

# HT Metal Fab Project Management & Metal Order Manual.

## Company Admin Manual (Detailed)

This document is a detailed guide for **Company Admin** users.  
All labels match the current UI.

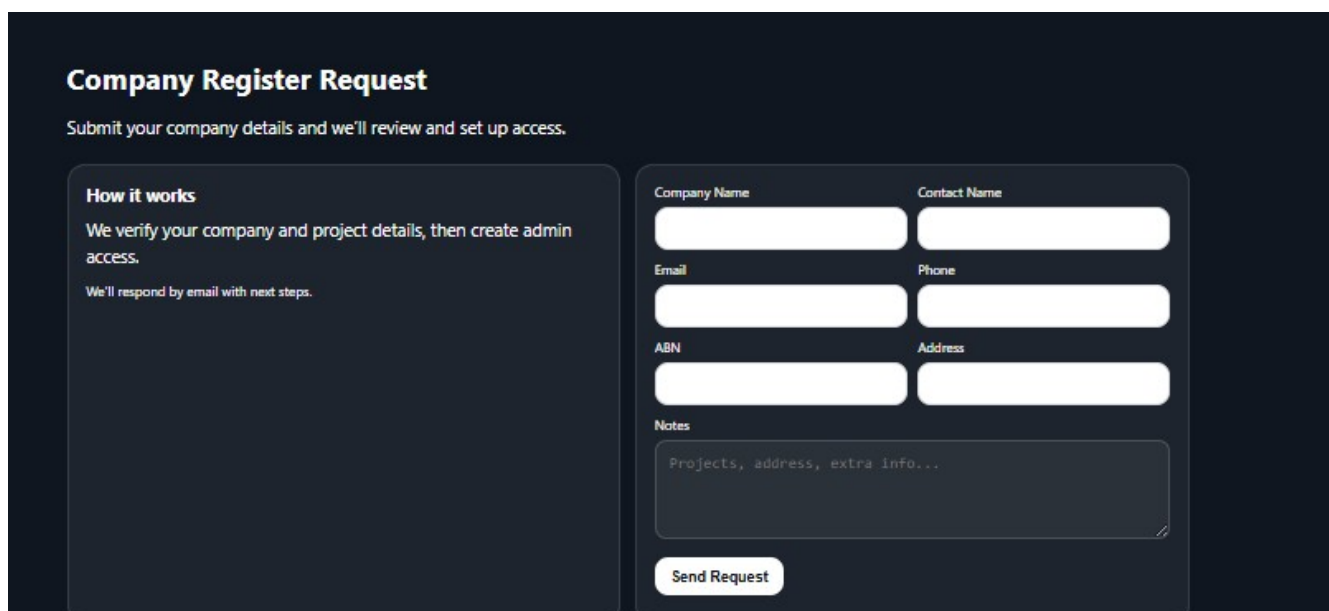
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### 1) Company Register Request

#### 1-1. Submit a company request

1. Open the company registration request page.
2. Fill required fields: company name, email, address, ABN.
3. Click **Submit** → request stays pending.

**Snapshot 1**



**Company Register Request**

Submit your company details and we'll review and set up access.

**How it works**

We verify your company and project details, then create admin access.

We'll respond by email with next steps.

Company Name

Contact Name

Email

Phone

ABN

Address

Notes

Projects, address, extra info...

Send Request

Snapshot 1

#### 1-2. After approval

1. Once approved, login with your admin account.
2. Select company and start managing projects and tasks.

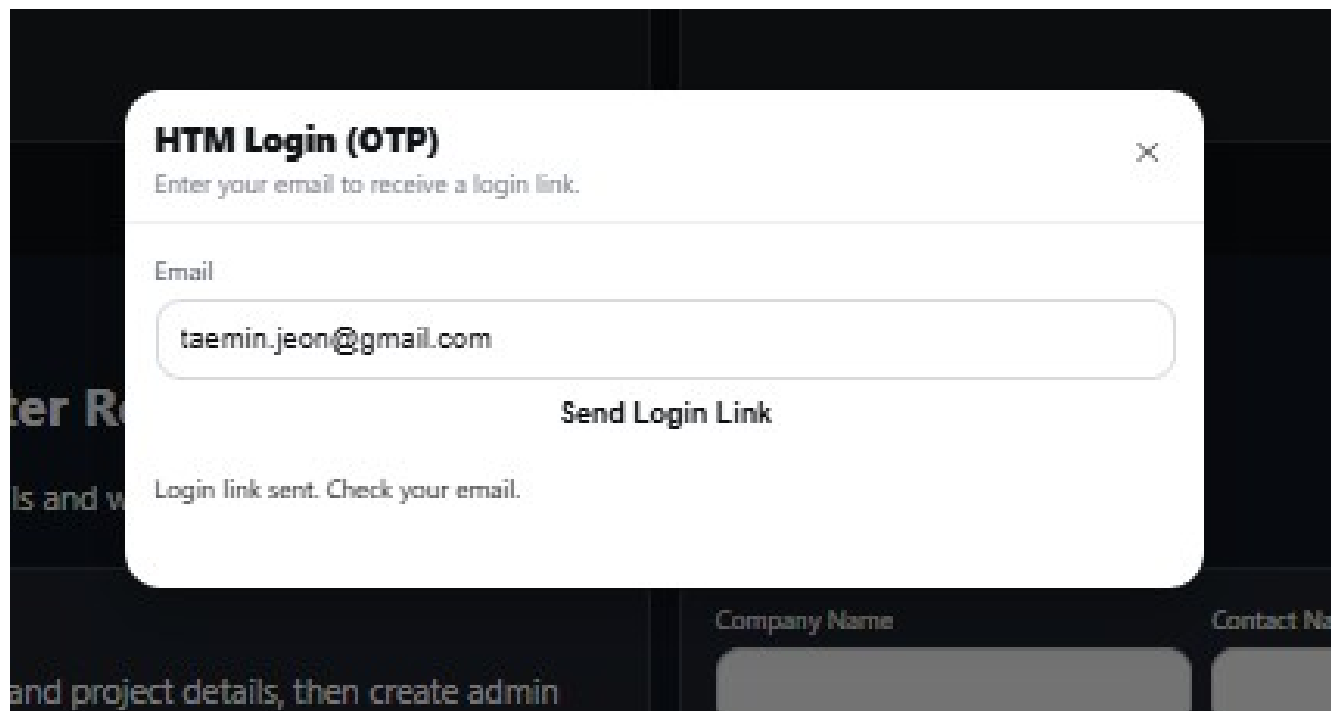
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### 2) Login and basic flow

