**WakeUpSales Feature list**

* **Beta user registration**
* On email submit, confirmation email will be sent
* The email will appear on site admin's users list page
* On approve the user's email by site admin another email will be sent for signup
* On-clicking the link signup popup will appear
* After successfully signup, the users list on the site admin section will be updated
* **Sign Up**
* On clicking the signup button the email field for beta account will be highlighted
* **Sign In**
* Display popup for sign in process
* If wrong information provided then it will redirected to another sign in page with error flash message
* **Forgot Password**
* Display popup for forgot password process
* If wrong information provided then it will redirected to another forgot password page with error flash message
* **Home Page**
* On clicking the “Manage Deals”, “Manage Contacts”, “Manage Sales Activities“ and “Sales Force Action” boxes, the respective static section will be displayed and on mouse over the boxes should be highlighted
* **Dashboard**
* **Notification**
* **Note:** On clicking the notification data, it will be redirected to the respective listing page
* Deal
* Admin/super-admin: All deal with status incoming
* Non-admin: All assigned deals with status incoming
* Overdue task
* Admin/super-admin: All overdue tasks
* Non-admin: All associated overdue task
* New Task
* Admin/super-admin: All today's task
* Non-admin: All associated today's task
* **Header count buttons**
* **Note**: For Admin/Super-admin user data fetched form all the data and for Non admin user fetched from associated data(created by or assigned to). And on clicking the button, it will be redirected to the respective listing section
* Task
* if Today task count > 1 then “Today's task count”
* else if Overdue task count > 1 then “Overdue count”
* else if Upcoming task count >1 then “Upcoming count”
* else “Tasks” with zero count
* Deal
* New deals count
* Qualified deals count
* **Task list widget**
* **Note**: For Admin/Super-admin user displayed all the tasks and for Non admin user displayed the associated tasks. (pagination with max. 20 numbers for each page & for each section)
* Displayed “Today”, “Overdue” & “Upcoming” task list with the respective task count
* Task tab is click-able only if it has some tasks
* if Today task count > 1 then Today's task tab will be selected by default
* else if Overdue task count > 1 then Overdue task tab will be selected by default
* else if Upcoming task count >1 then Upcoming task tab will be selected by default
* Grouped the task as per the assigned user
* Task completion functionality, where it will ask for outcome before completing any task
* Task “Edit”, “Follow up” & “Delete” functionality
* Follow up should create a new task with type “Follow up”
* After any action performed page must be redirected to the dashboard page
* On-clicking the assigned user name displayed on each task row, it will be redirected to task listing page and filter the tasks with that assigned to user
* Displayed “View more” link for each tab
* On clicking the “view more” link user will be redirected to the task listing page w.r.t the selected tab
* **Summary**
* **Note**: For Admin user fetched form all the data and for Non admin user fetched from all the associated data(created by or assigned to) for the last 3 months.
* Total Calls
* All task count with type 'Call'
* On clicking the count redirected to all task listing page and filter it with the task type “Call”
* Appointments
* All task count with type 'Appointment'
* On clicking the count redirected to all task listing page and filter it with the task type “Appointment”
* Out standing Tasks
* All the overdue task count
* On clicking the count redirected to overdue task listing page
* Upcoming Tasks
* All the upcoming task count
* On clicking the count redirected to upcoming task listing page
* Leads to nurture
* All active deals count with type incoming/new
* On clicking the count redirected to incoming deal listing page and filter it for the last 3 months
* Last deal closed
* Displayed the deal close date with link to redirect the user to the deal detail page and on mouse over tooltip will be displayed with the deal name
* Closed by user name
* Avg time to close a deal
* Number of days spend to close a deal
* **Usage**
* **Note**: Calculated counts for **last 3 months**.
