Terms of Reference (TOR)

Development of Council Public Service Portal Platform

1. Introduction
    - The Council seeks qualified software development firms to design, develop, and implement a Public Service Portal Platform as a web app that enables residents to access council services online. The platform should modernize public service delivery, automate workflows, and facilitate communication between residents and council departments through a secure and user-friendly digital interface.

2. Objectives
    - To provide residents with a centralized online platform to submit service requests, track progress, and make payments.
    - To streamline administrative workflows and improve transparency in council operations.
    - To enhance efficiency and accessibility for both residents and council staff through digital transformation.

3. Scope of Work
    - The scope includes **design, development, hosting, maintenance, and support** for the entire system.

    The platform will consist of:

    - **Admin Portal** – for council operations, staff, and process management.
    - **Customer Area** – for citizens to access services, track applications, and manage documents.
    - **Supporting Modules** – such as billing, payments, subscriptions, rentals, and document generation.

4. Hosting and Infrastructure
    - Hosting must be provided and maintained by the vendor based on council approved hosting facilities.
    - The vendor is responsible for ensuring uptime, data security, and regular server maintenance.

- All sensitive data and document storage must comply with security best practices and be hosted within the council's approved region·

5· System Modules and Functional Requirements

- Admin Area
- Service Builder
    - A flexible module that allows administrators to create and manage services dynamically·

  Key Features:

    - Service Settings
    - Each service should have configurable titles in both English and Dhivehi·
    - Unique slug for the service URL·
    - Service short code for internal reference·
    - Configurable application submission time·
    - Configurable processing time for service requests·
    - Sub-Request Type Manager
    - Administrators should be able to create multiple sub-request types for each service, enabling customers to submit requests under specific subcategories·
    - All fields within a sub-request type should be fully dynamic, allowing admins to define and customize fields as needed for any sub-request·

- Form Builder:
    - Google Forms / Jot Forms – style custom built form builder with bilingual field support·
    - The form builder should render the entire form on screen same as it would be displayed on the main service request form
    - Dynamic field sections, wizard-style forms, conditional logic, and data sources·
    - Integration with products for chargeable options and invoicing·
    - Form should support faruma font or another font like faruma·

- Field Settings Panel:
    - Each form field should have a comprehensive configuration panel that includes: English and Dhivehi labels, English and Dhivehi descriptions, a required/optional toggle, support for custom CSS classes, the ability to hide/show the field, and column/size adjustment options· Additionally, fields should support advanced conditional logic, allowing them to be dynamically shown or hidden based on the value of other fields· Conditional rules should cover all standard operators such as equal to, not equal to, greater than, greater than or equal to, less than, less than or equal to, empty, not empty, contains, and does not contain·
    - Option Fields Data Source:
    - Select, radio, and checkbox fields should have the ability to link to a dynamic data source· This allows administrators to populate options automatically from predefined lists or external datasets, ensuring consistency and reducing manual updates·

- Page Content:
    - Rich text editor with visual tabs builder (English/Dhivehi)·

- Stages Management:
    - Administrators should be able to create, edit, and reorder service stages with ease· Each stage must include a rich text field for admin instructions, allowing detailed guidance or notes for users processing the stage·
    - Stage properties should include bilingual titles (English and Dhivehi), stage type, and content fields·
    - Admins must be able to search for and assign specific users to each stage, ensuring that only authorized personnel can process tasks within that stage·
    - Assigned users should be visually represented as icons both within the stage modal and on the stage card for clear identification·
    - The system should support auto-population of predefined service stage templates, enabling rapid

setup of commonly used workflows.

- Supported stage types must include: General, Evaluation, Verification, Payment, Approval, and Completed, covering the full lifecycle of service processing.

- Billing & Payments
    - Administrators should be able to attach products to a service, configure quantities, and adjust product pricing. The system must automatically generate an invoice for the service when the service request reaches the payment stage, based on the configured products.
    - Admins should have the ability to link one or more bank accounts to the service for seamless payment processing.
    - The system must allow selection of predefined payment terms so that invoices are generated according to the chosen payment schedule.

- Generative Documents
    - The platform should provide the ability to create dynamic document templates that automatically generate permits or official documents once a service request is approved.
    - Each template should support bilingual content, including: English and Dhivehi titles, document type selection, validity/expiry logic, and sectioned content with rich text editors for both languages.
    - Templates should also include a form builder for custom fields, allowing administrators to capture and render additional data on generated documents as needed.
    - Approved Notifications
    - This feature should allow administrators to configure notification recipients for service approvals. Notifications should be automatically sent to relevant authorities, such as Fenaka, MWSC, WAMCO, or other designated parties, ensuring timely communication of approvals.

