

## Request List Management System

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### Client Overview

The client is a United States–based CPA firm serving clients across multiple countries. They required a secure, centralized enterprise application for continuous document sharing and collaboration. The solution streamlined cross-border communication while ensuring data security and compliance.

### Overview

The **Request List Management System** streamlines document coordination and request tracking by organizing work from Company to Projects to Requests. It ensures transparency, accountability, and real-time visibility of uploaded documents for all project team members.

### Business Problem

Organizations managing multiple projects often face:

- Scattered document communication via email
- Lack of clarity on pending and completed requests
- Poor visibility of uploaded documents
- No centralized tracking system

A centralized system was required to organize requests, maintain document updates, and improve collaboration across teams.

### Objectives

The system was developed to:

- Structure data from **Company → Project → Requests**
- Enable request creation and tracking
- Allow document uploads linked to specific requests
- Provide visibility to all project team members
- Maintain updated attachments for each project

## Request List Management System

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### Core Features

1. Company & Project Creation
2. Request Creation
3. Document Upload & Attachment Management
4. Team Visibility
5. Attachment Updates

### Workflow Example

- Admin creates a **Company** and sets up a **Project** under it.
- The Requestee raises a document request within the project.
- The Requestor uploads the required documents, which are visible to all project team members.
- Documents are updated as needed, and the request status is tracked until completion.

### Technology Stack

- Angular 16 | Bootstrap | .NET Core Web API | AWS | Docker

### Conclusion

The Request List Management System ensures a structured and transparent way to manage project-based document requests. Its organized workflow and real-time attachment updates enhance accountability and team collaboration, making it an efficient solution for project documentation management.

## Request List Management System

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Company List | Project List | Archived | Dashboard | Requestee | Settings | Trash

+ Create Company

	No.	Company Na...	Created By	Created Date	Contact Info...	Address	Last Updated	Last Update...	Total Projects	
									Open	Archived
<input type="checkbox"/>	1	LANDLORD	vijay ugale	03/23/2026			03/23/2026	vijay ugale	2	0
<input type="checkbox"/>	2	Test Comapny 13...	vijay ugale	12/03/2025	455645345	Indore	03/17/2026	vijay ugale	0	0
<input type="checkbox"/>	3	OptByte	vijay ugale	02/18/2026	8978897684	Hadapsar	03/17/2026	vijay ugale	7	0
<input type="checkbox"/>	4	Reminder	vijay ugale	02/20/2026			03/17/2026	vijay ugale	7	0

4 Items

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Company List | Project List | Archived | Dashboard | Requestee | Settings | Trash

+ Create Project | Search | Status: All

	No.	Company name	Project name	PBC Tab	Creator	Teammate	Created Date	Edited Date	Client Expected Dates	
									Upload	Finish
<input type="checkbox"/>	1	LANDLORD	Bungalow	Default	vijay ugale	1	03/25/2026	03/25/2026		
<input type="checkbox"/>	2	LANDLORD	One Acre	Default	vijay ugale	1	03/23/2026	03/23/2026		
<input type="checkbox"/>	3	Vijay Company	VJ	Test33	Tanay	1	03/20/2026	03/20/2026		
<input type="checkbox"/>	4	OptByte	Request List	School	vijay ugale	1	02/18/2026	03/17/2026	02/18/2026	03/19/2026
				Village	vijay ugale	1	02/18/2026	03/17/2026	02/18/2026	03/19/2026
				College	vijay ugale	1	02/18/2026	03/17/2026	02/18/2026	03/19/2026
<input type="checkbox"/>	5	Reminder	12312321	Default	vijay ugale	1	02/20/2026	03/17/2026		
<input type="checkbox"/>	6	Reminder	Reminder	Default	vijay ugale	1	02/20/2026	03/17/2026		
<input type="checkbox"/>	7	Reminder	sd	Default	vijay ugale	1	02/23/2026	03/17/2026		
<input type="checkbox"/>	8	Reminder	erghj	Default	vijay ugale	1	02/23/2026	03/17/2026		
<input type="checkbox"/>	9	Reminder	trewq	Default	vijay ugale	1	02/23/2026	03/17/2026		
<input type="checkbox"/>	10	Reminder	checkadd	Default	vijay ugale	1	02/24/2026	03/17/2026		

17 Items

<https://globby.optbyte.io/optbyte/requestlist/#pills-projectList>