

# Black Gold United Proposed Portal Layout

## DASH BOARD

### 1. SALES

- Manage Invoice – All Summary of Invoice (searchable)
- Create Invoice – new Invoice
- Manage (RFQ) – Quotation Summary List (searchable)
- Create RFQ – Request for Quotation
- Credit notes
- Refund Receipts
- Recurring Invoices
- Client Payments
- Sales Settings

### 2. CLIENTS

- Manage Clients
- Add New Clients
- Contact List - Summary List (searchable)
- Client Settings

### 3. INVENTORY

- Products & Services - Summary List (searchable)
- Manage Requisition
- Price List
- Warehouses
- Manage Stockings
- Inventory Settings
- Product Settings

### 4. PURCHASE

- Purchase Invoices
- Purchases Refunds
- Debit Notes
- Mange Suppliers

- Suppliers Payment
- Purchase Invoice Settings
- Suppliers Settings

### 5. FINANCE

- Expenses
- Incomes
- Treasuries & Bank Accounts
- Finance Settings

### 6. ACCOUNTING

- Journal Entries
- Add Entry
- Chart of Accounts
- Cost Centers
- Assets
- Accounting Settings

### 7. EMPLOYEES

- Manage Employees
- Manage Employees Roles
- Settings

### 8. ORGANIZATIONAL STRUCTURE

- Manage Designations
- Manage Departments
- Manage Employee Levels
- Manage Employment Type
- Organizational Chart

### 9. ATTENDANCE

- Attendance Logs
- Attendance Days
- Attendance Sheets
- Attendance Permissions
- Leave Applications
- Shifts Management
- Allocated Shifts

- Attendance Log Sessions
- Settings

### 10. PAYROL

- Contracts
- Pay Runs
- Pay slips
- Loan
- Salary Components
- Salary Structures
- Settings

### 11. REPORTS

- Sales Reports
- Purchase Reports
- Accounting Reports
- Employee Reports
- Clients Reports
- Store Reports
- System Activity Log

### 12. TEMPLATES

- Printable Template
- Prefilled Templates
- Terms & Conditions
- Manage Files/ Documents
- Auto Reminder Rules

### 13. QHSE

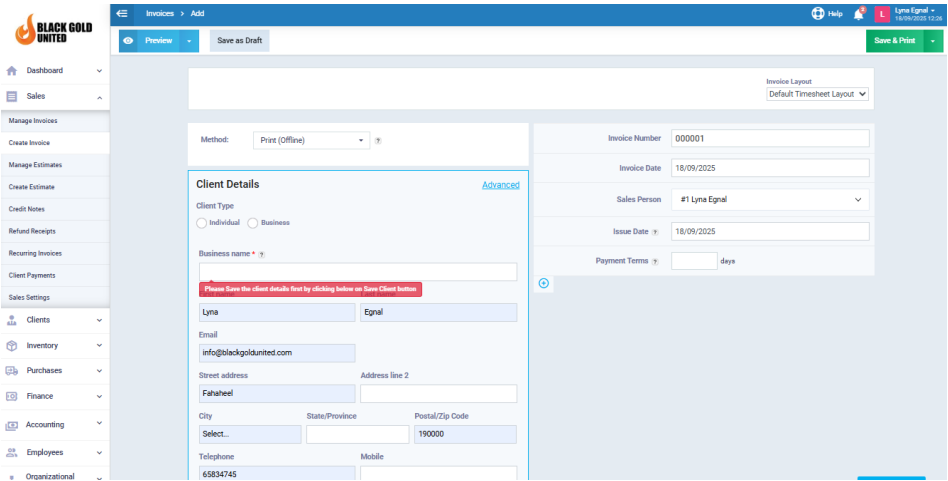
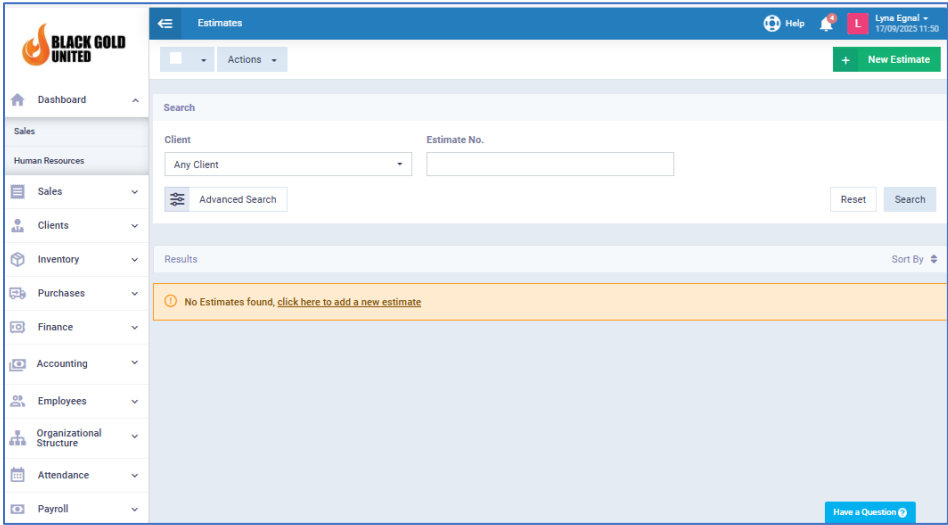
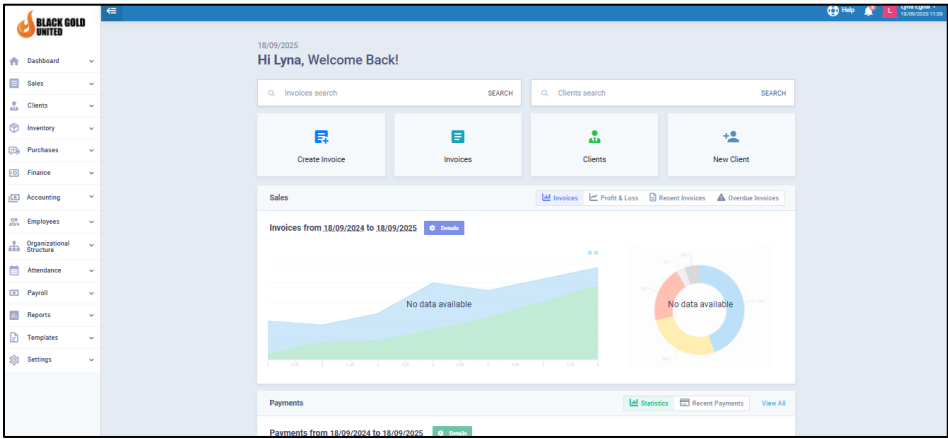
- Reports
- Policy
- Procedures
- Forms
- Reports

