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# Project Module

| **Feature** | **Tasks** | **Estimate (H)** |
| --- | --- | --- |
| Add all other fields for Project |  | 4 |
| **Registrations Heading**  *(see field chart excel project sheet row 139)* | Create Registrations module (CRUD) | 2 |
| Add one to many relationship between projects and registrations module | 0.5 |
| **Registrations Heading –** Approve Button  *(see field chart excel project sheet row 149)* |  | 16 |
| **Reservations Heading**  *(see field chart excel project sheet row 151)* | Add one to many relationship between projects and reservations module | 0.5 |
| **Sales Heading** | Add one to many relationship between projects and sales module | 0.5 |
| **Campaigns Heading** | Add one to many relationship between projects and campaigns module | 0.5 |
| **Bulk Upload**  *(see field chart excel project sheet row 193)* |  | 32 |
| **Bulk upload images**  *(see field chart excel project sheet row 197)* |  | 40 |
| **House Design Tab**  *(see field chart excel project sheet row 260)* |  | 40 |
| **Commissions Tab** |  | 40 |
| **Deposit Tab – Main Boxes – Holding Deposit**  *(see field chart excel project sheet row 501)* |  | 8 |
| **Deposit Tab – Main Boxes – Land Deposit**  *(see field chart excel project sheet row 502)* |  | 8 |
| **Deposit Tab – Main Boxes – House Deposit**  *(see field chart excel project sheet row 503)* |  | 8 |
| **Deposit Tab – Main Boxes – Exchange Deposit/Deposit**  *(see field chart excel project sheet row 504)* |  | 8 |
| **Deposit Tab – Main Boxes – Bank Guarantee/Bond**  *(see field chart excel project sheet row 505)* |  | 8 |
| **Deposit Tab – Main Boxes – Cash to disburse**  *(see field chart excel project sheet row 506)* |  | 8 |
| **Deposit Tab – Main Boxes – Interest earned**  *(see field chart excel project sheet row 507)* |  | 4 |
| **Deposit Tab – Deposit Heading**  *(see field chart excel project sheet row 509)* | Create Deposit module (CRUD) | 4 |
| Add one to many relationship between projects and deposits | 0.5 |
| **Deposit Tab – Bank Guarantee/Bond Heading**  *(see field chart excel project sheet row 510)* | Create BankGuarantee module (CRUD) | 4 |
| Add one to many relationship between projects and deposits | 0.5 |
| **Registrations Tab**  *(see field chart excel project sheet row 577)* | Create Registration module (CRUD) | 4 |
| Add one to many relationship between projects and registration | 0.5 |
| **Registration Tab –** Every project may have different fields required, so we need to be able to create the forms manually when we need them.  *(see field chart excel project sheet row 578)*  **Note:** Need to discuss with Al |  | TBD |
| **Registration Tab –** Email Button  *(see field chart excel project sheet row 579)* |  | 8 |
| **Registration Tab** – Approve  *(see field chart excel project sheet row 580)* | Add approve button in registrations subpanel | 4 |
| **Registration Tab –** Create Contract  **Note:** Need to discuss with Al. How does he envision the process?  *(see field chart excel project sheet row 582)* |  | TBD |
| **Registration Tab –** REG ID Every registration needs to have its own unique id  *(see field chart excel project sheet row 583)* | Create a logic hook that creates a unique id for every new registration created. Auto increment integer | 1 |

# Reports

| **Feature** | **Tasks** | **Estimate (H)** |
| --- | --- | --- |
| **Sales Advice Report**  *(see field chart excel reports sheet row 7)* |  | 8 |
| **Exchange Pending Report**  *(see field chart excel reports sheet row 10)* |  | 8 |
| **Exchange Report**  *(see field chart excel reports sheet row 9)* |  | 8 |
| **Settlement Pending Report**  *(see field chart excel reports sheet row 10)* |  | 8 |
| **Settlement Report**  **Note:** Need more info. Template, filters.  *(see field chart excel reports sheet row 11)* |  | TBD |
| **House & Land Sales Report**  *(see field chart excel reports sheet row 12)* |  | 16 |
| **House & Land Construction Report**  *(see field chart excel reports sheet row 13)* |  | 16 |
| **Unit-Townhouse Development Sale**  *(see field chart excel reports sheet row 14)* |  | 16 |
| **Unit-Townhouse Construction Report**  *(see field chart excel reports sheet row 15)* |  | 16 |
| **Status Report**  *(see field chart excel reports sheet row 16)* |  | 8 |
| **Termination and Rescission Report**  *(see field chart excel reports sheet row 17)* |  | 8 |
| **Project Report**  *(see field chart excel reports sheet row 18)* |  | 8 |
| **Stock Report**  *(see field chart excel reports sheet row 19)* |  | 8 |
| **Method of Deposit Used**  *(see field chart excel reports sheet row 20)* |  | TBD |
| **Registrations**  **Note:** Need more info. Template, filters.  *(see field chart excel reports sheet row 23)* |  | TBD |
| **Reservations**  **Note:** Need more info. Template, filters.  *(see field chart excel reports sheet row 24)* |  | TBD |
| **O&A Submitted**  **Note:** Need more info. Template, filters.  *(see field chart excel reports sheet row 25)* |  | TBD |
| **O&A Accepted**  **Note:** Need more info. Template, filters.  *(see field chart excel reports sheet row 26)* |  | TBD |
| **Build Start**  *(see field chart excel reports sheet row 27)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Commissions**  *(see field chart excel reports sheet row 28)*  **Note:** Need more info. Template, filters. |  | TBD |
| *(see field chart excel reports sheet row 29)* |  | TBD |
| **Titles Released**  *(see field chart excel reports sheet row 30)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Expected Land Completion**  *(see field chart excel reports sheet row 31)*  **Note:** Need more info. Template, filters, etc. |  | TBD |
| **Expected Build Completion**  *(see field chart excel reports sheet row 32)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Build Stages**  *(see field chart excel reports sheet row 33)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Sales People Reports**  *(see field chart excel reports sheet row 34)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Finance Status**  *(see field chart excel reports sheet row 35)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Cooling off Reports**  *(see field chart excel reports sheet row 36)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Lister**  *(see field chart excel reports sheet row 37)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Method Sale**  *(see field chart excel reports sheet row 38)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Marketing Reports**  *(see field chart excel reports sheet row 39)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Sales Reports**  *(see field chart excel reports sheet row 40)*  **Note:** Need more info. Template, filters. |  | TBD |
| **RES/Hold Report**  *(see field chart excel reports sheet row 41)*  **Note:** Need more info. Template, filters. |  | TBD |
| **KPI reports for Sales People**  *(see field chart excel reports sheet row 42)*  **Note:** Need more info. Template, filters. |  | TBD |
| **Project Status**  *(see field chart excel reports sheet row 43)*  **Note:** Need more info. Template, filters. |  | TBD |