#### 2-1. Login

1. Open the login page and enter your email.
2. Click the magic-link email.
3. You will land on the Dashboard.

**\*\*Snapshot 2\*\***



Snapshot 2

## 2-2. Select company and project

1. Choose a company from the top **\*\*Company\*\*** dropdown.
2. Choose a project from the top **\*\*Project\*\*** dropdown.
3. If there is no project, create one in the `Project` tab.

*Tip: Changing company/project refreshes tasks, files, notes, and Gantt.*

**\*\*Snapshot 3\*\***

**Sample company**
Sample company (client, ABN 12345678901)
Project: First Project
Logout

Logged in as: bombay.htm@gmail.com

Company
Project
Tasks
Contacts
Templates

**Sample company Detail**
Save Company

Edit company profile and contacts.

Company name

Sample company

ABN

12345678901

Contact name

John Doe

Phone

0400111222

Company email

bombay.htm@gmail.com

Address

20 Wentworth St. Clyde

**Sample company Roles**
Add Member

Role, name, email and phone for this company.

Role	Name	Email	Phone	Action
Admin	John Doe	bombay.htm@gmail.com	0400111222	Modify Delete

Manuals
Manual (KO)
Manual (EN)

Snapshot 3

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### 3) Company tab (Company details and members)

#### 3-1. Edit company profile

1. Open the `Company` tab.
2. In **Company Detail**, edit:
  - Company name, ABN, contact name, phone, email, address
3. Click **Save Company**.

**Snapshot 4**

**Sample company**
Sample company (client, ABN 12345678901) ▼
Project: First Project
Logout

Logged in as: bombay.htm@gmail.com

Company
Project
Tasks
Contacts
Templates

**Sample company Detail**
Save Company

Edit company profile and contacts.

Company name

Sample company

ABN

12345678901

Contact name

John Doe

Phone

0400111222

Company email

bombay.htm@gmail.com

Address

20 Wentworth St. Clyde

**Sample company Roles**
Add Member

Role, name, email and phone for this company.

Role	Name	Email	Phone	Action
Admin	John Doe	bombay.htm@gmail.com	0400111222	<span>Modify</span> <span>Delete</span>

Manuals
Manual (KO)
Manual (EN)

Snapshot 4

### 3-2. Manage company members

1. In **Company Members**, click **Add Member**.
2. Choose a role: Admin / Manager / Accountant / Staff
3. Enter name, email, phone.
4. Use **Modify** or **Delete** to update members.

*Tip: Company members are used for project roles and internal assignees.*


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## 4) Project tab (Projects and project members)

### 4-1. Create a project



1. Go to the `Project` tab.
2. Click **Create Project**.
3. Fill project details (name, status, dates, client, site, description).
4. Click **Save**.

**Snapshot 5**


**Sample company** Sample company (client, ABN 12345678901) Project: First Project  Logout

Logged in as: bombay.htm@gmail.com



Company **Project** Tasks Contacts Templates

**First Project Files**  
Thumbnails for files uploaded under this project.  



No attachments yet.


**First Project Notes**  
Latest notes with author and time. 

No notes yet.

**First Project Roles**  
Roles and contacts for this project.  

Role	Name	Email	Phone	Action
No members yet.				

**Sample company Project List**  
Select a project or open Modify.  

Project	Status	Action
First Project	Open	

Manuals Manual (KO) Manual (EN)

Snapshot 5

## 4-2. Edit a project

1. Select a project and click **\*\*Modify\*\***.
2. Update fields and click **\*\*Save\*\***.

## 4-3. Project members

1. In `Project` tab, open **\*\*Project Members\*\***.
2. Click **\*\*Add Member\*\***.
3. Select from existing company members and assign role.
4. Use **\*\*Import Company Roles\*\*** for quick bulk import.

