# TODO

## Immediate

1. ~~Jeanette needs reports~~
2. ~~Need ad source for money mailers~~
3. Fix bug when visit is dispatched( assigned for execution) but in workdetail TimeDispatched is null.
4. When printing ticket with PM on it, pm is not printed (BOLD AN BIG)
5. On Tickets print the word FLOOD, MONITORING, RUG PICKUP, DELIVERY like Name format on the bottom + Ticket
6. On Construction lead Lead ticket,
7. New project types – basement systems. Work like construction.
8. When we book an order for a rug pickup and with specific notes on the ticket those notes are not transferring over to the delivery ticket.
9. Also, when we put the advertising source on a rug pick up order, that ad source is not transferring over to the delivery ticket.  So we have had issues with paying franchisees their commission because that ad source is getting wipped out.  Donna may have got with you regarding this issue not sure though?

## Sales Force Setup

## Lead Management

1. ~~Add Feedback functionality to restoration site~~
2. ~~Make Feedbacks show up on rug cleaning site automatically~~
3. ~~Show lead history. How first updated lead, who last~~
4. ~~Notify when lead is late (more then 10 minutes) via email~~
5. ~~Modify templates~~
6. ~~Filter not working by date 1 hour~~
7. ~~Generate lead when reminder is due 2 hours~~

## Feedback Processing

### Positive Feedback

1. Dispatcher review , edit and publish on our site
2. System records when and who did it
3. ~~If customer asked to be reminded~~
   1. ~~Lead is generated when it is due~~
   2. ~~Email is sent to customer~~
4. Dispatcher follows up with the customer and ask to put review on insider pages and offer some kind of incentive. No coding here.

### Negative Feedback

1. Dispatcher review it and generates reject tasks
2. Dispatcher need to write note
3. Owner gets email on bad feedback resolution

## Reject Flow

## Reports

1. ~~Revenue Report – report to first of the month date~~
2. Revenue Report – Same day rugs are not added to total
3. Sales Tax Issue. No sales tax in the report
4. Report Numbers don’t match. Need to figure out example
5. Construction Manager Report
   1. Any time frame
   2. Any Lead CM received
      1. John Prov
      2. Bill …
      3. 25 leads
   3. How many signup
   4. Lead conversion by project manager

## Dashboard

1. ~~Fix issue with Totals on top of dashboard~~
2. ~~Show name of logged in dispatcher~~
3. Show on printed ticket who booked the job
4. Show on dashboard who booked the job
5. Add new service type for basement system
6. ~~Remove Amber, JR from dashboard~~

## User Management

1. Modify user permissions
2. Modify password

## Construction

1. Change “Account Manager” to “Sales Person”

## QB integration

1. Break down job totals to services

## Construction visits for leads

Add a construction board to track leads ?