TECKLE SAAS PROJECT

THESIS REPORT

Submitted in partial fulfilment of the requirements for the award of the degree

Of

MASTER Of DESIGN
In
INTERACTION DESIGN

submitted by

SEJAL
2k22/MDID/09

Guided by

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CERTIFICATE

This is to certify that the project entitled **Teckle Saas Project** is being submitted at DTU, Delhi for the award of M**aster's in Design** in **Interaction Design** degree. It contains the record of Bonafide work carried out by **SEJAL 2k22/MDID/09** under my supervision and guidance. It is further certified that the work presented here has reached the standard of M.Des and to the best of my knowledge has not been submitted anywhere else for the award of any other degree or diploma.

Ms. Taruna Singh
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Date:
Place:

ACKNOWLEDGEMENT

I would like to express my sincere gratitude who supported and guided me throughout the development of this Teckle Saas project. This internship was a tremendous learning experience, and I am deeply appreciative of the invaluable guidance and encouragement I received.

First and foremost, I would like to thank my mentors, who provided insightful advice and constructive feedback at every step of the project. Their expertise and dedication were instrumental in shaping the direction and success of this work.

A special thanks to my manager, whose leadership and support were crucial in navigating the challenges and complexities of this project. Their continuous encouragement and trust in my abilities motivated me to strive for excellence.

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Lastly, I would like to extend my heartfelt thanks to the entire team at Whitechalk. The collaborative spirit, willingness to help, and shared dedication of my colleagues made this project a truly rewarding experience. Their expertise and support were vital in bringing this project to fruition.

Thank you all for your support and belief in my potential. This project would not have been possible without your guidance and encouragement.

Sejal

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DECLARATION

I, **Sejal**, solemnly declare that the project report, **Internship- Teckle SaaS PROJECT,** is based on my own work carried out during the internship at WHITECHALK, Gurgaon and course of our study under the supervision of **MS. Taruna Singh**. I assert that the statements made in this document, and conclusions drawn are an outcome of my project work. I further certify that:

I. The work contained in the report is original and has been done by me under the supervision of my guide.
II. The work has not been submitted to any other Institution for any other degree/diploma/certificate in this university or any other University of India or abroad.
III. We have followed the guidelines provided by the university in authoring the report.
IV. Whenever we have used materials (text, data, tables, pictures, text, links etc.) from other sources, we have given credit to them in the report and have also given their details in the references.

Sejal

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LIST OF ABBREVIATIONS

Abbreviation	Description
SAAS	Software as a Service
IA	Information architecture
UI	User Interface
UX	User Experience
PDF	Portable Document Format
CTA	Call to action
API	Application Programming Interface

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ABSTRACT

Project management tools play a crucial role in the productivity and success of freelancers and small agencies. However, existing solutions often fail to address their unique needs, leading to fragmented workflows and increased costs. This thesis focuses on enhancing Teckle, a cloud-based SaaS project management tool, to better cater to the requirements of freelancers and small agencies. Features such as proposal creation, contract management, invoices and task tracking were prioritised based on user needs and feasibility.

The major findings reveal a pressing need for a centralised, cost-effective solution that streamlines project management processes. Through iterative prototyping and usability testing, a user-friendly interface was developed, incorporating customisable templates, integrated workflows, and simplified processes. The final design emphasises consistency, intuitiveness, and efficiency.

In conclusion, the thesis presents a comprehensive approach to enhancing project management tools for freelancers and small agencies. By addressing the specific needs and challenges of the target audience, the proposed solution aims to improve productivity, reduce costs, and enhance overall client satisfaction.

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CHAPTER 1: INTRODUCTION

This thesis presents the work undertaken during an internship at Whitechalk, focusing on enhancing Teckle, a cloud-based SaaS project management tool designed for freelancers and small agencies. The primary objective was to streamline project management processes by integrating features such as proposal creation, task tracking, invoicing, and client communication into a cohesive platform. Emphasising simplicity, usability, and an enhanced user experience, the project involved conducting thorough user research, developing interactive prototypes, and iterating designs based on feedback. The result is a more intuitive and efficient tool that addresses the unique needs of freelancers and small agencies, improving their workflow and productivity.

1.1 Company Profile

Whitechalk is a renowned full-service digital agency that specialises in delivering innovative solutions across various domains, including UX/UI design, web development, branding, content marketing, and product strategy. With a customer-centric approach, Whitechalk aims to create engaging experiences that drive growth and foster lasting relationships with businesses.

The agency stands out for its unified approach to building holistic solutions, seamlessly integrating product design, web development, and performance marketing campaigns. This unified strategy ensures scalability, consistency, and cohesion across all brand touchpoint, enabling clients to deliver a seamless and cohesive experience to their customers.

Whitechalk's diverse expertise and multidisciplinary team enable the agency to offer a comprehensive suite of services, positioning itself as a one-stop destination for all digital needs. By combining creativity, technical prowess, and strategic insights, Whitechalk empowers businesses to stay ahead in the ever-evolving digital landscape.

1.2 Role and Responsibilities

This thesis is based on a 14-week internship undertaken at Whitechalk, where the key responsibilities involved:

a. **Research and Design:** Conducting thorough user research and creating wireframes & designs for enhancing Teckle's features. This involved gathering insights from target users, analysing their pain points, and translating those findings into intuitive and user-centric design solutions.
b. **Design Improvements:** Regularly evaluating and iterating on the existing designs to enhance the overall user experience of Teckle. This process involved usability testing, incorporating user feedback, and implementing design improvements to ensure a seamless and delightful experience for users.
c. **Client Projects:** Assisting the design team with client projects at Whitechalk, as required. This exposure provided valuable hands-on experience in collaborating with cross-functional teams, adhering to project timelines, and delivering high-quality design solutions tailored to client requirements.

Throughout the internship, a strong emphasis was placed on maintaining a prominent level of professionalism, adhering to project timelines, and fostering effective communication within the team. The internship provided a supportive and collaborative environment, with access to guidance and mentorship from experienced team members, enabling continuous learning and professional growth.

1.3 Project Introduction

In today's dynamic business environment, effective project management is crucial for the success of freelancers and small agencies. These professionals often face unique challenges such as balancing multiple projects, maintaining client satisfaction, and ensuring profitability. Recognizing these needs, the internship project centered on enhancing Teckle, a cloud-based SaaS project management tool specifically tailored for freelancers and small agencies.

The internship project revolved around the enhancement of Teckle, a cloud-based SaaS project management tool specifically tailored to meet the needs of freelancers and small agencies. Teckle stands out in the competitive landscape by offering a comprehensive solution that consolidates various project management functions into a single, centralised platform. This includes essential features such as proposal creation, task tracking, invoicing, budget reporting, and client communication. Here in Figure 1 is the onboarding page of Teckle.

1.3.1 Overview of Teckle

Teckle distinguishes itself by offering a comprehensive solution that integrates various project management functions into a single, centralized platform. Key features include proposal creation, task tracking, invoicing, budget reporting, and client communication. These functionalities are designed to streamline workflows, improve project transparency, and enhance client collaboration, thereby empowering users to manage projects more efficiently.

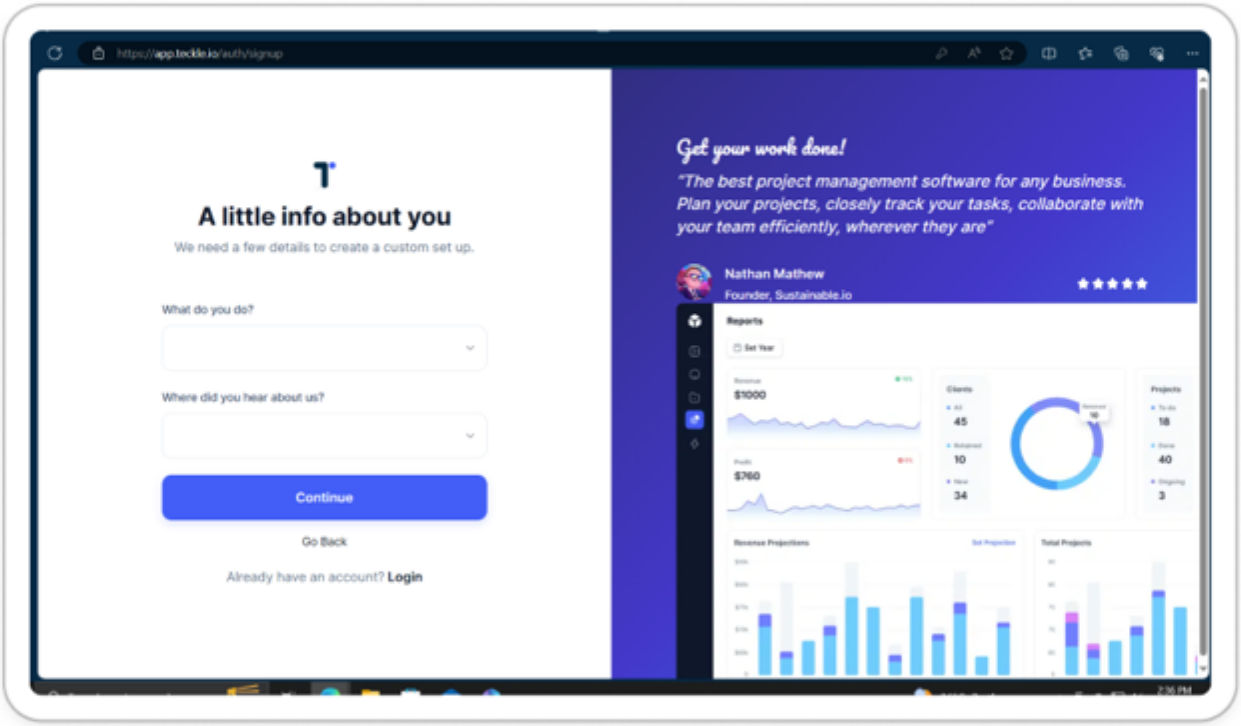

Figure 1 - Teckle Home page

The overarching goal of the project was to elevate the user experience while maintaining the simplicity and usability that Teckle users value. This involved a strategic focus on redesigning the user interface (UI) to enhance aesthetics and functionality. By infusing the platform with a fresh, modern look and feel, we aimed to create an environment that is not only efficient but also visually appealing and enjoyable to work with.

The internship project was driven by a commitment to optimising project management processes for freelancers and small agencies. By streamlining workflows and centralising essential functions, Teckle empowers users to manage their projects more effectively and efficiently. Through innovative design and thoughtful implementation, the project sought to redefine the standard for project management software, setting a new benchmark for simplicity, usability, and overall user experience. The primary objective of this internship project was to contribute to the ongoing development and refinement of Teckle. Through collaborative efforts, the project aimed to enhance the tool's functionality, usability, and integration capabilities.

1.3.2 Problem Statement

Project management tools have become indispensable for businesses across various industries, facilitating organisation, collaboration, and efficiency in project workflows.

However, while these tools offer numerous benefits, they often fall short in meeting the distinct needs of freelancers and small agencies. These user groups operate within unique constraints and requirements, necessitating a tailored approach to project management software.

1.3.3 Challenges Faced by Freelancers and Small Agencies:

- Managing multiple platforms for various aspects of project management, leading to fragmented workflows and data siloes.
- Incurring high subscription costs for various tools, making it financially burdensome, especially for small businesses.
- Lack of integration and data centralisation, resulting in inefficiencies and potential data loss or inconsistencies.
- Limitations in existing tools that fail to address the specific requirements of freelancers and small agencies, such as customisable templates, collaborative features, and invoicing capabilities.

This gap in the market presents a significant opportunity for Teckle to address the pain points of these user groups by offering a comprehensive and tailored solution that consolidates project management functions into a single platform.

1.3.4 Empathy: Understanding User Frustrations and Needs

To effectively address these challenges, it's essential to empathize with the frustrations experienced by freelancers and small agencies. These professionals face daily pressures to deliver high-quality work while managing operational complexities:

- **Juggling Multiple Platforms:** Managing multiple tools not only consumes time but also creates mental overhead as users switch between interfaces and struggle to reconcile data from different sources.
- **Financial Constraints:** Small agencies operate on tight budgets, and the cumulative costs of multiple subscriptions can strain financial resources, limiting investment in business development and client acquisition.
- **Efficiency and Productivity:** Simplifying workflows and enhancing productivity are paramount. A desire for tools that are intuitive, user-friendly, and cost-effective drives the search for integrated solutions that streamline project management tasks.

Teckle recognizes these pain points and aims to provide a comprehensive solution that consolidates all essential project management functions into a single platform. By offering customizable templates, robust collaboration features, seamless invoicing capabilities, and integration with other essential tools, Teckle seeks to empower freelancers and small agencies to manage their projects more efficiently and effectively. The goal is to alleviate the burden of fragmented workflows, reduce costs associated with multiple subscriptions, improve data consistency through centralized information management, and ultimately enhance overall business performance.

In addressing these challenges and understanding the needs of its users, Teckle not only aims to fill a gap in the market but also strives to become a trusted partner in the success and growth of freelancers and small agencies.

CHAPTER 2: DESIGN PROCESS

The design process for Teckle was a meticulously planned and executed journey, focusing on creating a user-centric project management tool tailored for freelancers and small agencies. This process involved several key stages, including research, defining user needs, ideation, prototyping, and iterative testing. Each stage was integral to ensuring that the final product not only addressed the unique pain points of the target audience but also provided an intuitive and seamless user experience. By leveraging design thinking principles and iterative methodologies, the project aimed to develop a robust, efficient, and enjoyable platform that enhances productivity and simplifies project management workflows.

2.1 Research

In the design process of enhancing Teckle, comprehensive research was conducted to understand the unique needs and pain points of freelancers and small agencies. This involved gathering insights through user interviews, surveys, and competitive analysis of existing tools like PandaDoc, Asana, and Proposify. The research identified key areas where current solutions fell short, such as the lack of integrated features, high subscription costs, and the need for streamlined workflows. These findings informed the development of Teckle, ensuring the platform was tailored to provide a seamless, user-centric project management experience that consolidates proposal creation, contract management, invoicing, and client communication into a single, efficient tool.

2.1.1 Current Scenario and User Feedback

Freelancers and small agencies often find themselves juggling multiple platforms for project management tasks, leading to fragmented workflows, and increased operational costs. During the initial stages of the internship project, user feedback sessions were conducted to understand the pain points and challenges faced by these user groups.

Before getting started **what was needed to-be address** are these questions:

1. What are the primary pain points faced by freelancers and small agencies in project management? In Figure -2 below
2. . What specific features are lacking in existing project management tools that cater to the needs of freelancers and small agencies?
3. How do freelancers and small agencies currently manage their proposals, contracts, and invoices?

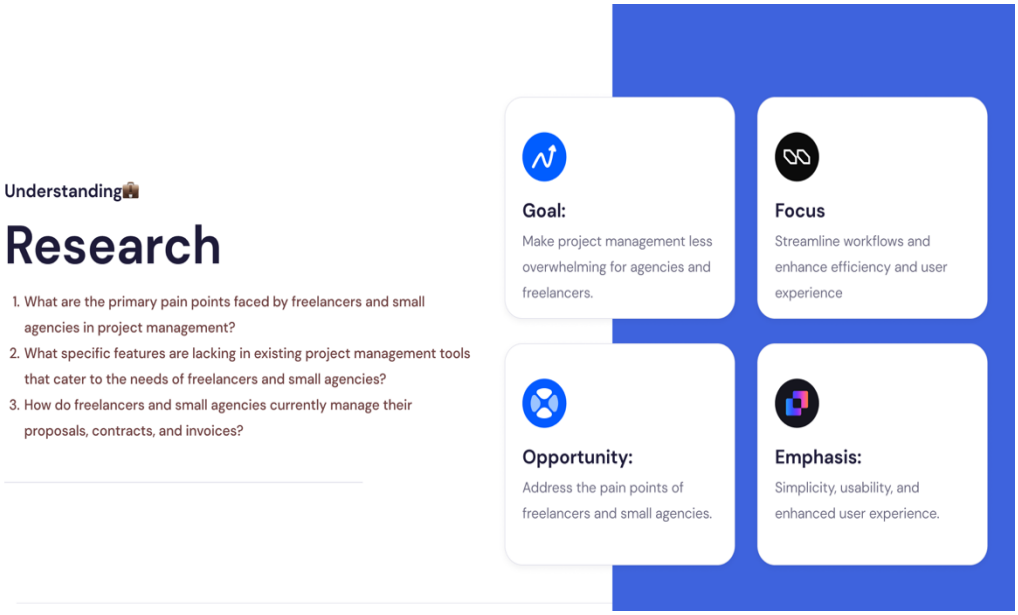

Figure 2 – Research questions

Evaluating Existing Saas:

Gap Analysis: Our research involved a meticulous evaluation of the features and functionalities offered by existing project management tools. By comparing these tools against the specific requirements of freelancers and small agencies, we identified significant gaps that hindered their ability to streamline their workflows. These gaps encompassed limited customisation options, insufficient collaborative features, and complexities associated with proposal and contract management.

Journey mapping in Figure- 3 of the current platform was conducted and mapped the pain points at each step to understand how the existing system is:

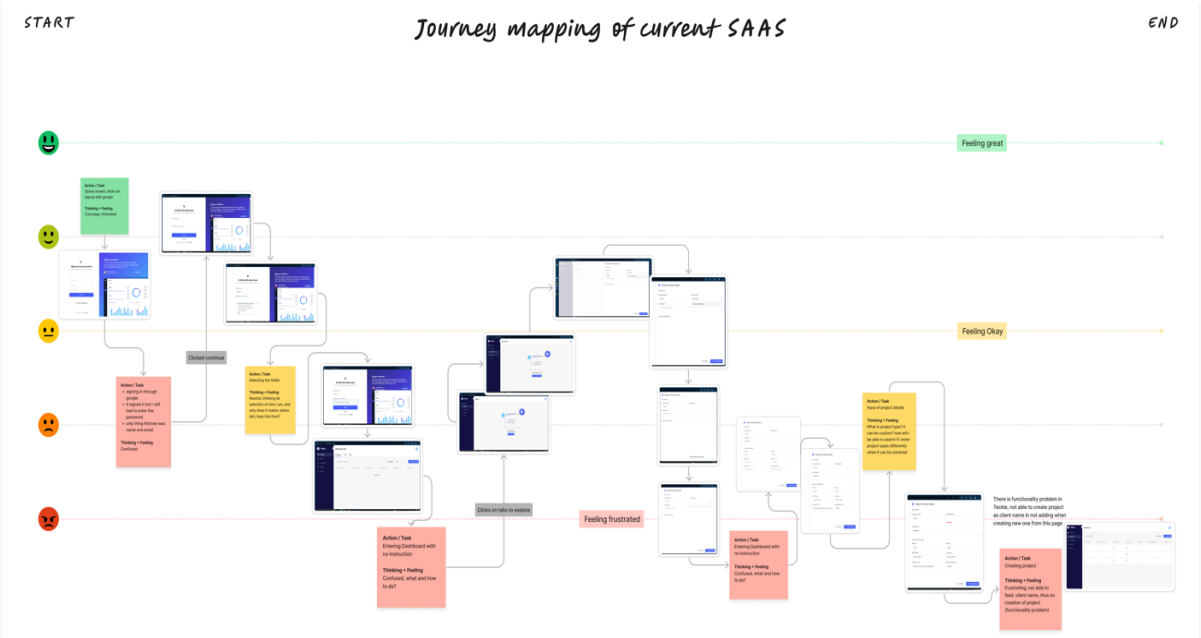

Figure 3– Journey mapping of current Saas

Current Workflow Analysis:
Insight into Proposal and Contract Management: To gain insight into how freelancers and small agencies currently manage their proposals, contracts, and invoices, we meticulously analysed their workflow. This involved dissecting the entire process from both the client's and freelancer/team's perspectives here in Figure- 4 below about What the proposal purpose.