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## 5) Metal Work (Instant Quote / Quote Request)

### 5-1. Instant Quote

1. **\*\*A project must be selected\*\*** to show the **\*\*Metal Work\*\*** card in `Tasks`.
2. In `Tasks`, click **\*\*Instant Quote\*\*** on the **\*\*Metal Work\*\*** card.
3. Select product → enter options/dimensions.
4. Check quantity/price in **\*\*Preview\*\***.
5. Click **\*\*Proceed\*\*** → quotation PDF is generated and attached to the task.
6. Manage the task status as it progresses.

**\*\*Snapshot 9\*\***

**First Project HT Work**  
Instant quote or request a quote, then track metal tasks here.

Instant Quote
Quote Request

Metal tasks: 2

Metal - Instant Quote - 2026-02-03 15:06 (2 items)  
Quote Issued Deposit Waiting Material - Fabricating - Balance - Pickup - Completed

Metal - Quote Request - 2026-02-03 15:22  
Quote Preparing Quote 2 - Deposit - Material - Fabricating - Balance - Pickup - Completed

Snapshot 9

**\*\*Snapshot 10\*\***

**HT Instant Quote**  
Logged in as: bombay.htm@gmail.com


Go Back

Company **Sample company** Project **First Project**

Bench Shelving Cladding Hood Geometry

Timezone: Australia/Sydney

**Bench Builder**  
Width Depth Qty  
1200 700 1  
☐ Splashback ☒ Bench Frame  
Bench Type: Flat Wet  
Sink  
None Single Double HB  
**Frame Options**  
☐ Heavy Duty ☐ Frame Height 900 ☐ Shelf None  
Foot  
Plastic  
Gap South Gap North  
10 50  
Gap Left Gap Right  
5 5  
Item Title (auto)  
F 1200x700 H900  
Format: F/W, WxD, SP&h, S/D/H, H/H&h, PS/BS  
Notes  
Phone order, urgent, install notes, etc.  
Add to Basket  
\$609.45 u price ex.gst

**Bench Preview**  
Add to Basket \$609.45 u price ex.gst  
3D 2D  
Full Screen  


Manuals
Manual (KO) Manual (EN)

