# TODO

1. Merge call log, servman log and assign how project was generated
   1. ~~Assign calls to transaction record in servman~~
      1. ~~Create table Transaction~~
         1. ~~ID~~
         2. ~~Ticket Number~~
         3. ~~Cust\_id – customer id (in our system)~~
         4. ~~Serv\_type – project type (Carpet Cleaning, Restoration, Floor)~~
         5. ~~Trans\_code – status of transaction~~
         6. ~~Employee Name~~
         7. ~~Extension~~
         8. ~~Date Created~~
      2. ~~Transaction To Phone Call~~
         1. ~~Phone Call ID~~
         2. ~~Transaction ID~~
      3. Associate voice files with phone call records
   2. Create web site to show
      1. ~~Import from servman enough information to show on lead screen~~
         1. ~~Design new tables~~
            1. ~~Lead Source~~
            2. ~~User~~
            3. ~~Tracking phone numbers~~
         2. ~~Import enough data from servman~~
            1. ~~Lead source name~~
            2. ~~Customer (based on caller id)~~
            3. ~~Call Created~~
            4. ~~From Phone~~
            5. ~~To Phone~~
            6. ~~Lead Status~~

~~New~~

~~Converted~~

~~Not matched~~

* + - * 1. ~~Job status~~

~~Pending~~

~~Scheduled Jan 22 8-10 pm~~

~~Cancelled~~

~~Customer Cancelled~~

~~Completed – Pending Account~~

~~Completed~~

~~Closed Amount - after account completion~~

* + 1. Finish call log page for owner 02/16/2011
       1. Filter by dates - replace 2 date fields with single date picker
       2. ~~Player~~
       3. ~~Import phone calls through APIs~~
       4. ~~Paging~~
       5. ~~Ticket detail~~
          1. ~~Ticket Number, closed amount , order status, order source~~
          2. ~~Grid of all calls related to the ticket~~
    2. Login and users 02/18/2011
       1. Login process
          1. Login page
          2. Password reminder
       2. Make call log screen role based
          1. If user is a lead source, then he can only view calls match to this lead source
    3. Management of User Info by Lead Source 02/24/2011
       1. Modify personal info other then lead source name
       2. Review assigned tracking phones
       3. Edit own phones
       4. Invitation landing page – probably user info page. Require enter password
    4. Sync 06/25/2011
       1. Grouping of transactions based on workflow id
       2. Create template to send invitation to join partner program
    5. Changes to layout of the page, make it more beautiful 03/2/2011
    6. Unplanned Changes
       1. Add filter by servman User name. Use combobox with all users. How to add username column, there is no room?
       2. Those columns should be removed from main grid – Caller Number, Incomin Did, Ticket Status, Closed Amount. Insert user name field
       3. Implement call details page, show it when clicking from main grid
       4. Modify call log grid in “ticket details” page according to these changes
       5. Summary Report
          1. User selects Order source and date range (current month, prev month, custom range). Report can be shown to business partner
          2. If user is partner he can only see report for him
          3. If user is owner he also can not to select particular partner but see all the partners
          4. Report should have the following fields

Tracking Number (own or incoming number, how we figured order source). If user clicks on tracking number he can see list of all calls for particular tracking number for date interval, selected in parent report

Number of calls

Number of newly booked tickets for each number

Total closed amount

* + 1. **Deployment 03/3/2011**
    2. Copy of files from input directory to processed directory and matching to call records 03/3/2011
    3. **Step 2 - Maintenance of the system by Owner**
       1. Manage tracking phone numbers
          1. Add new tracking number in status “Unassigned”
          2. Remove tracking phone number if in status “Unassigned”
          3. Review status of all phones (Assigned and unassigned)
       2. Manage lead sources
          1. Create new lead source

Lead Source Name (Unique)

Requires Login or Not?

If requires login – User Details. Send invitation to new user to join system over email

Add Tracking phones from unassigned tracking phones

Add Own phones (Unique)

* + - * 1. Update lead source
        2. Delete lead source (Make lead source inactive)

Delete user associated with lead source

* + - * 1. Release tracking assigned phone numbers
      1. Manage users
         1. For each user

Changes user, password

Re invite

Delete from the system

If user assigned to lead source, transfer to delete lead source page