company

Cost Centre

Name

Remarks

Direction

GST Applicable ⓘ

Status

Active

CANCEL

SAVE

### Bug

1. Status – Make radio button

### Enhancement Request

1. Add a flag – Margin Applicable – Something like GST applicable

## Transaction Module

## Add Transaction

Company

Bank Account

Cost Centre

Transaction Type

Direction  
CREDIT

Amount

Date  
dd-mm-yyyy

Notes

CANCEL      ADD

### Bug

1. Missing Chart fields 1) Entity. 2) Asset 3) Contract

### Enhancement

1. Add field Margin- Which is a number like amount. This will be enabled only for transaction type with Flag “Margin Applicable”

### Entity Module

## Add New Entity

Company \*

Entity Name \*

### Entity Type

PROPERTY

PROJECT

Linked Property \*

Status

Active

Remarks

### Enhancement

- Add a new entity type – Contacts
- Make it 3 radio buttons – Property, Project , Contact
- Option to link Property, Project and Contact

## Property Module

The screenshot shows the iGen Solutions Property Management interface. On the left, there's a sidebar with a search bar and a table listing properties under 'iGen Properties'. The main area is a modal titled 'Add Property' divided into four steps: 1. Property Details, 2. Configuration & Financials, 3. Address, and 4. Attachments & Key Dates. Step 1 is active, showing fields for Company (selected as 'iGen Properties'), Property Name ('B1303'), Location ('purva eternity'), Purchase Date ('dd-mm-yyyy'), Purchase Price, Purpose ('Rental'), and Status ('Vacant'). Step 2 is partially visible. A button labeled 'NEXT' is at the bottom right of the modal. To the right of the modal, a table lists properties with columns for Rent/Sale and Actions (edit and delete icons). At the bottom, there are pagination controls for rows per page (10) and page number (1-6 of 6).

- After location remove purchase date and purchase price
- Add LandLord – Search from the contact table
- After purpose,
  - If purpose is care, status can be occupied, vacant, under maintenance
  - If purpose is rental, status can be occupied, vacant, under maintenance
    - If status is Occupied, enter Tenant – Search from the Contact table
  - If purpose is Sale, status can be owner occupied, tenant occupied, vacant, under maintenance
    - If the status is occupied – Enter Tenant from contact table

**Add Property**

Property Details      Configuration & Financials      Address      Attachments & Key Dates

Bedrooms (BHK) — 3

Bathrooms — 3

Property Type

- Apartment
- Villa
- Plot
- iGen Service Charge

BACK      NEXT

- Bring property type as the 1<sup>st</sup> field in this page
  - If property type is apartment, then questions are
    - Number of bedrooms
    - Number of bathrooms
    - Sqft
    - Number of balconies
    - Furnishing : fully, semi, none (put radio button)
    - Floor height
    - Number of car park
    - Front Facing
    - Amenities (put a text box)
    - Highlight – text box
    - Remove land area
    - Remove igen service charge
  - If property type is Villa, then questions are
    - Number of bedrooms
    - Number of bathrooms
    - Sqft
    - Gated community? (flag)
    - Land area
    - Number of car park
    - Number of balconies
    - Front Facing
    - Amenities (put a text box)
    - Furnishing : fully, semi, none (put radio button)
    - Remove igen service charge
    - Highlight – text box

- If property type is plot, then questions are
  - Gated community? (flag)
  - Land area
  - Number of car park
  - Approach road width
  - Amenities (put a text box)
  - Furnishing : fully, semi, none (put radio button)
  - Remove igen service charge
  - Highlight – text box
  -
- If property type is commercial, then questions are
  - Sqft
  - Land area
  - Number of car park
  - Approach road width
  - Floor height
  - Furnishing : fully, semi, none (put radio button)
  - Remove igen service charge
  - Highlight – text box
- Change igen service charge to expected price – currency

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### Edit Property

Property Details      Configuration & Financials      Address      Attachments & Key Dates

Address Line 1  
Purva eternity, kakkanad

Address Line 2

City  
Kakknad

Pincode

State  
Kerala

Country  
India

[BACK](#)

[NEXT](#)

- Make everything non mandatory option

## Edit Property



Remarks

[UPLOAD DOCUMENT\(S\)](#)

### Key Dates

Date Label

Due Date —

dd-mm-yyyy

BACK

UPDATE

- Upload documents is not working
- Should be able to give name for each uploaded documents (20 docs)
- Use the mock up given below.

## Edit Property

1      2      3      4  
Property Details   Configuration & Financials   Attachments & Key Dates

Remarks

UPLOAD DOCUMENT(S)

### Key Dates

| Date Label      | Due Date   | Remarks                 |
|-----------------|------------|-------------------------|
| Inspection Date | 10-09-2025 | Annual inspection       |
| Lease Renewal   | 01-12-2025 | Renewal with tenant ABC |
| + Add Key Date  |            |                         |

BACK

UPDATE

## Edit Property

Property Details      Configuration & Financials      Address      Attachments & Key Dates

Remarks

+ UPOD DOCUMENT

### Documents

Upload up to 20 documents

|  |   |
|--|---|
|  Document_1.pdf   |    |
|  Document_2.pdf   |    |
|  Document_3.pdf   |    |
|  Document_4.pdf   |    |
|  Document_5.pdf  |   |
|  Document_6.pdf |  |
|  Document_7.pdf |  |

