DATE: 17.11.2023

1. Change Add sales tab as Add en query
2. Client name field should be as manual entry.
3. Details fetched in client name those details need to under department field.
4. Registered login name need to fetch automatically in sales employee name field and remove remaining names from drop down.
5. Change address as Client Address.
6. Font color should be bright and font size needs to be increased.
7. Only the relevant user stage should prompt viewing.
8. Lead closed – it should be as optional and it is not mandatory stage.
9. Revenue Assurance – Document field is not mandatory and add remarks field which is mandatory.
10. Project closed – it should be as optional and it is not mandatory stage.
11. Operation Manager – Billing process, billed status→Need to show only yet to complete in drop down, remove completed option.
12. Operation Manager – Billing process, billed status→ Need an attachment option as client confirmation which is mandatory.
13. Documents uploaded by Operation manager need to show to Accounts & QC team.
14. Billing process – Need a revert option for Accounts team; if Accounts reverted it need to move to Operation manager with Mandatory remarks.
15. Billing process – Need a revert option for QC team; if QC reverted it need to move to Accounts team with Mandatory remarks.
16. Add MIS report in Sales head, Revenue Assurance, Internal Audit and Accounts team.
17. MIS report option should be with filter and Date calendar (from and to date). Filter should with Stages, live projects, lead closed, project closed, billable and billed.
18. In Billing need a status in each stage.