6. Service Inbox

The Service Inbox serves as the central hub for managing and processing service requests· It should provide the following organized tabs and functionalities:

- Overview
    - Displays all service stages with clear visual indicators: completed stages highlighted in green and incomplete stages in grey·
    - Shows general service request details, including applicant name, submission ID, submission date, current status, and applied service name·
    - Each entry should include the task/action title, performing user, date, and time

- Files
    - Collects all documents and files submitted with the service request·
    - Displays files in a downloadable list format, including file name, upload date, and file type·

- Required Actions
    - Displays tasks for the current stage, visible only to users assigned to that stage·
    - System automatically generates tasks for each stage; admins can also add messages or instructions·
    - Each task includes “Verify” and “Complete” buttons for proper
    - workflow management·
    - Sub Tasks:
        - Admins can create subtasks when additional customer input is required·
        - Subtasks include titles and descriptions in both English and Dhivehi·
        - Each subtask can include a mini form builder for admins to define required fields·
        - Customers submit responses, which are locked for editing after submission·
        - Admins can approve or reject subtasks; only approved subtasks allow the main stage task to be completed·

- Stage Completion:

- The main stage task cannot be marked complete until all subtasks are approved and published·
- Completion triggers the next stage to populate in the Required Actions tab·

- Payment Stage:
  - Displays generated invoices with full details: invoice number, payment status, and date·
  - Online payments through BML are auto-processed and stage is completed upon confirmation·
  - Manual or bank transfer payments are marked “Processing” until verified by finance staff, after which the stage progresses automatically·

- Completion Stage:
  - Automatically generates and publishes configured documents or permits once the service request is finalized·

- Charges & Payment
  - Shows all generated invoices associated with the service request·

- View Form
  - Renders the full application form submitted by the customer, including all subtasks and approved sub-requests with responses·
  - Provides a “Download PDF” button for admins to download the
  - Complete application form·

- Documents
  - Lists all documents generated for the service request·

- Sub Requests
  - Displays all customer-submitted sub-requests in a card-style layout, including all fields and customer responses·
  - Admins can approve or reject each sub-request, with a reason field to

provide feedback visible to the customer·
- Approved or rejected requests display their status and hide action buttons automatically·

- Notifications
  - Once a service request is approved or is pending or recures more Document or payment, notifications are automatically sent to all relevant authorities configured by the council, ensuring proper communication and workflow transparency·
  - Reminder SMS Massage Should be Sent if a Payment due Date is Close, Due or has Passed· Admins Should be Able to Configure the Phone number and Text type of Massage a Clint Received·
  - Reminder message should be sent automatically with in pre-defined period of a Payment or Service·

7· Invoices & Finance Modules

The system should provide a comprehensive, ERP-style invoice management module with the following features:

- Invoice Index
  - Displays all essential invoice details in a clear, organized table: invoice number, customer name, amount, tax, total, date, due date, status, payment status, Viya status, and available actions·
- Invoice Creation
  - Admins can create new invoices with fields including:
  - Customer selection
  - Invoice date
  - Due date
  - Payment term selection
  - Viya Reference Number
  - Viya Invoice Upload
- Order Lines
  - ERP-style product addition interface including: product selection, description, quantity, UOM selection, unit price, tax

code, tax amount, line total, and a delete option·

- "Add Line" button allows dynamic addition of multiple products or services·

- Invoice Totals
  - Automatically displays subtotal, tax, discount, total, paid amounts, and remaining balance·

- Related Payments Section
  - Displays all payments linked to the invoice, including payment method, reference number, amount, status, and payment date·
- Invoice Update
  - Includes all features from the invoice creation page·
  - Payment Registration
    - ❖ Opens a modal to register payments, including amount, status, payment method, date, and notes·
    - ❖ Cash payments at counters can also be recorded manually by admin or finance staff·

8· Data Sources

- Enables admins to add and manage data sources, such as service options, charges, or other relevant data·
- Admins can add unlimited data sources, with each source supporting multiple data lines in English and Dhivehi·
- Supports linking products to individual data lines for automatic charge calculation·

9· Products

The system should support ERP-style product management with the following key fields:

- Name (English & Dhivehi)
- Type (Service, Product, Rental, Subscription)
- UOM (Unit of Measurement)
- Tax
- SKU
- Price

- Stock Quantity
- Category
- Description (English & Dhivehi)
- Image

Product categories are dynamic, allowing admins to add, edit, or configure types as needed.

10. Unit of Measurement (UOM)

- Interface to add and manage units of measurement for products, enabling accurate inventory and billing calculations.

11. Taxes

Admins can define unlimited tax options with:

- Title (English & Dhivehi)
- Percentage or fixed amount

Fully configurable for different service types or products.