# Commissions

| **Feature** | **Tasks** | **Estimate (H)** |
| --- | --- | --- |
| **Commissions Module** | Create commissions module (CRUD) | 4 |
| **Track lead source**  **Note:** Need to discuss with Al.  *(see field chart excel commission sheet row 32)* |  | TBD |
| **Variations**  **Note:** Need to discuss with Al.  *(see field chart excel commission sheet row 33)* |  | TBD |
| **Commission Menu – Hide Settled**  *(see field chart excel commission sheet row 55)* | Add a tick box in the list view. Ticked by default. | 0.5 |
| Implement workflow | 24 |
| **Commission Menu – Hide archived**  *(see field chart excel commission sheet row 56)* | Add a tick box in the list view. Ticked by default | 0.5 |
| Implement workflow | 24 |
| **Commission Menu –** Mail merge  *(see field chart excel commission sheet row 65)* |  | 24 |
| **Commission Tab – Project Fee**  **Workflow:** Either this can be entered or the flat fee can be entered, cant` enter both  **Proposed:** Let us use radio type field  *(see field chart excel commission sheet row 92)* |  | 2 |
| **Commission Tab – Unconditional (Exchanged)**  **Workflow:** If percentage was entered then this would display the % amount. If flat fee was entered then this would display $ amount  *(see field chart excel commission sheet row 97)* |  | 4 |
| **Commission Tab – Settlement**  **Workflow:** If percentage was entered then this would display the % amount. If flat fee was entered then this would display $ amount  *(see field chart excel commission sheet row 98)* |  | 4 |
| **Commission Tab – Build**  **Workflow:** I want to be able to enter in here either % or $ amounts as some builders will pay a fixed $ amount upon a stage being reached and others will pay a % of the build.  *(see field chart excel commission sheet row 99)* |  | 4 |
| **Commission Tab – Build – Add Build fee**  **Workflow:** If this box is ticked then the commission for the build is added to the commission entered for the project fee  *(see field chart excel commission sheet row 100)* |  | 2 |
| **Commission Tab – Commission Structure (Table)**  **Note:** Need to discuss Sugar and levels of access people may have to view company data and commissions  *(see field chart excel commission sheet row 111)* |  | TBD |
| **Commission Tab – Gradual Sales table**  *(see field chart excel commission sheet row 111)* | Create Gradual Sales module (CRUD) | 8 |
| Add one to many relationship between commissions and gradual sales module | 0.5 |
| **Commission Tab - Fee breakdown**  *(see field chart excel commission sheet row 110)* | Create Fee breakdown module (CRUD) | 8 |
| Add one to many relationship between commissions and fee break module | 0.5 |
| **Commission Tab – Commissions Payable**  *(see field chart excel commission sheet row 144)* |  | 4 |
| **Commission Tab – Commissions Paid**  *(see field chart excel commission sheet row 163)* |  | 4 |
| **Commissions Tab – Overrides**  *(see field chart excel commission sheet row 164)* |  | 4 |
| **Commission Tab – Deductions**  *(see field chart excel commission sheet row 166)* |  | 4 |
| **Commission Reports**  **Note:** Need more details. Need to discuss with Al.  *(see field chart excel commission sheet row 167)* |  | TBD |
| **Commission Reports – KPI`s**  **Note:** Need to discuss with Al.  *(see field chart excel commission sheet row 176)* |  | TBD |

# Summary

## Total number of hours

479.5