

# 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.

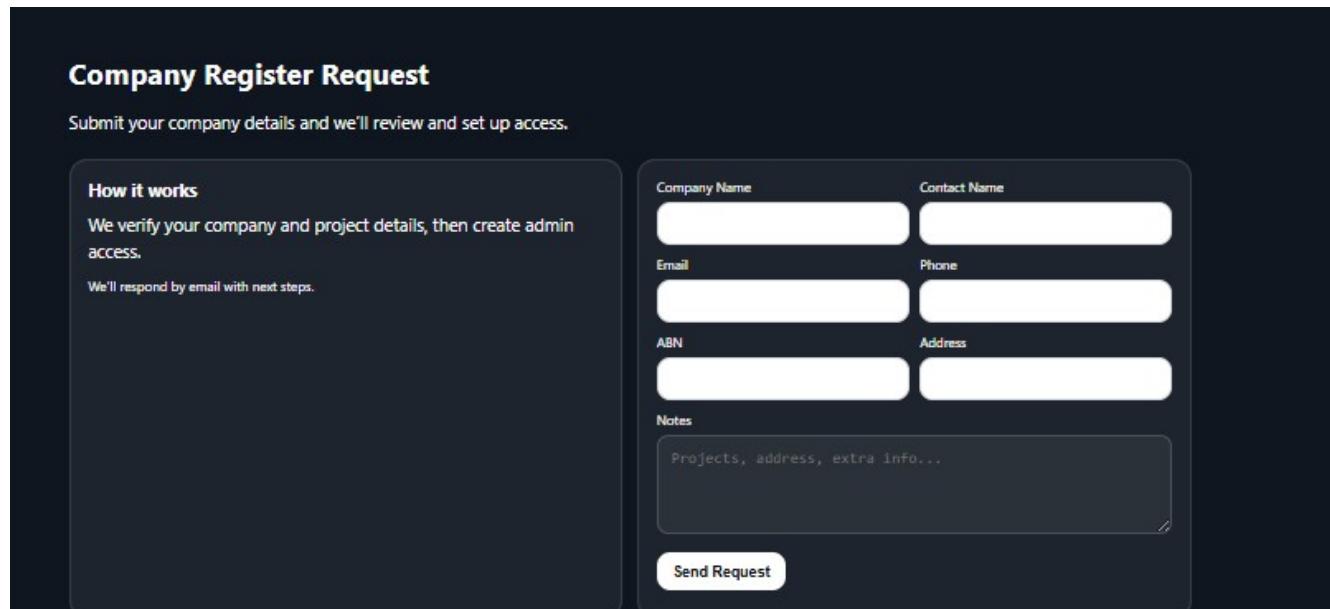
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### 1) Company Register Request

