# Inception completion requirements

## User management

## Roles

### Business partner

#### Functionality

1. Create lead
2. Edit new leads
3. View status his leads
4. Edit his profile
5. View payments sent to him
6. Reports

#### Screens

##### Home

1. Lead management
   1. Create lead, edit lead
2. Graph number of leads per day
3. Report (show and print to PDF)
   1. Select date range
   2. Number of leads submitted
   3. Number of leads converted
   4. Number of leads failed
4. Payments sent

### Employee

#### Functionality

1. Employee is connect to QB employee
2. Create lead for any business partner
3. Edit new leads
4. Add business partner
   1. Connect business partner to vendor
      1. Show list of vendors.
      2. Select which vendor or create new
5. Leads
   * 1. Review leads
        1. Default show first new leads pending order by date
        2. Search by Lead id, customer , created date, status (new and pending, converted, cancelled)
     2. Cancel leads with “Are you sure” logic
     3. Move lead to pending
     4. Add, Modify employee note
     5. Convert lead to project
   1. Add new customer or edit customer
6. Write employee comment
7. Report
   1. Select business partner
   2. Select date range
   3. Same report as for business partner
   4. Same report group by business partner

#### Screens

1. Leads
   1. Create lead , Edit leads that came from business partners, Cancel Lead , Move lead to pending
   2. Show leads with filters
   3. Convert lead to project
      1. Customer search based on (last name and first name), or phone number
      2. Select customer and or create new customer (qb as a source of truth)
      3. Edit customer
2. Business Partners
   1. View
   2. View by sales rep
   3. Add, edit
      1. Associate business partner with Sales Rep (employee)
   4. View info about business partner same as business partner can see about himself

### Owner

#### All Employee functionality

#### Reports

1. Performance per sales rep
   1. How many leads where created, converted, completed by sales rep business partners
   2. How much money it generated
   3. How many projects pending per sales rep (pipeline)
   4. Revenue from leads
2. Performance per business partner
   1. Select business partner and see information about him
3. Performance for all business partners (total)

### Admin

#### Settings

##### Lead email notification

##### Project Types

##### Employee Management

###### Ask if employee is vendor or employee in Qb

###### Select list of employees or vendors in QB

###### Invite them to use system

## Reports

## Deployment