Menu **Notifications | My profile** (desktop & mobile)

- **Dashboard** (desktop & mobile)
- **My Projects** (desktop & mobile)
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- **Settings** (desktop)

My projects

- This section lists all projects assigned to the user
- Only users roles with permission can create or edit projects and details
- Every project will have stages or sections (listed below)

Project Details | Survey | Drawings | Budget | Payments | Progress | QC | Snags

1. **Project Details**

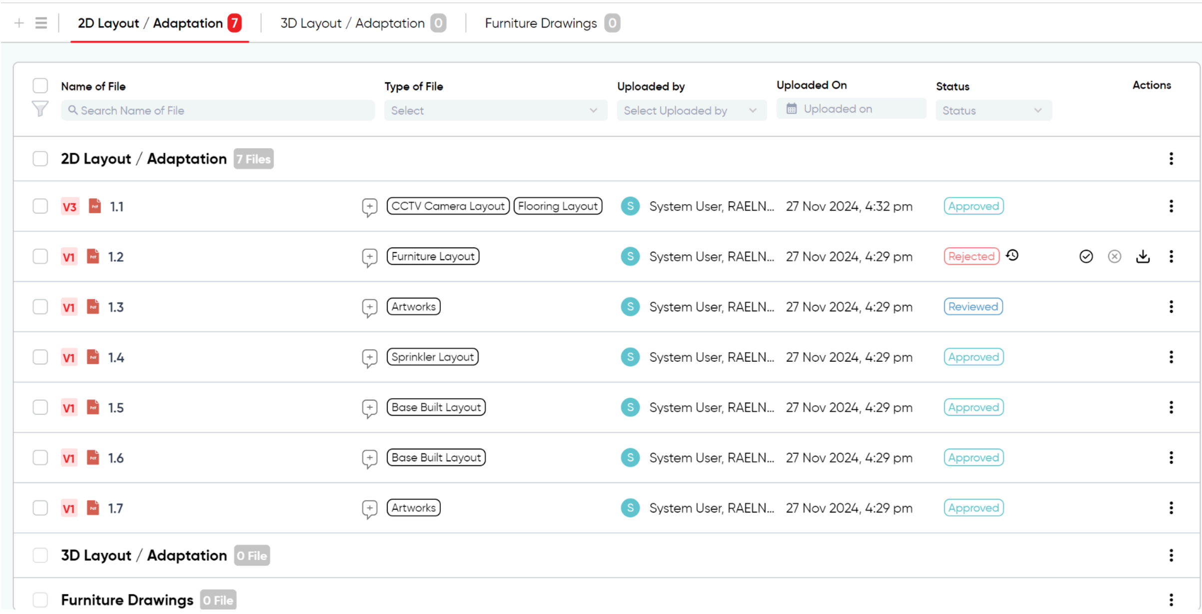
- Project ID
- Project name
- Client name, address, ph no, email
- Site address, plot size, total built up area
- Assigned project users
- Final agreed specification (PDF can be attached with click to open or download option)

2. **Survey/ Recce**

- Only user roles with permissions can create and assign surveys
- Click on the survey section to open - click on create survey button - create survey pop up opens - add survey details - click on assign survey button - Notification will be received by the assigned user - user either clicks on notification to open the assigned survey or clicks on survey section to see all assigned surveys and then clicks on the specific survey - Survey details page opens showing all survey details and Start survey button -Click on start survey - Fill all questions and click on submit button - Survey is sent to PM user role for approval and notified - Once PM role approves, it is sent to Architect role and notified.
  Create new survey - Survey Details-
- Select Survey template from drop down options (templates can be created in settings - module settings - survey)
- Project name
- Due date
- Assign to (Select from drop down)
- Add instructions if any

3. Drawings/ Design

- Only user roles with permission can upload drawings
- Drawings will be uploaded under respective sections
- New version uploaded in each section will be listed only after they are approved
- Older versions will automatically be moved to version history. These can only be viewed by selecting version history from options
- PDF versions can be opened within the desktop window to review and approve
- Specific parts can be pinned or marked and comments can be added tagging any specific user
- If any user is tagged in a comment, it will be registered as a task
- Users can also view and approve or reject the drawings as per approval hierarchy
- Drawing files can also be downloaded by users



4. Budget/BOQ

- Only user roles with permissions can create budgets
- Line items for budgets will be selected from drop down lists (the list can be created and edited in module settings)
- Columns for - Select category, select item, select stage, description, uom, qty, rate, amount

5. Payments/ Expenses

- SE role or PM role can add payment requests
- If amount is within limit and paid by SE, it is auto approved and marked as paid by SE from site expenses balance
- If above limit, approval is sent to PM - PM reviews and approves - sent to finance - finance makes payment - and marks as paid (payment proof attached)
- Columns for payment request - Bill/invoice date, select category, select item, select stage, description, UOM, qty, rate, upload photo(for materials), attach

invoice/bills/Mbook photo(for labour &contract), amount, add GST amount if applicable(or mark no GST)

- The categories, items and stages for both Budget and expenses will be the same. Budget vs actuals can be tracked in dashboard or exported google sheets
- Site expense amount received by the SE will be recorded and any payments made directly by SE will be deducted from this amount
- Core civil materials (Cement, steel, Msand, aggregates, Psand and any machinery) purchased will be automatically recorded as stock available - consumption recorded in the daily progress will be used to keep track of inventory

