<u>Company Management Software Hierarchy</u>

#All Lists should have that ability to Exported in Excel

#Project Files might be Uploaded and Downloaded

#Custom Designed Invoices and Receipt should be Uploaded And all Payments will Print in that Format

#All Status, Lists should be Editable

1. Dashboard
    - 1.1. Active Client
    - 1.2. Employee
    - 1.3. Running Project
    - 1.4. Tasks
    - 1.5. Recent Clients
    - 1.6. Running Projects with Overall Progress
    - 1.7. Pending Works with Deadline & Priority
    - 1.8. Upcoming Events/Activity
    - 1.9. Sales Overview
    - 1.10. Employee Statistics
        - 1.10.1. Total Employee
        - 1.10.2. Present Employee
        - 1.10.3. Absent Employee (With Name, ID & Department) (Also by Clicking it will Show His/her Submitted Reasoning Letter)
    - 1.11. Task Statistics
        - 1.11.1. Total Task
        - 1.11.2. Completed Task
        - 1.11.3. Pending Task
        - 1.11.4. In Progress Task
        - 1.11.5. Review Task
    - 1.12. Invoice Statistics (Recent Invoices with Status)
    - 1.13. Income (7-Days Chart)
    - 1.14. Expense (7-Days Chart)
    - 1.15. Balance Sheet (1-Month Graph)
    - 1.16. Calendar
2. Client
    - 2.1. Add New Client
        - 2.1.1. Client Information
            - 2.1.1.1. First Name
            - 2.1.1.2. Last Name
            - 2.1.1.3. Contact No. (Home & Office)
            - 2.1.1.4. Email Address
            - 2.1.1.5. Mailing Address
            - 2.1.1.6. NID
            - 2.1.1.7. Picture
            - 2.1.1.8. Authorized Dealing Person
            - 2.1.1.9. Status (Active or Inactive)

- 2.1.2. Bank Account Information
  - 2.1.2.1. Account No.
  - 2.1.2.2. Branch
  - 2.1.2.3. Bank Name
- 2.1.3. Job Info
  - 2.1.3.1. Job Description
    - 2.1.3.1.1. Designation
    - 2.1.3.1.2. Company Name
  - 2.1.3.2. Status (Running or End)
- 2.2. Client List (Showing Information) (Detailed Information of Client will Show in a Page if a Client is Selected from Client List) (Also there has to be Search Option)
  - 2.2.1. Picture
  - 2.2.2. Client ID (Automated Generated 16 Digit ID, Example- 01-1001-1000001-001)
  - 2.2.3. Client Name
- 2.3. Client Group
  - 2.3.1. Location Based (Filter System)
  - 2.3.2. Status Based (Active/Inactive)

3. Employee
- 3.1. Add New Employee
  - 3.1.1. Employee Information
    - 3.1.1.1. First Name
    - 3.1.1.2. Last Name
    - 3.1.1.3. Contact No. (Home & Office)
    - 3.1.1.4. Gender
    - 3.1.1.5. Nationality
    - 3.1.1.6. Marital Status
    - 3.1.1.7. Email Address
    - 3.1.1.8. Mailing Address
    - 3.1.1.9. Permanent Address
    - 3.1.1.10. NID
    - 3.1.1.11. Picture
    - 3.1.1.12. Emergency Contact No. with Relationship (At least 2)
  - 3.1.2. Bank Account Information
    - 3.1.2.1. Account No.
    - 3.1.2.2. Branch
    - 3.1.2.3. Bank Name
  - 3.1.3. Employment Information
    - 3.1.3.1. Hire Date
    - 3.1.3.2. Release Date
    - 3.1.3.3. Employee Type (Full Time or Part Time)
    - 3.1.3.4. Job Title
    - 3.1.3.5. Department
  - 3.1.4. Payroll Information
    - 3.1.4.1. Payroll Schedule
    - 3.1.4.2. Basic Salary (Category Wise)
    - 3.1.4.3. Bonus (From Payroll Management)
      - 3.1.4.3.1. Eid-Ul-Adha

3.1.4.3.2. Eid-Ul-Fitr
3.1.4.3.3. Pohela Boishakh
3.1.4.4. TA (Travelling Allowance – From Payroll Management)
3.1.4.5. DA (Dearness Allowance – House Rent, Medical Expenses – From Payroll Management)

3.2. Employee List (Detailed Information will Show in a Page if One is Selected from List) (Also there has to be Search Option)
3.2.1. Picture
3.2.2. Employee ID (Automated Generated 16 Digit ID, Example- 01-2011-1000001-001)
3.2.3. Employee Name

3.3. Employee Group
3.3.1. Department Wise

4. Contractor/Supplier/Supervisor
4.1. Add New Contractor/Supplier/Supervisor
4.1.1. Contractor/Supplier/Supervisor Information
4.1.1.1. First Name
4.1.1.2. Last Name
4.1.1.3. Contact No. (Home & Office)
4.1.1.4. Email Address
4.1.1.5. Mailing Address
4.1.1.6. NID
4.1.1.7. Picture
4.1.2. Bank Account Information
4.1.2.1. Account No.
4.1.2.2. Branch
4.1.2.3. Bank Name
4.1.3. Job Info
4.1.3.1. Job Type
4.1.3.2. Job Description
4.1.3.2.1. Designation
4.1.3.2.2. Company Name

4.2. Contractor/Supplier/Supervisor List (Showing Information) (Detailed Information will Show in a Page if One is Selected from List) (Also there has to be Search Option)
4.2.1. Picture
4.2.2. Contractor/Supplier/Supervisor ID (Automated Generated 16 Digit ID, Example- 01-3011-1000001-001)
4.2.3. Contractor/Supplier/Supervisor Name
4.2.4. Job Type
4.2.5. Contact No.

4.3. Contractor/Supplier/Supervisor Group
4.3.1. Job Type Based

5. Project
5.1. Add New Project
5.1.1. Project Information
5.1.1.1. Project Name
5.1.1.2. Project Type
5.1.1.3. Assigned Client

5.1.1.4. Project Location
5.1.1.5. Project Description
5.1.1.6. Special Conditions
5.1.1.7. Project Tasks (Select Services from Drop Down List)
5.1.1.8. Status (Pending, In Progress, Completed, Delivered) (New Project will Set Status as Pending Automatically)

5.2. Project List (Showing Information) (Detailed Information will Show in a Page if One is Selected from List) (Also there has to be Search Option)
5.2.1. Project ID (Automated Generated 16 Digit ID, Example- 01-1001-1000001-001)
5.2.2. Project Name
5.2.3. Assigned Client
5.2.4. To Do's (2 or 3 Upcoming Work from Schedule)
5.2.5. Status (Pending, In Progress, Completed, Delivered)
5.2.5.1. A Page will Show Information Regarding to Selected Project (From Project List)
5.2.5.1.1. All the Project Information
5.2.5.1.2. Estimate (Create an Estimate Making Page)
5.2.5.1.2.1. Estimated Cost
5.2.5.1.2.2. Actual Cost
5.2.5.1.3. Schedule (Create a Schedule Making Page – Automatically Generated Task from Services Taken) (There May be Multiple Schedule If Supervision or Construction Service Taken) (In Every Task of Schedule We Can Add Resources and Predecessor) (Resources might be Material/Person)
5.2.5.1.3.1. Start Date
5.2.5.1.3.2. Finish Date
5.2.5.1.3.3. Durations
5.2.5.1.3.4. Number of Tasks
5.2.5.1.3.5. Percent Complete
5.2.5.1.4. To Do's (Will Create a Step by Step Working Task from Schedule)
5.2.5.1.5. Accounts (A Page Showing Detailed Info. All Information Comes from Account Section)
5.2.5.1.5.1. Total Cost
5.2.5.1.5.2. Committed Cost
5.2.5.1.5.3. Remaining Balance
5.2.5.1.5.4. Pending Invoiced Amount
5.2.5.1.5.5. All Invoices/Receipts
5.2.5.1.5.6. Create a New Invoice/Receipt
5.2.5.1.5.6.1. Invoice for Total Estimated Cost (Automatically Generated from Initial Service Taken)
5.2.5.1.5.6.2. Invoice for Client Payment
5.2.5.1.5.6.3. Invoice/Receipt for Expenses for this Particular Project
5.2.5.1.5.7. A List of Table Will Show Items Below
5.2.5.1.5.7.1. Date
5.2.5.1.5.7.2. Invoice/Receipt No.
5.2.5.1.5.7.3. Payee
5.2.5.1.5.7.4. Paid to
5.2.5.1.5.7.5. Account Type
5.2.5.1.5.7.6. Description

