Task ID	Task Title	Description	Priority
Section 2: SPANCO to LMOTPO Sales Pipeline Stages			
2.1	Configure Lead Stage	Set up initial prospect identification and qualification workflow	High
2.2	Configure Meetings Stage	Implement telephone and field meetings tracking for understanding customer needs	High
2.3	Configure Opportunities Stage	Set up converted leads with deep-dive discovery and technical analysis tracking	High
2.4	Configure Trial Stage	Implement paid and unpaid trial provisioning and evaluation workflow	High
2.5	Configure Pricing Discussion Stage	Set up proposal, quotation, and negotiation tracking	High
2.6	Configure Order Booking Stage	Implement final closure workflow (Won or Lost)	High
Section 3.1: Data Model Structure			
3.1.1	Set Up Data Model Hierarchy	Ensure all CRM elements are created within existing lead context	High
3.1.2	Configure Deals Doctype	Create Deals linked to Leads	High
3.1.3	Configure Visits Doctype	Create Visits tracking linked to Leads/Deals	Medium
3.1.4	Configure Contacts Doctype	Create Contacts management linked to Leads	High
3.1.5	Configure Organizations Doctype	Create Organizations linked to Leads	High
3.1.6	Configure Notes Doctype	Create Notes tracking linked to Leads	Medium

Task ID	Task Title	Description	Priority
3.1.7	Configure Tasks Doctype	Create Tasks linked to Leads/Deals	High
3.1.8	Configure Call Logs Doctype	Create Call Logs tracking linked to Leads	Medium
Section 3.2: Lead Creation Requirements			
3.2.1	Create Lead Form - Mandatory Fields	Implement: Company Type, Company Name, Contact Name, Contact Number & Email, Industry, Territory, LoB, GST, GST	High
3.2.2	Implement GST Validation Logic	If GST matches existing customer, prevent lead creation and show customer code message	High
3.2.3	Implement Last Purchase Validation	Identify dormant customers based on last purchase information	Medium
3.2.4	Implement LoB Validation	Allow leads where same customer has different LoB requirement	Medium
3.2.5	Implement Contact Details Validation	Identify if requirement is from same PoC	Medium
~~3.2.6~~	~~Define Project Name Naming Convention~~	~~Establish naming convention for Project Name/Requirement field~~	~~Medium~~
3.2.7	Set Initial Status to New	Auto-generate only New status during lead creation	High
Section 3.3: Deal Creation Requirements			
3.3.1	Configure Deal Creation Rules	Deals can only be created for eligible contacts and organizations	High
3.3.2	Implement Pre-population Logic	Contact and Organization details pre-populated with existing information	Medium
3.3.3	Enable New Contact Addition	Allow new contacts to be added during deal creation for specific organization	Medium

Task ID	Task Title	Description	Priority
~~3.3.4~~	~~Configure Site Visit Dropdown~~	~~Align dropdown options with NEW stages~~	~~Medium~~
Section 3.4: Contact and Territory Management			
3.4.1	Restrict New Contact Creation	New contacts can only be created within existing lead or opportunity	High
3.4.2	Restrict Territory Addition	Only Admins can add new territories	High
Section 4.1: Sales Teams			
4.1.1	Configure Territory-Based Sales Teams	Organize sales teams by territory	High
4.1.2	Implement Territory-Based Visibility	Territory information determines which Sales Manager can view and act on leads	High
Section 4.2: Service Teams			
4.2.1	Configure Service Teams by LoB	Structure service teams for Alloys, Plating, and Machines	High
4.2.2	Enable Service Team Selection	Sales teams can select service team members based on LoB for demos and technical visits	Medium
Section 5.1: Maker-Checker Workflow			
5.1.1	Implement Maker Role	Field sales personnel (makers) create deals	High
5.1.2	Implement Checker Role	Back-office staff (checkers) verify data before customer account activation	High
Section 5.2: Status Management			
5.2.1	Implement 100% Stage Rule	New stages must total 100% - lead cannot be in more than one stage	High