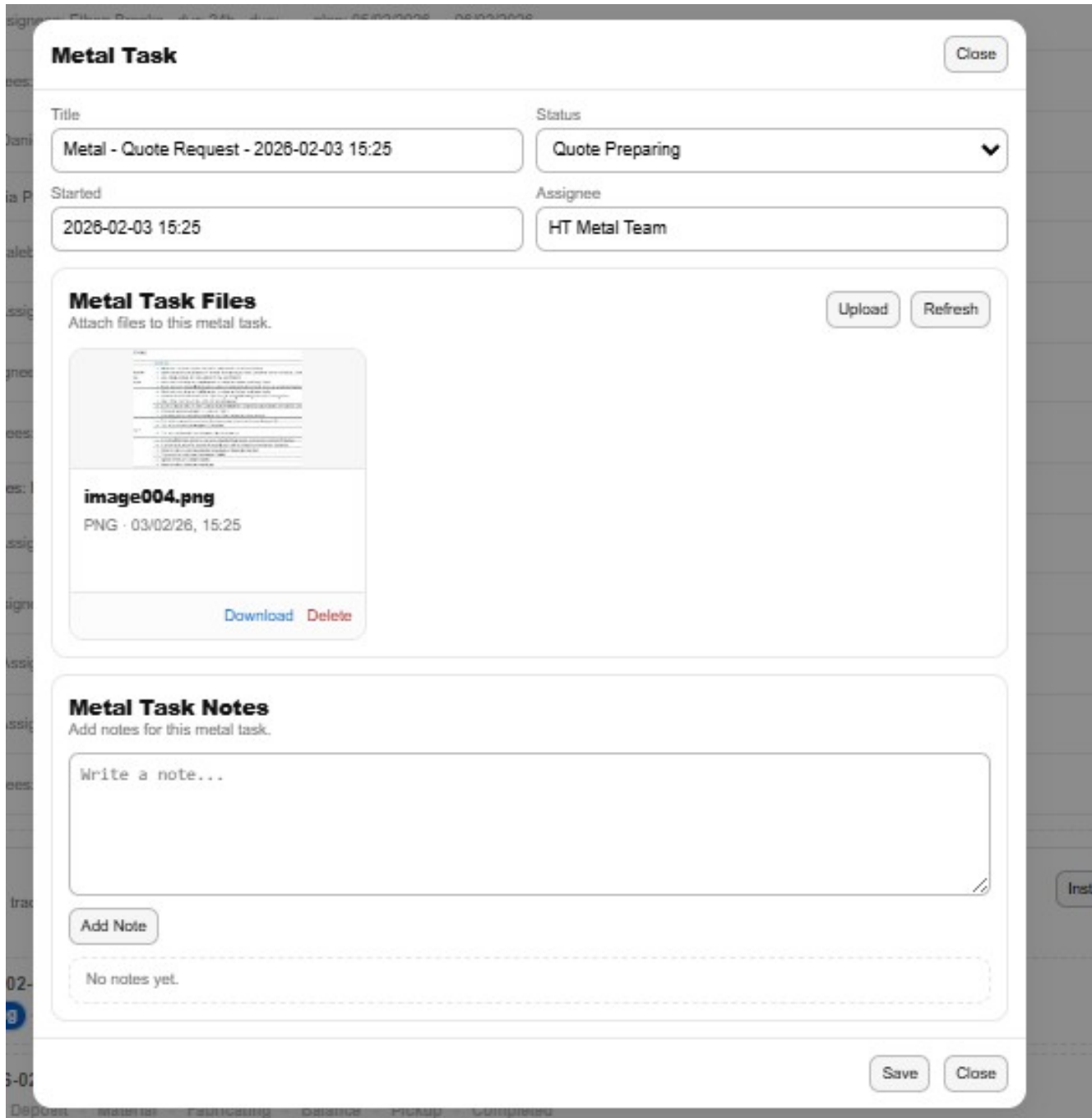
Snapshot 10

## 5-2. Quote Request

1. Click **\*\*Quote Request\*\***.
2. Upload files/notes and submit.

3. Status moves through steps (Quote Request → Quote Preparing → Quote Issued ...).

**\*\*Snapshot 11\*\***




**Metal Task** Close

Title: Metal - Quote Request - 2026-02-03 15:25      Status: Quote Preparing ▼

Started: 2026-02-03 15:25      Assignee: HT Metal Team

**Metal Task Files** Upload Refresh  
Attach files to this metal task.

  
**image004.png**  
PNG · 03/02/26, 15:25  
Download Delete

**Metal Task Notes**  
Add notes for this metal task.

Add Note

No notes yet.

Save Close

Snapshot 11

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## 6) Tasks tab (Tasks and Gantt)

### 6-1. View tasks

1. Open the `Tasks` tab.
2. Tasks appear after a project is selected.

**\*\*Snapshot 6\*\***

Sample company

Sample company (client, ABN 12345678901)

Project: First Project

Logout

Company

Project

Tasks

Contacts

Templates

First Project Tasks

List and Gantt views for this project.

+ New Task

Save Task

Schedule

Export PDF

All

None

Delete

Save new project template

List

Gantt

Project

Template applied

Due date

Scheduled

Ready. Tasks are scheduled. perm v20260201b: create=yes, plan=yes, company=ok, project=ok

Total tasks: 31

Planning & Permits

Assignees: Grace Lee · dur: 48h · due: 06/02/2026 · plan: 04/02/2026 → 06/02/2026

↑

Site survey & measure

Assignees: Olivia Tran · dur: 8h · due: — · plan: 06/02/2026 → 06/02/2026

↑

Design finalization

Assignees: Grace Lee · dur: 16h · due: — · plan: 05/02/2026 → 06/02/2026

↑

Council permit submission

Assignees: Samir Khan · dur: 8h · due: — · plan: 06/02/2026 → 06/02/2026

↑

Permit review & approval

Assignees: Samir Khan · dur: 40h · due: — · plan: 04/02/2026 → 06/02/2026

Site & Foundation

Assignees: Lucas Grant · dur: 24h · due: 06/02/2026 · plan: 05/02/2026 → 06/02/2026

↑

Site prep & fencing

Assignees: Lucas Grant · dur: 12h · due: — · plan: 05/02/2026 → 06/02/2026

↑

Excavation

Assignees: Ryan Fox · dur: 24h · due: — · plan: 05/02/2026 → 06/02/2026

↑

Footings & rebar

Assignees: Chloe Brown · dur: 16h · due: — · plan: 05/02/2026 → 06/02/2026

↑

Concrete pour

Assignees: Chloe Brown · dur: 8h · due: — · plan: 06/02/2026 → 06/02/2026

↑

Cure & inspection

Assignees: Daniel Wu · dur: 16h · due: — · plan: 05/02/2026 → 06/02/2026

Framing & Roof

Assignees: Noah Kim · dur: 48h · due: 06/02/2026 · plan: 04/02/2026 → 06/02/2026

↑

Frame walls & trusses

Assignees: Noah Kim · dur: 40h · due: — · plan: 04/02/2026 → 06/02/2026

↑

Roof sheeting

Assignees: Ethan Brooks · dur: 24h · due: — · plan: 05/02/2026 → 06/02/2026

↑

External wrap & windows

Assignees: Ivy Zhang · dur: 24h · due: — · plan: 05/02/2026 → 06/02/2026

Rough-in Services

Assignees: Elena Rossi · dur: 24h · due: 06/02/2026 · plan: 05/02/2026 → 06/02/2026

↑

Plumbing rough-in

Assignees: Isla Moore · dur: 24h · due: — · plan: 05/02/2026 → 06/02/2026

↑

Electrical rough-in

Assignees: Ethan Brooks · dur: 24h · due: — · plan: 05/02/2026 → 06/02/2026

↑

HVAC rough-in

Assignees: Ava Kim · dur: 24h · due: — · plan: 05/02/2026 → 06/02/2026

↑

Inspection

Assignees: Daniel Wu · dur: 8h · due: — · plan: 06/02/2026 → 06/02/2026

Internal Finish

Assignees: Mia Park · dur: 48h · due: 06/02/2026 · plan: 05/02/2026 → 06/02/2026

↑

Insulation

Assignees: Caleb Young · dur: 12h · due: — · plan: 05/02/2026 → 06/02/2026

↑

Plasterboard install

Assignees: Chloe Brown · dur: 32h · due: — · plan: 05/02/2026 → 06/02/2026

Snapshot 6

## 6-2. Create and edit tasks

1. Click **\*\*New Task\*\***.
2. Enter a title and save.
3. Click a task to edit:
  - Status
  - Start/Due dates
  - Notes and attachments