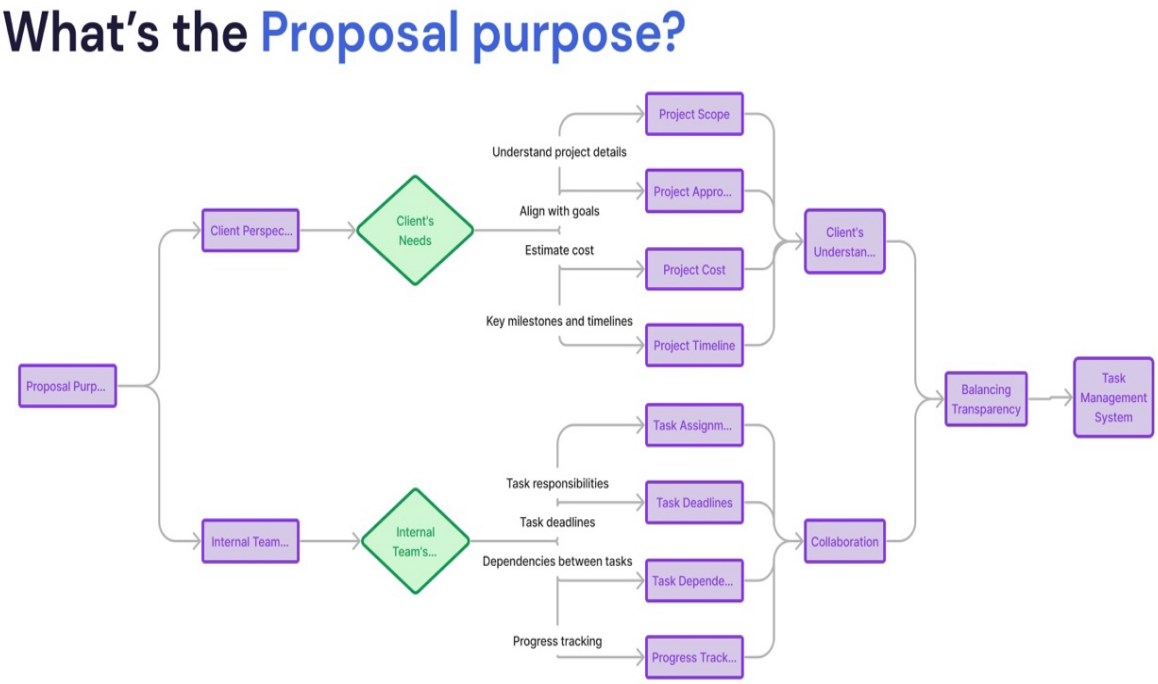

Figure 4 - Proposal purpose two perspective

Client Perspective Understanding: We delved into the client's journey, from the receipt of a proposal to the signing of a contract, examining their expectations, pain points, and preferred modes of communication throughout the process.

Freelancer/Team Perspective Analysis: On the freelancer or agency side, we meticulously examined the steps involved in creating, managing, and sending proposals to clients for approval. This encompassed internal team collaboration, customisation of documents to suit client needs, and monitoring the status of sent proposals.

2.1.2 Competitive Analysis

To gain a thorough understanding of the competitive landscape, an extensive competitive analysis was undertaken. This involved evaluating several prominent platforms, including **PandaDoc, Asana, and Proposify**, focusing on their features, usability, and pricing models as shown in Figure- 5. Each platform offered a variety of project management capabilities but revealed notable gaps in addressing the specific needs of freelancers and small agencies.

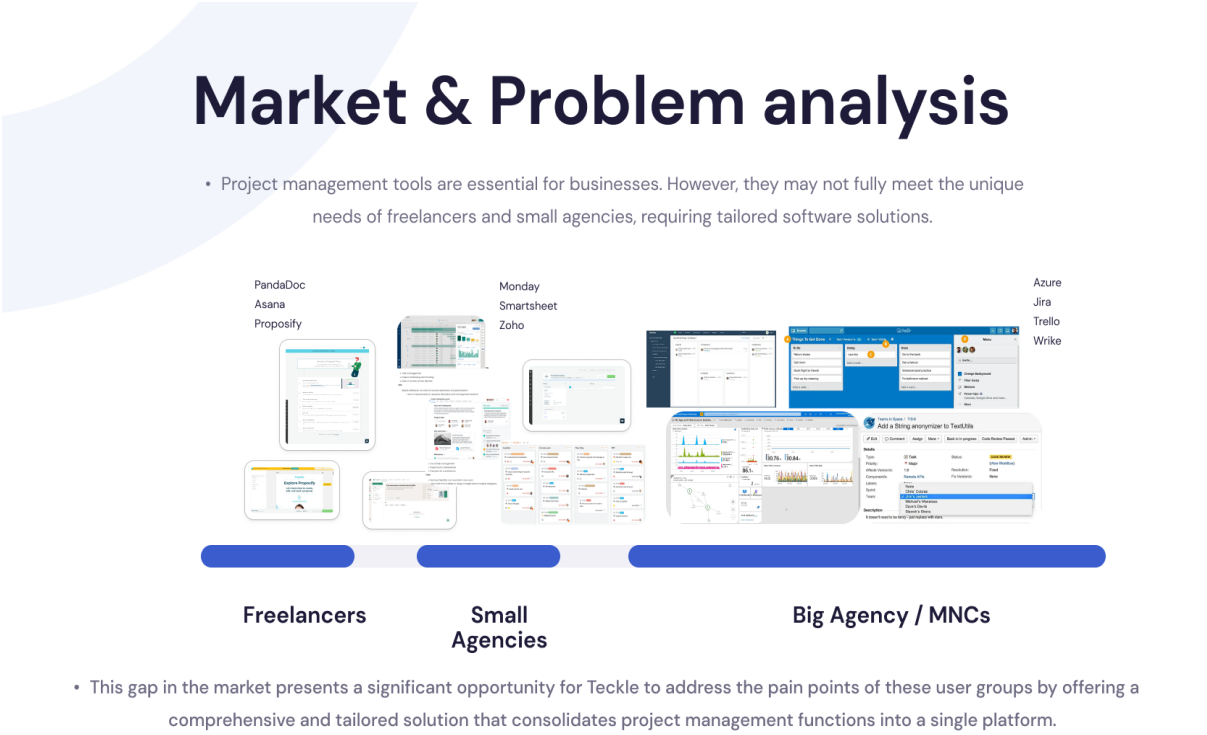

Figure 5 - Market & Problem analysis

Platforms Evaluated:

- **PandaDoc:**
  - **Strengths:**
    - Excels in document management and electronic signature capabilities.
    - Provides robust templates for creating professional documents.
  - **Weaknesses:**
    - Lacks comprehensive project management features.
    - Limited integration with other tools necessary for complete project workflows.
    - Users often need to rely on additional platforms for task management and client communication, leading to a fragmented user experience.
- **Asana:**
  - **Strengths:**
    - Renowned for its powerful task tracking and team collaboration features.
    - Offers a wide range of project management capabilities.
  - **Weaknesses:**
    - Does not handle proposals and invoicing efficiently without additional integrations.

        - This leads to a disjointed workflow, as users must switch between multiple platforms to manage various aspects of their projects.
        - Can be overwhelming for freelancers and small agencies due to its complexity and feature overload.
    - **Proposify:**
        - **Strengths:**
            - Specializes in proposal creation with robust templates and collaboration features.
            - Provides tools for tracking proposal status and obtaining electronic signatures.
        - **Weaknesses:**
            - Falls short in areas such as task management and client communication.
            - Requires supplementary tools to manage complete project workflows, resulting in inefficiencies.
- **Key Findings:**
    - **Fragmented Workflows:**
        - Existing tools often force users to switch between multiple platforms, leading to disjointed workflows and inefficiencies.
        - This fragmentation is particularly problematic for freelancers and small agencies that need a streamlined approach to manage their projects.
    - **Cost Implications:**
        - High subscription costs of multiple tools can be financially burdensome for small businesses.
        - A need exists for a cost-effective solution that consolidates essential features into one platform.
    - **Usability Issues:**
        - Many platforms are either too complex or lack necessary integrations, making them less suitable for freelancers and small agencies.
        - There is a significant opportunity to create a user-friendly tool that simplifies project management without sacrificing functionality.
- **Opportunity Identified:**
    - **Integrated Solution:**
        - Develop a unified project management tool that combines the best features of PandaDoc, Asana, and Proposify.
        - Aim to streamline processes such as proposal creation, contract management, task tracking, and invoicing within a single, cohesive platform.
    - **Tailored to Needs:**
        - Specifically address the unique requirements of freelancers and small agencies.

- Focus on creating a user-friendly interface that enhances productivity and provides a seamless user experience.

- **Cost-Effective:**
  - Offer a pricing model that is affordable for small businesses, providing high value without the need for multiple subscriptions.

By understanding these limitations, became clear that there was a need for a unified project management tool that combines the best aspects of these platforms. The envisioned solution would streamline processes such as proposal creation, contract management, task tracking, and invoicing within a single, user-friendly interface. This would not only enhance productivity but also provide a seamless and cohesive user experience tailored specifically to the unique demands of freelancers and small agencies.

2.1.3 Pain Points

Common issues highlighted included the disjointed nature of existing solutions, the financial burden of subscribing to multiple tools, and the lack of integration resulting in inefficiencies and potential data loss. It became evident that there was a pressing need for a centralised, cost-effective solution that could cater specifically to the requirements of freelancers and small agencies.

a. Fragmented Workflows:

Freelancers and small agencies often find themselves navigating through a maze of disparate platforms for distinct aspects of project management. From proposal creation to task tracking and invoicing, the use of multiple tools leads to fragmented workflows and data siloes. This fragmentation hampers productivity increases the risk of errors and complicates collaboration among team members.

b. Financial Burden of Subscription Costs:

The cost of subscription-based project management tools can pose a significant financial burden, particularly for small businesses with limited budgets. Subscribing to multiple tools to fulfil various project management needs can quickly escalate expenses, impacting the bottom line and hindering growth opportunities.

c. Lack of Integration and Data Centralisation:

Existing project management solutions often lack robust integration capabilities, resulting in disparate data scattered across multiple platforms. This lack of integration leads to inefficiencies in data management and communication, as users struggle to synchronise information across different tools. As a result, critical project data may be fragmented, leading to potential data loss or inconsistencies.

d. Limitations in Feature Set:

Many off-the-shelf project management tools are designed with larger enterprises in mind, overlooking the specific requirements of freelancers and small agencies. These

users often require customisable templates, collaborative features, and invoicing capabilities tailored to their unique workflows. However, existing tools may lack the flexibility and scalability needed to accommodate these requirements effectively.

e. Limitations in Existing Tools:

Many off-the-shelf project management tools fail to adequately address the specific needs of freelancers and small agencies. Customisable templates, collaborative features, and invoicing capabilities are often limited or non-existent, forcing users to resort to manual workarounds or third-party solutions. This lack of tailored functionality hampers productivity and efficiency, hindering the ability of freelancers and small agencies to compete effectively in their respective markets.

Proposed Solutions:

Armed with the insights gleaned from our research efforts, we embarked on the design and development of Teckle, with a clear objective of addressing the identified pain points and enhancing the overall user experience. By aligning our solutions with the specific needs and preferences of freelancers and small agencies, we aimed to deliver a platform that simplifies project management processes and fosters efficiency and productivity.

2.2 Define

In the define phase of the project, the insights gathered from the research were synthesised to establish a clear understanding of user needs and project requirements. The primary pain points identified were the fragmentation of project management tools, excessive costs, and lack of integration. To address these, a comprehensive information architecture was created, outlining the navigation flow from document management to proposal, contract, and personal document sections. This architecture included features such as customisable templates, collaborative editing, version history tracking, and seamless client interaction for proposals and contracts. By defining these elements, a solid foundation was established for designing a user-centric, streamlined project management solution tailored specifically for freelancers and small agencies.

2.2.1 Project Management SAAS: Understanding User Needs

In-depth research was undertaken to understand how freelancers and small agencies utilise project management software in their daily operations. User personas were developed based on interviews and observations, capturing the goals, pain points, and workflow preferences of the target audience. It became clear that these users required a solution that could facilitate proposal creation, contract management, task tracking, and invoicing within a single platform. Customisable templates, collaborative features, and simplified processes emerged as key requirements, highlighting the importance of developing a user-cantered solution that addresses these needs effectively.

2.2.2 User persona

User personas are fictional yet realistic representations of the target audience, created to understand their needs, behaviours, and goals. They help in humanising the design process, ensuring that the product development is user centred. By identifying key characteristics, pain points, and motivations of typical users, personas guide design decisions and prioritise features that enhance user experience. In the context of the Teckle project, personas were developed for freelancers and small agency representatives, reflecting their unique challenges and requirements in project management. These personas in Figure- 6 served as a foundation for creating tailored solutions that address specific user needs and improve overall satisfaction with the platform.

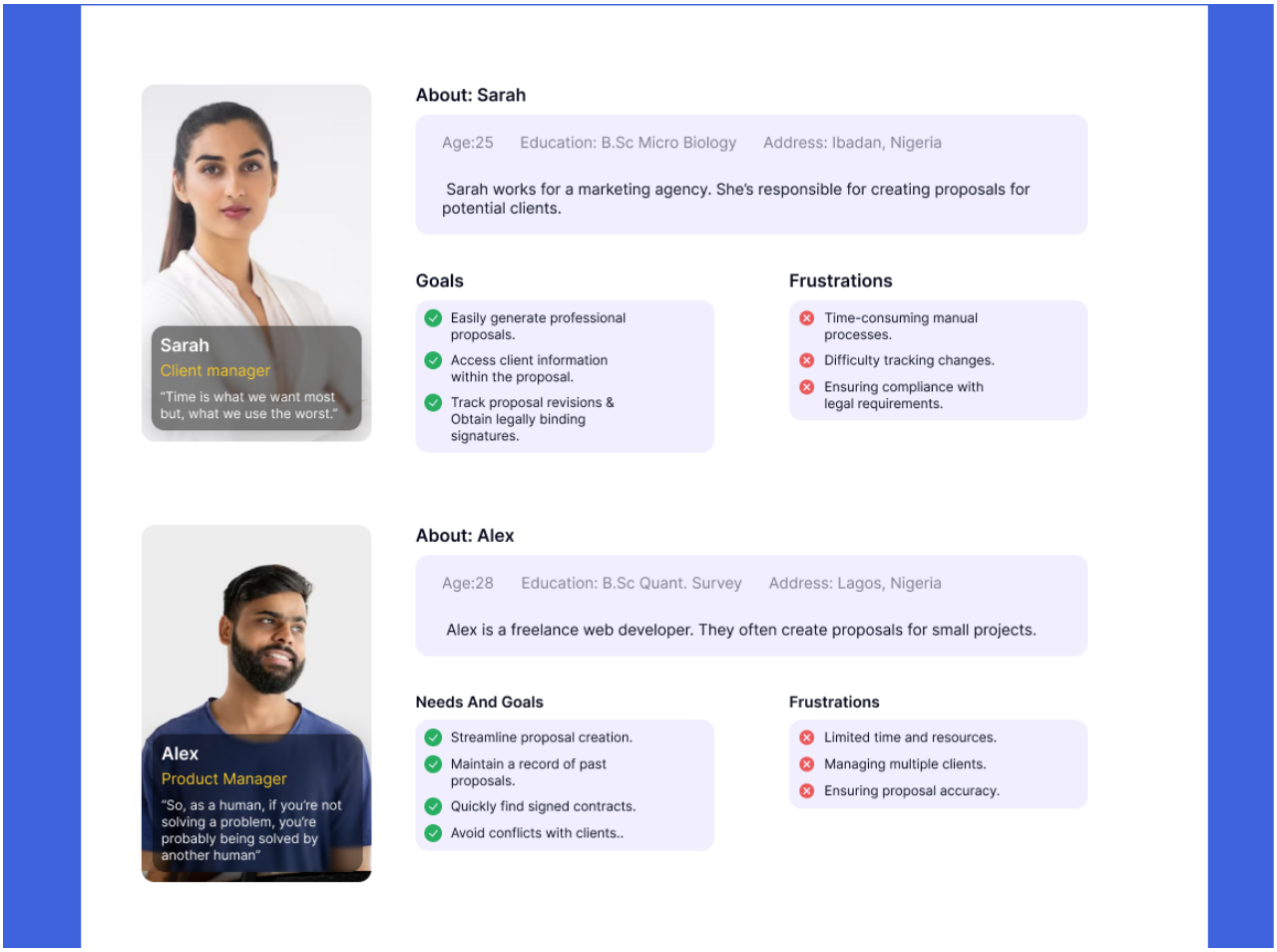

Figure 6– User personas

Client Manager - Sarah:

Background: Sarah works for a marketing agency. She is responsible for creating proposals for potential clients.

Needs and Goals:

- Easily generate professional proposals.
- Access client information within the proposal.

- Track proposal revisions.
- Obtain legally binding signatures.

Pain Points:

- Time-consuming manual processes.
- Difficulty tracking changes.
- Ensuring compliance with legal requirements.

Freelancer - Alex:

Background: Alex is a freelance web developer. They often create proposals for small projects.

Needs and Goals:

- Streamline proposal creation.
- Maintain a record of past proposals.
- Quickly find signed contracts.
- Avoid conflicts with clients.

Pain Points:

- Limited time and resources.
- Managing multiple clients.
- Ensuring proposal accuracy.

Stakeholders:

Clients:

Need clear, well-organized proposals.
Want easy access to signed contracts.
Prefer a straightforward process for reviewing and accepting proposals.

Proposal Creators (Agency Staff, Freelancers):

Need efficient tools for proposal creation.
Want a system that maintains revision history.
Prefer a legally binding process for contract signing.

Scenarios:

Creating a New Proposal:

- Sarah wants to create a proposal for a potential client. She needs to input project details, customize sections, and ensure legal compliance.
- Alex wants to quickly draft a proposal for a web development project. He selects relevant components and adds client-specific information.

Tracking Revisions:

- Sarah revises a proposal based on client feedback. She needs to track changes and maintain a history of revisions.
- Alex wants to review past proposals to reuse content and learn from successful ones.

Obtaining Signatures:

- Sarah sends the proposal to the client for review. Once approved, she needs a secure way to obtain electronic signatures.
- Alex wants a seamless process for clients to sign contracts online.

Accessing Signed Proposals:

- Sarah needs to find a signed proposal from last year for reference. She wants an organized repository.
- Alex wants to download a signed contract to share with his accountant.

