# 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~~

# 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~~

# Match lead to job

Fix bug

# Email notifications

1. If lead is received, email is sent to leadsource user, parent leadsource user, owner receives email.

# Quickbooks online support

# ~~User~~

~~Remove phone~~

# ~~App~~

~~Remove all timers~~

# 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