**\*\*Snapshot 8\*\***

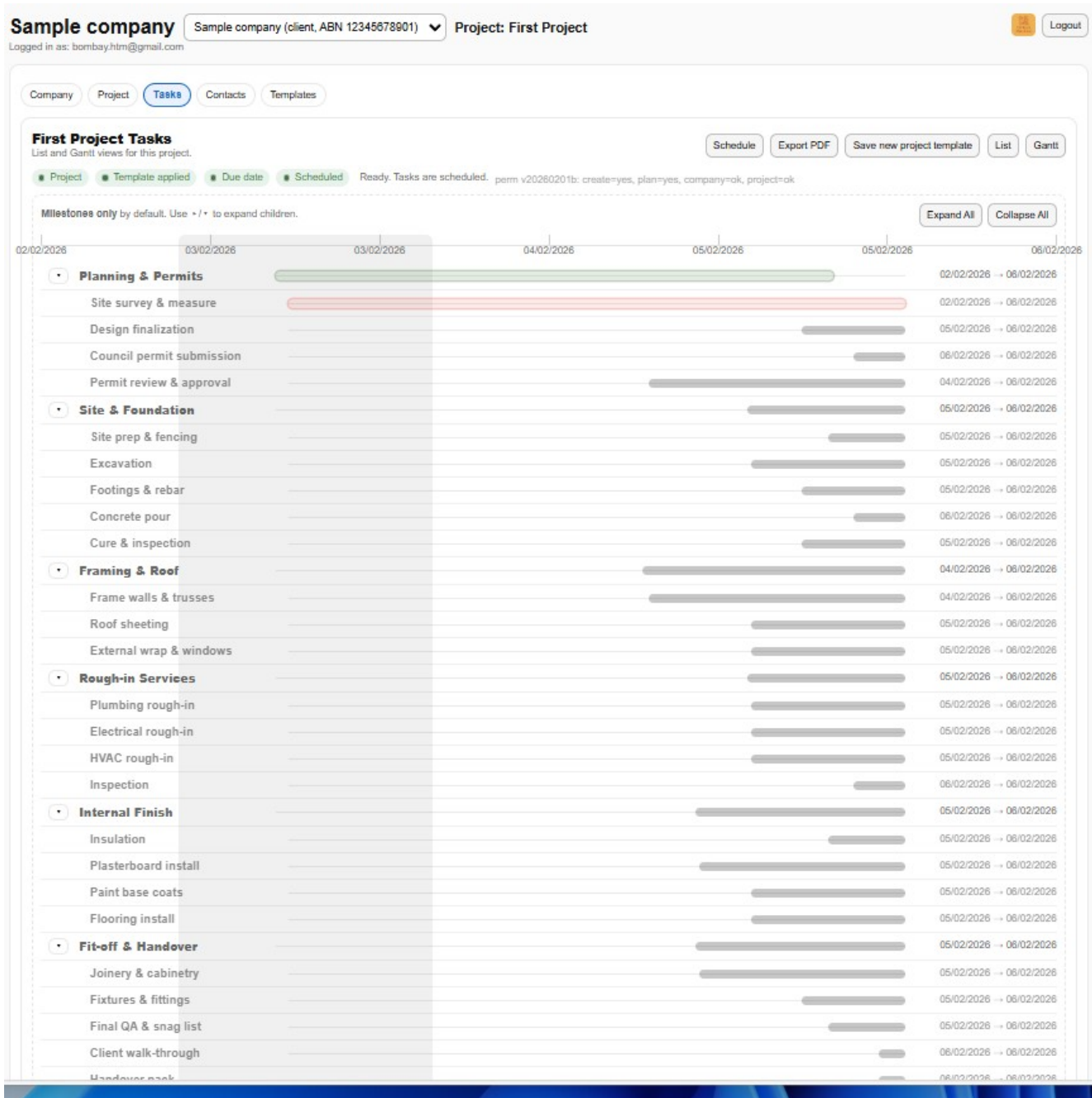


### 6-3. Assign users

- ## 6-4. Reorder tasks

1. Drag & drop to change order.
2. Subtasks are indented.
3. Milestones display in bold.

**\*\*Snapshot 7\*\***



Snapshot 7

## 6-5. Task scheduling

1. If you enter **\*\*Start/Due\*\***, duration is auto-calculated.
2. If only one date is set, the other may be auto-adjusted.
3. Parent task duration follows child tasks.
4. Use the schedule button to align overall dates.

### 6-5-1. Scheduling logic summary

1. **Forward**: uses Project Start Date as the base.
2. **Backward**: uses Project Due Date as the base.
3. Task order follows **dependencies**.
4. **Parent tasks** span from the earliest child start to the latest child finish.
5. Results are saved to `planned\_start / planned\_finish`.

## 6-6. Export PDF

1. Switch to List or Gantt view.
2. Click **Export PDF**.
  - List view → Task list PDF
  - Gantt view → Gantt PDF

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## 7) Contacts tab

### 7-1. Manage contacts

1. Open `Contacts` tab.
2. View/edit contact list.
3. Use CSV upload for bulk changes.
4. Sample contacts can be removed with **Delete Sample Contacts**.