12. Payment Terms

Admins can create or delete payment terms, including:

- Title (English & Dhivehi)
- Number of days
- Description (English & Dhivehi)

13. Payments

- Displays all registered payments for invoices, including:
  - Number, Customer, Amount, Payment Method, Payment Date, Status

- Payment Update Page
  - Shows payment details plus uploaded receipts for bank transfers.
  - For BML payment gateway, displays response data: Invoice ID, Payment Method ID, Transaction ID, State, and Signature.
  - Admins can approve payments or revert approved payments to pending.

14. Payment Methods

- Admins can configure payment methods. Default methods include: Cash,

Card, and Bank Transfer·
    - Supports adding new payment methods in the future·

15· Bank Accounts

- Fields include: Account Name, Account Number, Bank Name, Branch Name, Currency, Balance, Chart of Accounts selection, Active status, Default account designation·

16· Charts of Accounts

- Provides a general accounting framework with the ability to add, edit, or remove accounts·
- Fields include: Title, Code, Type, and Active Status·

17· Subscriptions

- The Subscriptions module enables admins to manage recurring charges such as monthly rentals, monthly fees, yearly fees, rental agreements, and garbage disposal fees collected from customers· Only admins can create a subscription and customers cannot·

- Subscription Index View
- Displays a comprehensive list of subscriptions with the following fields:
    - Subscription Number
    - Customer Name
    - Amount
    - Tax
    - Total
    - Start Date
    - End Date
    - Status
    - Next Invoice Date

- Subscription Update Page
  Details Tab
    - Customer Name

- Start Date & End Date
    - Payment Term Selection
    - Billing Cycle
    - Invoice Timing & Billing Alignment
    - Billing Address Selection
    - Option to attach multiple customers to a single subscription so that all linked customers can view and manage invoices and payments
    - Fines management configuration panel where admins can setup late fees, penalties and fines based on different types such as percentage or fixed fine after invoice deadline·

- Agreement Details
    - Agreement Number
    - Agreement Start Date & End Date
    - Upload Agreement PDF
    - Multi-upload option for additional related documents

- Order Lines
    - Admins can add subscription products so the system can auto-generate recurring invoices based on the defined billing cycle

- Terms and Conditions
    - Rich-text editor for defining terms and conditions for the subscription; these terms will be applied to all future invoices generated under this subscription

- Invoices Tab
    - Displays all invoices related to the subscription in a card-style layout, showing:
        - Invoice Number
        - Invoice Date
        - Due Date
        - Total Amount
        - Payment Status Badge

- Recent Invoice Summary
  - The top-right corner of the subscription update page displays the most recently generated invoice, including its status, invoice number, and total amount

- Addresses, Atolls & Islands
  - Addresses
    - Admins can add and manage all island addresses within the system for use across modules such as Subscriptions and Services·
  - Atolls & Islands
    - A separate table will maintain Atolls and Islands· When adding an address, admins can select the relevant Atoll and Island from a dropdown list·

- Rental Booking Calendar
  - Provides a calendar view of all confirmed rental bookings for rooms, equipment, and venues·
  - Calendar views include Weekly, Monthly, and 6-Month views·
  - Each booked slot displays:
    - Booking Request Number
    - Products
    - Customer Name

- Documents
  - Stores all generated documents from service requests·
  - Admins can create custom documents for customers and publish them to the customer's document locker·
  - A **Document Types** table allows admins to add or remove types (e·g·, Permit, Certificate, etc·)·

- Users
  - Displays all registered portal users·
  - Admins can view, update, and assign permissions to users·

- When a user logs in via Efaas, the system automatically creates a new user with the "Customer" role.
- Admin Should be able to create pre-Defined customer, when a customer login it should assigned pre-Defined Role based on Customers ID card Number
- Admins can assign roles such as Administrator, Service Editor, Rental User, etc., and the system sends notifications to users about their assigned roles.

- Permissions

  - Each CRUD operation and page in the application has dynamically generated **Create, Update, Delete, and View** permissions.
  - Permissions can be assigned to users or roles.

- Roles
  - Admins can create, update, or delete roles.
  - The Role Edit page includes a searchable list of permissions that can be assigned via multi-select or checkboxes.
    - Application Logo Upload
    - Application Name
    - Service Request Reference Number Format
    - Organization Logo Upload
    - Invoice Reference Number Format
    - Payment Reference Number Format
    - Default Invoice Terms & Conditions (rich-text editor)
    - Document Reference Number Format
    - Subscription Reference Number Format
    - Booking Reference Number Format
    - Add more parameters where ever needed

- Environment Variables

  Admins can configure the following:
  - Amazon AWS Credentials
  - Database Configuration
  - File Upload Settings
  - BML Payment Gateway Credentials
  - Efaas Credentials
  - Web Socket Service Credentials
  - Dhiraagu & Ooredoo SMS Gateway Credentials
  - SMTP Email Configuration