5.2.5.1.5.7.7. Payment Method
5.2.5.1.5.7.8. Amount
5.2.5.1.5.7.9. Payment Status (Pending, Received)
5.2.5.1.6. Activities
5.2.5.1.6.1. Create New Activity (From Activities Created by Admin)
5.2.5.1.6.2. Activity List
5.2.5.1.6.3. Activity Outcome
5.2.5.1.7. Project Files
5.3. Project Group
5.3.1. Location Based (Filter System)
5.3.2. Type Based (Filter System)
5.3.3. Status Based (Pending, In Progress, Completed, Delivered)
6. Task List (Priority Based Which is Assigned to Individual Project Schedule) (Filtered by Status)
6.1. Task Name
6.2. Assigned Project Name
6.3. Due Date
6.4. Priority
6.5. Status (In Progress/Pending/Completed) (Or Status can be a Sub-Menu)
7. Sales
7.1. Client Info (With What they Want)
8. Inventory
8.1. Add New Material (Can Add Previous Material with New Quantity)
8.2. Material List with Detail
8.3. Material Sold
9. Payroll
9.1. Payroll Management (Manage Salary)
9.1.1. Department
9.1.2. Job Title/Designation
9.1.3. Salary
9.2. Employee Salary List (Detailed Information of Employee such as Basic Salary, Bonuses, TA, DA etc. will Show in a Page if One is Selected from List)
9.2.1. Employee Name
9.2.2. Employee ID
9.2.3. Total Salary
9.3. Payroll Summery (Recent Month)
9.3.1. Employee Name
9.3.2. Employee ID
9.3.3. Payroll Type (Daily, Weekly, Quarterly, Monthly, Half-Yearly, Yearly)
9.3.4. Basic Salary
9.3.5. TA
9.3.6. DA
9.3.7. Bonus
9.3.8. Deduction
9.3.9. Net Salary
9.4. Generate Pay Sleep (Customized Sleep by Company)
10. Accounts
10.1. Create a Payment

- 10.2. All Transactions
  - 10.2.1. Invoice/Receipt No.
  - 10.2.2. Transaction Date
  - 10.2.3. Payee
  - 10.2.4. Paid to
  - 10.2.5. Payment Type
  - 10.2.6. Account (Select Account form Drop Down List)
  - 10.2.7. Account Code
  - 10.2.8. Amount
- 10.3. Journal (Automated)
- 10.4. Trial Balance (Automated)
- 10.5. Balance Sheet (Automated)
- 10.6. Income Statement (Automated)
- 10.7. Expense Statement (Automated)

11. Reports (Chart Based Value Presentation)
    - 11.1. Overall Project Report (Completed, Running Chart Based as well as List Based)
    - 11.2. Project Report for Individual Project
      - 11.2.1. Project Payment Report (Paid Amount, Due Amount, Estimated Amount)
      - 11.2.2. Project Status Report (% Complete Task Based)
      - 11.2.3. Project Overall Progress Report
    - 11.3. Income Report
      - 11.3.1. Weekly Income Report
      - 11.3.2. Monthly Income Report
      - 11.3.3. Half-Yearly Income Report
      - 11.3.4. Yearly Income Report
    - 11.4. Expense Report
      - 11.4.1. Weekly Expense Report
      - 11.4.2. Monthly Expense Report
      - 11.4.3. Half-Yearly Expense Report
      - 11.4.4. Yearly Expense Report
    - 11.5. Profit/Loss Report
      - 11.5.1. Weekly Report
      - 11.5.2. Monthly Report
      - 11.5.3. Half-Yearly Report
      - 11.5.4. Yearly Report
    - 11.6. Employee Report
      - 11.6.1. Department Wise (List Based)
        - 11.6.1.1. Attendance Report
        - 11.6.1.2. Leave of Absent Report
        - 11.6.1.3. Evaluation Report
12. Utilities
    - 12.1. Activity Log (A list of last 7 Days Activity in Portal)
    - 12.2. Email Log (A list of last 7 Days Email Received & Sent)
13. Settings
    - 13.1. User Settings
      - 13.1.1. Admin
      - 13.1.2. Client

13.2. General Settings (Font, Theme, Units Etcetera)

14. Company
    - 14.1. Add New Company (All Needed Information of a Company)
    - 14.2. Company List
    - 14.3. Create a Company Organogram
15. Calendar
    - 15.1. Show Calendar with Schedule of Task
    - 15.2. Show Calendar with holiday
    - 15.3. Add a New Item in Calendar (Customized)
16. Email System (Full Email System for Company)
17. Notice Board (Automatically Add holidays from Calendar & Admin also can Add New Notice)
18. Recruitment (Can Add a Job Post for Vacancy)
19. User Defined Items (Admin must have ability to add new item as well as edit all items given below)
    - 19.1. Services with Rate
        - 19.1.1. Architectural Design
        - 19.1.2. 3D Modeling
        - 19.1.3. Structural Design
        - 19.1.4. Interior Design
        - 19.1.5. Electrical Design
        - 19.1.6. Plumbing Design
        - 19.1.7. Supervision
        - 19.1.8. Soil Test
        - 19.1.9. Survey
        - 19.1.10. Construction
        - 19.1.11. Cost Estimation
        - 19.1.12. Utility Supply
        - 19.1.13. Renovation & Expansion
        - 19.1.14. Land Development
        - 19.1.15. Etcetera
    - 19.2. Contractor
        - 19.2.1. Construction Contractor
        - 19.2.2. Glass Contractor
        - 19.2.3. Wood Contractor
        - 19.2.4. Grill Contractor
        - 19.2.5. Electric Contractor
        - 19.2.6. Plumbing Contractor
        - 19.2.7. Tiles Contractor
        - 19.2.8. Paint Contractor
        - 19.2.9. Etcetera
    - 19.3. Supplier
        - 19.3.1. Generator Supplier
        - 19.3.2. Lift Supplier
        - 19.3.3. Cable Supplier
        - 19.3.4. Cement Supplier
        - 19.3.5. Sand Supplier
        - 19.3.6. Stone Supplier
        - 19.3.7. Brick Supplier

19.3.8. Steel Supplier
19.3.9. Etcetera

19.4. Expense Account Type
19.4.1. Office Development
19.4.2. Office Supplies
19.4.3. Office Rent
19.4.4. Office Utility Charge
19.4.5. Transportation
19.4.6. Advertising
19.4.7. Mailing
19.4.8. Tax