#### 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.

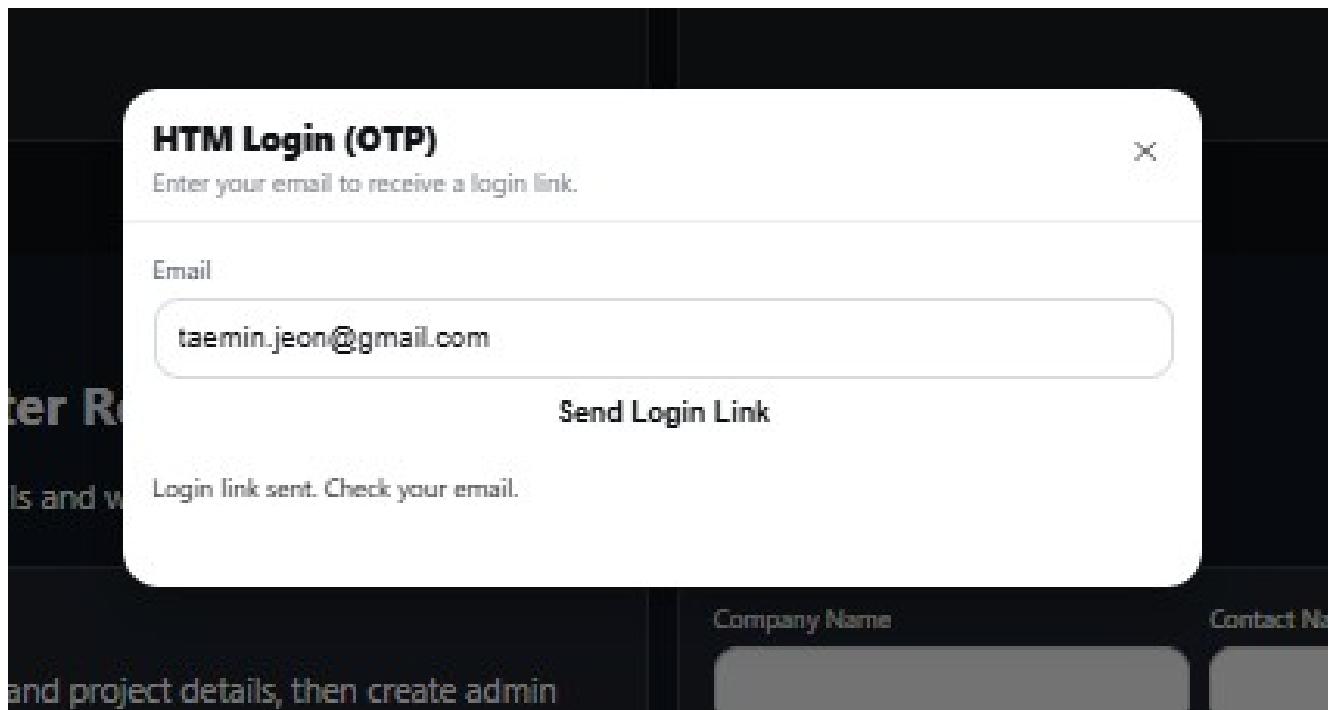
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### 2) Login and basic flow

#### 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

Logged in as: bombay.htm@gmail.com Logout

Company Project Tasks Contacts Templates

**Sample company Detail**  
Edit company profile and contacts. Save Company

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**  
Role, name, email and phone for this company. Add Member

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

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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

Logged in as: bombay.htm@gmail.com

Company    Project    Tasks    Contacts    Templates

**Sample company Detail**  
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

**Save Company**

**Sample company Roles**  
Role, name, email and phone for this company.

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

**Add Member**

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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** 

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  

## 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.

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

Company **Sample company** Project **First Project** **Bench** Shelving Cladding Hood Geometry Timezone: Australia/Sydney

**Bench Builder**

Width: 1200 Depth: 700 Qty: 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: 10 Gap North: 50

Gap Left: 5 Gap Right: 5

Item Title (auto): F 1200x700 H900

Format: F/W, WxD, SP&h, S/D/H, H/H/Hh, 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](#)