2.2.3 Identifying Pain Points and Creating Solutions

The research phase identified several pain points experienced by freelancers and small agencies, including the need for a unified platform that could streamline project management processes. The proposed solution aimed to address these pain points by offering customisable templates, integrated workflows, and simplified processes. Consider figure- 6.1 where rough features of proposal were sketch out as mind map. By prioritising features such as proposal creation, contract management, and task tracking, the project sought to provide a comprehensive solution that met the specific requirements of the target audience.

User-Friendly Proposal Creation:

- **Dashboard:** Upon logging into SAAS Teckle, users are greeted with a clean and intuitive dashboard. A prominent "New Proposal" button stands out, inviting users to initiate the proposal creation process seamlessly.
- **Proposal Templates:** To expedite the proposal creation process, SAAS Teckle offers a range of professionally designed templates tailored for various industries and purposes. These templates provide users with a structured framework, saving valuable time and effort.
- **Customisation:** Users have the flexibility to customise the selected template to align with their brand identity. They can easily incorporate their company logo, adjust fonts, and personalise colours to create a cohesive and professional-looking proposal.

Proposal Content Creation:

- **Sections and Blocks**: SAAS Teckle organises proposals into distinct sections such as Introduction, Solution, Pricing, and Timeline. Within each section, users can add customisable content blocks, allowing for granular control over the proposal's structure and narrative flow.
- **Rich Text Editor:** It incorporates a robust WYSIWYG editor, enabling users to format text, insert images, and embed multimedia elements seamlessly. This feature enhances the visual appeal and readability of the proposal, capturing the attention of clients effectively.

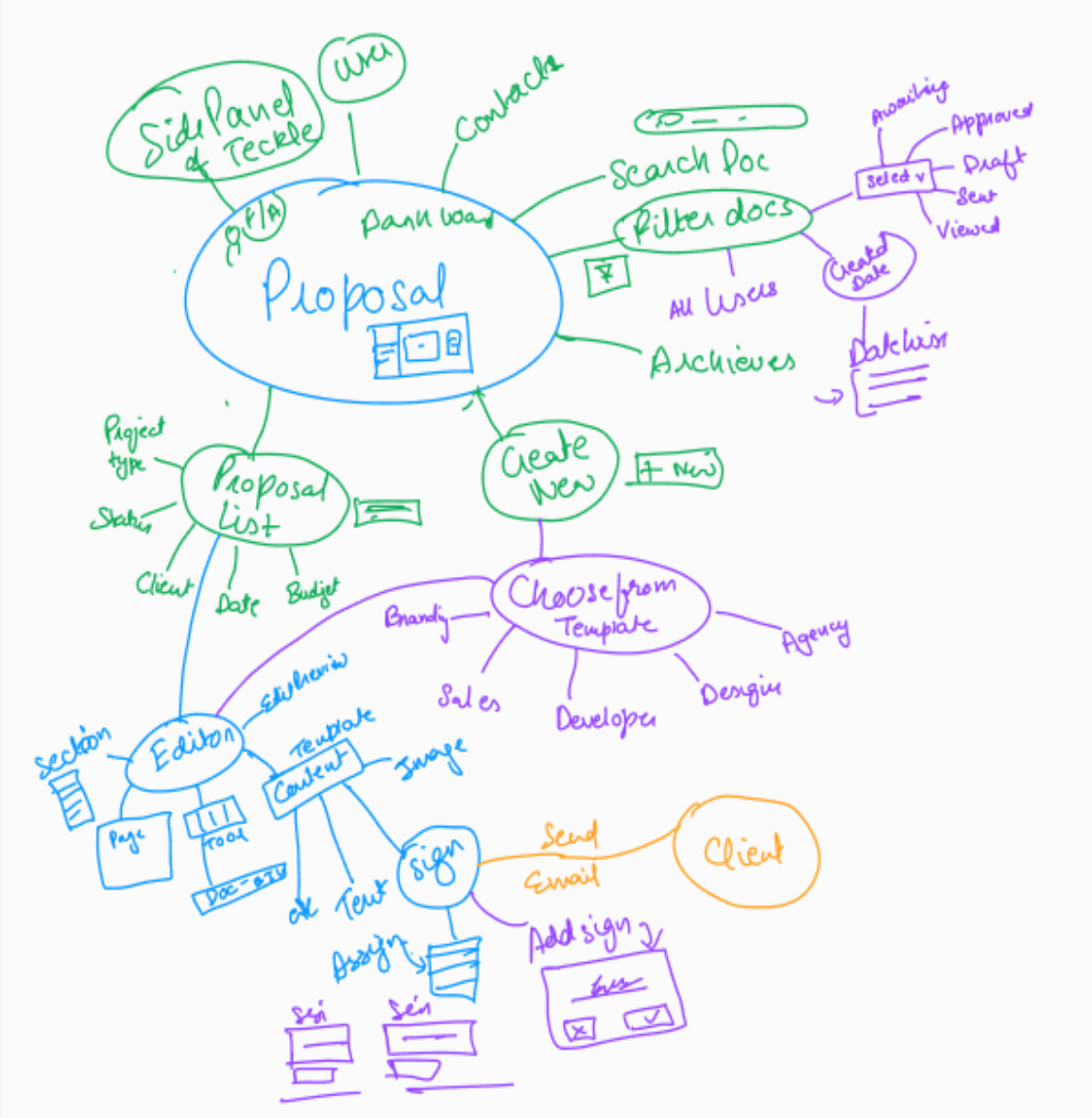

Figure 7– Mind map of proposal features

Client Collaboration:

- **Collaboration Mode:** SAAS Teckle facilitates real-time collaboration between users and clients. Clients can access the proposal remotely, view its contents, and provide feedback directly within the platform.
- **Comments and Feedback:** Clients have the option to leave comments and suggestions directly on the proposal, fostering transparent communication and facilitating iterative improvements. Users receive real-time notifications for new feedback, ensuring timely response and resolution.
- **Version Control:** SAAS Teckle maintains a comprehensive version history of each proposal, allowing users to track changes over time and revert to previous iterations if necessary. This ensures data integrity and compliance with regulatory requirements.

Electronic Signatures:

- **Signature Blocks:** At the conclusion of the proposal, SAAS Teckle integrates signature blocks where clients can electronically sign the document. Users have the flexibility to specify the required signature locations within the proposal.
- **Client Sign-Off:** Clients can sign the proposal electronically using their mouse or touchscreen, eliminating the need for manual signatures, and streamlining the approval process. SAAS Teckle records the date and time of each signature, providing an audit trail for legal and compliance purposes.

Proposal Approval Workflow:

- **Internal Review:** Before finalising the proposal, users can share it internally for review and feedback. SAAS Teckle facilitates seamless collaboration among team members, ensuring consensus and alignment before client delivery.
- **Approvals:** Users can configure customised approval workflows within SAAS Teckle. For instance, proposals may require approval from designated stakeholders such as sales managers or legal representatives before being sent to clients.
- **Notifications:** SAAS Teckle sends notifications to users at key stages of the approval process, keeping them informed of any updates or changes. This proactive approach enhances transparency and accountability throughout the workflow.

Proposal Delivery and Storage:

- **Options**: Once finalised, users have multiple options for delivering the proposal to clients. They can choose to send it via email directly from SAAS Teckle, generate a shareable link for online access, or download a PDF for offline distribution.
- **Centralised Storage:** SAAS Teckle automatically archives all proposals in a dedicated folder within the platform. This centralised storage system ensures easy access to past proposals, fostering organisation and efficiency in document management.
- **Search and Filter:** To facilitate quick retrieval of proposals, SAAS Teckle offers robust search and filtering capabilities. Users can search for specific proposals by keywords, client names, or dates, significantly reducing the time spent on document retrieval.

Analytics and Follow-Up:

- **Proposal Tracking:** SAAS Teckle provides users with comprehensive analytics on proposal engagement. Users can track metrics such as client interactions, time spent on each section, and page revisit rates, gaining valuable insights into client preferences and behaviours.
- **Follow-Up Reminders:** Users can set automated reminders within SAAS to follow up with clients after proposal delivery. These reminders help maintain engagement and facilitate timely communication, increasing the likelihood of proposal acceptance.

2.2.4 Initial Phase: Establishing Information Architecture (IA)

In the foundational stage of the project, the primary objective was to establish a robust Information **Architecture (IA)** that forms the backbone of the platform's structure and navigation here shown in figure-7. This involved meticulous planning and organisation to ensure seamless user interaction and efficient access to key features.

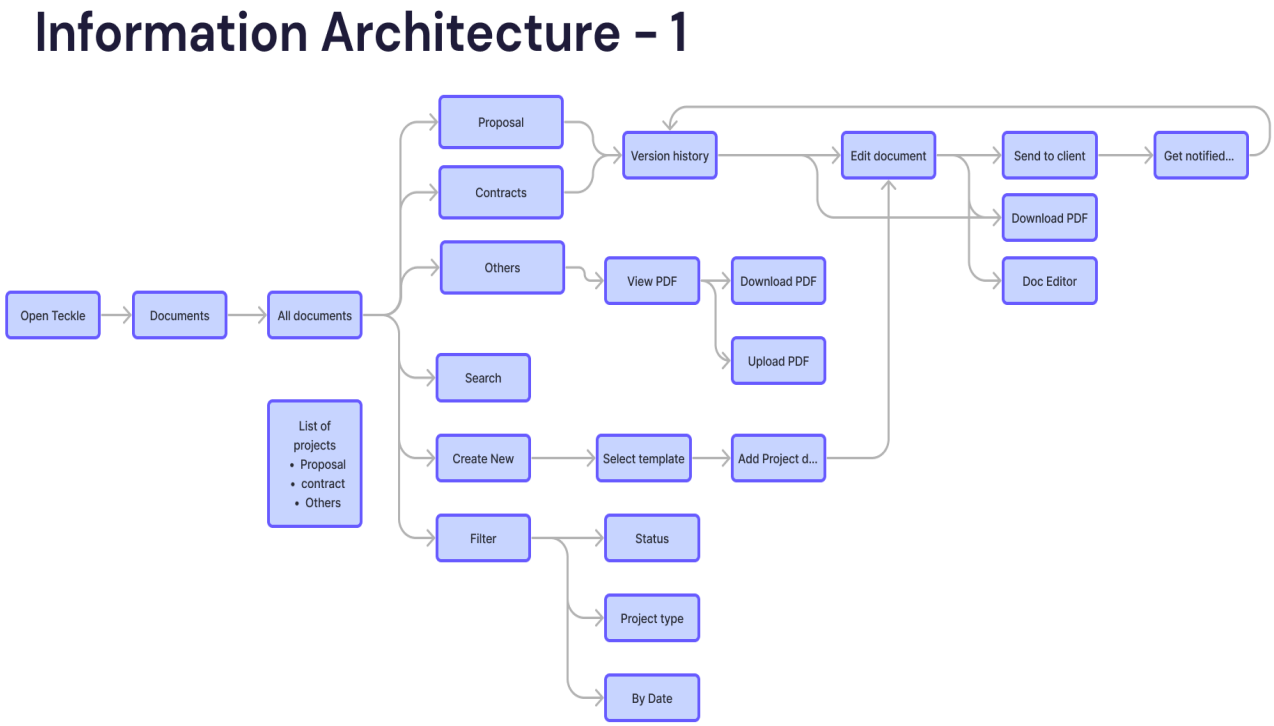

Figure 8– Information Architecture

2.3 Ideate

In the ideate phase, creative brainstorming sessions were conducted to generate innovative solutions to the identified pain points. Various design concepts were explored through sketching and creating wireframes, focusing on simplifying the user experience while ensuring robust functionality. The initial ideas were visualised into multiple prototypes, considering the feedback loop from potential users. Key features such as an intuitive drag-and-drop proposal editor, integrated client communication tools, and a centralised document management system were ideated. These concepts aimed to streamline workflows, enhance usability, and provide a cohesive project management experience tailored to freelancers and small agencies.

2.3.1 Sketches and Wireframes

During the initial stages of the project, emphasis was placed on developing initial sketches and wireframes to visualize the proposed solution for Teckle. The primary goal was to create a user-friendly interface that would enable freelancers and small agencies to navigate seamlessly through various functionalities such as proposal creation, document management, and invoicing.

- **Designing for User-Friendliness and Functionality**
  The process began with brainstorming sessions and rough sketches that captured essential features and user interactions. These sketches evolved into detailed wireframes, which served as a blueprint for the design and development phases. Figure 9 illustrates one such wireframe, depicting the layout and structure envisioned for Teckle's interface.

- **Seamless Navigation and Integration**
  Key considerations during the wireframing process included ensuring intuitive navigation between different modules and functionalities. For example, the layout was designed to allow users to easily switch between drafting a proposal, managing project documents, and generating invoices without encountering complex menu structures or disjointed workflows.

Figure 9– Sketches of lo-fi wireframes

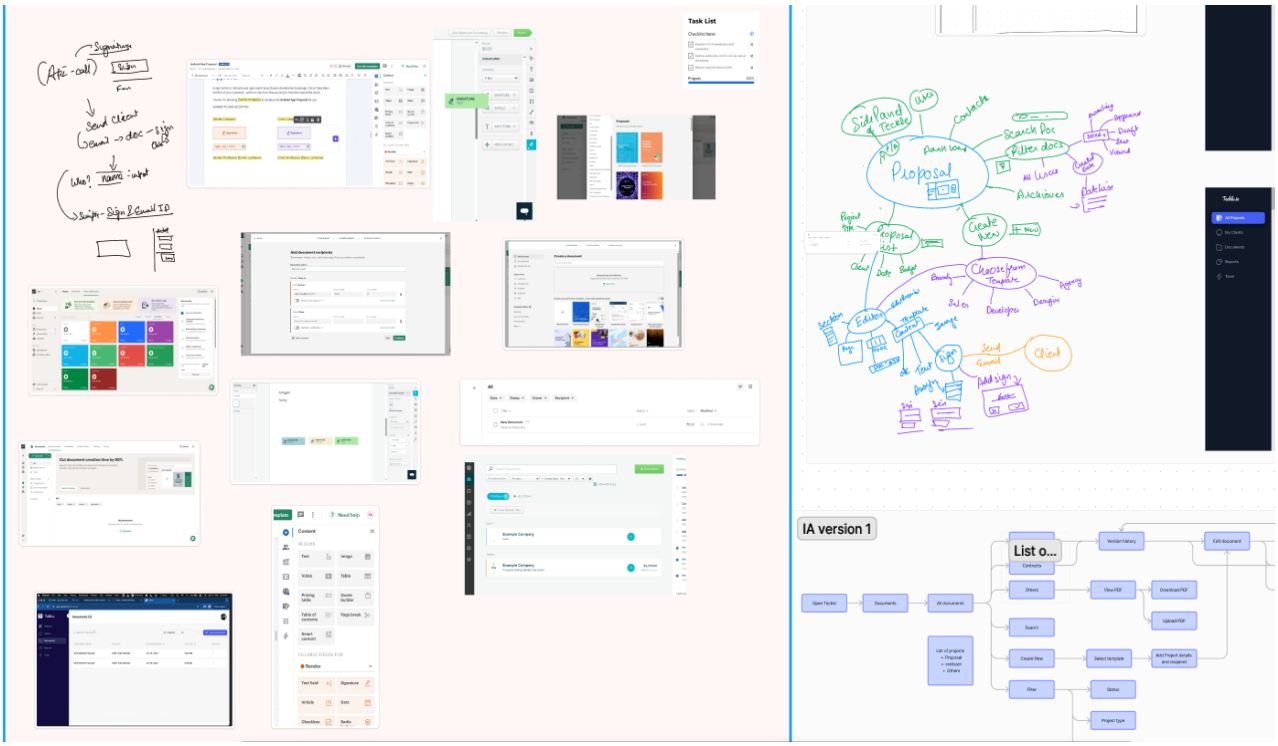

Figure 10 - Rough Research work

2.3.2 Iterative Design Process

Throughout the design process, regular feedback sessions were conducted with end-users to iterate on the designs and incorporate user suggestions. This iterative approach ensured that the proposed solution met the needs and expectations of the target audience effectively. By incorporating user feedback into the design process, the project aimed to create a solution that provided a seamless and intuitive user experience.

2.3.3 Information Architecture Enhancement

In response to the identified needs of freelancers and small agencies, a significant enhancement was made to the information architecture (IA) of Teckle. This involved the addition of a dedicated "Personal Document" section alongside existing sections for proposals and contracts.

a. **Purpose and Functionality:**

- **Enhanced User Flexibility:** The inclusion of a personal document section offers users the flexibility to manage both project-related documents and personal notes, lists, and tasks within a single platform. This streamlines their workflow and reduces the need to switch between multiple tools.
- **Comprehensive Document Management:** Users can now create, edit, and manage a wide range of personal documents, including to-do lists, notes, meeting agendas, and more. This empowers them to organise their work and personal tasks effectively within Teckle.

b. **Integrated Document Management Tabs**

With the addition of the personal document section, the IA of Teckle now features three primary tabs:

- **Proposals:** Dedicated to managing all aspects of proposal creation, customisation, and tracking.
- **Contracts:** Designed for seamless contract management, including drafting, negotiation, and signing processes.
- **Personal Documents:** Introduced to cater to users' personal organisation needs, allowing for the creation and management of personal notes, to-do lists, and other documents.

c. **Streamlined Workflow for Document Creation**

The final IA design incorporates a streamlined workflow for creating new documents directly from the home page. Users can effortlessly initiate the document creation process by selecting the desired document type (proposal, contract, or personal document) from the main navigation menu. This intuitive interface reduces friction and enhances user productivity by providing quick access to essential document creation functionalities.

d. **Home Page Flow:**

- **Project Section:** Users can access existing project-related documents, including proposals and contracts, within the projects section as shown in Figure – 11.
- **Personal Docs Section:** Positioned alongside the project section, the personal document section offers users convenient access to their personal notes, lists, and tasks.
- **New Document Creation:** By clicking on the "New" button, users can initiate the document creation process and select the desired document type from the dropdown menu. This initiates the creation flow, guiding users through the document customisation and editing process.

e. **Defining Document Navigation Flow:**

a. **Proposal Creation and Contract Management:** The IA was structured as shown in figure – 10 to facilitate smooth navigation for users to create and manage proposals and contracts effortlessly. This encompassed a series of steps, starting from the main dashboard and leading to template selection, data input, and access to editing tools for refining documents.

b. **Version History Integration:** Initially, a standalone page for version history management was envisioned. However, upon collaborative review and feedback, the decision was made to integrate this vital feature directly into the main dashboard. By adopting an accordion-style dropdown approach, users could conveniently access and manage different versions of their documents without navigating to a separate page.

c. **Personal Document Section:** Recognising the diverse needs of users, a dedicated section for personal documents was incorporated into the IA. Positioned strategically at the top of the document tabs, this section provided users with a convenient space to store and organise personal files, such as notes, lists, to-dos, and other miscellaneous documents.