- Navigation Menu

- Admins can add, edit, or remove customer portal navigation menu items·
- The menu supports drag-and-drop ordering, multi-level structure, and English/Dhivehi language support·

- Custom CSS
    - Admins have access to a custom CSS panel with a web-based code editor·
    - CSS changes are applied globally across the application interface·

- Dynamic Home Page
    - The customer portal home page is fully dynamic with a page builder·
    - Admins can add or remove content blocks to display services, rentals, and other key information in English and Dhivehi·
    - Admins can add, update, or remove footer widgets and content across the portal·

Customer Area

- Header
    - Includes a language switcher to toggle between English and Dhivehi·
    - Dark mode / Light mode toggle·
    - Displays the application logo prominently·
    - Notifications badge and user profile dropdown are included·
    - Notification dropdown lists all user notifications with an option to mark items as read·

- Home Page
    - Displays all published services and rentals·
    - Dynamic content created by admins using the page builder is also visible·

- Services Archive Page
    - Lists all available services for the customer to browse·

- Service Single Page
    - Displays service title, "Apply Now" button, processing time, submission time, and additional information tabs configured by admins·
    - If the customer is not logged in, the "Apply Now" button is hidden and replaced with a **Login** button·

- Subscriptions
    - Displays all subscriptions assigned to the logged-in user·

- Admins create subscriptions and assign users·
- Each subscription card shows:
  - ❖ Number
  - ❖ Products billed
  - ❖ Status
  - ❖ Start and end dates
  - ❖ Next billing date
  - ❖ Billing schedule (monthly, yearly, etc·)

- Single Subscription Page
  - Displays complete subscription details:
    - ❖ Billing address
    - ❖ Start and end dates
    - ❖ Next billing date
    - ❖ Billing schedule
    - ❖ Services being billed
    - ❖ Total amount
    - ❖ Agreement details (number, start/end dates, PDF)
    - ❖ Additional attachments
    - ❖ Generated invoices in card style with: number, date, due date, total, and status

- Customer Dashboard
  - Metrics displayed:
    - ❖ Total service requests
    - ❖ Ongoing requests
    - ❖ Completed requests
    - ❖ Uncompleted tasks
    - ❖ Total pending balance
    - ❖ Rental requests
    - ❖ Subscriptions
  - Quick links to requests and pending tasks·

- Customer Invoices Page
  - Card-style display of invoices with number, status, date, due date, total, and related service request number·

- Single Invoice Page
  - Displays full invoice details:
    - ❖ Header with app logo and organization details
    - ❖ Billing and customer information

        - Invoice date, due date, source (service request, subscription, or rental)
        - Payment terms
        - Order lines (item, quantity, unit price, tax, total)
        - Summary section: subtotal, tax, total, registered payments, balance
    - Displays all submitted payments in card format· Floating window at the top shows total amount, pay button, and download button·
    - **Pay Button**: Opens a payment modal·
        - Card payments redirect to BML gateway·
        - Bank transfers display account details, with receipt upload and validation rules·
    - **Download Button**: Downloads PDF version of the invoice

- Locker

    - Displays all documents, permits, and booking approvals·
    - Default filter shows active items; expired items can also be filtered·
    - Each document is displayed as a card with:
    - Type, title, number, issue date, expiry date, QR code, download, and details button
    - QR codes validate documents via a link with an access ID·
    - Download button saves an image of the document card for offline use·

- Footer
    - Dynamic content added by admins (e·g·, important links, contact info)·

- Notifications

    - All relevant actions trigger notifications·
    - Customers receive notifications via SMS and email·
    - Admins receive notifications if added to service stages or rental processing teams·
    - Finance department receives email notifications for payments requiring action·

- Integrations
    - eFaas login (authentication)
    - BML Payment Gateway
    - Dhiraagu/Ooredoo SMS Gateway (admin selectable)
    - Amazon AWS for document storage
    - Microsoft 365 Email for notifications

- Deliverables
    - Admin Portal
    - Public (Customer) Web App
    - Promotional Dhivehi Video – For public awareness and training.
    - Admin Documentation & Training Videos – Per-section tutorial videos and manuals.
    - Live Training Sessions – Conducted by the developer for council administrators.
    - Application Launching Video
- Development Timeline
    - The full system development, deployment, and training must be completed within 2 months from project kickoff.

- Maintenance and Support
    - Regular updates and maintenance to ensure performance and security.
    - Technical support for council staff.
    - Any applicable maintenance fees must be included in the financial proposal.

- Project Timeline

    The bidder must include a detailed project timeline with milestones such as:

    - Requirement confirmation
    - Design Approval
    - Development
    - Testing
    - Training
    - Go-Live