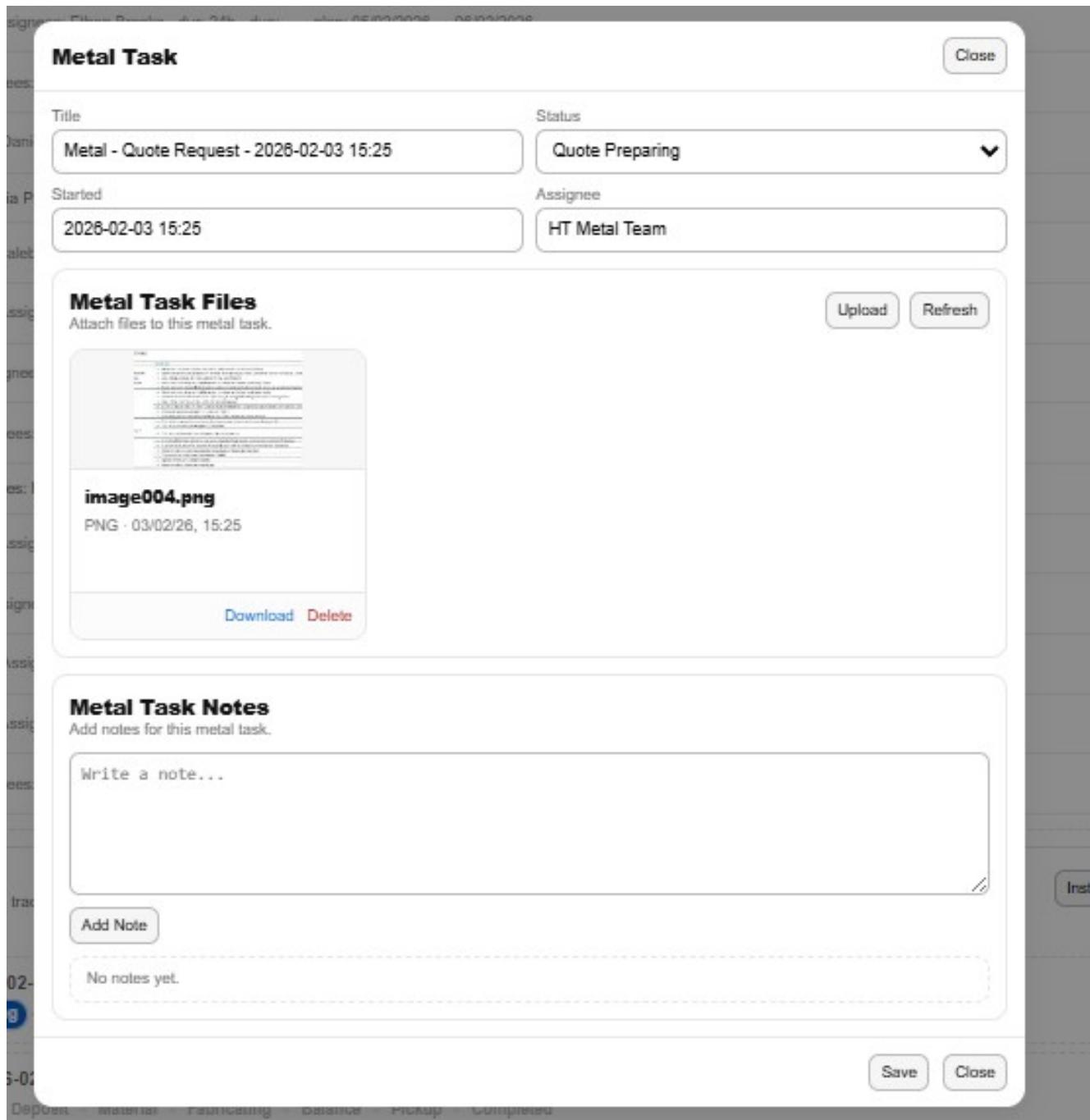
Snapshot 10

## 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**

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

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

**Status**

**Assignee**

**Notes**

**Completed**

**Save** **Close**

Snapshot 11

## 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**

Logged in as: bombay.htm@gmail.com  

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\*\***

Permit review & approval todo Close

Start dd/mm/yyyy Due dd/mm/yyyy Hours 40

Work Start dd/mm/yyyy Work Finish dd/mm/yyyy

Assignees Dependency (milestone)

Field Consultant Company PermitWork Name Samir Khar None

Child tasks cannot be dependencies.

**Task Attachments** Refresh

Files are tied to project\_id + task\_id.

Upload files

Choose Files No file chosen Upload

No attachments yet.

**Task Notes** Save Close

Notes are tied to project\_id + task\_id.

No notes yet.