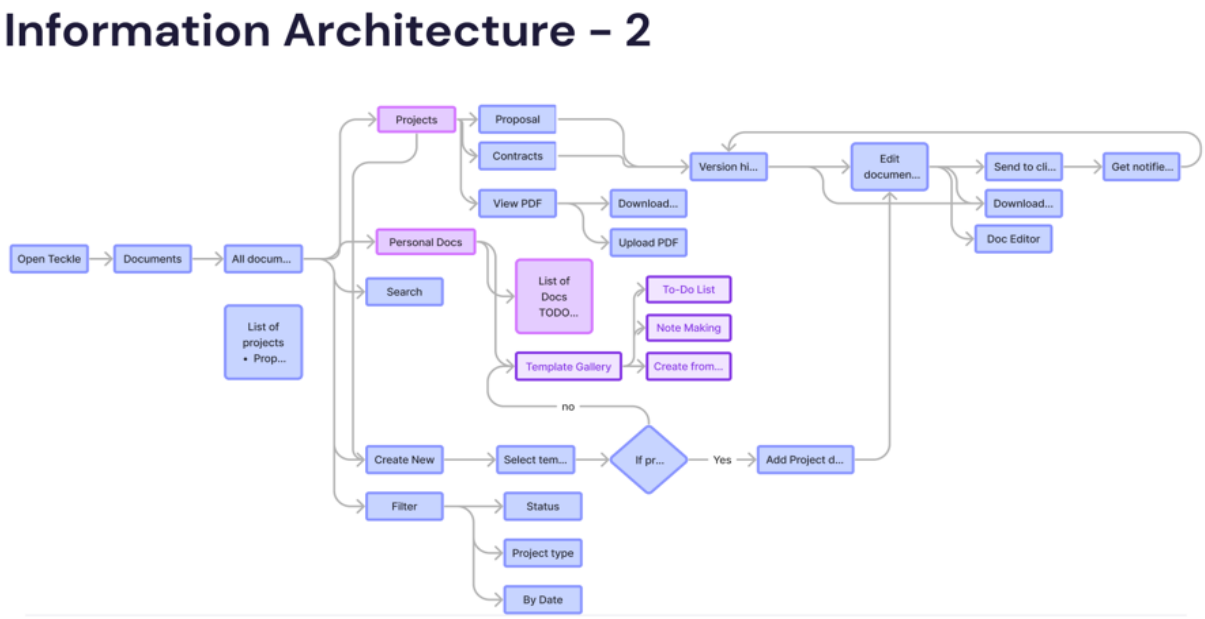

Figure 11 - Final IA for document section

2.3.4 Design Iterations: Refinement and Evolution

After defining the information architecture, the design was started for implementation of prototype. Several iterations with meetings and feedback from senior took place. Design iterations are a fundamental part of the creative process, allowing designers to refine and enhance their work iteratively. In the context of creating a SaaS dashboard for document management, the iterative approach ensures that the final product not only meets user expectations but also balances aesthetics and functionality.

a. **Wireframes:**
The design journey commenced with the creation of sketches and wireframes, serving as the initial blueprints for the platform's layout and functionality. These early-stage drafts provided a tangible visual representation of the proposed design direction, facilitating discussions and feedback from stakeholders. Several iterations took place as shown here in figure - 12.

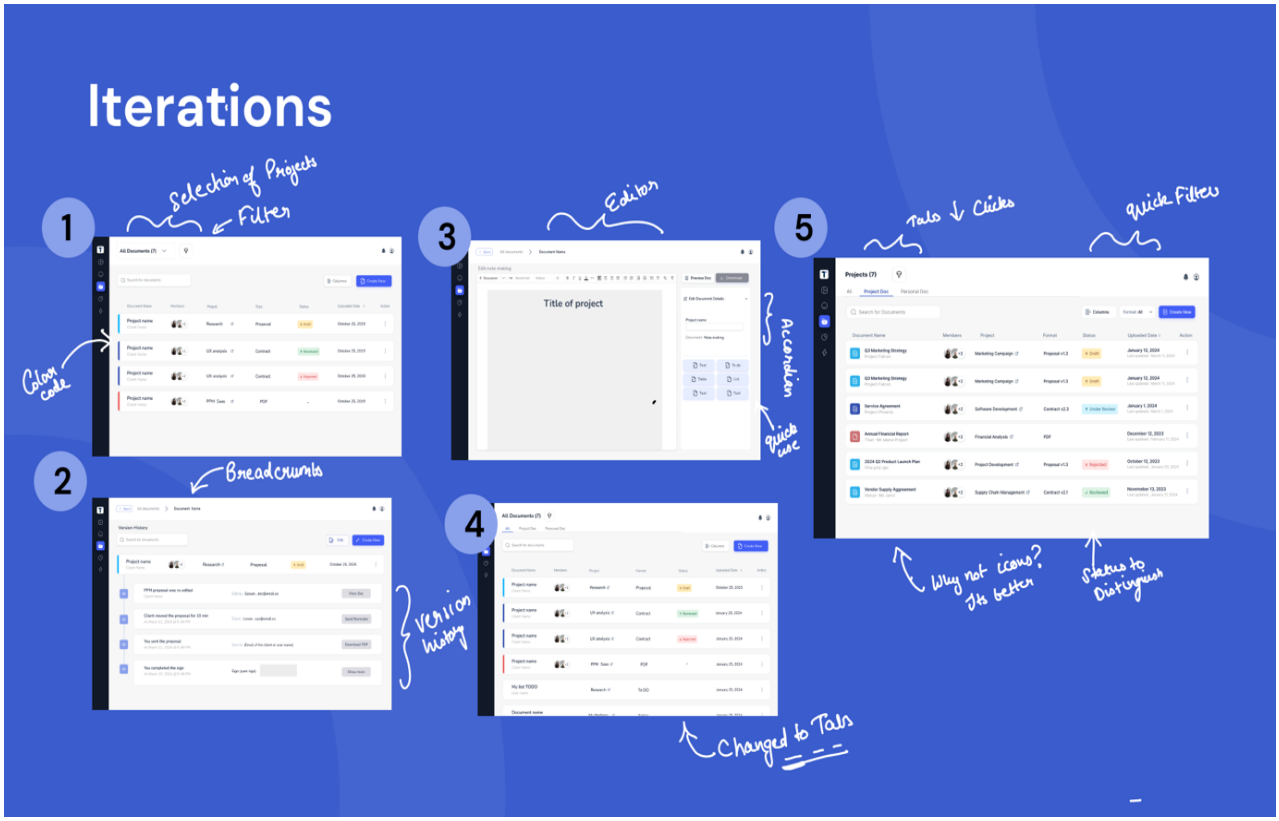

Figure 12 - Iterations of UI design

b. Colour-Based Designs:

Building upon the foundation laid by sketches and wireframes, the focus shifted towards developing colour-based designs to inject visual appeal and coherence into the interface in Figure -13. Various colour palettes and layouts were explored to establish a cohesive aesthetic that resonated with the project's objectives and target audience.

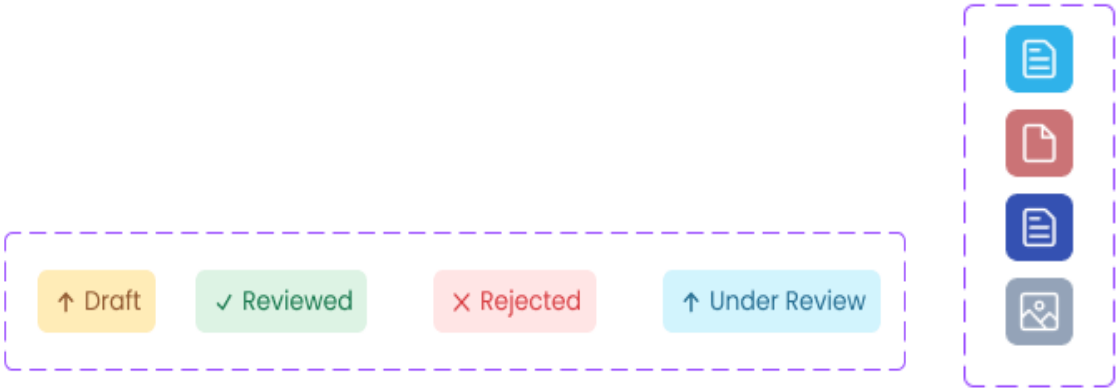

Figure 13 - Labels for different status of docs

c. Icon-Based Designs:

To enhance usability and clarity, icon-based designs were introduced to aid users in distinguishing between different document types seamlessly in Figure- 14 below. Carefully curated icons were selected and iterated upon to ensure optimal user comprehension, thereby enhancing the overall user experience.

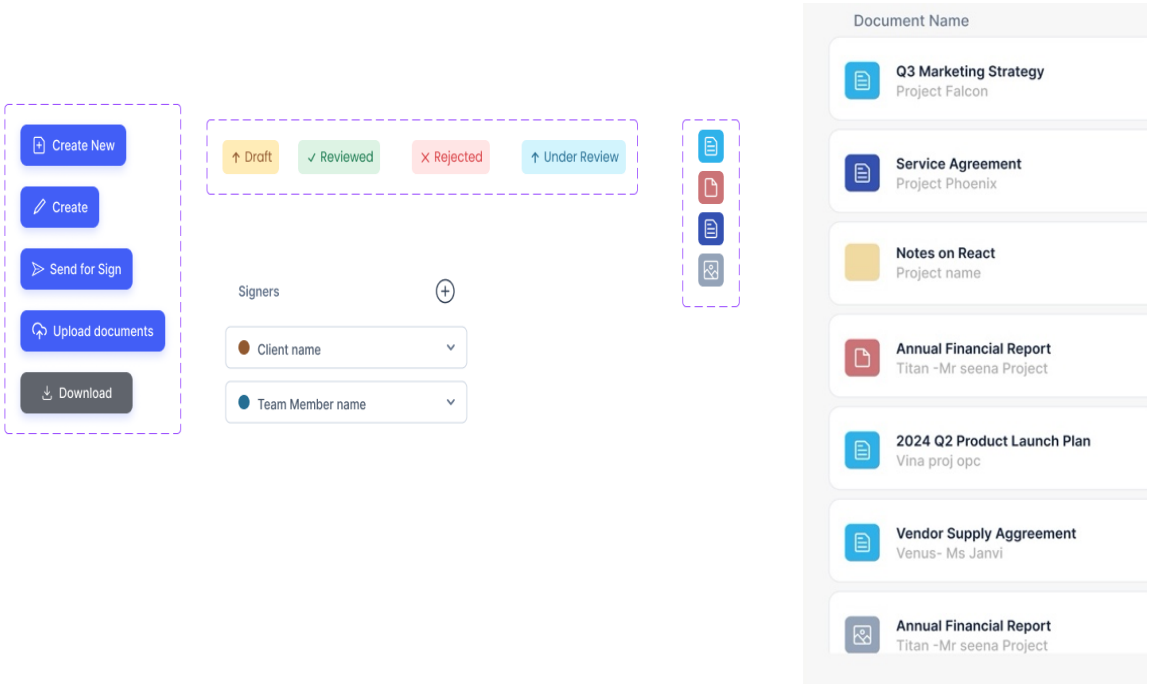

Figure 14 - Components and usage on doc list

d. Final Design: Integration and Validation

- **Continuous Iteration and User-Centered Refinement**

  The final design iteration of Teckle was achieved through a rigorous process of continuous iteration and refinement, heavily influenced by user feedback and extensive usability testing. This iterative approach ensured that the platform not only met but exceeded the expectations and needs of freelancers and small agencies.

- **Collaborative Efforts and Iterative Refinement**

  Throughout the development cycle, collaborative efforts were pivotal in refining the user interface (UI) and user experience (UX) of Teckle. Stakeholders, including users and developers, actively participated in providing feedback on prototypes and mock-ups, which were then iteratively improved based on usability insights and design principles.

- **Reliable Roadmap: Approved Information Architecture (IA)**

  The approved Information Architecture (IA) served as a reliable roadmap for the final design phase. It provided a structured framework that organized Teckle's functionalities and content in a logical and user-centric manner. Figure 15 exemplifies how the IA guided the seamless navigation and efficient user interaction within the platform.

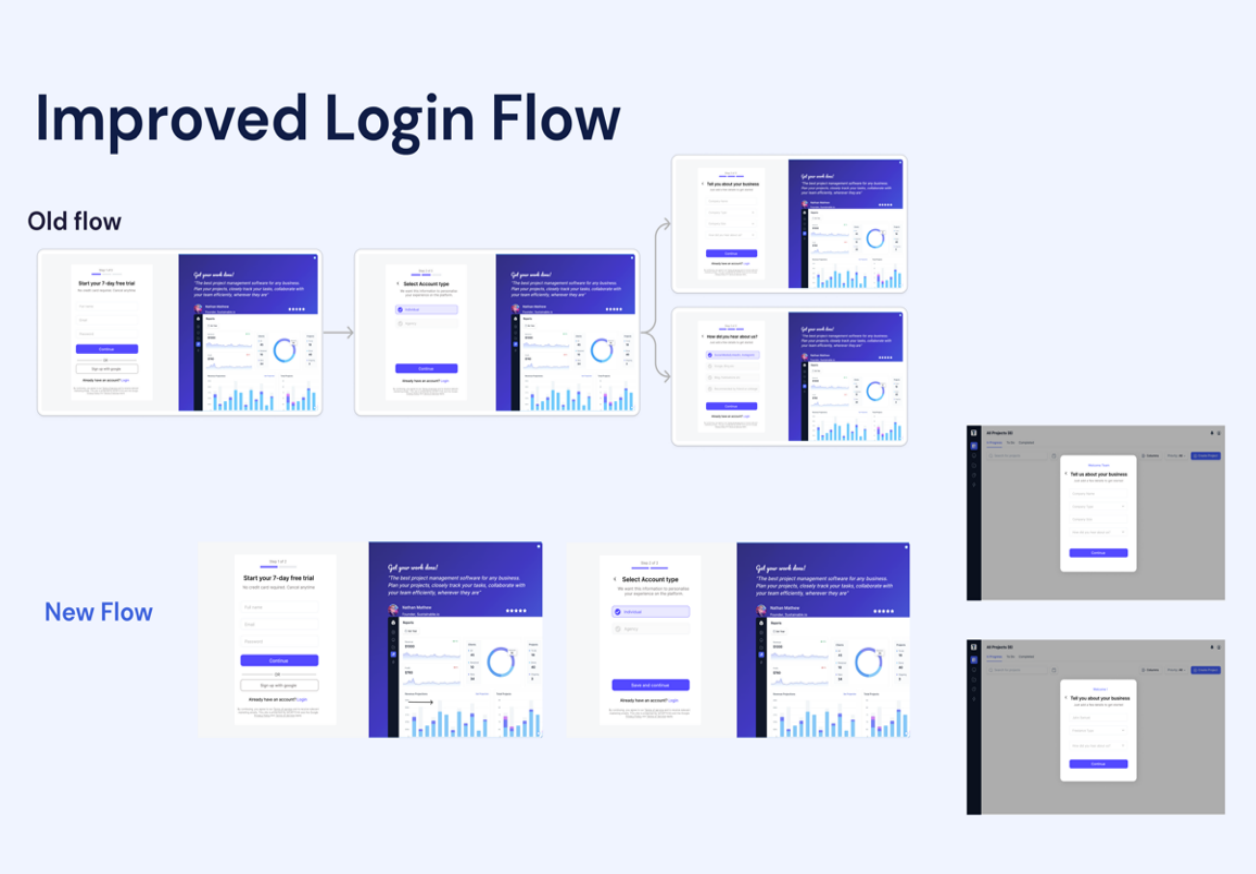

Figure 15 - Improved login flow

• The final design boasted a user-friendly interface, intuitive navigation, and visually engaging elements, aligning seamlessly with the project's overarching goals of simplicity, usability, and enhanced user experience as shown in Figure- 16, 17, 18,19 & 20.

- **Integration of Key Features and Functionalities**

  Key features such as proposal creation, document management, task tracking, invoicing, and client communication were seamlessly integrated into Teckle's final design. Each feature was meticulously designed to ensure coherence and usability, fostering a cohesive user experience that supported the diverse needs of freelancers and small agencies.
- **Validation through User Testing**

  User testing played a crucial role in validating the final design of Teckle. Real-world scenarios and user feedback were incorporated to identify pain points, optimize workflows, and fine-tune interface elements. This validation process ensured that this not only met but also anticipated user expectations, delivering a solution that was intuitive, efficient, and aligned with industry standards.
- **Visual Representation and Implementation**

The culmination of these efforts resulted in a visually compelling and functionally robust platform. The visual representation of Teckle's final design reflected a harmonious blend of aesthetics and usability, aiming to enhance user engagement and satisfaction.

