# Setup

1. Step 1 – Authorize Lead Central to your Quickbooks Data
   1. Modify sentence to say “To access your quickbooks data”
   2. In Inuit, it says “Servman” Should say “Lead Central”
   3. Create page “Thank you” after oauth authentication
   4. Page “Congratulation”
2. Step 2 - Setup phone workflows
   1. Default “Thank you for calling”, Empty redirect phone number
   2. If redirect phone number is empty, use voice mail flow
3. Step 3– Setup Lead Sources

# Manage Lead Sources

1. ~~Remove “root” on empty lead sources~~
2. Create new
   1. ~~Remove word Null from Lead Source~~
   2. ~~Is Child Of~~
      1. ~~Remove word “Root” just make it empty~~
   3. ~~Customer Type~~
      1. ~~Make it a drop down with empty selection as first selection~~
   4. ~~Sales Rep~~
      1. ~~Call it “Sales Rep”~~
      2. ~~Drop down with empty selection as default~~
   5. Grant Login – Can Login
   6. Own Phone Numbers
      1. “The lead source can be identified by calls from these phone numbers regardless of tracking phone numbers”
         1. Add ability to add tracking phone number without saving
3. Assign trucking phone number
   1. Change “Purchase New”
4. Add ability to setup rules

# ~~Setup~~

1. ~~Remove Edit button~~

# Support for inactive

1. If lead source is inactive, don’t show it. Have a button with “Show Inactive” check box
2. When inactivate lead source, release all phone numbers

# Lead

1. Modify layout of filter
2. Lead Source, Type of Lead – fixed length
3. Status
   1. Make it dropdown
   2. Allow changes from any to any

# Lead List

1. Lead Source, Lead type – fixed length
2. Filter
   1. Drop down lead status “New and Pending”, Cancelled, Converted

# User

Remove phone

# App

Remove all timers

# Signup

1. Request
   1. Name
   2. Email address
   3. Phone
2. Response
   1. Thank you for your interests in Dalworth Restoration Lead Program. Invitation to join was sent to [valery@affilia.com](mailto:valery@affilia.com) . Please view movie on how to sign up. Embed youtube movie to the page.