**Notes for Meeting held on 05/02/18**

Dashboard:

1. Add Email Reply
2. Finish archiving
3. Add filtering, searching for emails
4. Add attachments
5. Attach the email to the newly created task
6. Change "Notes" to "Actions"
7. Store bank and other client details
   1. Encrypted format to be saved in the database, storing URLs, usernames, passwords
   2. Can store as many files

Setup:

1. Inline editing for setup tables

Task Recurrence:

1. Try to pattern the UI after the Outlook interface
2. Add a Bi-Monthly option
3. Add quarterly
4. No end date add a new task every time one is completed

Task Deferral

1. Change "Defer" to "Reassign"

\* Fix links for Close or Cancel button

\* Deleting of records should only mark them with "IsDeleted" then the user and transaction details are saved

\* Allow immediate editing for Admin users

\* Add readme.txt file