## Contacts Module

### Edit Contact

Phone  
8129686484

Alternate Phone  
8113900760

Email  
intasolutionpvtltd@gmail.com

Address  
Kozhikode

PAN

GST

Notes  
iGen software team

Linked Properties

CANCEL UPDATE

- Capture bank account details ( account number, ifsc code, account name) and gpay number
- Remove Linked Property
- Add key dates for the vendors as given in the mock up below

## Key Dates

| Date Label                     | Due Date   | Remarks                 |
|--------------------------------|------------|-------------------------|
| Inspection Date                | 10-09-2025 | Annual inspection       |
| Lease Renewal                  | 01-12-2025 | Renewal with tenant ABC |
| <a href="#">+ Add Key Date</a> |            |                         |

## Entity Module

Add New Entity

**Entity Type**

PROPERTY
PROJECT

Linked Property \*

- B103
- B301
- A1406
- Blue Lets scooty
- Thunder Bird
- Red Lets Scooty

- Inactive properties are listed in the drop down

- Change drop down to search as we are expecting more number of properties
- 

## Project Module

Add Project

Project Type \*  
interior

Stakeholders  
IN-TA solutions

Expected Return

Address Details

Landmark

Pincode

CANCEL ADD

The screenshot shows a vertical form titled 'Add Project'. At the top is a dropdown labeled 'Project Type \*' with 'interior' selected. Below it is another dropdown labeled 'Stakeholders' with 'IN-TA solutions' selected. There is a text input field for 'Expected Return'. Under 'Address Details', there are two text input fields: 'Landmark' and 'Pincode'. At the bottom right are two buttons: 'CANCEL' and 'ADD'.

- Remove Expected return
- Address – Make everything non-mandatory, Push address to the bottom of the page
- **Enhancement Request** : please use the following UI

## Edit Project

Company \*  
Select company

Project Name  
Edapally

Status \*  
Ongoing

Project Type  
Interior

Description / Scope

Budget

### Stakeholders

+ Add Stakeholder

Anusha

Gopu

Add Stakeholder

### Milestones

| Milestone Name  | Start Date | End Date   | Status      | Notes   |
|-----------------|------------|------------|-------------|---|
| Foundation Work | 01-07-2025 | 15-07-2025 | In Progress |  |
|                 |            |            |             |   |

+ Add Milestone

Documents



Address



CANCEL

UPDATE

## Asset Module

## Add Asset

**Basic Details**

|                 |  |
|-----------------|--|
| Company         | iGen Properties  |
| Asset Name      | Asset Name   |
| Category        | Vehicles, Electrical Equipment, IT Equipment, Tools & Machinery, Furniture, Fixtures |
| Purchase Date   | 15-08-2025 <input style="font-size: small;" type="button" value="Edit"/>             |
| Purchase Expiry |  |

**Service & Key Dates**

|                   |            |
|-------------------|------------|
| Label             | Due Date   |
| Insurance Renewal | 15-08-2025 |
| Annual Service    | 10-09-2025 |
| Oil & filter      | filter     |

[+ ADD KEY DATE](#)

**Linked To**

Project  Property

Select search property

Select 'Property → Internal → Store' for internal assets.

B103 - Purva Eternity

**Ops & Status**

Maintenance Frequency

|          |        |
|----------|--------|
| Location |        |
| Status * | Active |

[+ Add Key Date](#)

**Documents**

insurance\_policy.pdf
Delete

warranty.pdf
Delete

**Service & Key Dates**

Upload up to 20 documents

[+ UPLOAD DOCUMENT](#)

CANCEL
ADD
↓

Please use the above UI

Find below table for more explanation

| Field Name               | Example Value   | Type             | Source / Notes   |
|--------------------------|-----------------|------------------|--|
| Company                  | iGen Properties | Dropdown         | Fetch from companies table   |
| Asset Name               | Two Wheeler     | Text             | User input   |
| Category                 | Vehicles        | Dropdown         | Fixed list: Vehicles, Electrical Equipment, IT Equipment, Tools & Machinery, Furniture, Fixtures |
| Purchase Date            | 15-08-2025      | Date Picker      | User input   |
| Warranty Expiry          | 15-08-2027      | Date Picker      | User input   |
| Tag ID<br>(Barcode/RFID) | ABC12345        | Text<br>(Unique) | Must be unique in asset_master table   |

|   |                                     |                     |  |
|---|-------------------------------------|---------------------|--|
| <b>Linked To – Type</b>                   | Property                            | Radio Button        | Values: Project / Property   |
| <b>Linked To – Entity Search</b>          | B103 – Purva Eternity               | Searchable Dropdown | Fetch from entities table filtered by selected type (Project / Property) |
| <b>Maintenance Frequency</b>              | Yearly                              | Dropdown            | Fixed list: Monthly, Quarterly, Half-Yearly, Yearly, Custom              |
| <b>Location</b>                           | Internal Store                      | Text                | User input   |
| <b>Status</b>                             | Active                              | Dropdown            | Fixed list: Active, In Repair, Retired                                   |
| <b>Notes</b>                              | Company-owned vehicle for staff use | Multiline Text      | User input   |
| <b>Service &amp; Key Dates – Label</b>    | Insurance Renewal                   | Text                | User input or predefined quick-add list                                  |
| <b>Service &amp; Key Dates – Due Date</b> | 15-08-2025                          | Date Picker         | User input   |
| <b>Service &amp; Key Dates – Remarks</b>  | Comprehensive Insurance             | Text                | User input   |
| <b>Documents – File Name</b>              | insurance_policy.pdf                | File Upload         | User uploads file  |
| <b>Documents – Category</b>               | Insurance                           | Dropdown            | Fixed list: Invoice, Warranty, Insurance, Service Report, Other          |