* Tasks Completed
* Admin/super-admin: All completed tasks
* Non-admin: All assigned to/created by tasks completed
* On clicking the count, redirected to completed task listing page
* Call Completed
* Admin/super-admin: All completed task with type “Call”
* Non-admin: All completed tasks with task type "Call" & task assigned to the logged in user
* On clicking the count, redirected to completed task listing page and filter it with type “Call”
* Won Deals
* Admin/super-admin: All deals with status “Own”
* Non-admin: Deals assigned to the current user & deal status is "Won”
* On clicking the count redirected to won deal listing page
* Lost Deals
* Admin/super-admin: All deals with status “Lost“
* Non-admin: Deals assigned to the current user & deal status is "Lost"
* On clicking the count redirected to lost deal listing page
* Lead nurtured
* Admin/super-admin: All deals where status is not "incoming"
* Non-admin: Deals associated to the current user where deal status is not "incoming"
* **Activity stream**
* For Admin user, all the organization user activity and for Non admin user only the data where he/she is associated(created by or assigned to) will be displayed
* Only the recent 10 activities will be displayed
* On clicking the “View more” link redirected to activity list page
* **Charts**
* **Admin user**
* **Note:** Chart will be displayed w.r.t all the deals of the organization
* Deal by stage
* Pie chart to display the deal count for each stage of the last 1 month
* Deal statistics
* Column chart to display the deal count for each stage of the last 3 months
* **Non admin user**
* **Note:** Chart will be displayed w.r.t all the associated deals of the organization
* Deal statistics
* Line chart to display the deal count for each stage weekly basis
* Statistics
* **Note**: Here users means, all the users belongs to logged in user group i.e (Sales, Lead generator ..etc)
* Two sections

1. Deals closing percentage
2. Deals win percentage
3. Deals closing percentage

* Average days to complete a deal
* Shortest days to complete a deal
* Longest days to complete a deal
* Displaying the closing percentage, if the other users of the organization closed deal in less days then the current logged in user
* Closing percentage will be calculated from the days taken to close deals by other users if it is less than current logged in user's close days

1. Deals win percentage

* Total deals count assigned to the current user
* Won deals count form total deals
* Win percentage
* Win percentage will be displayed if the other users of the organization won more deals then the current logged in user
* **User settings dropdwon**
* Admin
* Settings
* Profile
* Admin
* Log out
* Non admin
* Settings
* Profile
* Log out
* **Deal listing**
* 6 different optional tabs as per the deal stages
* Incoming
* Qualified
* Won
* Lost
* Not Qualified
* Junk
* Click the + button to add or remove tabs to limited the tabs display
* Deal listing will be displayed as per the deal stage in respective tabs
* Datatable with server side processing used to display the list
* Deal listing informations are coming in JSON format for faster loading
* Deals are listed as per the recent activities
* Create deal popup
* Actions available with each deal
* Admin (Action available for all deals)
* Non Admin (Action available only with the associated deals)
* Add task
* On click task create popup will come where the assign deal field is pre filled with the deal name & is disabled
* On creating a task it will display on the task widget of deal detail page
* Add note
* On click note add popup will appear and on save it will be displayed under the activity stream
* Apply label
* All the labels available for the organization will be appeared in a popup
* After save labels will be displayed under the title column for the deal
* Send email
* On click send email popup will appear with the contact email pre filled within the email field
* On clicking “Send” button, an email will be sent to the contact with the given message
* Edit
* Quick edit
* Delete
* On delete the deal's status will changed to inactive, it will not removed from the database
* Admin
* Always display
* Non Admin
* If the deal is created by the user
* Move deal
* Popup will appear with the following fields
* Radio buttons for all the available deal statuses: Check one of the status for the deal
* Assigned user fields: changed the assign user so that after status change the deal will assigned to the selected user
* Note field: why the deal should be moved
* On submit the deal status will be changed and then the deal will listed under the changed status tab
* Sorting functionality
* On clicking the the column heading
* On clicking the priority label
* On clicking the email of Contact column, a popup will appear to send email
* Filter functionality
* Available columns to filter on clicking the “Filter” button
* Created by
* Assigned to
* Location
* Priority
* Create at
* No Activities
* Filter value is stored in the cookies, if the user will come to the deal list page after some time then list will be filtered as per the cookies values
* On clicking the reset button on the header section all the filter cookies will be cleared
* On clicking the close buttons of a selected filter, the respective filter cookies will be cleared
* Quick filter
* On clicking the assigned to name of Title column, deals which are assigned to the user will be filtered
* On clicking created by name of Created column, deals which are created by the user will be filtered