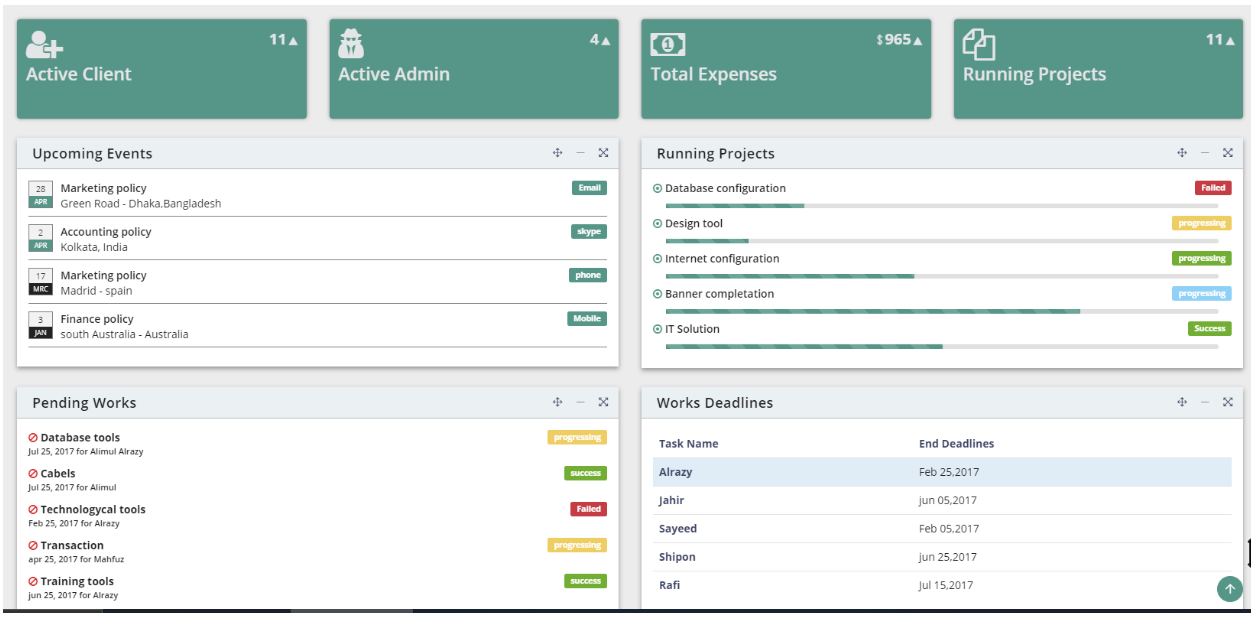
19.5. Department
19.5.1. Sales
19.5.1.1. Sales Manager
19.5.1.2. Sales Executive
19.5.1.3. Etcetera
19.5.2. Design
19.5.2.1. Architecture
19.5.2.1.1. Chief Architect
19.5.2.1.2. Executive Architect
19.5.2.1.3. Architect
19.5.2.1.4. Etcetera
19.5.2.2. Civil/Electrical/Mechanical/Computer Engineer
19.5.2.2.1. Chief Engineer
19.5.2.2.2. Executive Engineer
19.5.2.2.3. Assistant Engineer
19.5.2.2.4. Etcetera
19.5.3. Marketing
19.5.3.1. Marketing Manager
19.5.3.2. Etcetera

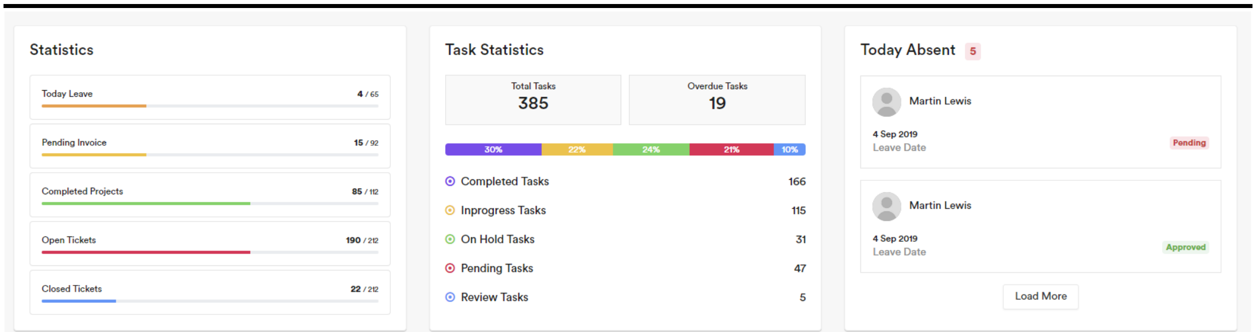
19.6. Account Type with Code
19.6.1. Income Account
19.6.1.1. Client Payment – I-101
19.6.1.2. Supervision – I-102
19.6.1.3. Etcetera
19.6.2. Expense Account
19.6.2.1. Contractor Payment – E-101
19.6.2.2. Material – E-102
19.6.2.3. Office Rent – E-103
19.6.2.4. Machine – E-104
19.6.2.5. Etcetera

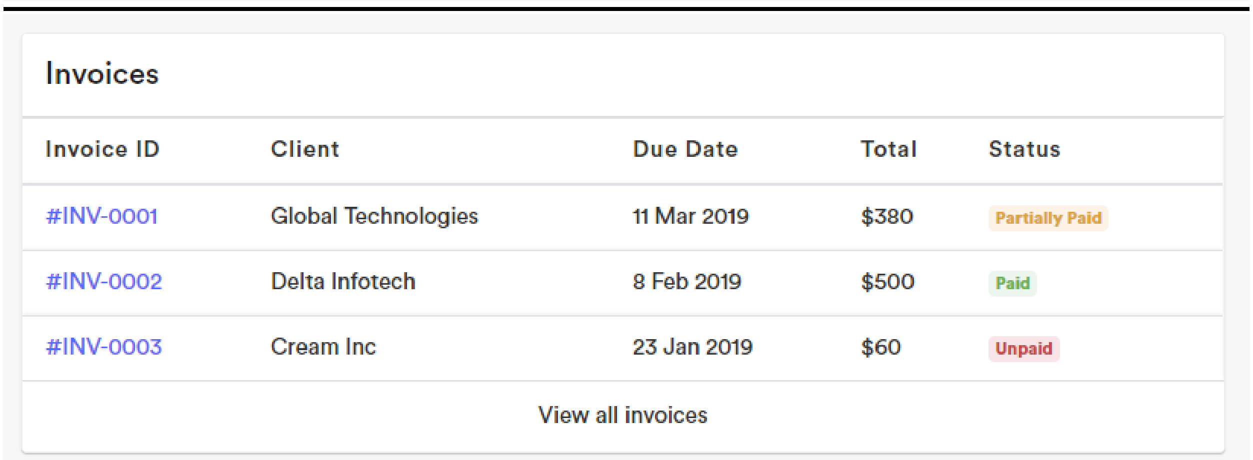
19.7. Task (For Schedule Creation in Project Schedule)
19.7.1. Task Name Created from Services Directly
19.7.2. Foundation Work
19.7.3. Piling Work
19.7.4. Pavement Work
19.7.5. Etcetera