**Snapshot 12**

Sample company

Sample company (client, ABN 12345678901)

Project: First Project

Logged in as: bombay.htm@gmail.com

Company

Project

Tasks

Contacts

Templates

Sample company Contacts

Upload CSV using the contact-samples.csv format.

Choose File

No file chosen

Upload CSV

Download Sample

Delete Sample Contacts

Add Contact

Column 1 (Role/Field) is used as role. If Company is Internal, it is an internal role.

Select All

Select Assignee

Deselect All

Email Selected

Role/Field :	Company :	Contact Name :	Email :	Phone :	Notes :
<input type="checkbox"/> Mechanical	BluePeak HVAC	Ava Kim	ava.kim@bluepeak.example.sample	0410 710 014	
<input type="checkbox"/> Inspector	City Inspect	Daniel Wu	daniel.wu@cityinspect.example.sample	0410 710 007	
<input type="checkbox"/> Glazing	ClearView Glass	Ivy Zhang	ivy.zhang@clearview.example.sample	0410 710 010	
<input type="checkbox"/> Painting	ColorFlow	Ravi Patel	ravi.patel@colorflow.example.sample	0410 710 017	
<input type="checkbox"/> Excavation	EarthWorks Co	Ryan Fox	ryan.fox@earthworks.example.sample	0410 710 005	
<input type="checkbox"/> Plumbing	Flowrite Plumbing	Isla Moore	isla.moore@flowrite.example.sample	0410 710 012	
<input type="checkbox"/> Builder	Harbor Build	Lucas Grant	lucas.grant@harbor.example.sample	0410 710 004	
<input type="checkbox"/> Insulation	HeatGuard	Caleb Young	caleb.young@heatguard.example.sample	0410 710 016	
<input type="checkbox"/> Client	Home Owner	Ben Cho	ben.cho@homeowner.example.sample	0410 710 019	
<input type="checkbox"/> Finishes	InteriorCraft	Mia Park	mia.park@interiorcraft.example.sample	0410 710 015	
<input type="checkbox"/> Architect	Northside Design	Grace Lee	grace.lee@northside.example.sample	0410 710 001	
<input type="checkbox"/> Carpentry	Oakline Carpentry	Noah Kim	noah.kim@oakline.example.sample	0410 710 008	
<input type="checkbox"/> Surveyor	Peak Survey	Olivia Tran	olivia.tran@peaksurvey.example.sample	0410 710 002	
<input type="checkbox"/> Consultant	PermitWorks	Samir Khan	samir.khan@permitworks.example.sample	0410 710 003	
<input type="checkbox"/> Services	Prime Services	Elena Rossi	elena.rossi@prime.example.sample	0410 710 011	
<input type="checkbox"/> Roofing	Skyline Roofing	Ethan Brooks	ethan.brooks@skyline.example.sample	0410 710 009	
<input type="checkbox"/> Concrete	StoneCrete	Chloe Brown	chloe.brown@stonecrete.example.sample	0410 710 006	
<input type="checkbox"/> Flooring	TimberLine	Grace Han	grace.han@timberline.example.sample	0410 710 018	

Manuals

Manual (KO)

Manual (EN)

Snapshot 12

## 7-2. CSV workflow

1. Download a sample template.
2. Edit locally.
3. Upload and apply.

---

## 8) Templates tab

### 8-1. Step-by-step template workflow

1. **\*\*Download\*\*** a sample template.
2. Open it in Excel and **\*\*edit\*\*** as needed.
3. Save as `MyStandard.csv`, for example.
4. Go to `Templates` and **\*\*Upload\*\*** the file.
5. A template named `MyStandard` is created.
6. In the apply popup, click **\*\*Apply\*\***.
7. The template is applied to the selected project.

**\*\*Snapshot 13\*\***

**Sample company**
Sample company (client, ABN 12345678901)
Project: First Project
Logout

Company
Project
Tasks
Contacts
**Templates**

**Sample company Project Templates**  
Upload, download, and apply templates.

Fitout Standard (Sample)
Download Sample
Choose File No file chosen
Upload
Sample - House Build 3 Months
Download
Apply