* Action for multiple deals
* On selecting the deals, the drop-down present on the table header section will be activated to apply the following changes
* Add label
* Pop up will appear to add new label with custom color
* Manage label
* Redirect to settings label section
* Move Deal
* Re-assign
* On click popup will appear with the user list
* On changing the assign user, all the selected deal's assigned user will be updated with the selected one
* Bulk lead upload
* upload deals in CSV format
* Preview the leads by retrieving from the CSV
* Inline edit functionality in the preview page
* On confirmation leads will be saved in the database
* Email will be sent to the assigned user with all the assigned deals link
* **Deal detail**
* Following are the sections displayed
* Deal information
* Associated contact information
* Image, Social site links, Name, Company, Email, Website, Work phone, Cell, Location
* Skype call on clicking the work phone and Cell number
* Send email message popup on clicking the email
* Associate new contact
* Auto suggest the contacts available, on select pre filled the other fields & associate on save
* Create new contact information if not exist & associate on save
* If there is only one contact associated with the deal then delete button should not appear
* On delete the contact associated, it will removed the mapped information with the deal
* Task widget
* Displaying tasks related to the deal only in 4tabs
* All
* Today
* Overdue
* Upcoming
* Edit, follow up & delete functionality
* Only follow up action for completed tasks
* Follow should create a new task with type “Follow up”
* Profile link to the task assigned to name
* Task complete/active functionality
* After any action performed page must be redirected to the dashboard page
* Note & attachment
* On adding note with/without attachment it will display under the activity stream without page refresh
* Activity stream
* Edit button
* button will appear only if current user is associate with the deal or admin or super-admin
* Delete button
* button will appear only if the deal stage is not won and current user has created the deal or admin or super-admin
* Add task
* The deal auto suggest field will be auto filled with the deal name
* **Deal Create**
* Enter deal information to create a deal
* Contact name is auto suggested, and on select email, country & phone no will be pre filled
* If the contact is not exist then a new individual contact will be created and associated with the deal
* On creating deal, mail will be sent to the assigned user
* **Deal Edit**
* Quick edit
* To update minimal important fields
* Popup will appear to update title, assigned user, amount, visibility
* Normal edit
* Deal section
* Inline update for Deal name, Source, Industry
* On clicking the Source or Industry loader should display unless the information retrieved from server
* Option to add new Source & Industry and map with the deal on the fly
* Contact section
* Associate new contact
* Auto suggest the contacts available, on select pre filled the other fields & associate on save
* Create new contact information if not exist & associate on save
* If there is only one contact associated with the deal then delete button should not appear
* On delete the contact associated, it will removed the mapped information with the deal
* Image, Social site links, Name, Email, Work phone
* Skype call on clicking the work phone
* Send email message on clicking the email
* **Task listing**
* **Note**: For **Admin** user fetched form all the tasks and for **Non admin** user fetched from the tasks he/she is associated(created by or assigned to)
* Task list is displayed on ascending order of Due date
* Datatable with server side processing used to display the list
* Task listing informations are coming in JSON format for faster loading
* All
* Both active & completed tasks
* On tab bracket, count displaying the active tasks
* Today
* Task due date is equals to current date
* Overdue
* Task due date is greater then current date
* Upcoming
* Task due date is less then current date
* Completed
* Completed tasks list
* Action available with each task
* Edit – not available in completed tab
* Follow up
* Delete – not available in completed tab
* On check the checkbox present with each task, popup will appear to insert outcome. On giving the outcome or skip that form that task will be completed and comes under the “Completed” tab
* On uncheck the task will be active again
* Outcome will be displayed under the completed tab
* Calendar view
* Task background color is set as per the task type
* On clicking the task, it will redirected to the deal detail page
* Filter functionality
* Available columns to filter on clicking the “Filter” button
* Deal type
* Assigned to
* Task type
* Any time – Not available in case of calendar view
* Filter value is stored in the cookies, if the user will come to the deal list page after some time then list will be filtered as per the cookies values
* On clicking the reset button on the header section all the filter cookies will be cleared
* On clicking the close buttons of a selected filter, the respective filter cookies will be cleared
* **Task Create**
* Title
* Due date
* Datepicker to add date and time
* Task type
* Display all the task type of the organization by retrieving from the database
* Assign user
* Display all the users of the organization by retrieving from the database
* Mail to
* Pre fill with the selected assign user's email
* Priority
