Proposal Document for SA Tax Submission System

Project Title:
Development of Self-Assessment (SA) Tax Submission Portal

Project Overview:
We are seeking an experienced web developer to create a Self-Assessment (SA) Tax submission system within our existing portal. The system will allow customers to log in, fill out a tax form with their available details, and submit it. Once submitted by client, the system will generate a CSV file in the backend and forward it to an internal email, which will then be assigned to an employee for expert revie. Additionally, the system should include a live chat feature that allows for real-time document exchange between customers and the assigned expert employee.

Key Features and Requirements:

1. **User Login and Registration:**

   o **Secure login and registration system for customers.**

   o **Password recovery options.**

2. **SA Tax Submission Form:**

   o **A user-friendly form for customers to input their tax details.**

   o **Auto-fill options for fields where customer data is already available.**

   o **Validation checks to ensure all necessary fields are completed.**

3. **CSV File Generation:**

   o **Automatic generation of a CSV file containing the submitted form data.**

   o **The CSV file should be securely stored and easily accessible to assigned employees.**

4. **Live Chat and Document Exchange:**

   o **A real-time live chat feature allowing direct communication between the customer and the assigned expert employee.**

   o **Secure document exchange within the chat for any additional files or information needed for the tax submission.**

   o **Chat history should be stored securely and accessible for future reference.**

5. **Admin Dashboard:**

   o **A comprehensive dashboard for administrators to manage users, view submissions, and track progress.**

   o **Role-based access control for different levels of employees.**

6. **Security and Compliance:**

   o **Ensure the system complies with GDPR and other relevant data protection regulations.**

   o **Secure data storage and transmission protocols.**

- Regular security audits and updates.

7. **Documentation and Support:**

    o **Provide thorough documentation for both the system's functionality and the codebase.**

    o **Offer post-launch support for bug fixes, updates, and possible future enhancements.**

Technical Requirements:

- **Backend: On your option (Suggest)**

- **Frontend: On your option (Suggest)**

- **Hosting: We already have cloud hosting and domain**

Timeline:

- **Proposal Submission Deadline:**

- **Project Start Date:**

- **Expected Completion Date:**

Budget:
Please provide a detailed budget breakdown, including costs for development, testing, and post-launch support.

Submission Requirements:

- **Portfolio showcasing similar projects.**

- **A brief outline of your approach to this project.**

- **Any additional services or recommendations you can offer.**