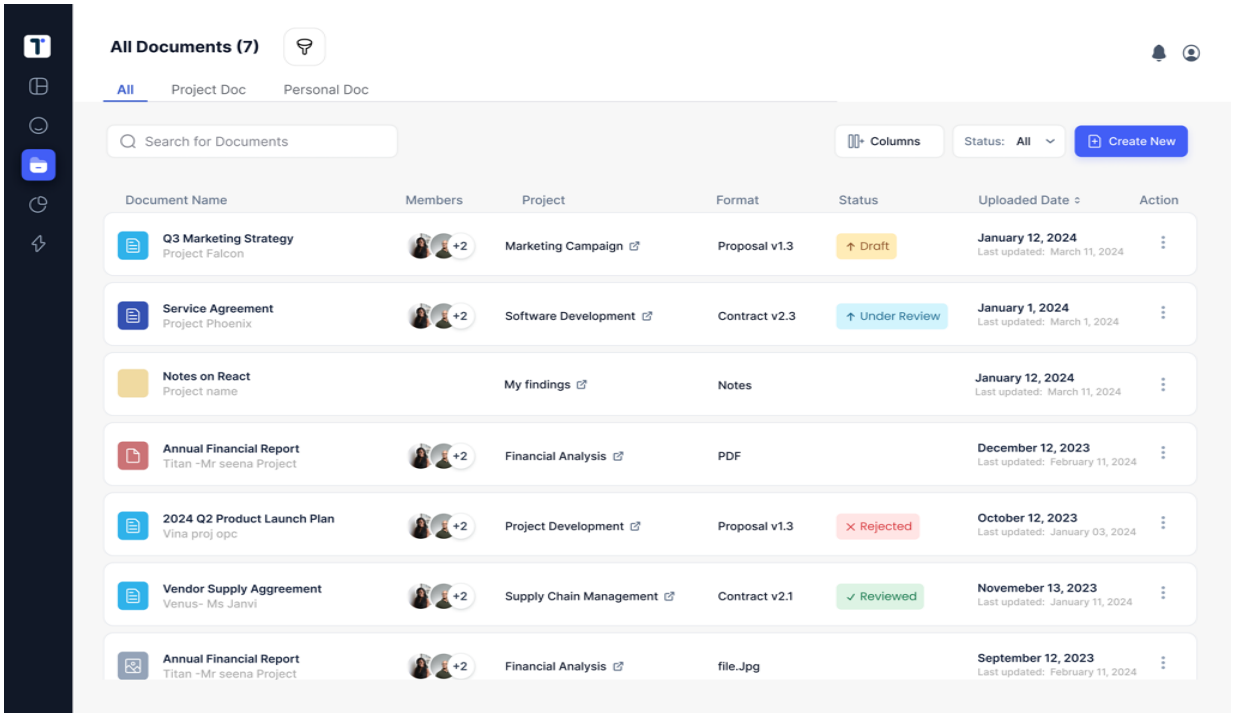

Figure 16 - Documents dashboard

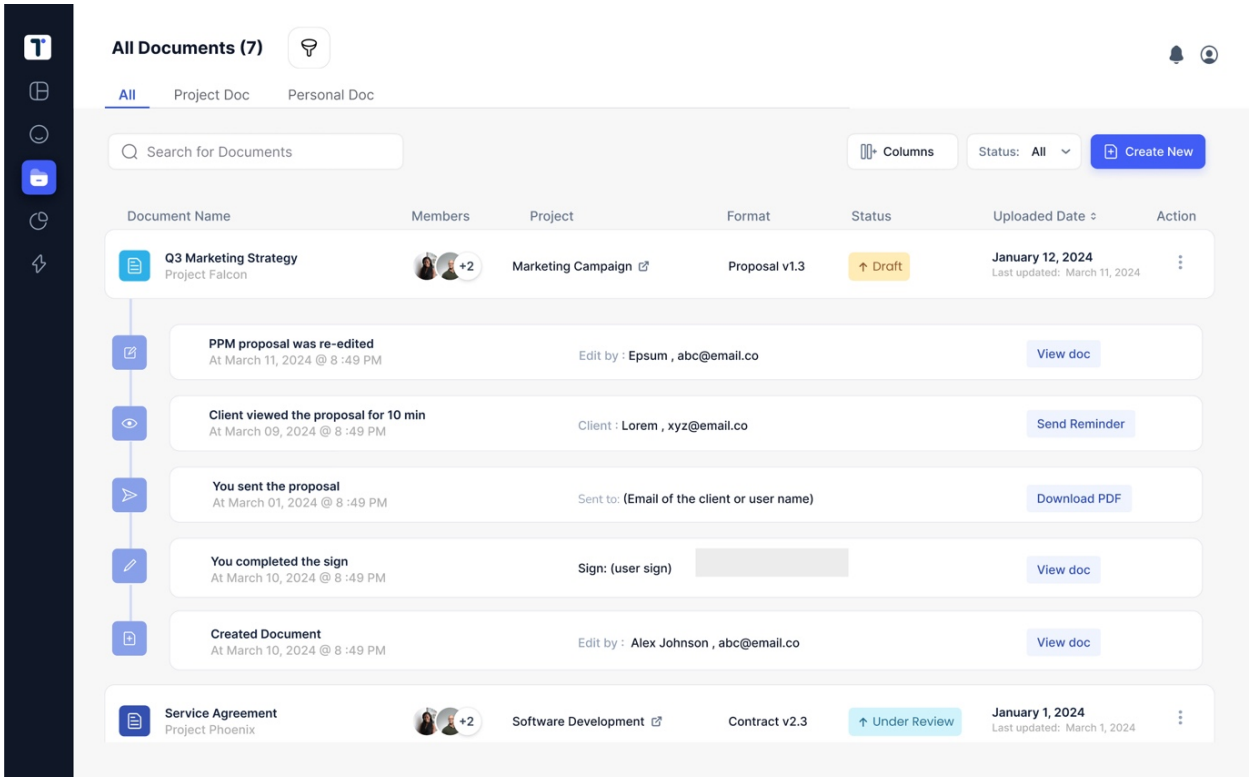

Figure 17 - Version history on click of a document row

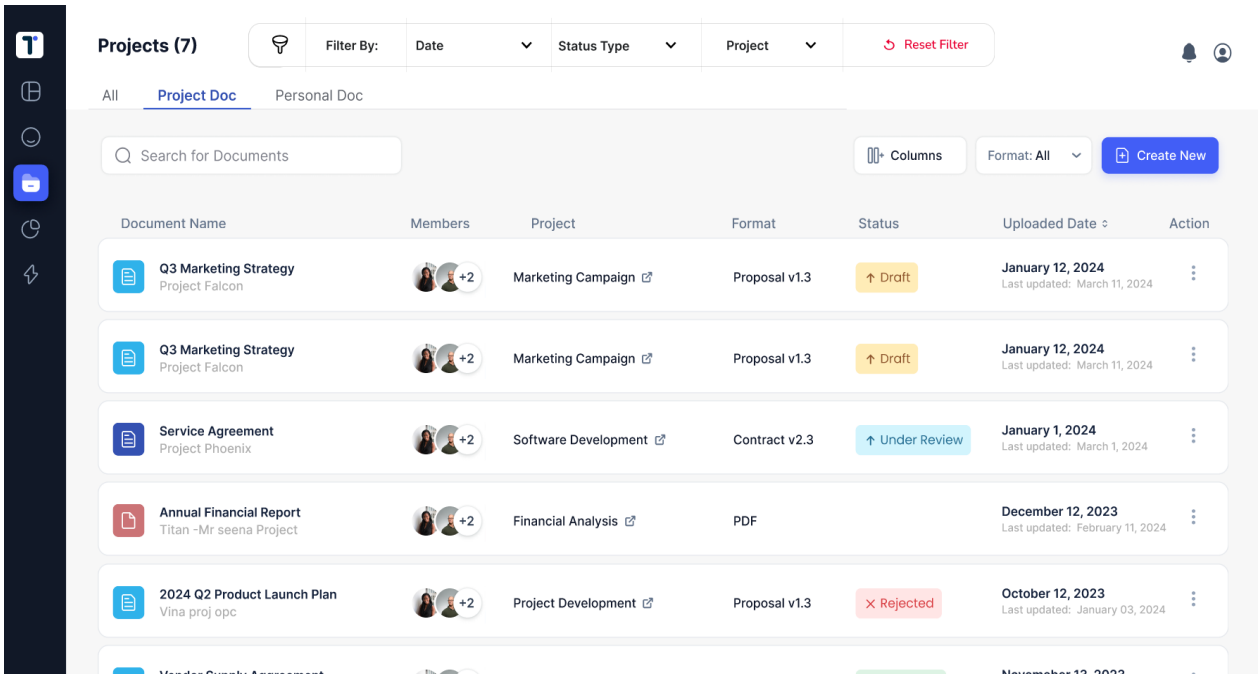

Figure 18 - Filter and project doc tab opened

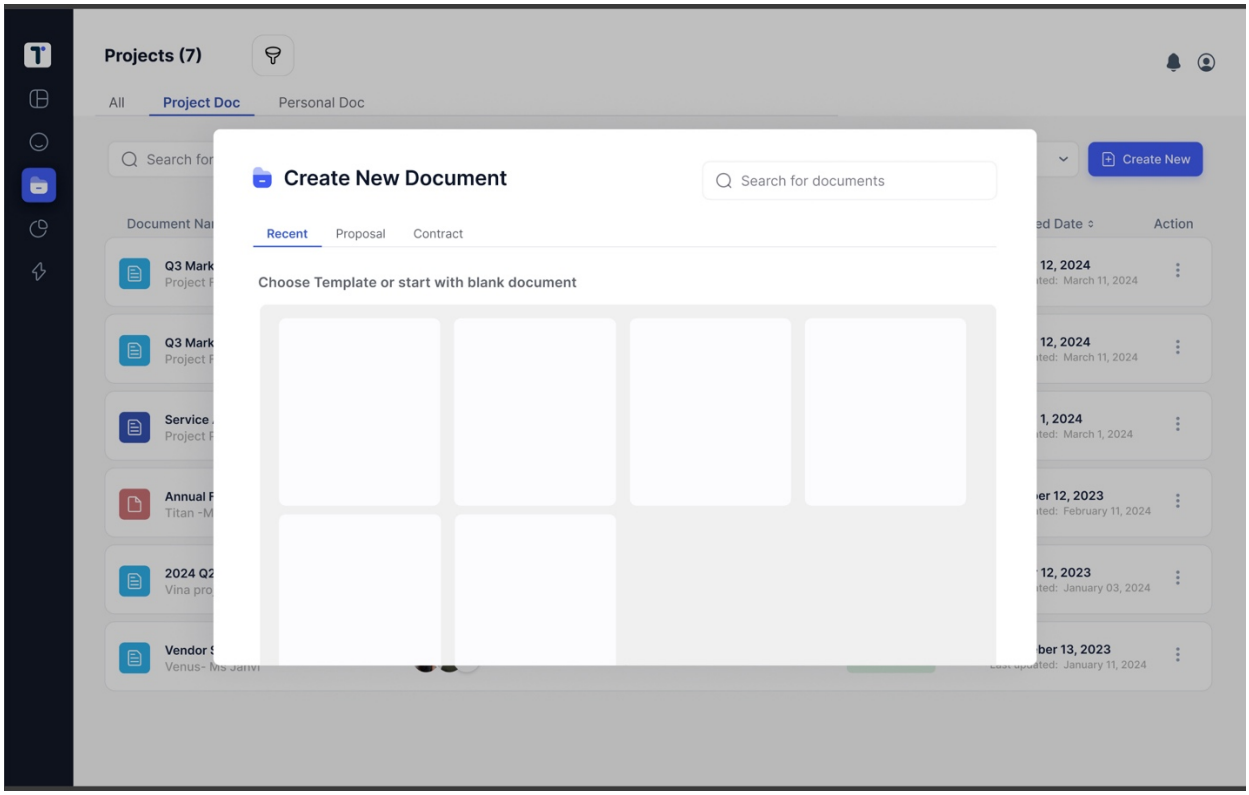

Figure 19 - Clicking on create document will trigger this popup

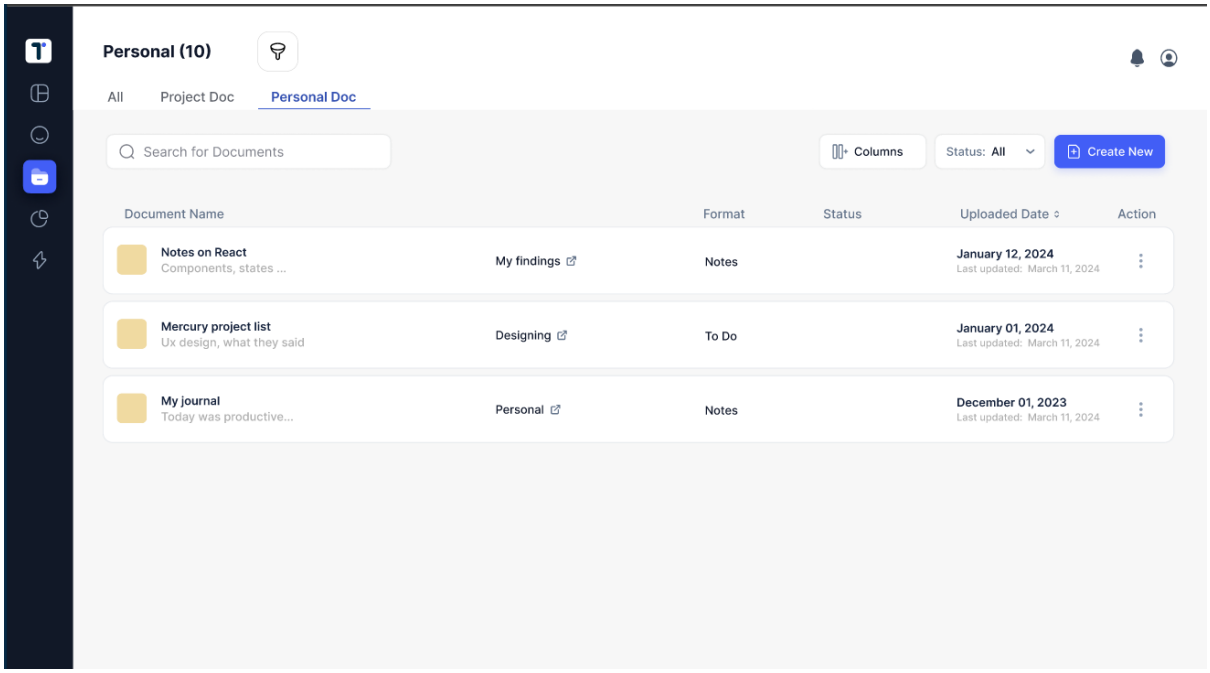

Figure 20 - Personal Doc tab section

2.4 Prototyping

During the prototyping phase, high-fidelity prototypes were developed to bring the design concepts to life. These interactive prototypes incorporated key functionalities, allowing users to navigate through different sections like proposals, contracts, and personal documents. The prototypes simulated real-world interactions, providing a realistic user experience. This phase also included the creation of detailed user interfaces and design elements, ensuring consistency and visual appeal. The prototypes served as a crucial tool for usability testing, enabling the team to gather actionable feedback and make necessary refinements before moving to the development stage.

2.4.1 Interactive Prototypes

High-fidelity prototypes were developed based on the wireframes, incorporating interactive elements for realistic user interactions. These prototypes allowed for user testing to gather feedback on the usability and effectiveness of the proposed solution. Screens and mock-ups shown in Figure- 21 below. By simulating real-world interactions, the prototypes provided valuable insights into how users would interact with the final product, allowing for further refinements to be made.

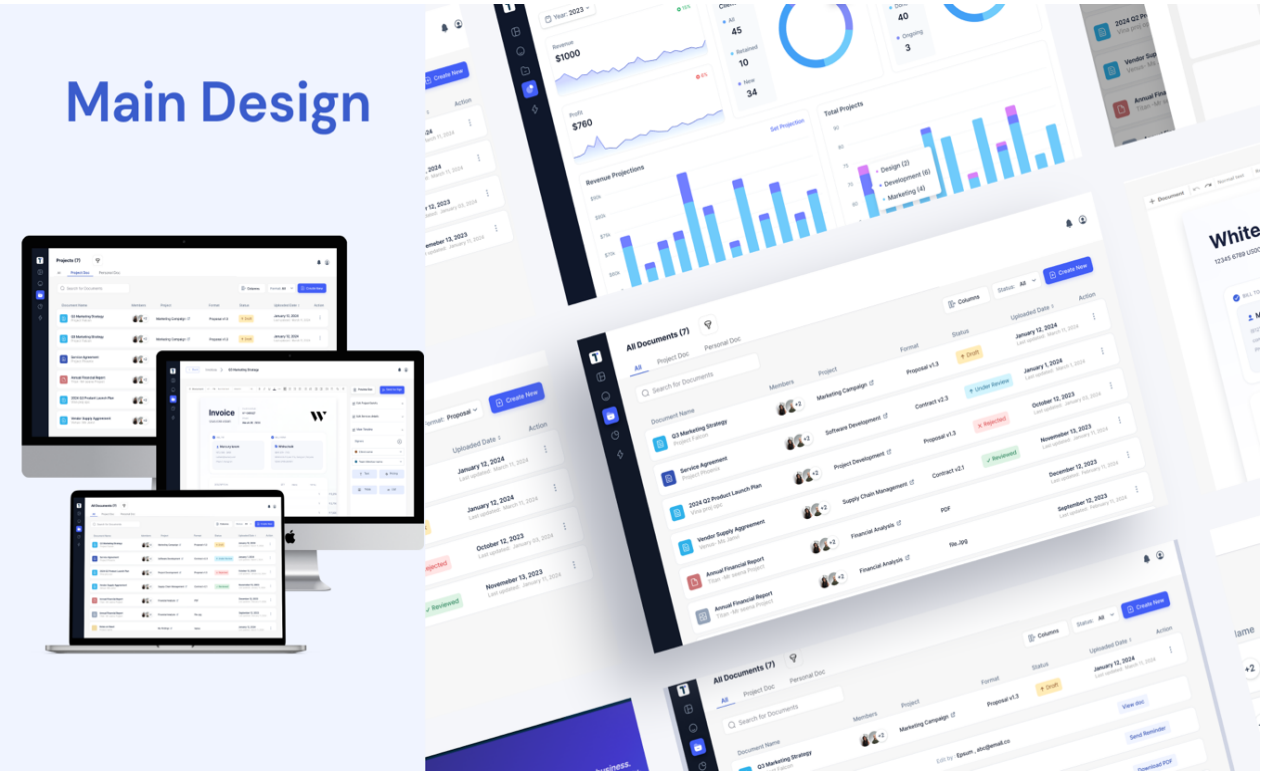

Figure 21 - Main Design

2.4.2 Design System Development

A design system was established to maintain consistency across the platform, including UI elements, typography, and colour schemes in Figure- 22 and Figure- 23. This ensured a cohesive and intuitive user experience throughout the application. By adhering to a design system, the project aimed to create a visually cohesive and user-friendly interface that would enhance user engagement and satisfaction.