* Display all the priority of the organization by retrieving from the database
* Assign Deal
* While creating a task from navigation header bar only the deals available for the organization will be displayed as auto sugget
* Task created from the deal detail page the assign deal field is pre filled with the deal name & is disabled
* Task created from the contact detail page the assign deal field is pre filled with the contact name & is disabled
* **Note**: Only the task created from the contact detail page will be associated with the contact
* On creating task, email will be sent to the assigned user
* The date within the email is as per the assigned user's time zone
* Unique date format
* **Task Edit**
* On edit the task associated deal/contact field is disabled
* **Task Follow up**
* On follow up the task type and associated deal/contact fields is disabled
* A new task will be created with the type “Follow up”
* On creating task, email will be sent to the assigned user
* **Contact**
* There are 2 section
* Contact listing
* Contact detail
* Contact listing
* Drop down to select the contact type
* Small boxes with A..Z alphabets will append one by one
* The box will be inactive if there is no contact starting with the alphabet
* On clicking the box, contacts will be listed below the box with fixed size and scroll-able
* At a time only 10 contacts name will appear, on scrolling 10 more contact list will append
* On clicking the contact name, detail page will appear on the right hand side without refreshing the page
* Contact detail
* By default it will display the last contact added
* On the left hand side contact list, the opened contact will be selected
* It has following sections
* Contact information
* For company contact
* company logo, name, social network links, email, website, work phone, mobile phone, address, address map
* For individual contact
* image, name, social network links, email, work phone, mobile phone, address, address map,
* Actions
* Enable/disable, edit, delete
* Button will be visible if the current user has created the contact or admin or super-admin
* Address map
* It is dynamic & on click it will open a new tab with google map
* Email is linked to open send email popup
* Phone numbers are having Skype click to call plugin
* Website will opening in a new tab
* Displaying last activity on the contact and by whom
* “Add deal” & “Task” buttons to add with respect to contact
* Note section
* Form to add note with/without attachment
* On submit the note will display on the activity stream without refreshing the page
* Activity stream & Deal section
* Activity tab
* Display all the activities associated with the contact
* Deal tab
* Display all the deals associated with the contact with the following detail
* Deal name, amount, created at, assigned to, created by and deal status
* On clicking the deal it will be redirected to deal detail page
* Links will be available only for active deals, if the deal has deleted then link will not be available
* Contact create & edit
* Company Contact
* Enter company information like name, email, company size, website, country & phone number to create company
* Individual Contact
* Company name will be auto suggest on type
* On submitting the form the individual is created and associated with the company
* If company name is not exist, then a new company will be created and the created individual will be associated with that company
* **Reports**
* **Note:** Only for Admin or super-admin users
* Drop down to change quarter and year
* All the result will be displayed as per the quarter & year selected
* Leaderboard
* All the users list with the activities on deals of the organization
* Columns are: Name, Group, Deals assigned, Deals won, Total Revenue, Avg. time, Activity, Task assigned, Task completed, Overdue tasks
* Link on the data of deals assigned column to redirect admin to deal listing page with the filter for assigned user & quater
* Link on the data of task assigned column to redirect admin to all task listing page with the filter for assigned user & quater
* Link on the data of task completed column to redirect admin to completed task listing page with the filter for assigned user & quater
* Link on the data of overdue tasks column to redirect admin to overdue task listing page with the filter for assigned user & quater
* Sales funnel
* Displaying funnel chart with the following information
* New deals count
* Qualified deals count
* Lost deals count
* Won deals count
* On clicking the count redirect the admin to deal listing for the respective type with the filter for quarter & year selected
* Deals won
* All the own deal listing with the following fields
* Title
* Won Date
* Assigned To
* Created By
* Amount
* On clicking the data of deal title column, it will redirect the admin to deal detail page
* On clicking the data of assigned to column, it will redirect the admin to assigned user's profile page
* On clicking the data of created by column, it will redirect the admin to created user's profile page
* **Activity**
* Contact
* Will track on create, on update & on delete
* Display the following information
* Time of activity
* Small default contact image
* Contact name with link will be provided to view detail page
* Created by user information with link to it's profile page
* Deal
* Will track on create, assign, update, delete & contact associate
* Display the following information
* Time of activity
* Small default deal image
* deal title with link will be provided to view detail page
