

# EC-Exhibits Client Portal

A focused plan to ship a client portal that tracks project progress, tasks, and two-way messaging.

## Objectives

- Let EC-Exhibits staff create clients, projects, milestones, and tasks.
- Give each client a secure portal to view progress, timelines, files, and invoices.
- Two-way messaging on a per-project basis with notifications.
- Simple roles and permissions. Easy to maintain.

## Roles and permissions

- **Owner** - full access to everything.
- **Staff** - access to all clients and projects, can create tasks, update statuses, send messages.
- **Client** - can see only their own company, projects, tasks, files, invoices. Can post messages and notes.

## What This Means for Development

This confirms the portal needs:

1. **Structured project stages** (each with its own tasks + file upload + checklists).
2. **Dynamic progress tracker** (with “You are here” state).
3. **Editable Yes/No checklist fields** (only editable by EC staff).
4. **Messaging system** (real-time chat per project).
5. **Document/file management** with drag & drop uploads.
6. **Client-facing dashboard** showing clear progress and visual cues.

# Functional Breakdown

## 1. Project Workflow Stages

- Stages shown as icons/tabs (Files, Payments, Furniture, Graphics, Pre-Build, etc.).
- Each stage contains:
  - Task list (with due dates, overdue flag).
  - Upload boxes for related documents.
  - Editable Yes/No check fields (green/red indicator).

## 2. Document & File Management

- Drag-and-drop file upload per stage.
- Label and remarks attached to each file.
- EC staff controls the “addressed?” toggle.

## 3. Task Management

- Deadlines attached to items (e.g., “Upload Final Renders – 2 days”).
- Status shown: overdue, completed, pending.
- Simple “YOU ARE HERE” progress tracker.

## 4. Chat / Messaging

- Built-in chat box per project between project manager and client.
- Replaces email back-and-forth.

## 5. Invoices & Payments

- Upload and track invoices (EC estimate, first invoice, second invoice).
- Flags for “Client First Payment Paid? Yes/No.”

## 6. Furniture & Equipment

- Editable confirmation checkboxes for each item (sofa, lights, fridge, coffee machine, etc.).
- Each confirmation is Yes/No with color-coded feedback.