Sample Images of Software

Dashboard

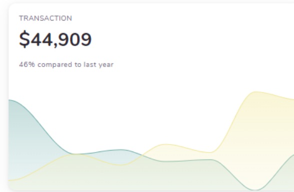


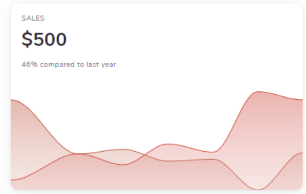


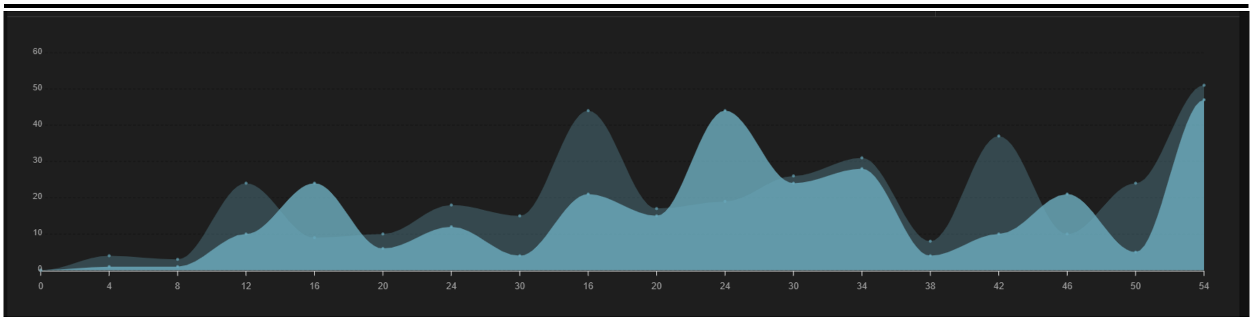



INCOME
$1000
46% compared to last year


APPROVE
$500
46% compared to last year


TRANSACTION
$44,909
46% compared to last year


SALES
$500
46% compared to last year


60
50
40
30
20
10
0
0
4
8
12
16
20
24
30
16
20
24
30
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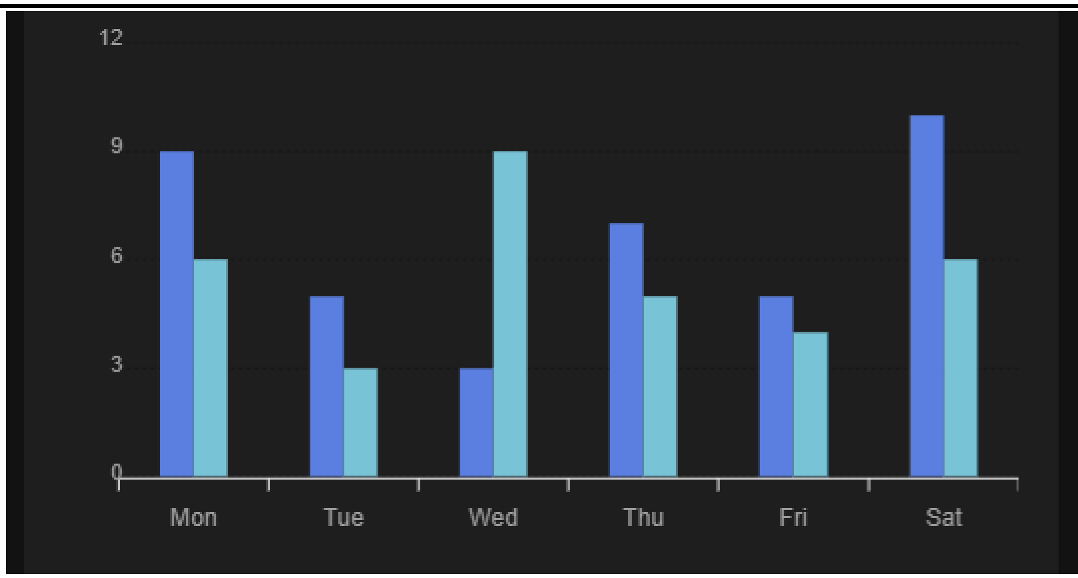
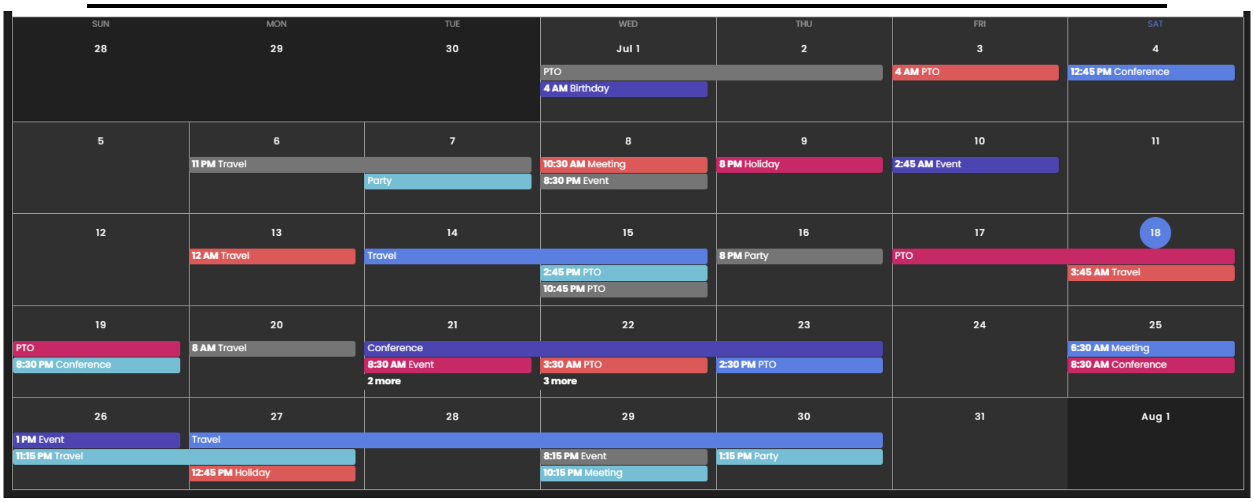
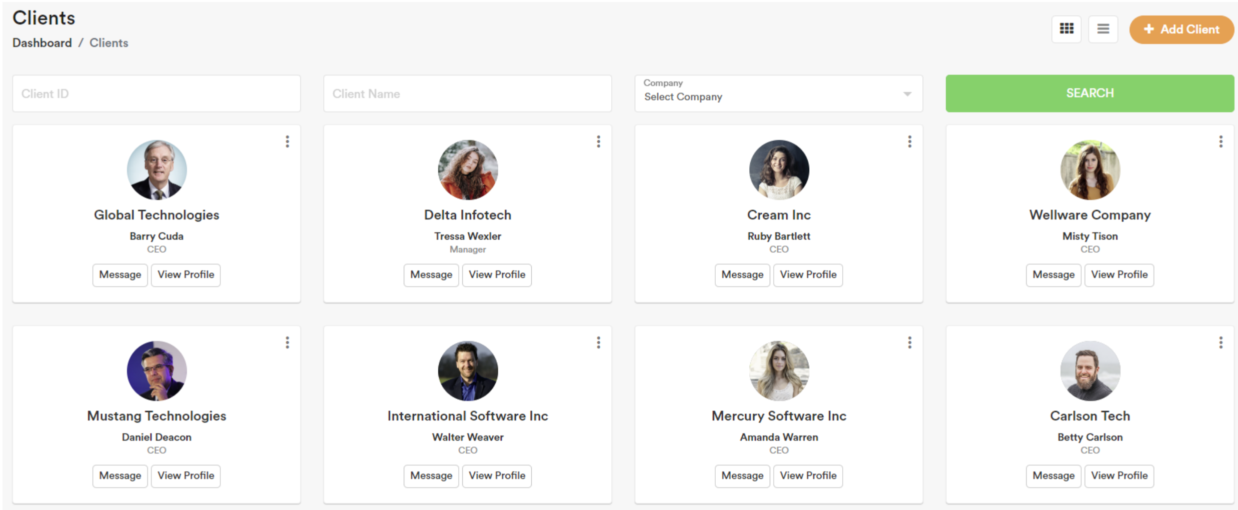
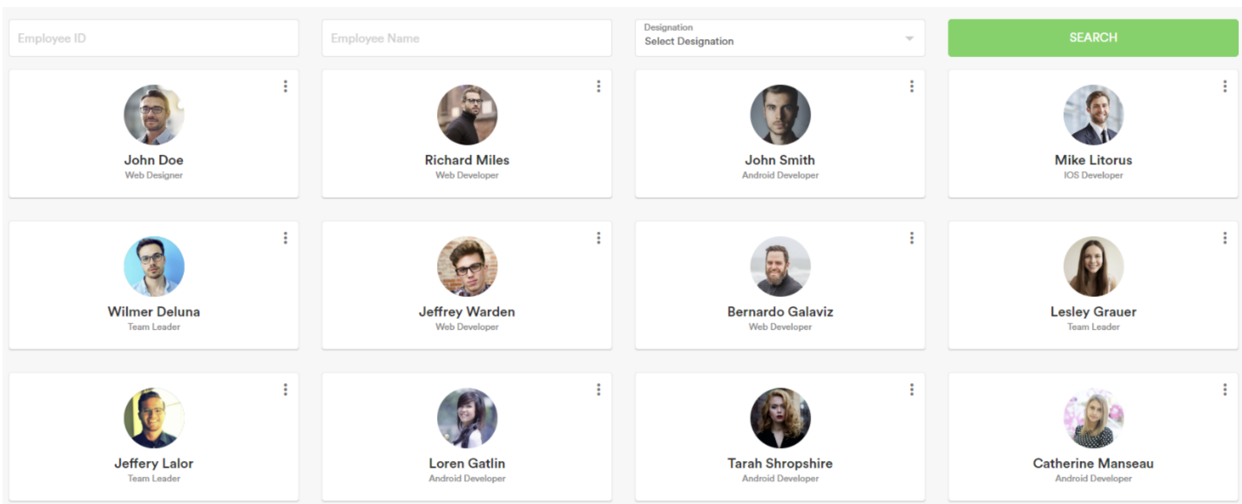
38
42
46
50
54