* Assigned to user name with link to it's profile page only for assign deal activity
* Created by user name with link to it's profile page
* Note
* Will track on note creation only
* Display the following information
* Time of activity
* Small default note image
* note detail with attachment and link to download the attachment if present
* Created by user name with link to it's profile page
* Task
* Will track on task create, update, assign, follow up & complete
* Display the following information
* Time of activity
* Small default task image
* deal title and task title
* Assigned to user name with link to it's profile page only for assign task activity & due date of the task
* Created by user name with link to it's profile page
* **User Profile**
* There are following sections
* User information
* User image, name, group, company name
* User image will be updated on clicking the image
* General information
* Full name with inline update
* Encrypted password with inline update
* Company name
* Email
* Website link to open in new tab
* Work phone number with inline update
* Time zone with inline update
* User group
* Buttons to display the task count, new deals count, qualified deals count associated to the user
* Display all the deals associated with the user with the following detail
* Deal name, amount, created at, assigned to, created by and deal status
* On clicking the deal it will be redirected to deal detail page
* Links will be available only for active deals, if the deal has deleted then link will not be available
* **Setting section**
* Public
* Feed Keywords
* SNS Medias
* Widgets
* Checked section of the following list will be displayed on dashboard
* Chart, Activities, Summary, Usage, Tasks
* Personal
* Charts
* Checked charts from the following charts will be displayed on the dashboard only if the chart widget is checked
* For **Admin** user
* Pie Chart, Column Chart
* For **Non-admin** user
* Statistics Chart, Line Chart
* Groups (Display only to **admin** user)
* To add new user groups to the organization
* Used datagrid table for edit, delete and sorting functionality
* The groups listed here will come while creating a new user
* Account
* Priority  
   (Display only to **admin** user)
* Priority of the organization will be listed here
* Rename functionality, which will used only for this organization
* Deal Status  
   (Display only to **admin** user)
* Deal status of the organization will be listed here
* Rename functionality, which will used only for this organization
* Label
* All the labels of the organization will be listed here
* Used datagrid table for edit, delete and sorting functionality
* The label listed here will come while adding label to deal(s)
* **Admin section (Only for Admin and super admin)**
* User
* List of all the users of the organization
* Small boxes with A..Z alphabets in ascending order will append one by one
* User starting alphabet boxes will be displayed
* On clicking the box all the users starting with the alphabet will be displayed under the box
* Following user information will be displayed
* User image, name, group, email, location
* Edit and delete buttons
* Resend invitation button only if the user has not accepted the invitation
* On clicking the user name, it will redirected to that user's profile page
* Invite User
* To invite a user need to enter following fields
* First name, last name, email, phone number, time zone, and user group
* On submit invitation email will be sent to the user with link to accept invitation
* On clicking the accept invitation link the user will be redirected to set password page
* After giving the password, he/she will be logged in to the application
* And the user name will come in the user listing page
* Edit user
* Image upload functionality on clicking the image
* Email id will be disabled
* Source
* Add, edit, delete & listing functionality
* Industry
* Add, edit, delete & listing functionality
* **Search Functionality**
* **Note:** For **Admin** user fetched form all the data and for **Non admin** user fetched from the data he/she is associated(created by or assigned to)
* Full text search functionality using elastic search
* Redirected to new page to display the search result
* Display the total number of result count on header like “Displaying about 1234 result(s) for 'test'”
* Pagination with 20 records on each page
* Result type will be indicated on the left hand side like a label
* Link to redirect it to the detail page only for deal, task , contact
* **Getting Started section**
* Small description and link to create/update for the minimal necessary functionality of CRM as below
* Add a contact
* Add a deal
* Create a task
* Timezone & profile settings
* Themes
* Invite a user (For **admin** user)
* Settings (For **admin** user)
* **Feedback & Support**
* Using **UserVoice** for feedback & support purpose
* Registered the application with **UserVoice**
* **Other functionality**
* After login all the time displayed in the application should be as per the logged in user's timezone set on the profile page
* All the email sending functionality working by the background process
* Tracking all the activity on different models like deal, task, company contact, individual contact, note, deal move
* Use background process to insert the activity of the model into the database
* On bulk lead upload, lead notification send functionality should be moved to background process
* Cron job to send today's task alert email to assigned users of each organization
* Attention deal
* **Opportunity**
* **Salescycle**