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4KPAINT
Solution Backlog

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4KPAINT Solution Improvement Backlog

A structured backlog of improvements to make the solution more complete, faster to use, and more valuable for the client.

Version	Status	Prepared by	Date
v1.0	Draft	Caufero	15 Feb 2026

Table of Contents

4KPAINT Solution Improvement Backlog

A full list of additions and improvements to make the solution more complete, faster to use, and more valuable for the current client.

This list is based on: - The structure we documented from the DDR XML - The screens you shared (Dashboard, Ledger, Daily Logs, Time Cards, Pay Rates, Setups, iOS) - The workflow decisions we discussed (ledger views, approvals, exports, mobile usage) - Common real-world needs for contractor operations (job costing, payroll controls, auditability, reporting)

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1. Must-have improvements

These are the items that make the solution feel finished and “production-ready” for the client.

1.1 Consistent desktop UI and navigation

- **Uniform window size and position**
  - Enforce one standard window size for desktop layouts
  - Enforce consistent object spacing so screens do not feel like different apps
- **Standard toolbar layout**
  - Keep tools in the same position across all report layouts (Filter, Export, Print, Email)
  - Keep the same icon meaning everywhere (no icon reuse with different behavior)
- **Global navigation rules**
  - Side menu should be available from every major layout
  - Always show where the user is (module name and layout title in header)
- **Consistent list-detail behavior**
  - Same left list width across Clients, Jobs, Employees, Contractors, Suppliers
  - Same tab style across all detail screens
  - Same “Add, Delete, Search, Filter” placement in all setup modules

1.2 Ledger module improvements

- **Put Master Ledger and Cost Reports on one screen**
  - Use tabs or a toggle at the top
  - Keep filter state shared when switching between the two views
- **Print and export should always include filter context**
  - Printed PDF should show: date range, job, client, supervisor, work area filters used
- **Saved report presets**
  - Allow office users to save filter presets like:
    - “This Month All Jobs”
    - “Job 1023 Only”
    - “Supervisor A Weekly”
- **Export quality upgrade**
  - Excel export should be true tabular output with clean headings and totals
  - PDF export should match a consistent report template

1.3 Daily Logs improvements

- **Clear daily workflow states**
  - Draft → Submitted → Approved → Locked

    - Show state clearly on Daily Log Details and on the list screen
- **Stronger lock behavior**
    - Once locked, block edits except for admin roles
    - If unlocked, require a reason and log it
- **Better materials capture**
    - Add structured materials entry with quantities and unit cost (optional per client)
    - Support quick add from a materials list
- **Notes section upgrades**
    - Add note categories (Safety, Issues, Progress, Delays, Client Requests)
    - Add ability to attach photos to notes (job site reality)

1.4 Time Cards and Pay Rates improvements

- **Make approvals easier and safer**
    - Bulk unapprove should require reason and log it
- **Overtime rule support**
    - Define overtime thresholds in settings (per day or per week)
    - Auto-calculate overtime, still editable by authorized roles
- **Time rounding rules**
    - Add rounding options (nearest 15 minutes, nearest 30 minutes)
    - Store raw time and rounded time separately for audit
- **Pay rate effective dates**
    - Support pay rates that change over time
    - Apply the correct rate based on date of work
- **Audit trail for wage edits**
    - Every rate edit should write a log entry:
        - who changed it, old value, new value, date/time, and reason

1.5 Setup modules improvements (Clients, Jobs, Employees, Contractors, Suppliers)

- **Data completeness enforcement**
    - Require critical fields before record can be used in daily logs:
        - Job must have Client, Supervisor, Active status
        - Employee must be Active and Time Card User allowed
- **Duplicate prevention**
    - Prevent duplicate records by key fields:

        - Client name + address (or account code)
        - Employee ID
        - Supplier name
- **Standard “related items” tabs**
    - Contacts, Documents, Ledger, Activity should be consistent across all parties
- **Job “Cost-to-date” should be first-class**
    - From Jobs, show cost-to-date summary and drilldown to ledger and logs
    - Provide a “Job Health” quick view (hours, cost, logs entered, approvals pending)

1.6 Documents improvements

- **Standard document categories and naming**
    - Document types: Contract, PO, Invoice, Photo, Plan, Safety, Change Order
    - Auto naming: `JobNumber – DocType – Date – Sequence`
- **Fast document capture**
    - On iOS, allow photo capture directly into job log or job documents
- **Document security**
    - Restrict sensitive documents (payroll, contracts) by role

1.7 Security and roles

- **Role-based menus**
    - Supervisor sees Daily Log Console, job view, and limited exports
    - Payroll/Admin sees approvals and wage screens
    - Management sees ledger and reporting
- **Privilege set cleanup**
    - Ensure delete privileges are limited
    - Ensure “Unlock log” and “Unapprove” are restricted
- **User session clarity**
    - Display logged-in user and role in header
    - Add “switch user” workflow for shared devices

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2. Should-have improvements

These improve operational efficiency and reduce errors.

