Managers

View Sale

* Add Edit button for managers. Managers can change sale information, but agents cannot. Allow Managers to delete a sale from the edit screen, but have a confirmation pop up so it is not done by accident. Have this pop up:
  + IMPORTANT! Do NOT delete a sale if the sale was canceled. ONLY delete a sale if it was submitted by error such as a duplicate.
* Keep the version of the View Sale page with the two tabs
* (uploaded documents) When “Delete” is clicked, have a confirmation pop up so nothing is accidentally deleted.

Change Sale Status

* Add another yellow status option: “Company Signing”
* Make sure Closed Successfully is not an option. I noticed it was the one highlighted.

Sales/Agents Overview

* Will the colored boxes at the top with the numbers be filter options when someone clicks on them?

View Agent

* Change “Routing No.” to “Routing Number”
* Make sure the Account Number looks like the Routing number with the stars and shows only the last 4 digits.
* Make the title for the documents section “Agent Documents”
* Please add a tab or section for notes. Only Managers would see the notes. It would be helpful for customer service interactions. A manager could see what others managers have helped them with.
* We need to add statuses to agents such as “working” and “not working” but they would actually be:
  + Pending (yellow)
  + Contracted (green)
    - Only Contracted Agents would be able to submit new sales.
* Also add a change status button to the agent profile for Managers to change their status.

Agents

Sign Up page

* Add a password field.
* Change “Email” to “Email (you will use this to sign in)”
* Before DocuSign:
  + When a new agent is filling out their information, that information will be entered into their contract document. They will then download the document, sign it, and Upload the document before they can submit their information.
* With DocuSign:
  + After a new agent has filled out their information, it will take them to a screen to sign their contract document. It should auto-fill with the information they have provided.

Agent Profile

* Show the Agent’s status (Pending or Contracted) next to their name like the sales status is shown on a sale profile.

Add Banking Details

* Change “Routing No.” to “Routing Number”

View Sale

* Remove edit button for agents. We will figure out a form for them to submit to make changes, but we do not have that right now.

New Page Request for Agents and Managers

* Clients
* A page to view all client profiles that have been submitted similar to the Agents Page
* Some clients will have multiple sales. Please have Submit New Sale have an auto-fill option with only the clients that the agent has submitted themselves.
* Managers will be able to edit the Client information.

Small addition to the document I sent Today.

• When adding a tab to view Client profiles, there would be a documents section as well. This is where we would save the welcome letters that we send to the clients.

• Have a field that shows the client’s agent in their profile.

On Managers’ side of view sale:

• Add an Edit Log for the managers.

• Add a View Edit Log button where a manager can look and see when another manager has made a change. It would include the manager’s name, date and time, what the field was changed to and what it was previously.

On Referrals:

• Add a pop-up confirmation so no one is referred accidentally.