<http://206.189.126.187/yair/public/admin/sales>

* Make sure the color boxes include all of the statuses. Remove “Pending” only have “Processing.” Add “Pending Fee Payment” done
* The statuses should be (make sure this is changed on the sale detail screen as well) done
  + Processing (Default instead of Pending)
  + Waiting on Funds
  + Action Required
  + Company Signing
  + Cancelled
  + Pending Fee Payment
  + Completed
* Make each color box have a filter function to show the sales that correspond with the title when clicked on. done

All date formats should be Month/Day/Year. On this page it is under “Data Created” done

* On the Sales table, add the “Sales Type” column to show if it is qualified or non-qualified. done

<http://206.189.126.187/yair/public/admin/sales_detail/32>

* Create a tab (like the Sales and Agents pages) to put Client information and give Clients their own profiles (not users to use the website, but a profile that an agent can view the client’s information and list of sales) discuss
* On a sale, put a hyperlink to the Client’s profile. Then the tab “Client and Sale Information” will just be “Sale Information” since the client information will be with the Client’s profile in the Client Tab on the Left Side. discuss
* Change “Uploaded Document” to “Uploaded Documents” done
* Under Change Sale Status, the statuses should be: done
  + Processing (Default instead of Pending)
  + Waiting on Funds
  + Action Required
  + Company Signing
  + Cancelled
  + Pending Fee Payment
  + Completed
* The Success Pop-up should say “Status changed successfully” done
* The word “Sales” should be a link back to the Sales Overview page. done

Uploaded Documents

* Upload Files: Change “Submit Sales Materials File” to “Submit” done
* Upload Files: Change “Back” to “Cancel” done
* Change “Uploadded on” to “Uploaded on” done
* Add a View button to view the document done
* Please make sure the website does not change the name of the file that is uploaded. Currently it adds numbers and an underscore for spaces. The underscore is ok if it’s necessary, but please remove the numbers. done
* Newest Documents should be added to the top of the list of documents. done
* Delete a document Success pop-up should say “The document was deleted successfully.” done

View Notes section

* When Cancel is clicked on the Create Note box, it should not save the text for later. When I click cancel then click create note again, the text is still there from before I clicked cancel. done
* The note success pop-up should say “Note added successfully” done
* New Notes should be added to the top of the list of notes so most recent notes will be seen first. done
* Add a Delete button to the notes done

<http://206.189.126.187/yair/public/admin/edit_sale/32>

* The State and Country selections did not save. (We also need to add those options.) done
* Delete Sale Confirmation pop-up: Change “My Sale” to “Delete Sale” done
* Delete sale confirmation pop-up should say “Are you sure you want to delete this sale?” done
* Delete Sale Confirmation pop-up: Change “close” to “Cancel” make sure to capitalize it. done
* Delete Sale Confirmation pop-up: Change “Submit” to “Delete” done
* Deleted sale Success pop-up should say “Sale deleted successfully” done
* Add a Cancel Button at the bottom. done