## Prototype application Requirement

Create Federated IPP and SalesForce app exchange application

1. Step 1 IPP sync
   1. Sync information about company form Intuit
      1. The following data will be synced into application
         1. Services company provides (Items)
         2. Employees
         3. Accounts
         4. Invoice Templates
         5. Sales Tax Codes
         6. Class Types
         7. Sales Reps
         8. Advertising Sources
         9. Vendors
      2. Test it with real Quickbooks application of Dalworth restoration
      3. Implement sync of data. Modify any of the information in Qb and see changes appear in our application
   2. Setup
      1. For now just show imported information read only
   3. Lead Management
      1. Create Lead from application
      2. Show leads based on status, vendor,
      3. Convert lead to project and create project into Qb
      4. Cancel lead
      5. Print lead on paper
      6. Show lead report
      7. Leads emailed to certain employees based on permission
   4. Invoice Creation
      1. Find Project
      2. Create invoice
      3. Sync invoice into qb
      4. If invoice was changed in qb, update changes back to application
2. Step 2 SalesForce Sync
   1. Sync Customers from Sales Force
   2. Create lead in Sales Force
   3. Put it into our application for processing
   4. When lead status change, salesforce is updated
   5. If customer info changes, salesforce is updated