**Sample - House Build 3 Months Template Tasks**

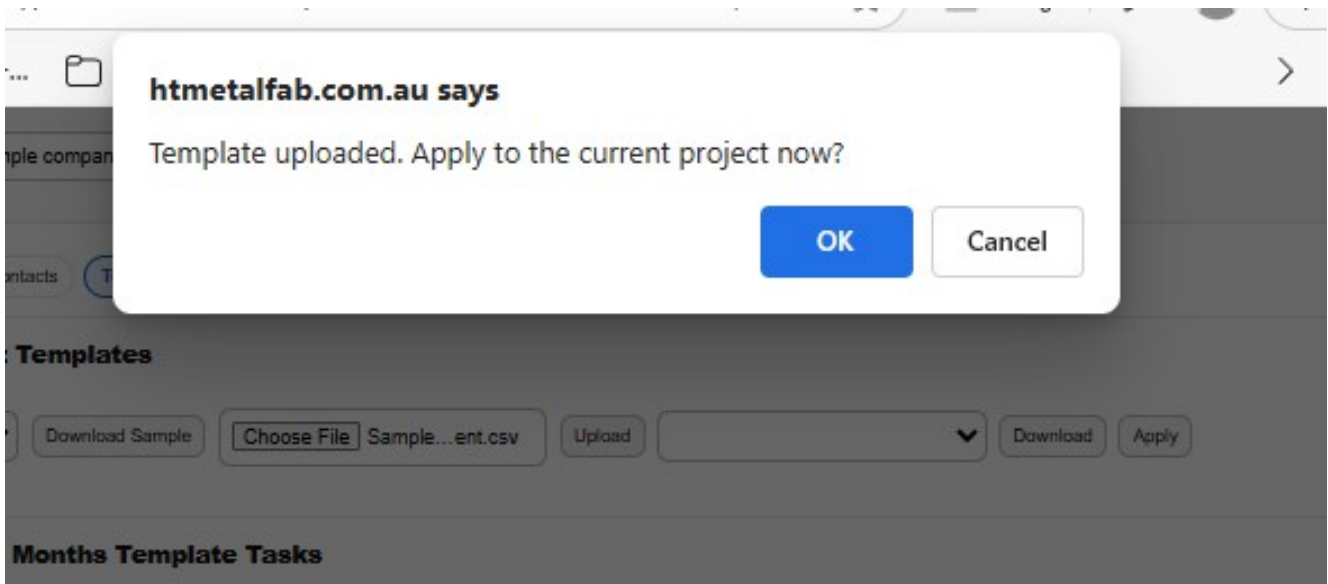
- Planning & Permits (0h)  
Field/Role: — Company: Northside Design · Assignee: Grace Lee · Phone: 0410 710 001 · Email: grace.lee@northside.example.sample
- Site survey & measure (8h)  
Field/Role: — Company: Peak Survey · Assignee: Olivia Tran · Phone: 0410 710 002 · Email: olivia.tran@peaksurvey.example.sample
- Design finalization (16h)  
Field/Role: — Company: Northside Design · Assignee: Grace Lee · Phone: 0410 710 001 · Email: grace.lee@northside.example.sample
- Council permit submission (8h)  
Field/Role: — Company: PermitWorks · Assignee: Samir Khan · Phone: 0410 710 003 · Email: samir.khan@permitworks.example.sample
- Permit review & approval (40h)  
Field/Role: — Company: PermitWorks · Assignee: Samir Khan · Phone: 0410 710 003 · Email: samir.khan@permitworks.example.sample
- Site & Foundation (0h)  
Field/Role: — Company: Harbor Build · Assignee: Lucas Grant · Phone: 0410 710 004 · Email: lucas.grant@harbor.example.sample
- Site prep & fencing (12h)  
Field/Role: — Company: Harbor Build · Assignee: Lucas Grant · Phone: 0410 710 004 · Email: lucas.grant@harbor.example.sample
- Excavation (24h)  
Field/Role: — Company: EarthWorks Co · Assignee: Ryan Fox · Phone: 0410 710 005 · Email: ryan.fox@earthworks.example.sample
- Footings & rebar (16h)  
Field/Role: — Company: StoneCrete · Assignee: Chloe Brown · Phone: 0410 710 006 · Email: chloe.brown@stonecrete.example.sample
- Concrete pour (8h)  
Field/Role: — Company: StoneCrete · Assignee: Chloe Brown · Phone: 0410 710 006 · Email: chloe.brown@stonecrete.example.sample
- Cure & inspection (16h)  
Field/Role: — Company: City Inspect · Assignee: Daniel Wu · Phone: 0410 710 007 · Email: daniel.wu@cityinspect.example.sample
- Framing & Roof (0h)  
Field/Role: — Company: Oakline Carpentry · Assignee: Noah Kim · Phone: 0410 710 008 · Email: noah.kim@oakline.example.sample
- Frame walls & trusses (40h)  
Field/Role: — Company: Oakline Carpentry · Assignee: Noah Kim · Phone: 0410 710 008 · Email: noah.kim@oakline.example.sample
- Roof sheeting (24h)  
Field/Role: — Company: Skyline Roofing · Assignee: Ethan Brooks · Phone: 0410 710 009 · Email: ethan.brooks@skyline.example.sample
- External wrap & windows (24h)  
Field/Role: — Company: ClearView Glass · Assignee: Ivy Zhang · Phone: 0410 710 010 · Email: ivy.zhang@clearview.example.sample
- Rough-in Services (0h)  
Field/Role: — Company: Prime Services · Assignee: Elena Rossi · Phone: 0410 710 011 · Email: elena.rossi@prime.example.sample
- Plumbing rough-in (24h)  
Field/Role: — Company: Flowrite Plumbing · Assignee: Isla Moore · Phone: 0410 710 012 · Email: isla.moore@flowrite.example.sample
- Electrical rough-in (24h)  
Field/Role: — Company: BrightWire Electric · Assignee: Ethan Brooks · Phone: 0410 710 009 · Email: ethan.brooks@skyline.example.sample
- HVAC rough-in (24h)  
Field/Role: — Company: BluePeak HVAC · Assignee: Ava Kim · Phone: 0410 710 014 · Email: ava.kim@bluepeak.example.sample
- Inspection (8h)  
Field/Role: — Company: City Inspect · Assignee: Daniel Wu · Phone: 0410 710 007 · Email: daniel.wu@cityinspect.example.sample
- Internal Finish (0h)  
Field/Role: — Company: InteriorCraft · Assignee: Mia Park · Phone: 0410 710 015 · Email: mia.park@interiorcraft.example.sample
- Insulation (12h)  
Field/Role: — Company: HeatGuard · Assignee: Caleb Young · Phone: 0410 710 016 · Email: caleb.young@heatguard.example.sample
- Plasterboard install (32h)  
Field/Role: — Company: WallPro · Assignee: Chloe Brown · Phone: 0410 710 006 · Email: chloe.brown@stonecrete.example.sample
- Paint base coats (24h)  
Field/Role: — Company: ColorFlow · Assignee: Ravi Patel · Phone: 0410 710 017 · Email: ravi.patel@colorflow.example.sample
- Flooring install (24h)  
Field/Role: — Company: TimberLine · Assignee: Grace Han · Phone: 0410 710 018 · Email: grace.han@timberline.example.sample
- Fit-off & Handover (0h)  
Field/Role: — Company: Home Owner · Assignee: Ben Cho · Phone: 0410 710 019 · Email: ben.cho@homeowner.example.sample
- Joinery & cabinetry (32h)  
Field/Role: — Company: ModelCraft Works · Assignee: Leo Thorne · Phone: 0410 710 010 · Email: leo.thorne@modelcraft.example.sample