12
9
6
3
0
Mon
Tue
Wed
Thu
Fri
Sat

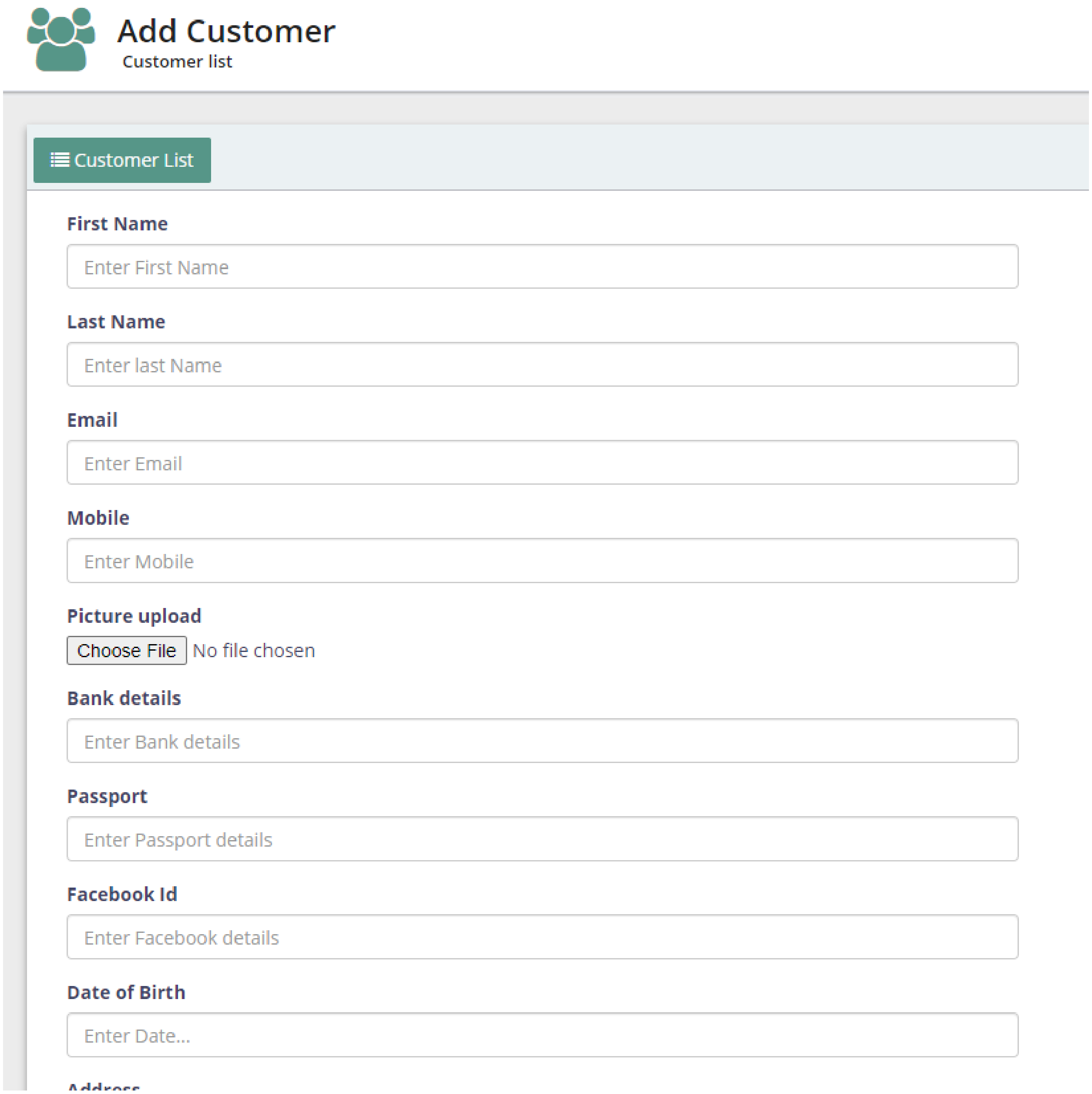

SUN
MON
TUE
WED
THU
FRI
SAT
28
29
30
Jul 1
2
3
4
PTO
4 AM Birthday
4 AM PTO
12:45 PM Conference
5
6
7
8
9
10
11
11 PM Travel
Party
10:30 AM Meeting
8:30 PM Event
8 PM Holiday
2:45 AM Event
12
13
14
15
16
17
18
12 AM Travel
Travel
2:45 PM PTO
10:45 PM PTO
8 PM Party
PTO
3:45 AM Travel
19
20
21
22
23
24
25
PTO
8:30 PM Conference
8 AM Travel
Conference
8:30 AM Event
2 more
3:30 AM PTO
3 more
2:30 PM PTO
6:30 AM Meeting
8:30 AM Conference
26
27
28
29
30
31
Aug 1
1 PM Event
11:15 PM Travel
Travel
12:45 PM Holiday
8:15 PM Event
10:15 PM Meeting
1:15 PM Party

List (Client/Employee/Contractor/Project)