Task ID	Task Title	Description	Priority
5.2.2	Configure Manual Status Changes	Allow manual status changes by makers per stage & status process doc	Medium
Section 5.3: Quotation Management			
5.3.1	Enable Mobile Quotation Creation	Sales teams can create quotations from mobile devices	High
5.3.2	Implement Quotation Email Feature	Enable emailing quotations to self (corporate ID) and customer	Medium
Section 7: User Rights and Permissions			
7.1	Configure Customer Creation Permissions	Determine who can create customer accounts	High
7.2	Configure Credit Limit Permissions	Define authorization levels - only Admins can set credit limits	High
7.3	Configure Territory Addition Permissions	Only Admins can add new territories	High
7.4	Configure Task Management Permissions	Admins have full control; consider manager access if activity logged in client account	Medium
Section 8.1: Sales Pipeline Dashboards			
8.1.1	Create Leads Created Dashboard	Display number of leads created	Medium
8.1.2	Create Stage-wise Leads Dashboard	Display leads at each stage	Medium
8.1.3	Create Conversion Rates Dashboard	Display conversion rates at each stage	Medium
8.1.4	Create Stage Duration Dashboard	Display stage durations and cycle times	Medium
8.1.5	Create Revenue Dashboard	Display revenue and potential deal sizes	High

Task ID	Task Title	Description	Priority
8.1.6	Create Negotiation Dashboard	Display negotiation volumes	Medium
Section 8.2: Manager Reports			
8.2.1	Create Team Performance Reports	Capture dynamics of sales and service activities	High
8.2.2	Create Individual Metrics Report	Provide visibility into individual performance metrics	Medium
8.2.3	Create Team Metrics Report	Provide visibility into team performance metrics	Medium
Section 10.2: Data Integrity Requirements			
10.2.1	Review Updated Validation Process	Refer to last set of emails and meeting notes for updated information	High
10.2.2	Implement Mandatory Reason Logging	Require reason logging for Lost/Unqualified outcomes for BI data quality	High
10.2.3	Implement Activity Panel	Track all edits for audit trail	High
Section 10.3: Service Request Process			
10.3.1	Implement Basic Service Team Integration	Integrate at Tech Analysis and Demo stages (Phase 1 scope)	Medium
10.3.2	Document Phase 2 Service Management Scope	Document comprehensive service management workflow for future phase	Low
Section 10.4: Credit Management			
10.4.1	Implement Credit Check at Tech Analysis	Credit checks completed during Tech Analysis stage	High
10.4.2	Implement Customer Creation at Tech Analysis	New customer creation formalities completed during Tech Analysis	High

Task ID	Task Title	Description	Priority
10.4.3	Configure Role-Based Credit Permissions	Appropriate role-based permissions for customer creation and credit limits	High

Status	Assignee	Notes
In Progress	DHAIRYA MARWAHA	
In Progress	DHAIRYA MARWAHA	
In Progress	DHAIRYA MARWAHA	
In Progress	DHAIRYA MARWAHA	
In Progress	DHAIRYA MARWAHA	
In Progress	DHAIRYA MARWAHA	
PR Merged	DHAIRYA MARWAHA	1. Error converting to deal: Internal Server Error {exception: "pymysql.err.OperationalError: (1054, "Unknown column 'lead' in 'SELECT'")",…} 2. last name should be
PR Merged	DHAIRYA MARWAHA	1. Internal Server Error (lead filed not created) {exception: "pymysql.err.OperationalError: (1054, "Unknown column 'lead' in 'SELECT'")",…}
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W

Status	Assignee	Notes
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W
Done on Dev	goblin sanger	W
PR Merged	DHAIRYA MARWAHA	W
Not Started	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W
~~Not Started~~	~~DHAIRYA MARWAHA~~	
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W

Status	Assignee	Notes
~~Not Started~~		
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W
Not Started		
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Not Started		
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Status	Assignee	Notes
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PR Merged	DHAIRYA MARWAHA	W
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PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W
PR Merged	DHAIRYA MARWAHA	W

Status	Assignee	Notes
PR Merged	DHAIRYA MARWAHA	W
In Progress	DHAIRYA MARWAHA	Pending
In Progress	DHAIRYA MARWAHA	Pending
In Progress	DHAIRYA MARWAHA	Pending
Not Started		
PR Merged	DHAIRYA MARWAHA	
PR Merged	DHAIRYA MARWAHA	
Not Started		
Not Started		
Not Started		
Not Started		

Status	Assignee	Notes
Not Started		

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	Fixed