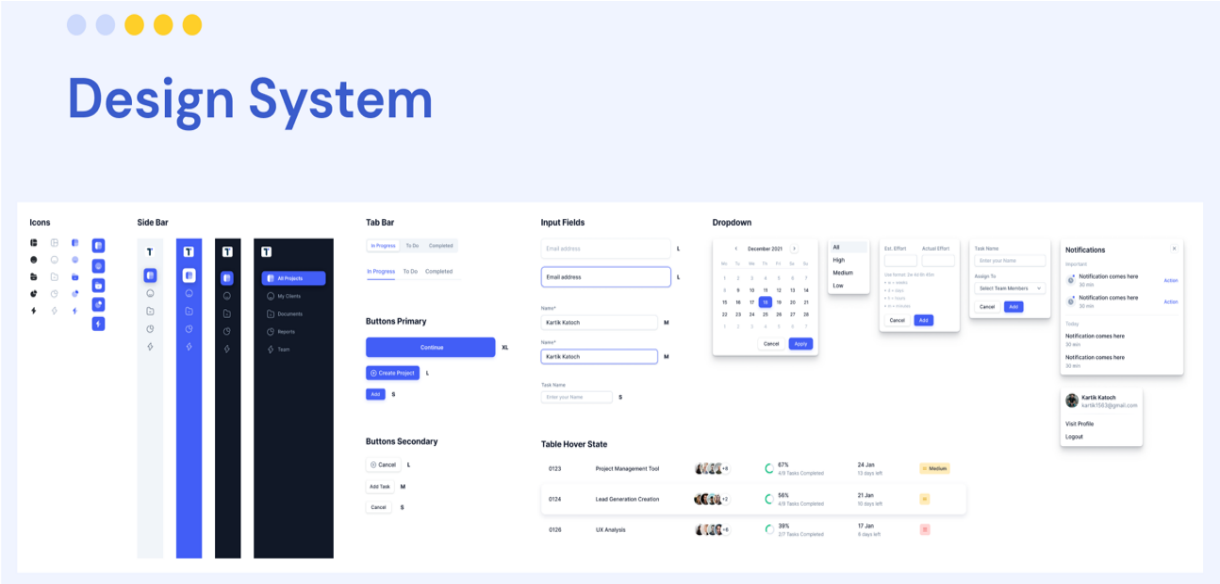

Figure 22 - Design System

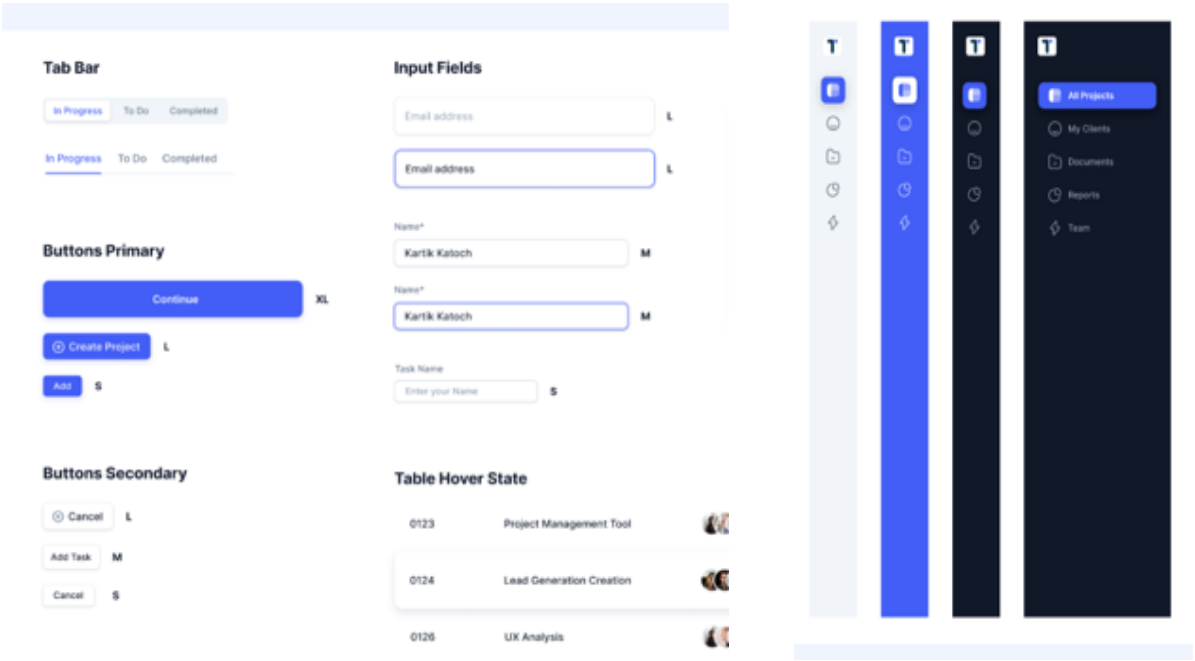

Figure 23 - Field inputs, buttons and Sidebar

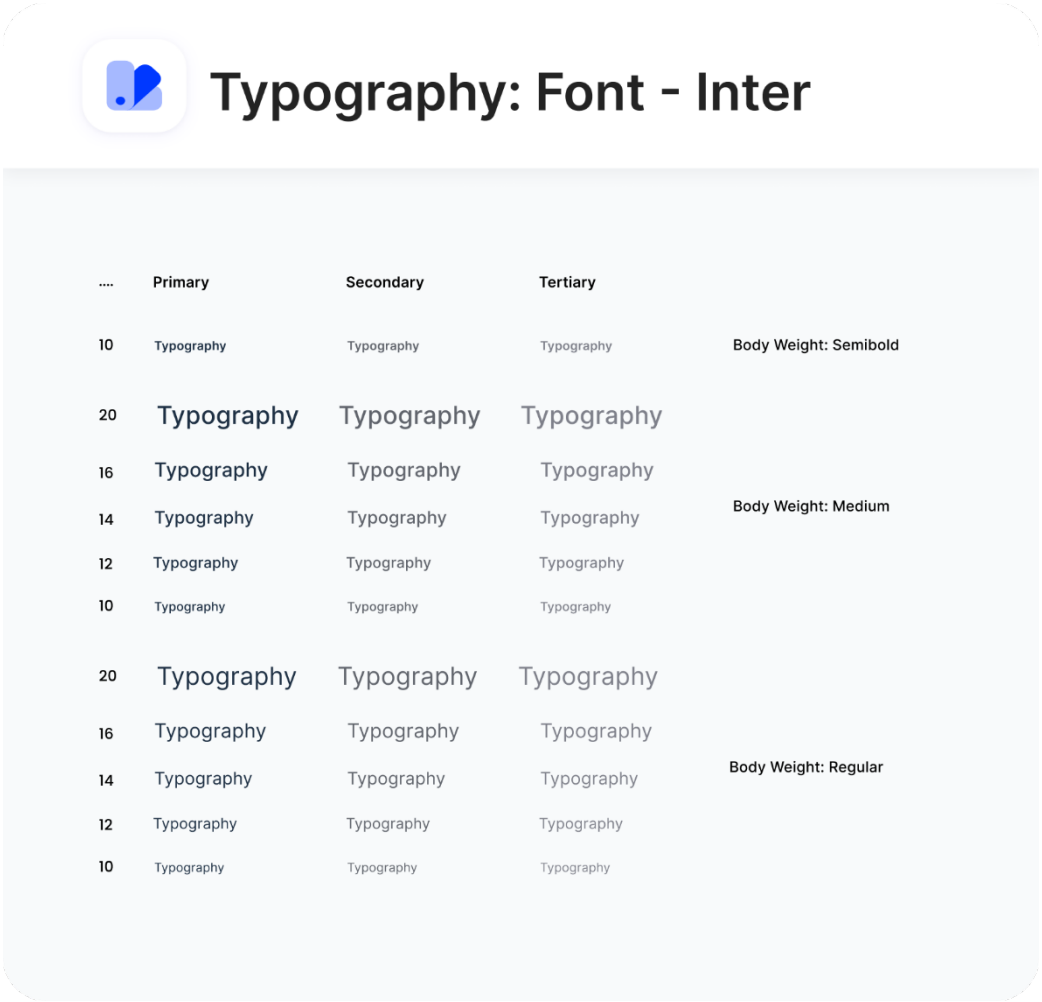

Figure 24 - Typography

Development Process

Wireframe to Prototype Transition:

The process began with detailed wireframes that outlined the structure and layout of key sections, including the proposal, contract, and document management features. Each wireframe was then transformed into a high-fidelity prototype using interactive design tools, which added clickable elements, navigation flows, and dynamic content transitions.

a. Interactive Elements:

- **Navigation:**
  - Users could navigate through the dashboard, access different sections (proposals, contracts, personal documents), and switch between tabs seamlessly in below Figure below.

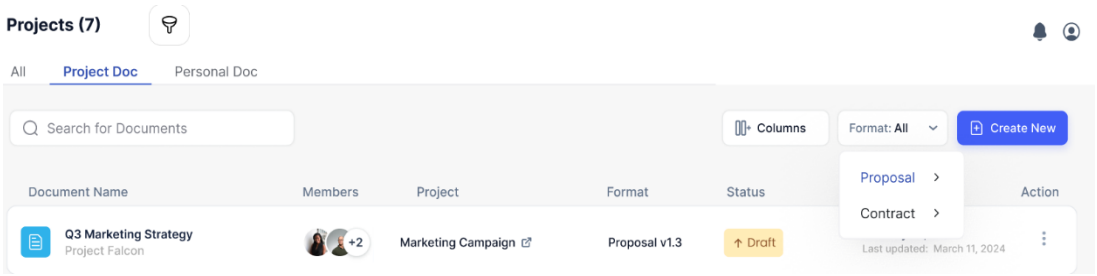

Figure 25 - Dropdown

- **Proposal and Contract Creation:**
  - The prototypes allowed users to select templates, customise content, and use the WYSIWYG editor to add text, images, and edit style in figure

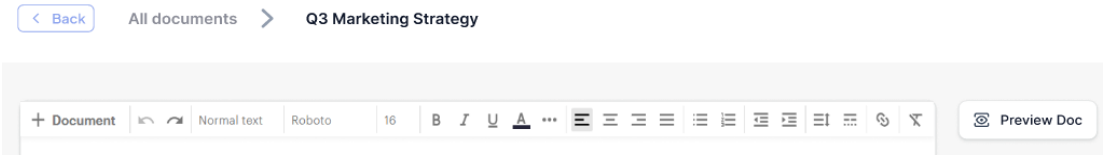

Figure 26 - Editor

- **Version History and Document Management:**
  - An interactive version history feature was included, allowing users to view, edit, and track changes within documents in Figure -27.
  - The accordion-style design for version history in the home page was implemented to streamline access to document revisions and actions.

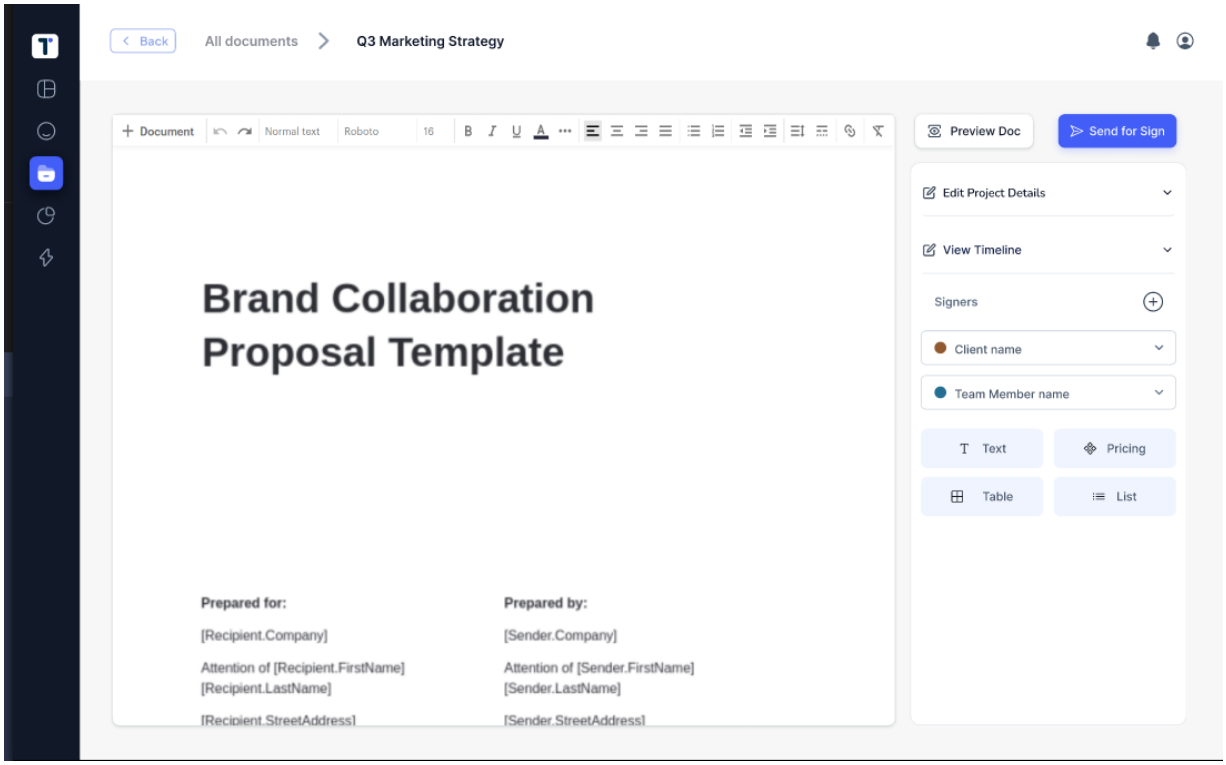

Figure 27 - Editor for proposal

b. User Testing and Feedback:

- The interactive prototypes were subjected to rigorous user testing with real freelancers and small agency representatives.
- Test sessions were conducted to observe user interactions, gather qualitative feedback, and identify any usability issues.
- Users were able to perform tasks such as creating and editing proposals, sending documents for client signatures, and managing version histories.

c. Insights and Refinements:

- **Usability Testing:**
  - Feedback from usability testing revealed key insights into user preferences and pain points.
  - Users appreciated the streamlined workflow and intuitive navigation but suggested improvements in the visibility of certain functions.
- **Iteration and Improvements:**
  - Based on the feedback, several refinements were made:
    - Enhanced the accordion feature for version history, making it more intuitive and accessible from the main dashboard.
    - Improved the visual design and user interface elements to ensure consistency and ease of use.

- Added personal document sections, allowing users to create and manage notes, to-do lists, and other personal documents alongside project files in Figure -28.

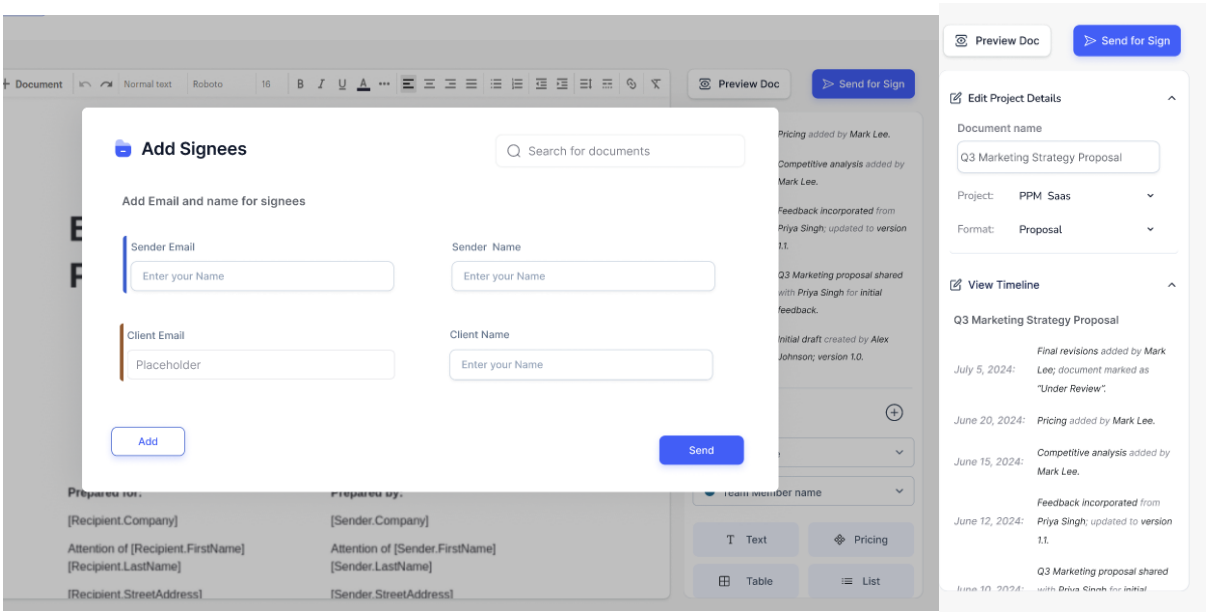

Figure 28 - Add signees and Version history

2.4.3 Benefits of Interactive Prototypes

- **Realistic User Experience:**
  - The high-fidelity prototypes provided a near-realistic experience, enabling users to interact with the tool as they would with the final product. This realism was crucial for gathering authentic feedback.
- **Early Detection of Issues:**
  - By simulating real-world interactions, the prototypes helped identify usability issues early in the design process. This proactive approach allowed for timely refinements, reducing the risk of costly changes during later stages of development.
- **Stakeholder Engagement:**
  - The interactive prototypes served as an effective communication tool with stakeholders, demonstrating the potential and functionality of the proposed solution. This engagement was instrumental in securing buy-in and alignment on design decisions.
- **Iterative Refinement:**
  - The iterative nature of the prototype development and testing cycle ensured continuous improvement. Each round of feedback informed subsequent iterations, leading to a more refined and user-centric final product and prototype wireframe as shown here in Figure – 29 below.

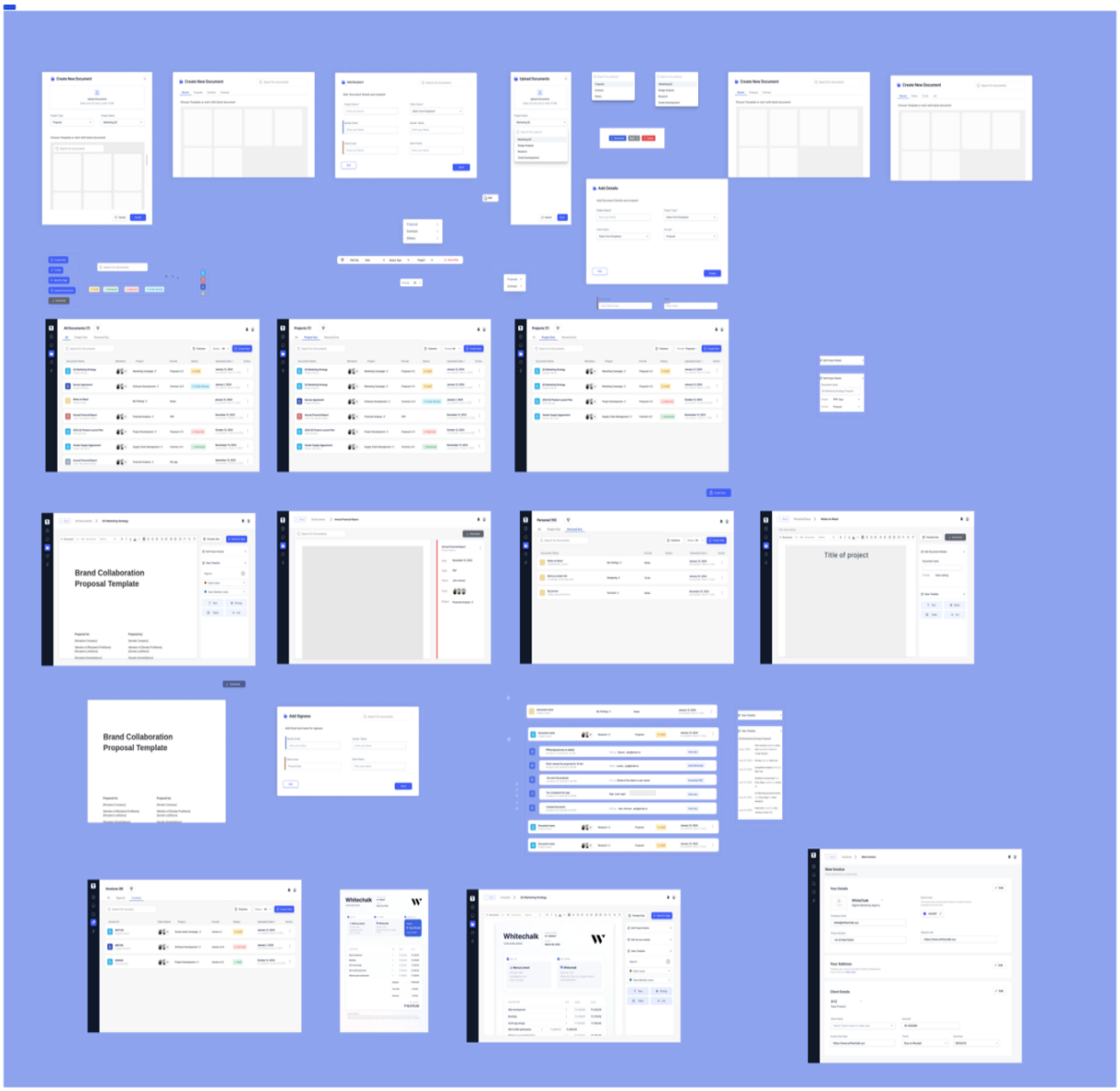

Figure 29 - Wireframes screens

2.5 Testing and Development

Usability testing was a critical component in validating the design solutions. Sessions were conducted with freelancers and small agency representatives to evaluate the effectiveness and user-friendliness of the prototypes. Participants provided valuable insights on the navigation flow, ease of use, and overall experience. Feedback revealed areas for improvement, such as streamlining the version history and enhancing the proposal creation process. Iterative refinements were made based on this feedback, ensuring that the final design met user needs and expectations.