Add a note... Add Note

Snapshot 8

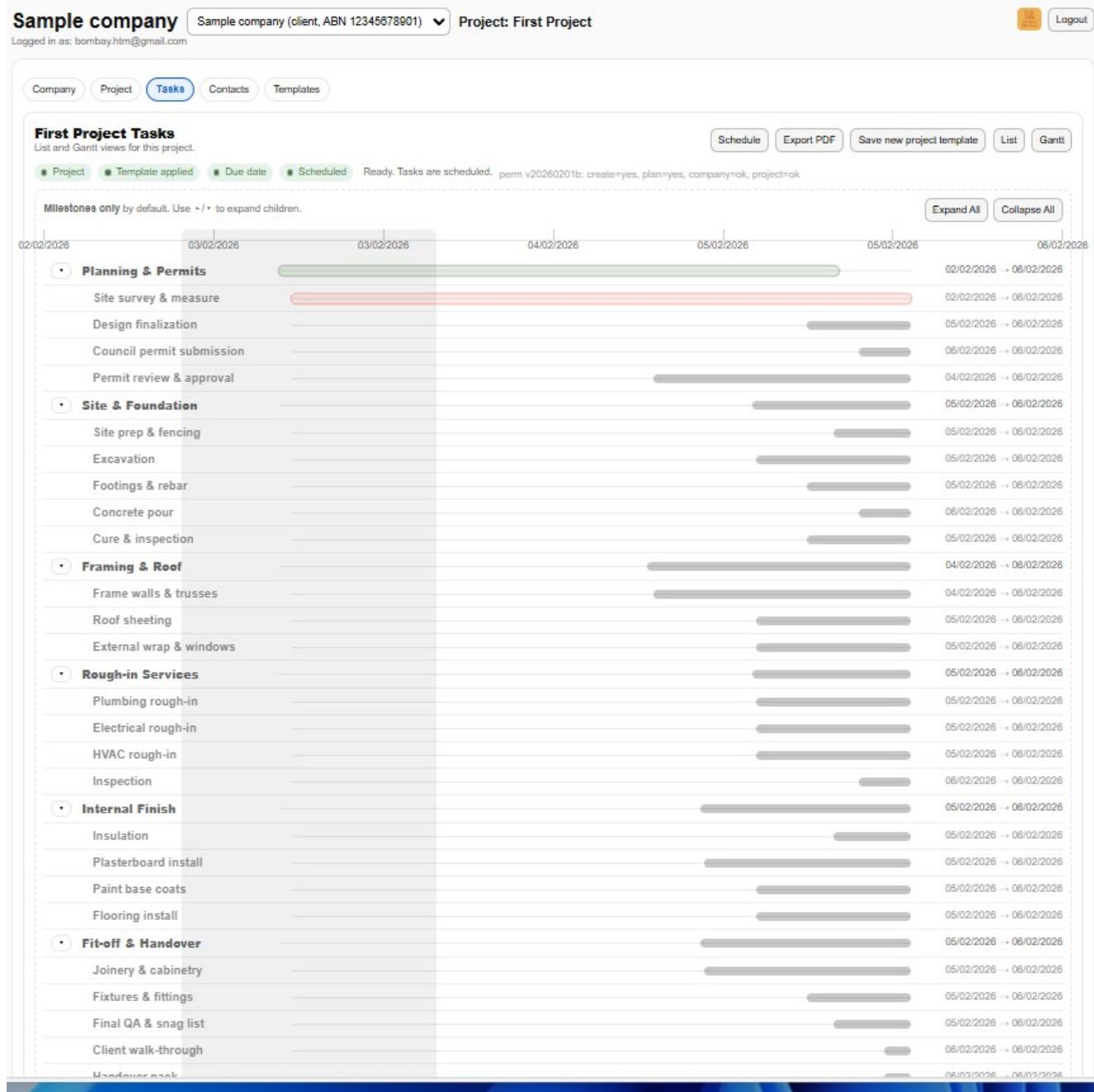
### 6-3. Assign users

1. In task detail, open \*\*Assignees\*\*.
2. Internal assignment:
  - Type: \*\*internal\*\*
  - Role: project role
  - Name: member
3. External assignment:
  - Type: external field/role
  - Company: external company
  - Name: contact

### 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

\* 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	

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## Snapshot 12

### 7-2. CSV workflow

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

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## 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