Snapshot 13

## 8-2. Upload templates

1. Open `Templates` tab.
2. Upload a CSV file.
3. Confirm auto-apply prompt.
4. Assignees from the template are automatically saved into **\*\*Contacts\*\***.

**\*\*Snapshot 14\*\***



Snapshot 14

### 8-3. Sample templates

1. Choose a sample template from the list.
2. Download, edit, and re-upload.

### 8-4. Template list

- Sample - Fitout Standard
- Sample - House Build 3 Months
- Sample - Party Planning Friends Event
- Sample - Friends Trip 4 People
- Sample - Renovation Small Apartment
- Sample - Retail Kiosk 3 Weeks

### 8-5. CSV file format

Header (required):

- No, Task name, Duration, Field, Assignee company, Assignee name, Contact no., Contact email, Dependency

Rules:

- **\*\*No\*\***: task number (e.g., 1, 1.1, 1.2) → decimals indicate subtasks
- **\*\*Task name\*\***: task title
- **\*\*Duration\*\***: duration in days
- **\*\*Field\*\***: role/discipline (e.g., Architect, Consultant, Supplier)
- **\*\*Assignee company / name / contact\*\***: assignee info
- **\*\*Dependency\*\***: predecessor task number (single value)

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## 9) Files and notes

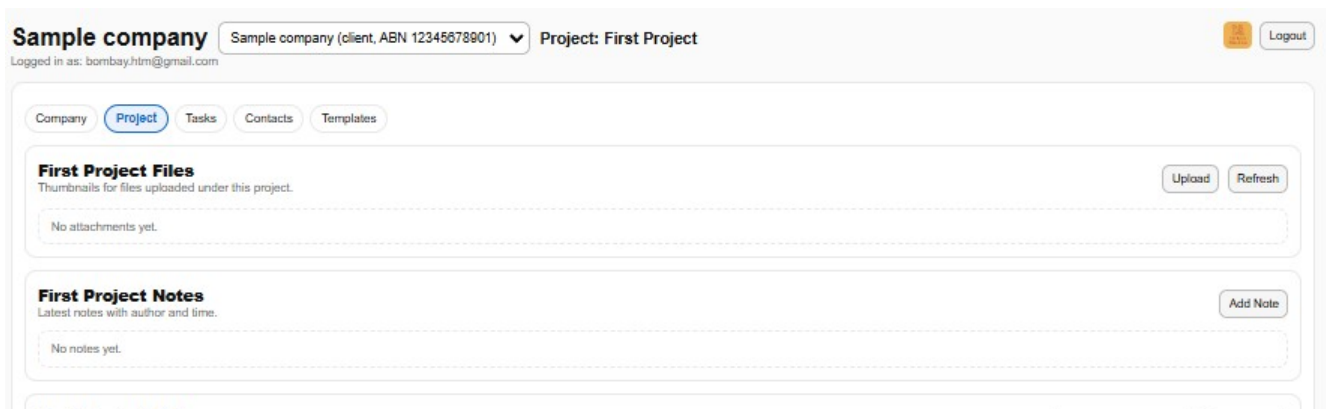
### 9-1. Project files

1. Select a project.
2. Upload files in the project area.



3. Project files/notes can be uploaded and shared by **\*\*all project members\*\***.

**\*\*Snapshot 15\*\***



Snapshot 15

## 9-2. Project notes

1. Click **\*\*Add Note\*\***.
2. Save your note.
3. Project notes can be created and shared by **\*\*all project members\*\***.

## 9-3. Task files/notes

1. Open a task and add files or notes.
2. **\*\*Task assignees\*\*** and **\*\*project managers/admins\*\*** can upload and share.

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## 10) Permissions summary

- Company Admin has full access within the company.
- Can manage members, projects, tasks, contacts, and templates.

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## 11) FAQ

**\*\*Q. I see no tasks.\*\***

A. Select a company and project first.

**\*\*Q. Internal assignees are missing.\*\***

A. Ensure company members exist and are added to the project.

**\*\*Q. PDF export fails.\*\***

A. Select a project and try again.