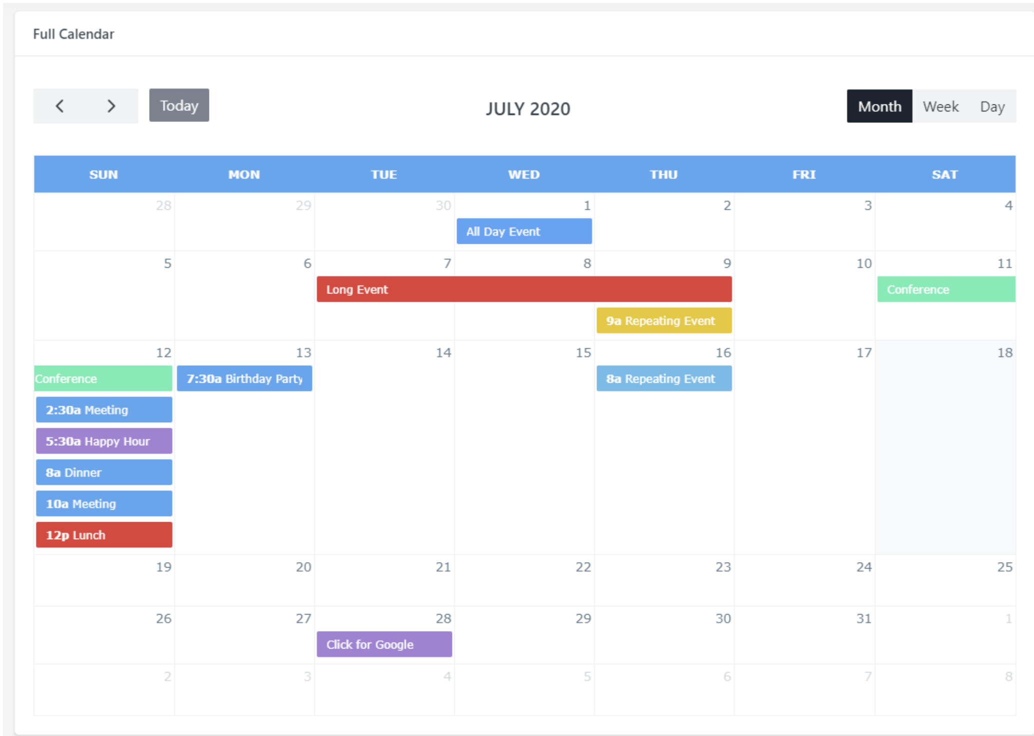


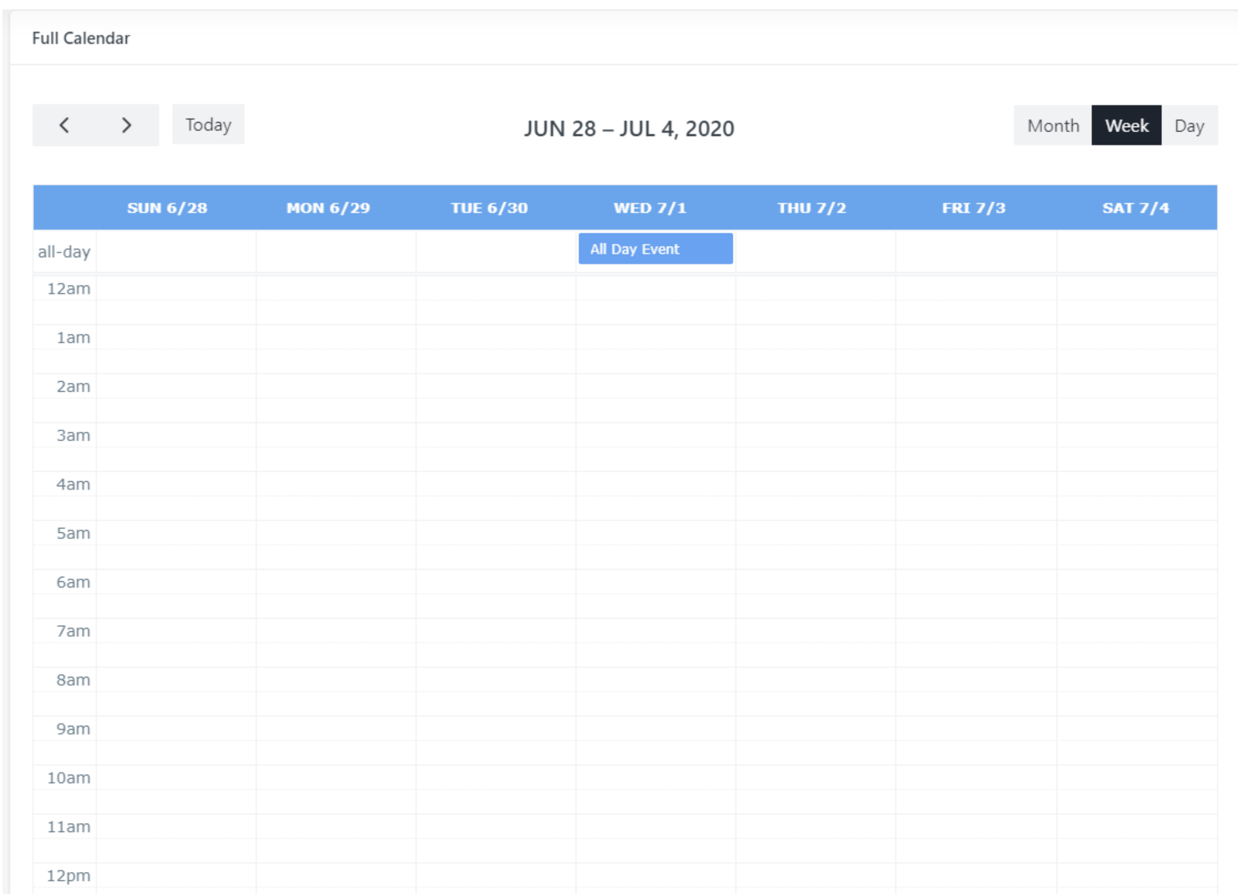


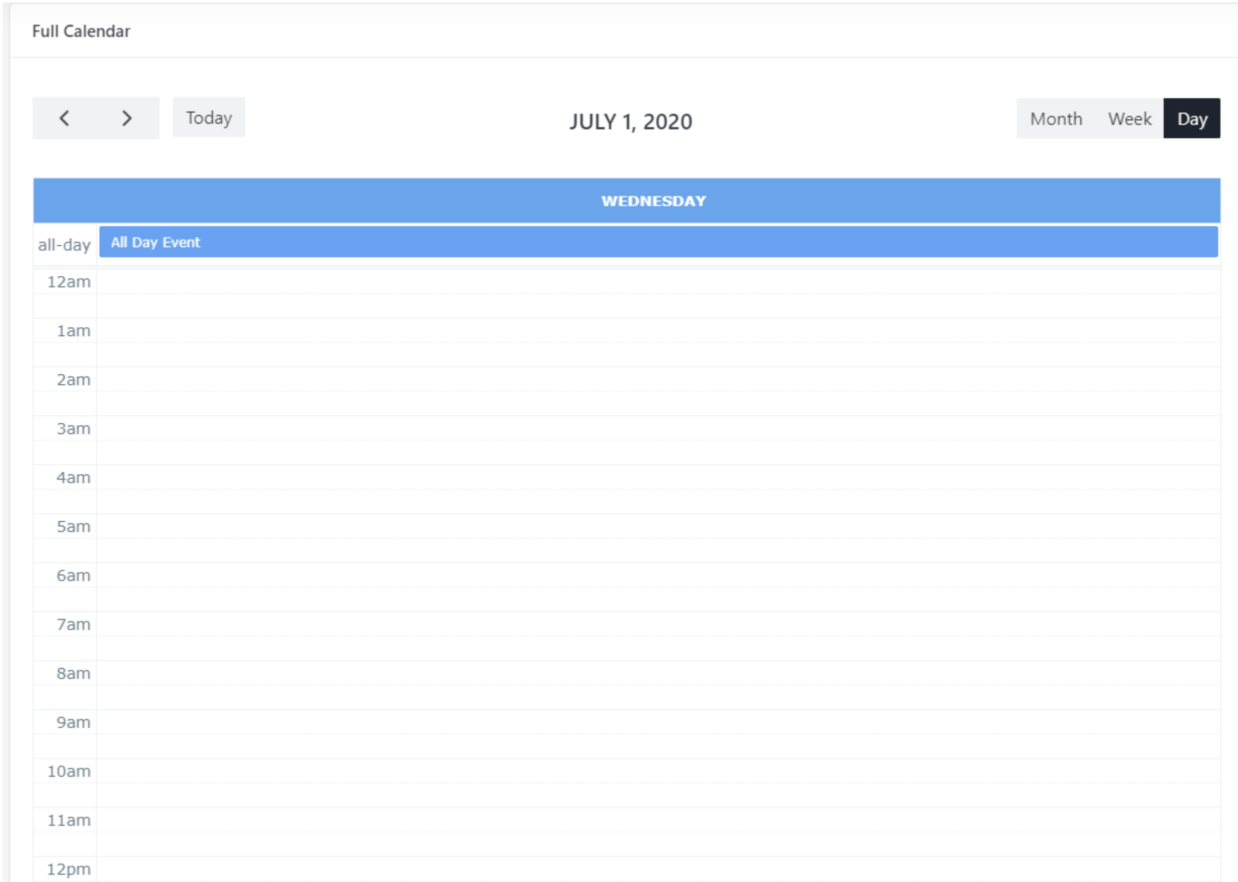
Add Form (Client/Employee/Project/Contractor)

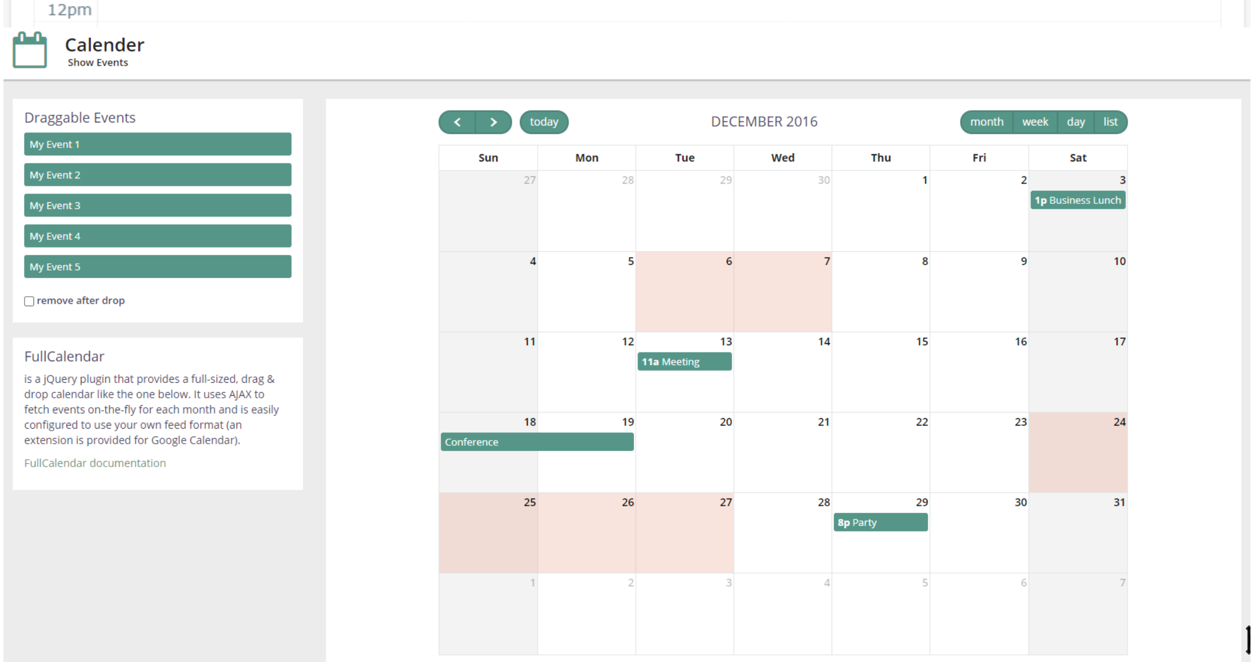


Calendar

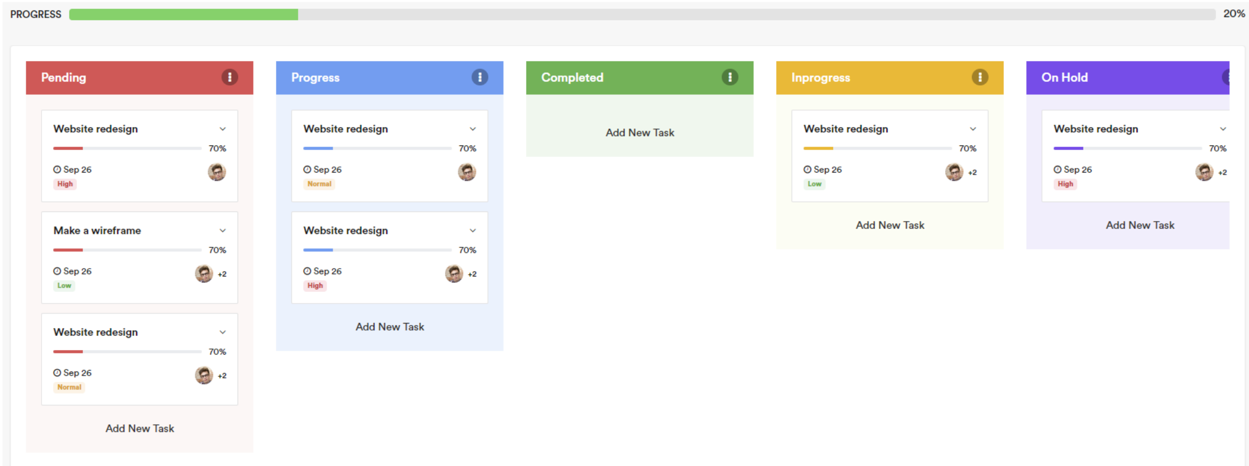

Full Calendar
Today
JULY 2020
Month
Week
Day
SUN
MON
TUE
WED
THU
FRI
SAT
All Day Event
Long Event
Conference
9a Repeating Event
Conference
7:30a Birthday Party
8a Repeating Event
2:30a Meeting
5:30a Happy Hour
8a Dinner
10a Meeting
12p Lunch
Click for Google


Full Calendar
Today
JUN 28 – JUL 4, 2020
Month
Week
Day
SUN 6/28
MON 6/29
TUE 6/30
WED 7/1
THU 7/2
FRI 7/3
SAT 7/4
all-day
All Day Event
12am
1am
2am
3am
4am
5am
6am
7am
8am
9am
10am
11am
12pm