2.5.1 Usability Testing

Usability testing sessions were conducted with freelancers and agency representatives to evaluate the effectiveness of the prototypes. Feedback was collected to identify areas for improvement and refine the design further. By involving end-users in the testing process, the project aimed to validate the design decisions and ensure that the final product met the needs and expectations of the target audience.

2.5.2 Iterative Refinement

Based on the testing feedback, iterative refinements were made to the prototypes to address usability issues and enhance the overall user experience. This iterative approach ensured that the final design met the needs of the target users effectively. By continuously refining the design based on user feedback, the project aimed to create a solution that provided a seamless and intuitive user experience.

Process:

- **Feedback Analysis:**
  - Analysed feedback from usability testing sessions to identify recurring issues and user pain points.
  - Prioritised given feedback from peers and users based on its impact on user experience and feasibility of implementation.
- **Design Adjustments:**
  - **Version History Navigation:**
    - Initially designed as a separate page, version history was integrated into an accordion-style dropdown in the home page for easier access.
  - **Personal Document Section:**
    - Simplified navigation and removed redundant features like version history and signatures which were not necessary for personal documents.
  - **Enhanced Collaboration Features:**
    - Improved real-time collaboration features based on user suggestions to facilitate better teamwork and communication.

Outcome:

- The iterative refinement process ensured that design changes were driven by actual user needs and feedback.
- Continuous improvements based on user feedback resulted in a more user-friendly and efficient platform.

2.5.3 Development

In the development phase, the refined prototypes were handed over to the development team for implementation. Collaboration between designers and developers was crucial to ensure the envisioned features were accurately translated into the functional platform. Some features, like the version history for personal documents and electronic signatures for certain sections, were modified based on technical feasibility and user feedback. Regular updates and iterations were made based on ongoing feedback, culminating in a robust project management tool tailored for freelancers and small agencies.

- **Collaboration Between Designers and Developers**

  During the development phase of Teckle, the transition from refined prototypes to a functional SaaS platform was a collaborative effort between the design and development teams. This collaboration was essential to ensure that all envisioned features were accurately translated into the final product, meeting both design specifications and user requirements.

- **Modification and Iteration Based on Feasibility and Feedback**

  Several features underwent modification during development, influenced by both technical feasibility assessments and user feedback. For instance, functionalities such as version history for personal documents and electronic signatures were refined to enhance usability and align with the platform's technical capabilities. Regular updates and iterations were conducted based on ongoing feedback loops, ensuring that Teckle evolved into a robust project management tool tailored specifically for freelancers and small agencies.

Objective:

- To translate the refined design into a functional and robust SaaS platform.
- To ensure the developed product maintains the integrity of the design and meets user requirements.

Process:

- **Hand-off to Development Team:**

  The hand-off process involved providing the development team with all necessary materials and facilitating ongoing communication to ensure the project's success.

- **Detailed High-Fidelity Prototypes:**

  Comprehensive prototypes were delivered to the development team, encompassing detailed design specifications and interactive elements. These prototypes served as a blueprint, guiding the implementation of UI components, user flows, and functionality.

- **Regular Meetings and Ongoing Communication**:

Frequent meetings were conducted between designers and developers to maintain alignment on design intent and address any technical challenges encountered during implementation. This proactive communication ensured that any deviations from the initial design were addressed promptly, maintaining coherence in the final product.

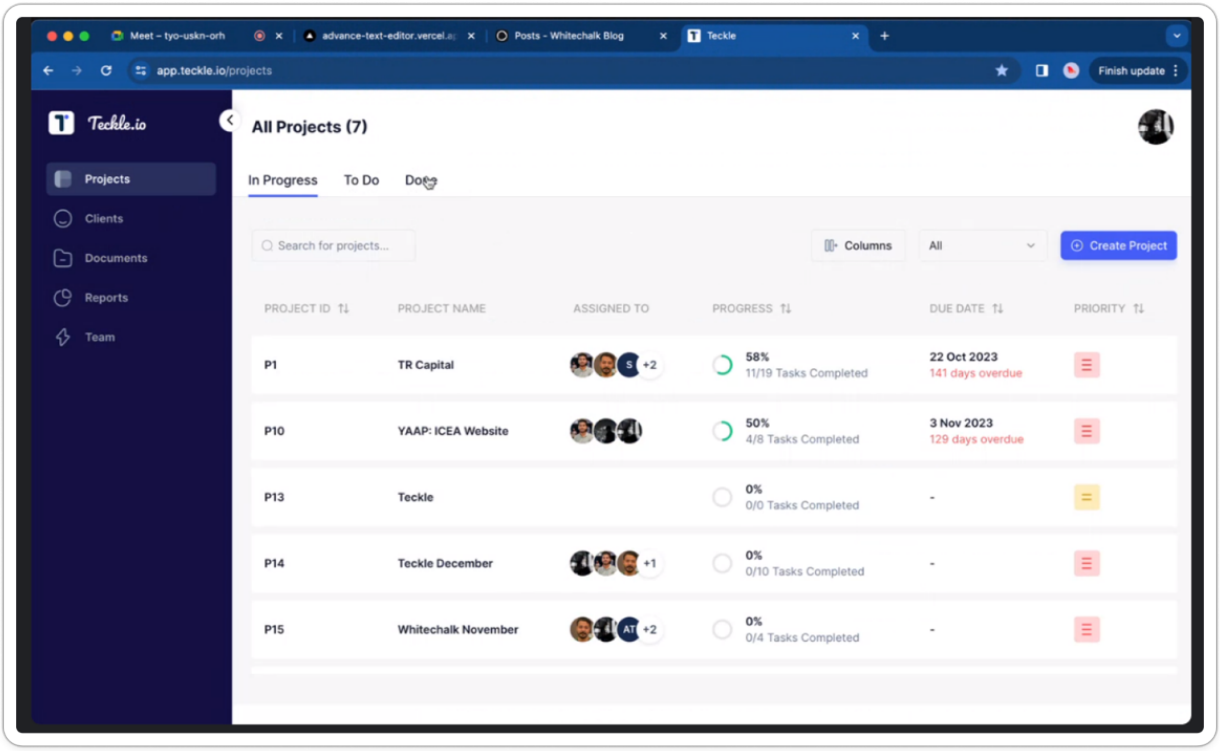

Figure 30 - All projects section

- **Development Phase:**

  The development phase was centred on translating the design into a functional user interface while making necessary adjustments based on technical feasibility and user feedback. Regular meetings were held with developers to discuss the prototypes and demonstrate their functionality as shown in figure – 31 below, ensuring a clear understanding of the design requirements for successful implementation.

- **Iterative Development and Feedback Integration**

  Throughout the development phase, an iterative approach was adopted, allowing for continuous refinement based on user feedback and usability testing results. This iterative process not only enhanced the platform's functionality but also validated its usability, ensuring that Teckle would deliver an intuitive and efficient user experience upon launch.

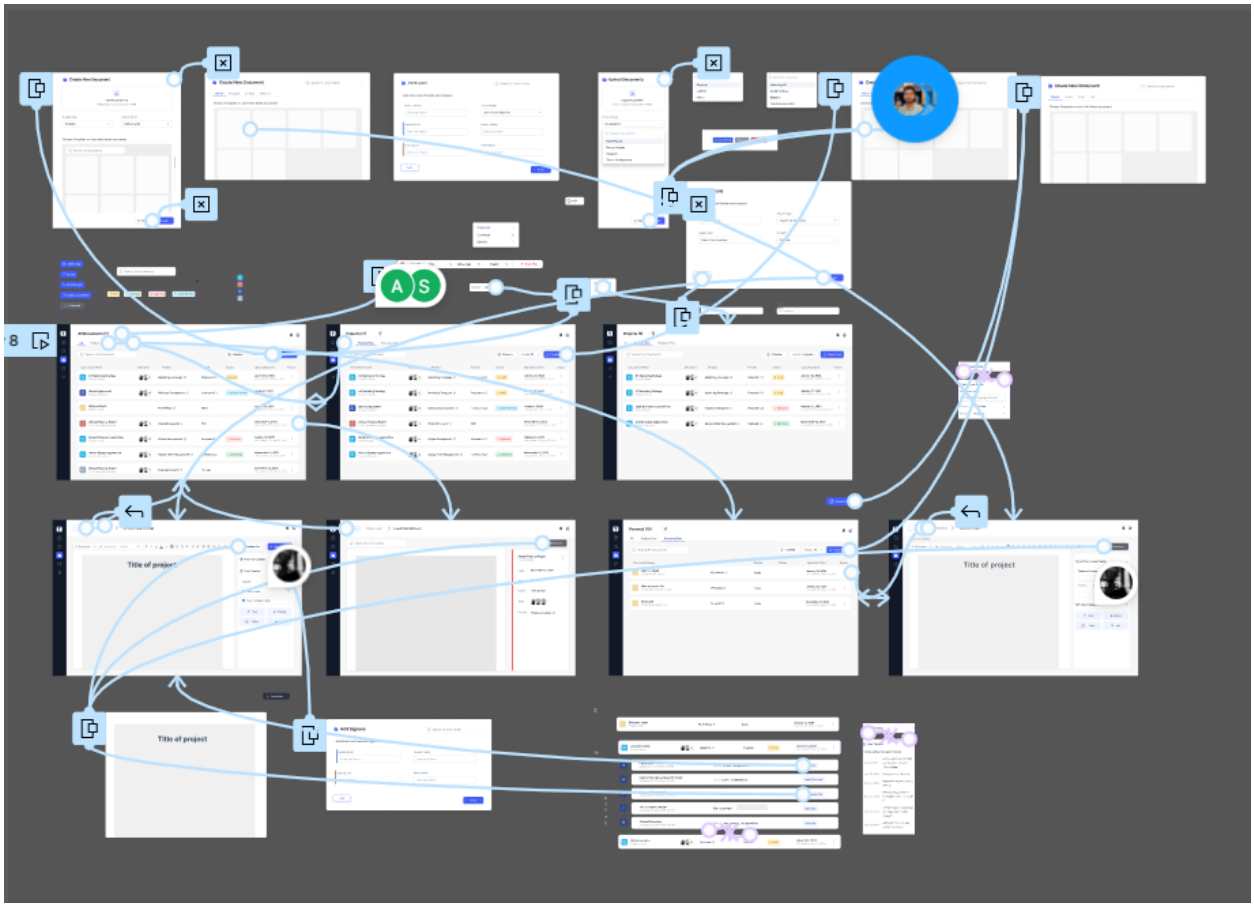

Figure 31 – Prototype and Iterative Development

- **Front-End Development:**
  - **Implemented User Interface:** Utilized technologies such as HTML, CSS, and JavaScript to create a responsive design that worked well across different devices and screen sizes.
  - **Ensured Responsiveness:** Ensured that the design was responsive and functioned well across various devices and screen sizes, maintaining a consistent user experience.

- **Feature Adjustments:**
  - **Technical Feasibility and User Feedback:** During development, some features were adjusted based on technical feasibility and user feedback.
  - **Removal of Version History in Personal Documents:** The version history feature in the personal documents section was removed to simplify the user experience.
  - **Revamp of Signature Features:** Signature functionalities were streamlined or removed based on their necessity, enhancing overall functionality and user experience.

2.6 Invoices Section Development

The future scope of the Teckle SaaS platform includes the addition of a comprehensive invoices section. This development aims to further streamline project management for freelancers and small agencies by integrating invoicing capabilities directly into the platform. The invoices section will be designed to handle the entire invoicing process, from creation to tracking payments, and will be interconnected with the existing proposal section for seamless data flow.

2.6.1 Research and Requirements for Invoices

To ensure Teckle effectively addressed the unique challenges faced by freelancers and small agencies, extensive user research was conducted. The objective was to gain a deep understanding of how these user groups manage their project-related tasks, especially invoicing. The research process includes online research about invoices, what is the use of invoice, how they use and user observation sessions, targeting a diverse group of freelancers and small agency representatives.

Understanding User Needs

The user research phase aimed to uncover the specific pain points experienced by freelancers and small agencies in managing invoices. Insights gleaned from the research, depicted in Figure 32 as a draft research mind map, highlighted several critical areas:

- **Manual Data Entry:** Many users expressed frustration with manual data entry processes, which are time-consuming and prone to errors.
- **Client Management:** Managing multiple clients and ensuring accurate client details in invoices emerged as a common challenge.
- **Tax Requirements:** Addressing various tax requirements, such as different tax rates and regulations, posed significant difficulties for users.

Key Features Identified

Based on the findings from user research, several key features were identified to enhance the invoices section of Teckle:

- **Simplified Invoice Creation:** Intuitive tools and templates to streamline the creation of professional invoices quickly.
- **Automated Client Detail Retrieval:** Integration with client databases to automatically retrieve and populate client details into invoices.
- **Comprehensive Tax Handling:** Tools to manage diverse tax requirements, including automatic tax calculations and customizable tax settings.
- **Integration with Proposals and Contracts:** Seamless integration with the proposal section to convert accepted proposals into invoices automatically.
- **Additional Notes and Charges Section:** Flexibility to add supplementary information, such as terms, additional charges, or discounts, directly on invoices.

- **Analytical Tools for Financial Tracking:** Built-in analytics and reporting features to track invoice status, payments received, and overall financial performance.

Figure 32 - Mind map for invoice section

2.6.2 Functional Requirements

The functional requirements for the invoicing section of Teckle are designed to streamline the process for freelancers and small agencies, ensuring efficiency and ease of use. These requirements outline the essential features and functionalities that the invoicing system must have to meet the specific needs of its users.

a. **Invoice Creation Page**

The invoice creation page is a fundamental feature where users can generate invoices quickly and efficiently. This page will include:

- **Generate an Invoice Page and PDF:** Users will have the ability to create a new invoice through an intuitive user interface that also generates a PDF version for easy sharing and record-keeping.
- **Fill in Invoice Details:** Users can enter detailed information about the invoice, including itemized charges, descriptions of services or products provided, and applicable taxes. The system will ensure that all necessary fields are filled out to avoid any errors.
- **Select Applicable Taxes:** Depending on the client's location, users can select and apply the correct tax type, such as GST or VAT, ensuring compliance with regional tax regulations.

b. Client Details

Efficient client management is critical for streamlined invoicing. The system will offer functionalities as shown in figure – 33 to:

- **Add New Client Information:** Users can enter and save new client details directly within the invoicing section.
- **Automatically Fetch Existing Client Details:** For repeat clients, the system will automatically populate previously entered client information, saving time, and reducing manual entry errors.
- **Include Client Address and Currency Preferences:** Users can specify the client's address, preferred currency, and other relevant contact information to ensure accurate invoicing.

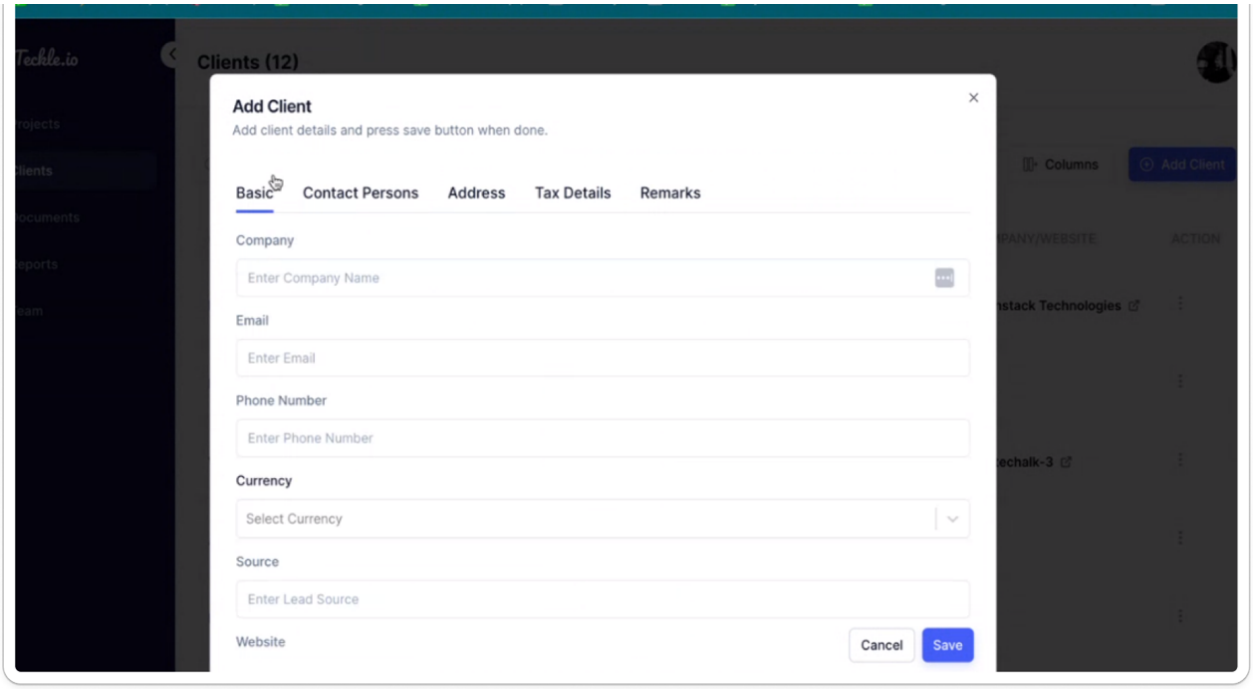

Figure 33 - Add client process

c. Tax Handling

Tax compliance is a major concern for freelancers and small agencies. The invoicing system will address this by:

- **Providing Fields for GST and VAT Numbers:** Users can enter relevant tax identification numbers for clients, ensuring that invoices are tax compliant.
- **Ensuring Compliance with Tax Requirements:** The system will cater to both domestic and international clients, applying the correct tax codes and regulations automatically.

d. Additional Notes and Charges

Flexibility in invoicing is provided through sections for additional charges and notes:

- **Include Sections for Additional Charges:** Users can add any extra fees or per-day charges that are relevant to the invoice, ensuring that all costs are accounted for.
- **Option to Apply Discounts:** Users can offer discounts directly on the invoice, with the system calculating the adjusted total automatically.
- **Analytical Section:** An analytical section will help users track key invoice metrics such as the total billed amount, outstanding payments, and other financial insights, aiding in better economic management.

e. Creating Invoices:

- **Invoice Creation Page:**
  - Generate an invoice page and a PDF.
  - Users can fill in invoice details such as itemised charges, taxes, and client information.
  - Select applicable taxes (GST, VAT) and handle different tax requirements based on client location.
- **Client Details:**
  - Add new client information or automatically fetch existing client details.
  - Include client address, currency preferences, and contact information.
- **Tax Handling:**
  - Provide fields for GST and VAT numbers where applicable.
  - Ensure compliance with tax requirements for both domestic and international clients.
- **Additional Notes and Charges:**
  - Include sections for additional charges or per-day fees.
  - Option to apply discounts.
  - Analytical section to track invoice metrics such as total billed amount and outstanding payments.

d. Interconnected Workflow:

- **Integration with Proposals and Contracts:**
  - Fetch client data from the proposal section to minimise manual entry.
  - Create invoices based on approved proposals or signed contracts.
  - Allow the addition of new clients directly from the invoice creation page.
- **Budget and Project Tracking:**
  - Generate budget reports detailing invoiced amounts, total budget, remaining budget, and budget used.

- Link project details such as hours worked, cost breakdown, and expenses directly to the invoice.