Logged in as: bombay.htm@gmail.com

Company Project Tasks Contacts **Templates**

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

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

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

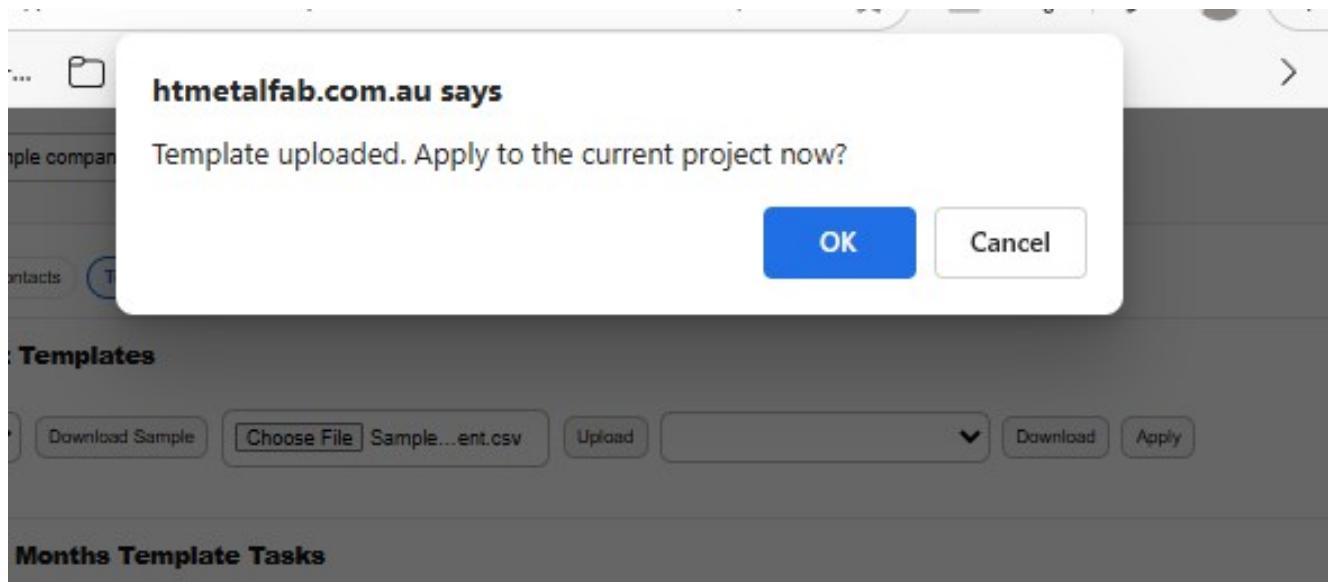
- Planning & Permits (0h)
  - Site survey & measure (8h)
    - Field/Role: --- · Company: Northside Design · Assignee: Grace Lee · Phone: 0410 710 001 · Email: grace.lee@northside.example.sample
  - Design finalization (16h)
    - Field/Role: --- · Company: Peak Survey · Assignee: Olivia Tran · Phone: 0410 710 002 · Email: olivia.tran@peaksurvey.example.sample
  - Council permit submission (8h)
    - Field/Role: --- · Company: Northside Design · Assignee: Grace Lee · Phone: 0410 710 001 · Email: grace.lee@northside.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: CustomCabinetry · Assignee: Emily Parker · Phone: 0410 710 020 · Email: emily.parker@customcabinetry.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)

## 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\*\***

A screenshot of a web-based project management application. The top navigation bar shows "Sample company" (client, ABN 12345678901), "Project: First Project", and "Logout". Below the navigation are tabs for "Company", "Project" (which is selected and highlighted in blue), "Tasks", "Contacts", and "Templates". The main content area is divided into two sections: "First Project Files" and "First Project Notes". The "First Project Files" section contains a message "No attachments yet." and buttons for "Upload" and "Refresh". The "First Project Notes" section contains a message "No notes yet." and a button for "Add Note".

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.