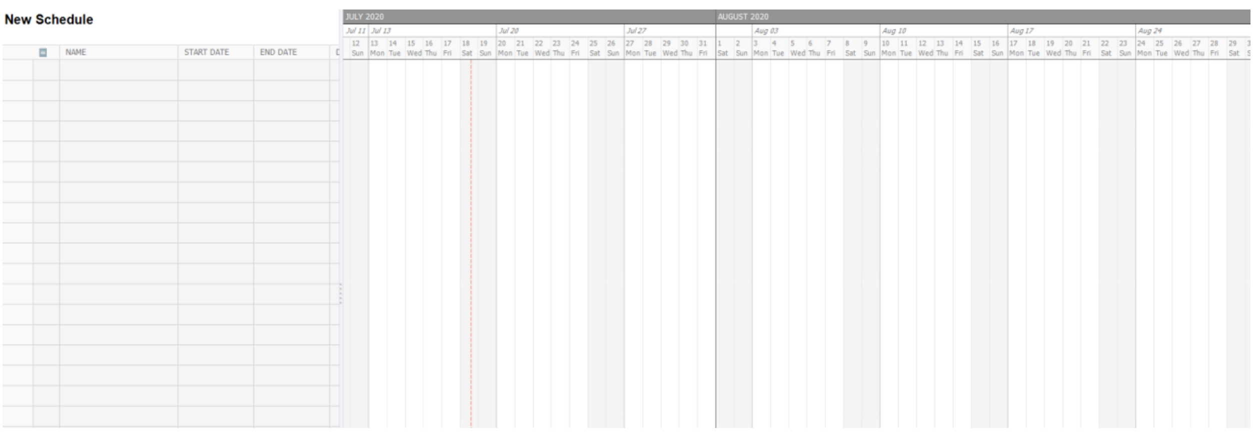

Full Calendar
Today
JULY 1, 2020
Month
Week
Day
WEDNESDAY
all-day
All Day Event
12am
1am
2am
3am
4am
5am
6am
7am
8am
9am
10am
11am
12pm


Calender
Show Events
Draggable Events
My Event 1
My Event 2
My Event 3
My Event 4
My Event 5
remove after drop
FullCalendar
is a jQuery plugin that provides a full-sized, drag & drop calendar like the one below. It uses AJAX to fetch events on-the-fly for each month and is easily configured to use your own feed format (an extension is provided for Google Calendar).
FullCalendar documentation
today
DECEMBER 2016
month
week
day
list
Sun
Mon
Tue
Wed
Thu
Fri
Sat
1p Business Lunch
11a Meeting
Conference
8p Party

Task List



Schedule

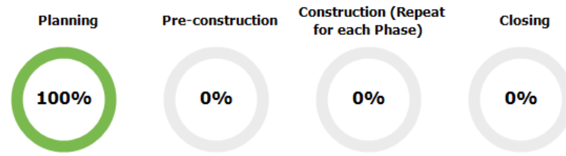


Estimate

NAME	TYPE	METHOD	TOTAL PRICE
[add category]			
Category 1			
Subcategory 1	Estimate	Detailed	$0.00
[add subcategory]			
Total: Category 1			**$0.00**
[add category]			
Project Subtotal:			**$0.00**
Company Overhead & Margin			$0.00
Company Overhead	Estimate	Detailed	$0.00
Company Margin	Estimate	Detailed	$0.00
Contingency	Estimate	Detailed	$0.00
Other 1	Estimate	Detailed	$0.00
Other 2	Estimate	Detailed	$0.00
Total: Company Overhead & Margin			**$0.00**
Unclassified QuickBooks Expenses			
Project Total:			**$0.00**

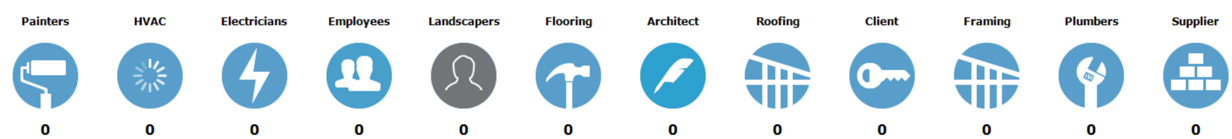
Workflow

PROJECT WORKFLOW

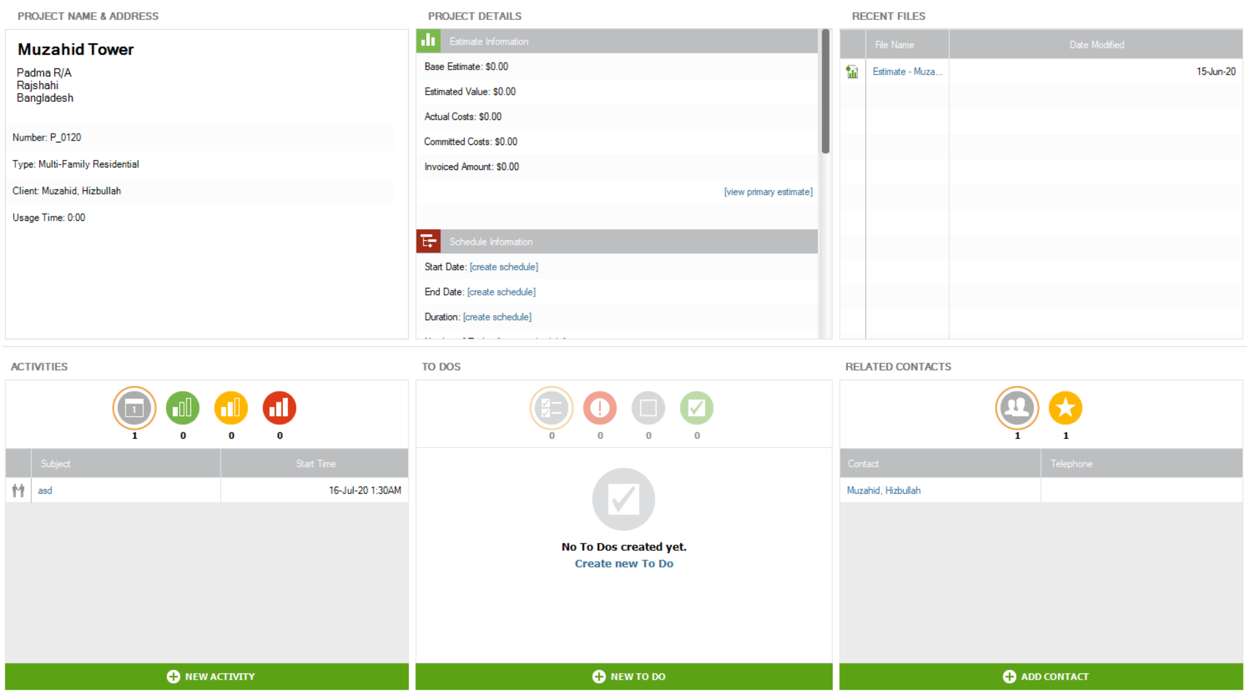


- **Planning**
  - Create Project
  - Review Plans
  - Generate Takeoffs
  - Create Estimate
    - Request Material and Labor Bids
    - Enter Bids into Items Database
    - Review Bids
  - Create Schedule
  - Create Specifications
- **Pre-construction**
  - Enter Client/Lead Information
  - Discuss and Select Options with Client
  - Create Contract Package
  - Sign Agreement
    - Assign Resources in Scheduling
    - Verify Resource Insurance
  - Award Bids
  - Confirm/Secure Financing
  - Set Profitability, Cash Flow, and Scheduling Baselines

Grouping with Icon



Project Details



Client/Contractor/Employee Details