### 14. SETTINGS

- Account Information
- Account Settings

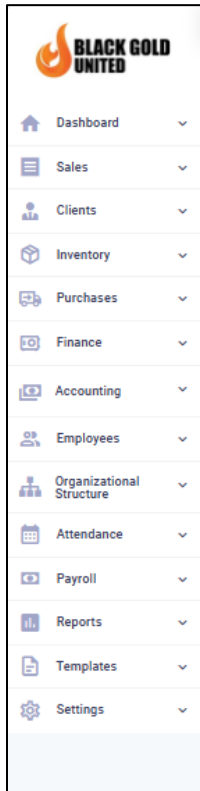
Sample

Main Dash Board

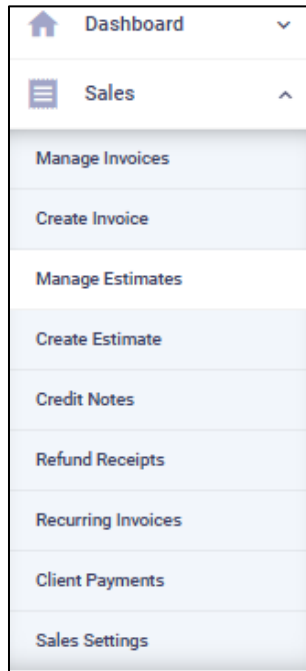


• Invoice Generator

## Main Folders



## Subfolders



## System Requirements

- **Folder-based with access rights** – Accessible remotely
- **Document version control** (so edits are tracked)
- **Approval workflow** (simple email-based or in-system)
- **Backup & security** (regular backups, password protection)
- **Retention policy** (e.g., invoices kept 10 years, HR records 5 years after leaving)

## Input new information

Access Control Matrix (BGU Small Company System)						
						<div>Full Access</div> <div>Read-Only</div> <div>No Access</div>
IMS/QHSE	N	N	N	R	F	R
Admin/HR	F	N	N	N	N	R
Procurement/BD	N	R	F	F	N	R
Finance	R	F	R	R	N	N
Management	F	F	F	F	F	F
	Administration	Finance	Procurement	Projects & Operations	IMS/Compliance	Correspondence

visual Access Control Matrix

- **Green (F): Full Access**
- **Yellow (R): Read-only**
- **Red (N): No Access**

## Access Control (Limited Access by Role)

- **Management (MD / President)**
  - Full access to all categories
- **Finance Team**
  - Full access to Finance
  - Read-only access to Contracts/Procurement
- **Procurement / BD Team**
  - Full access to Procurement & Projects
  - Read-only access to Finance (for PO values)
- **Admin / HR**
  - Full access to HR & Admin docs
  - Limited read-only access to others (licenses, permits)
- **IMS / QHSE Officer**
  - Full access to IMS / Compliance
  - Limited access to Operations/Projects