6. **Progress/Schedule**

Schedule | Progress update | Progress reports | Materials

<u>Schedule</u>

- Detailed project schedule will be prepared before commencing site work
- Each activity will have planned start and end dates
- Some activities start date will be dependent on completion of other activities
- Material selections to be finalized by clients will have a start and due date. Start date for these will trigger a notification to SE and PM

<u>Progress update</u>

- SE will select activity and mark progress based on % of completion
- Corresponding work images will be attached
- Daily curing images will be uploaded
- Section to manually enter any other update with images
- Any blocker causing delays will be recorded (select from list)
- Tomorrow's work plan will be mentioned
- Materials used will be recorded. This is for only core civil materials (Cement, steel, Msand, aggregates, Psand and machinery)

- Blocker delays will be collated to calculate total delay of project if any
- Any delays and dues will trigger notifications
- Material stock for (Cement, steel, Msand, aggregates, Psand and machinery) is recorded once entries are made in payments requests - consumption recorded in the daily progress will be used to keep track of available inventory
- At the end of day, daily report can be generated - Specific sections can be downloaded as PDF to be sent to clients
- All previous reports are available in the progress reports section

7. **QC checklist**

- Preset checklists for all works
- SE will select the specific work happening on site and complete all applicable checklist points
- Remarks can be added if necessary
- All checklists will be stored and can be filtered by date or specific works

8. **Snags**

- User roles with permissions can create and assign snags
- Click on create snag button - upload images - give description - select category - record audio/video - assign to - date of completion - submit/addmore
- Assignee will be notified once snag is assigned, assigner will be notified once snag is marked as completed by assignee. Assigner can review and mark as closed
- All snags whether completed or open will be listed and marked accordingly
- All snags can be filtered based on category, status

Task Manager

- User roles with permission can assign tasks
- Tasks will be segregated into Tasks by me & tasks for me
- Click on create task button - Add description - assign - add due date - create
- Assignee will be notified
- Once task is received - click on task to open - add comments if needed - can tag people in comments - mark completed - Assigner will receive notification - review, add comments and can mark closed or reopen task
- Any project snags assigned to the user will also be listed in the task manager page - click to open specific project snags page
- Any tags or comments will also be shown in this page - click to open comment or tag location
- Any survey / recce assigned will be shown in this page - click to open project specific survey page to complete

Manage Databases

- Vendor database
- Client database

Settings

Company Details | Users | Roles | Approvals hierarchy | Module settings

Company Details

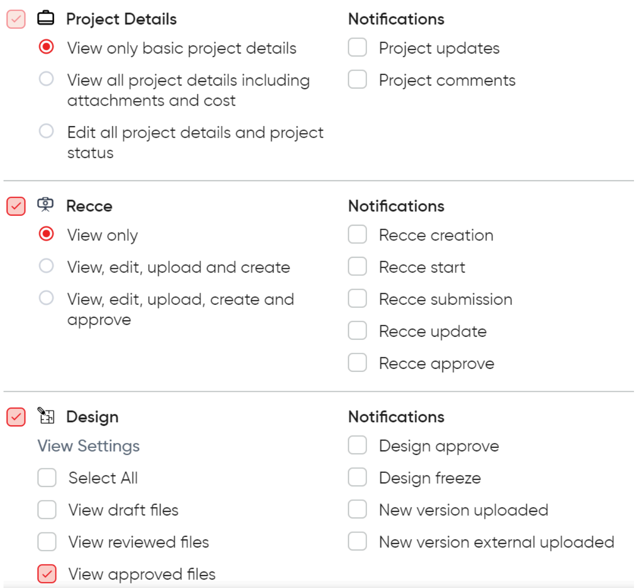
- Logo
- Registered Name
- Address
- GST no & attach certificate
- PAN no & attach card
- Bank ac name, ac no, ifsc, branch
- MSME no & attach certificate

Users

- List of all users with columns for - Name, phno, email, org role, project role status(can be marked active or inactive)
- Click on user to open pop up with edit button
- Add new user button - opens pop up - Users Name, phno, email, org role, project role - click on add button

Roles

- List of existing project roles with columns for - Role name, status (can be marked active or inactive)
- Click on role to open edit settings(permissions&notifications)
- Add new role button - click to open role - Add role name - add role permissions & notifications for all sections/stages in projects. Example below-



Approval Hierarchy

- Survey - as mentioned in the survey section
- Drawings - Architect will add drawings, Project manager will check and approve - once approved it will automatically be shown as the latest drawing. Older drawings will be moved to archive section and automatically marked version wise
- Payment requests/ expenses - If amount is within limit and paid by SE, it is auto approved and marked as paid by SE from site expenses balance. If above limit, approval is sent to PM - PM reviews and approves - sent to finance
- Snags - Will be marked completed by the assignee. Only assigner can mark as closed
- Tasks - Will be marked completed by the assignee. Only assigner can mark as closed

Module Settings

Survey/Recce

- List of survey templates
- Create new survey template button - Template name - Select fields /add custom questions (Date/time, text/number fields, upload images/videos) - save template

Drawings/Design

- List of sub sections (example - 2D floor plans, Electrical, Plumbing etc..)
- Add more sections button - Section name - add

Budget/BOQ

- Lists for Categories, items, stages can be edited
- These lists will be used in the drop downs for budgets and expenses sections

Progress/Schedule

- Blocker list can be created and edited here