2.6.3 Information Architecture (IA):

- **Navigation Flow:**
  - Access the invoices section from the main navigation menu under "Financials."
  - Sub-sections include "Create Invoice," "View Invoices," and "Budget Reports."
- **Editor Interface:**
  - When creating a new invoice, an editor interface opens with fields for all required details.
  - Include tabs for "Invoice Details," "Client Information," "Project Details," and "Payment Terms." In Figure- 34 below in IA of invoice.

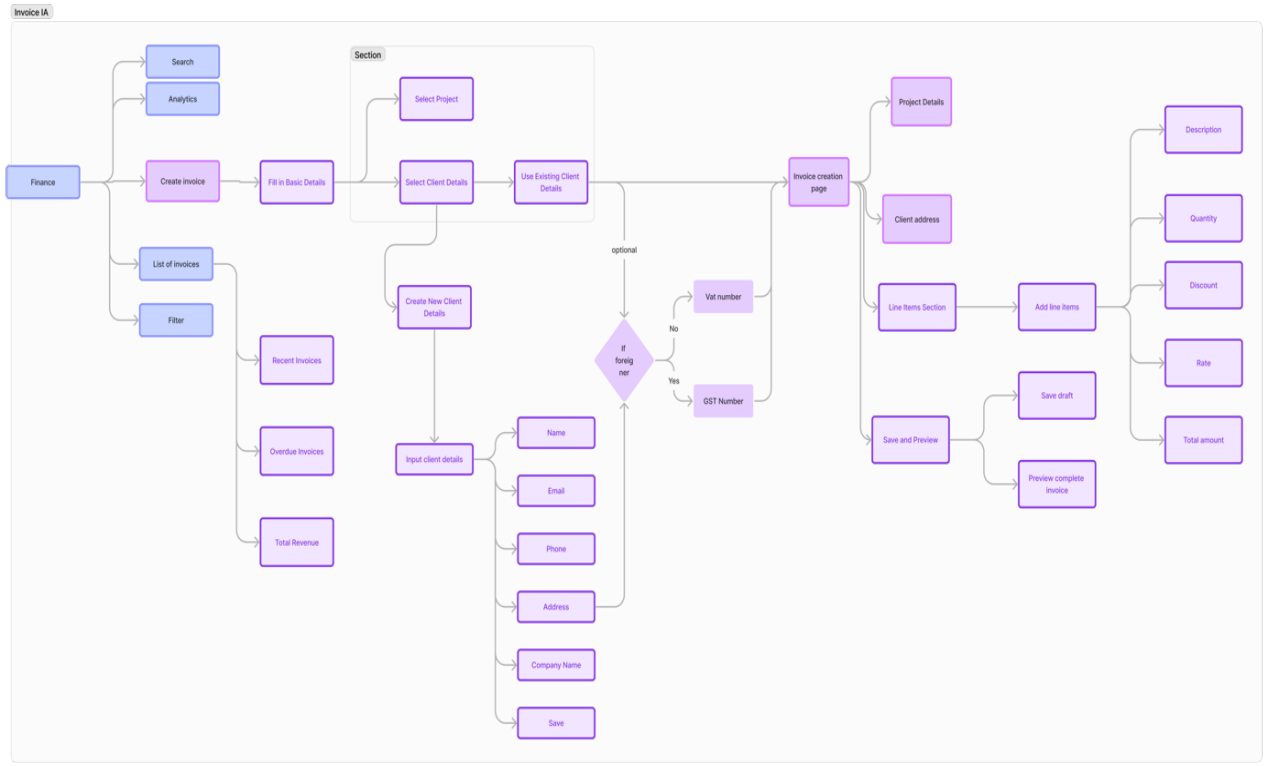

Figure 34 - Invoices IA

- **Important Invoice Details:**
  - Subject, client details, project details, timeline, deliverables, cost breakdown, terms and conditions, and payment terms.
  - Payment due dates accepted payment methods, overdue payment penalties, and additional terms.

- **Budget Report Details:**
  - Total invoiced amount, overall budget, remaining budget, and budget used.

- **Project Details:**
  - Project name, number of hours, cost breakdown, timeline, hourly rate, expenses, intellectual property rights, cancellation policy, and references.

- **Payment Terms:**
  - Payment due date, methods, overdue payment penalties, and terms.

- **Additional Information:**
  - Client contact details, address, project description, deliverables, notes, and attachments.

2.6.4 Development Process

The development process for Teckle's invoicing section involved multiple stages, each focusing on refining the user experience and ensuring the functionality met the specific needs of freelancers and small agencies. This process included prototyping, user feedback, and iterative improvements to create a seamless and efficient invoicing system.

a. **Prototyping and Iteration:** The development began with the creation of initial wireframes and interactive prototypes. These prototypes were based on the Information Architecture (IA) developed earlier in the project and were essential for visualizing how the invoicing section would function.
   - **Initial Prototypes:**
     - Created wireframes and interactive prototypes based on the IA.
     - Included detailed sections for creating and managing invoices here shown in Figure – 35 and Figure -36.

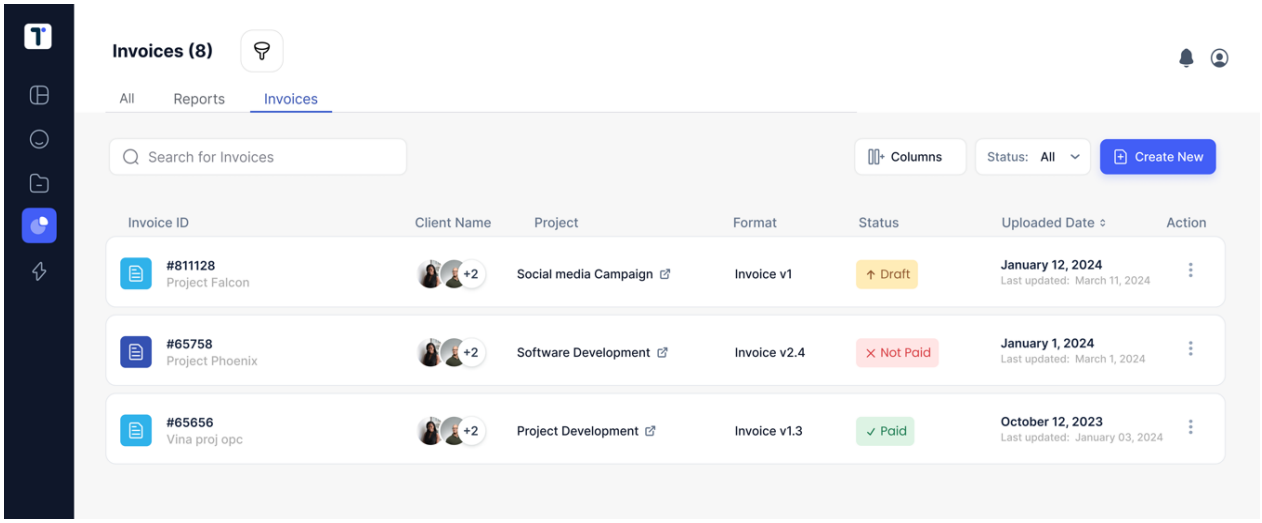

Figure 35 - Invoices section in dashboard

b. User Feedback

User feedback was a critical component of the development process, ensuring that the invoicing section was both user-friendly and effective.

- **Conducted Usability Testing:** Usability testing sessions were conducted with target users, including freelancers and small agency representatives. These sessions aimed to gather detailed feedback on the prototypes, focusing on ease of use and overall functionality.
- **Gathered Feedback:** Feedback from these sessions provided valuable insights into how users interacted with the prototypes, highlighting any pain points or areas that needed improvement.

c. Iterated on the Design

Based on the feedback collected, the design was iteratively refined to address any usability issues and incorporate user suggestions.

- **Addressed Usability Issues:** Identified issues were systematically addressed, with design modifications ensuring a smoother and more intuitive user experience.
- **Incorporated User Suggestions:** User suggestions were integrated into the design, enhancing features, and adding new functionalities that better aligned with user needs.

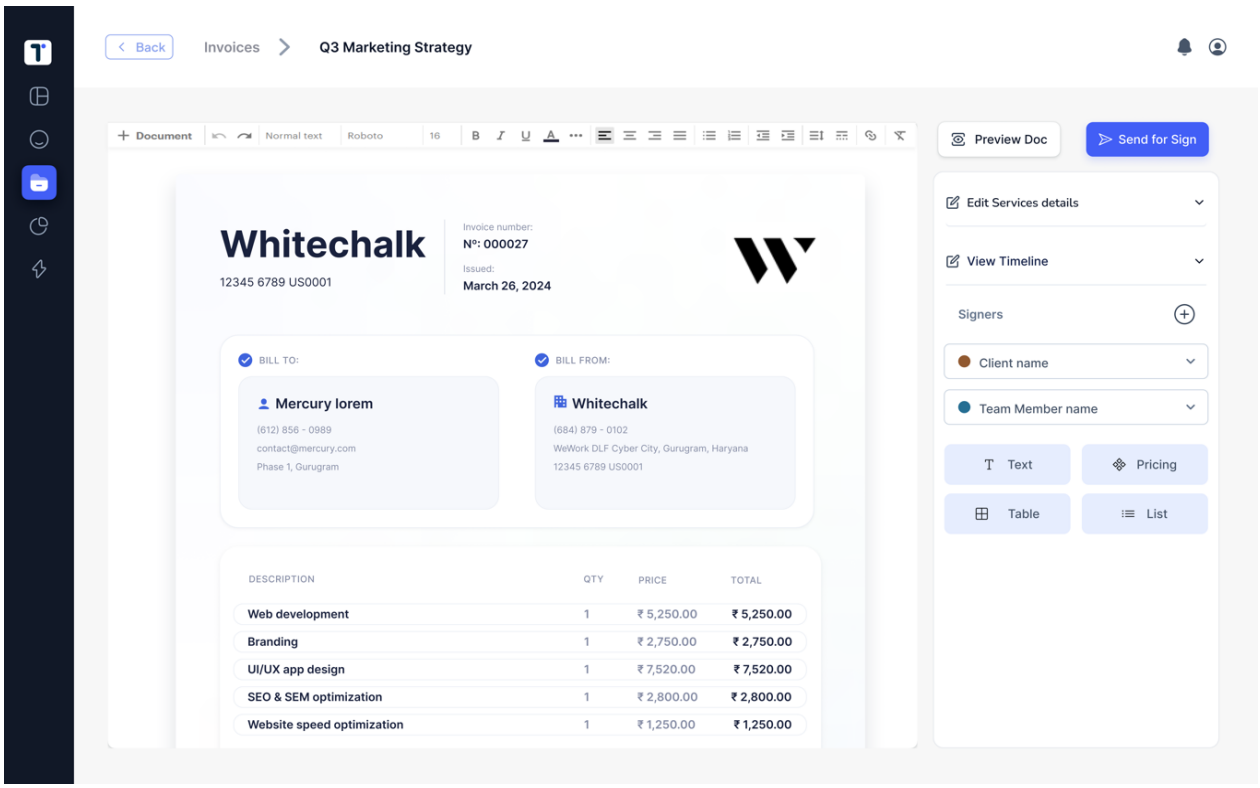

Figure 36 - Editor for invoices

d. **Integration and Testing:**
    - **Development Phase:** Worked closely with developers to ensure correct implementation of design specifications. Addressed technical constraints and made necessary adjustments to the design.
    - **Quality Assurance:**
        - Conducted thorough testing to ensure functionality and usability.
        - Validated that all features worked seamlessly and met user needs.
    - **Continuous Improvement:**
        - Gathered ongoing user feedback to find areas for further improvement.
        - Planned future updates to enhance functionality and user experience.

By adding the invoices section, Teckle aims to provide a more holistic project management solution that addresses the financial management needs of freelancers and small agencies. This addition will help users manage their projects from proposal to payment within a single, integrated platform, further streamlining their workflows and enhancing overall productivity.

Outcome:

The development process successfully resulted in a functional SaaS platform that aligned with the project's goals.

- **Functional Product:**
    - Successfully developed a functional SaaS platform that incorporated all the refined design elements.
    - The platform provided a seamless and intuitive user experience, aligning with the project's goals.
- **User-Centric Solution:**
    - Delivered a project management tool that effectively addressed the pain points of freelancers and small agencies.
    - The final product streamlined workflows, enhanced efficiency, and provided a pleasant user experience, meeting the needs of the target audience.

By following an iterative design process and closely collaborating with the development team, the project ensured that the final product was both user-centric and technically robust. The continuous refinement based on user feedback and practical implementation considerations resulted in a comprehensive solution tailored to the needs of freelancers and small agencies.

CHAPTER 3: CONCLUSION

The Teckle project embarked on a journey to bridge the gap in project management software, catering specifically to the needs of freelancers and small agencies. Through meticulous research, innovative design, and dedicated development efforts, we set out to create a platform that not only simplifies project management but also enhances user experience.

Throughout the project, our focus remained on addressing the pain points faced by freelancers and small agencies, such as fragmented workflows, high subscription costs, and limitations in existing tools. By consolidating proposal creation, contract management, and invoicing into a centralised platform, Teckle aimed to streamline project management processes and boost overall efficiency.

One of the key objectives was to maintain simplicity and usability while elevating the platform's look and feel. The new UI design reflects this commitment, offering a visually appealing and intuitive interface that enhances user engagement and satisfaction.

- The Teckle project aimed to address the unique needs of freelancers and small agencies in project management.
- Through extensive research, innovative design, and dedicated development, Teckle sought to simplify project management processes while enhancing user experience.
- Key objectives included consolidating proposal creation, contract management, and invoicing into a centralised platform.
- The focus remained on maintaining simplicity and usability while elevating the platform's aesthetics with a new UI design.
- Teckle was envisioned as a solution to empower users, making project management less overwhelming and more manageable.
- Incorporating user feedback and iterative refinement, Teckle aimed to serve the specific needs of agencies and freelancers effectively.
- The conclusion underscores the collaborative effort of stakeholders and expresses gratitude to all involved in bringing the Teckle vision to fruition.
- Looking ahead, Teckle remains committed to ongoing improvement and evolution to meet the evolving needs of users in project management.

CHAPTER 4: FUTURE SCOPE

The future scope of the Teckle project involves expanding and enhancing the platform to meet evolving user needs and market demands. This section outlines the planned developments and potential improvements aimed at increasing the platform's functionality, usability, and overall value for freelancers and small agencies.

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4.1 Advanced Invoicing System

One of the primary areas of future development is the integration of an advanced invoicing system. This system will automate the creation and management of invoices, significantly streamlining financial workflows and improving overall efficiency.

- **Automated Invoice Creation**:
  - **Overview**: The system will automatically generate invoices based on project milestones and deliverables.
  - **Benefits**: This reduces manual input, minimizes errors, and ensures timely billing.
  - **Features**: Users can set up recurring invoices for ongoing projects and customize templates to fit their branding.
- **Client Information Management**:
  - **Overview**: Client details will be auto populated from existing records within the platform.
  - **Benefits**: This streamlines the invoicing process, reduces the need for repetitive data entry, and enhances accuracy.
  - **Features**: The system will allow easy updates to client information and synchronize changes across all related documents.
- **Tax Handling**:
  - **Overview**: Comprehensive tax management features will accommodate different tax regimes, including GST and VAT.
  - **Benefits**: This ensures compliance with local tax laws and simplifies tax calculations for international transactions.
  - **Features**: Users can input tax details once and apply them automatically to all relevant invoices, with support for multiple tax rates and jurisdictions.

4.2 Integration with Proposals and Contracts

To provide a seamless user experience, the invoicing system will be fully integrated with the proposal and contract management modules.

- **Effortless Data Transfer**:
    - **Overview**: Client details and project information will be seamlessly transferred across proposals, contracts, and invoices.
    - **Benefits**: This eliminates redundant data entry, reduces errors, and speeds up the overall workflow.
    - **Features**: Data fields will be synchronized, so updates in one document reflect across all related documents.
- **Unified Workflow**:
    - **Overview**: Users will benefit from a cohesive workflow where project details, client information, proposals, and invoices are interconnected.
    - **Benefits**: This integration enhances efficiency, ensuring that all necessary documents are linked and easily accessible.
    - **Features**: Users can track the status of proposals and contracts and generate invoices directly from these documents once they are approved.

4.3 Financial Reports and Analytics

Future enhancements will include the development of comprehensive financial reporting and analytics features to provide users with valuable insights into their business performance.

- **Financial Dashboards**:
    - **Overview**: Dashboards will display key financial metrics, such as total invoiced amounts, outstanding payments, and overall profitability.
    - **Benefits**: Users can quickly assess their financial health and make informed decisions based on real-time data.
    - **Features**: Customizable widgets and charts will allow users to tailor the dashboard to their specific needs.
- **Profit and Loss Graphs**:
    - **Overview**: Graphical representations of profit and loss will help users track financial performance over time.
    - **Benefits**: Visual insights will aid in identifying trends, forecasting future performance, and making strategic adjustments.
    - **Features**: Interactive graphs will enable users to drill down into specific periods and transactions.
- **Budget and Cost Projections**:
    - **Overview**: The platform will offer projections and estimations of project costs and budgets.
    - **Benefits**: This will aid in financial planning and ensure projects stay within budget.
    - **Features**: Users can set budget limits and receive alerts when approaching or exceeding them.

4.4 Project Management Enhancements

In addition to financial features, further improvements in project management capabilities will be implemented to enhance user experience and project oversight.

- **Progress Tracking**:
  - **Overview**: Enhanced project dashboards will show progress metrics for each project, including timelines, member contributions, and completion statuses.
  - **Benefits**: This will provide a clear overview of project status and help in resource allocation and timeline management.
  - **Features**: Gantt charts, milestone trackers, and task lists will be integrated into the dashboards.
- **Budget Monitoring**:
  - **Overview**: Users will be able to monitor project budgets against actual spending.
  - **Benefits**: This ensures better financial control and prevents budget overruns.
  - **Features**: Real-time budget tracking and spending reports will provide transparency and accountability.
- **Client Success Tracking**:
  - **Overview**: The platform will track successful projects and client engagements.
  - **Benefits**: This will provide insights into client satisfaction and project outcomes, helping improve future projects.
  - **Features**: Feedback forms, client satisfaction ratings, and project outcome summaries will be included.

4.5 User Experience and Interface Improvements

Continual refinement of the user interface and experience will remain a priority to ensure Teckle remains intuitive and user-friendly.

- **Enhanced Usability**:
  - **Overview**: Ongoing usability testing and user feedback will inform iterative improvements to the platform's design.
  - **Benefits**: This ensures that the platform remains easy to use and meets user expectations.
  - **Features**: Simplified navigation, intuitive design elements, and user-friendly interfaces will be prioritized.
- **Personal Document Management**:
  - **Overview**: Additional features for managing personal documents, notes, and to-do lists will be integrated.
  - **Benefits**: This provides users with comprehensive organizational tools within the same platform.

- **Features**: Users will be able to create, edit, and organize personal documents, with templates and note-taking functionalities available.

4.6 Conclusion

The planned future enhancements for Teckle aim to solidify its position as a comprehensive project management solution tailored for freelancers and small agencies. By expanding its features and improving integration, Teckle will continue to streamline workflows, enhance productivity, and provide valuable insights, supporting the growth and success of its users.

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