2.1 Better search and filtering everywhere

- **Global search**
  - Search by Job Number, Job Name, Client, Employee, Contractor, Supplier
- **Filter panels that feel the same**
  - Same control styles and placement across Ledger, Logs, Time Cards, Pay Rates
- **Quick filters**
  - Today, Yesterday, This Week, This Month
  - Pending Approval only
- **Remember my last filter**
  - Save user's last filter per module

2.2 Stronger reporting set

- **Job Summary report**
  - Costs vs hours vs materials vs subcontract, by job and by date range
- **Supervisor productivity report**
  - Logs submitted, approvals pending, hours tracked, jobs active
- **Payroll preparation report**
  - Approved hours, approved rates, totals per employee for week ending
- **Supplier spend report**
  - Total invoices by supplier and by job
- **Contractor spend report**
  - Total contractor hours and cost by contractor and by job

2.3 Better error handling and guidance

- **User-friendly validation messages**
  - Clear "what to fix" messages, not generic errors
- **Prevent broken states**
  - Block approving a log that has missing start/end times
  - Block approving pay rates if time card is not approved
- **In-app help**
  - A help icon per screen that explains what the screen is for
  - Short "how to" steps for supervisors and payroll staff

2.4 Operational logs and auditability

- **System audit log table**
  - Log key actions:
    - approvals, unapprovals, locks, unlocks, deletions, exports, wage edits
- **Change history per record**
  - On Jobs, Employees, Logs: show last changed by and when

2.5 Data model strengthening

- **Referential integrity checks**
  - Scripts to detect orphan records and fix them
- **Controlled deletions**
  - Replace deletes with “Inactive” or “Marked for deletion” workflows
  - Provide an admin cleanup tool

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3. Nice-to-have improvements

These make the solution feel premium and reduce manual work.

3.1 Mobile and supervisor experience upgrades (iOS)

- **Offline-friendly entry**
    - Cache “today’s jobs” and allow entry even with poor network
    - Sync when online (if client’s hosting supports it reliably)
- **Photo and signature support**
    - Capture site photos directly on the daily log
    - Optional supervisor signature when approving the day
- **Location and weather capture**
    - Optionally store GPS location and weather notes for the log
- **Favorites**
    - Favorite jobs and work areas for faster entry
- **Voice notes**
    - Quick voice note to text for daily log notes

3.2 Notifications and reminders

- **Approval reminders**
    - Notify payroll/admin when there are pending time card approvals
    - Notify supervisors if daily log is not submitted by a cutoff time
- **Daily completeness reminders**
    - “No log entered for active job today” alerts

3.3 Automation

- **Scheduled exports**
    - Weekly payroll summary to PDF and email to management
- **Scheduled cleanup - Cold Storage**
    - Archive old logs into summary tables for faster reporting

3.4 Integrations

- **Accounting export**
    - Export supplier invoices, contractor totals, payroll totals in a format the client’s accounting system accepts
- **Email templates**
    - Prebuilt email templates for:
        - sending ledger report
        - sending payroll report
        - sending job cost report

4. Performance and stability upgrades

These are important once the client has real volume.

4.1 Reporting performance

- **Summary tables for ledger**
  - Pre-calculate totals (daily, weekly, monthly) to make ledger fast
- **Faster filters**
  - Use indexed keys for filter fields
  - Avoid heavy unstored calcs in report lists

4.2 Script reliability

- **Standard error capture**
  - Capture script errors into an ERROR_LOG table with context:
    - user, layout, script name, error code, timestamp
- **Transaction-style scripts**
  - When approving or posting data, ensure the script is “all or nothing”
- **PSOS queue if needed**
  - Use background processing for heavy exports and summaries

5. Feature completeness per module (what to add to make each area feel complete)

5.1 Dashboard

Add: - “Pending approvals” counter and quick links - “Logs missing today” counter - “Jobs over budget” indicator (if budget is captured) - Quick actions: - New Daily Log - Approve Time Cards - Approve Pay Rates - Open Master Ledger

5.2 Ledger

Add: - Presets - Print/export headers showing filter context - Drill down from totals to supporting logs and time card lines - Option to exclude unapproved data by default, with a toggle to include it

5.3 Work Logs

Add: - Draft/Submitted/Approved/Locked states - Required fields checklist before approval - Materials entry improvements - Photo attachments on logs

5.4 Time Cards

Add: - Approval batch review screen - Overtime rules and rounding - Bulk operations with confirmation and logging

5.5 Pay Rates

Add: - Effective date support - Wage change audit trail - Bulk approve with preview - Flag unusual rates (rate outside expected range)

5.6 Clients, Jobs, Employees, Contractors, Suppliers

Add: - “Activity” tab showing last 30 days actions - Duplicate detection - Mandatory fields for operational use - Better document and contact consistency

5.7 Documents

Add: - Categories, naming rules - Quick upload on mobile - Access control for sensitive docs

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6. Quality assurance and rollout plan improvements

These help you deliver it cleanly.

- Create a UAT checklist per module:
  - Dashboard
  - Logs
  - Approvals
  - Ledger
  - Setup records
  - iOS workflow
- Create sample test scenarios:
  - A job with employee hours, contractor hours, materials, and invoices
  - A week ending payroll run
  - A month end ledger export
- Add an admin “test data generator” option for internal use
- Create a “go-live switch” checklist:

    - privileges verified
    - backup schedule confirmed
    - default settings configured
    - user accounts created
    - training done

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7. Deliverable format suggestion

To make this actionable, convert the list into a backlog with statuses:

- **Must-have**: go-live blockers and core workflow polish
- **Should-have**: operational efficiency improvements
- **Nice-to-have**: premium features and integrations

Each item should have: - Owner - Complexity (S, M, L) - Target date - Acceptance criteria (what “done” means)

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8. Summary of the biggest wins

If you do only a few things first, do these:

1. Put Master Ledger and Cost Reports on one screen with shared filters
2. Add strict workflow states for Daily Logs and approvals (Draft → Approved → Locked)
3. Add audit logging for approvals, unlocks, and wage edits
4. Improve exports so every PDF and Excel includes filter context
5. Make UI consistent (window sizes, toolbars, list-detail patterns)
6. Strengthen mobile logging with photo capture and faster entry patterns