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

* Select Time Period drop down box. Change the options to these:
  + Last Week
  + Last Month
  + Year to Date
  + Last Year discuss
* Specific Period date fields. Allow the person to type the date, numbers only with automatic slashes added.
* Make the date format MM/DD/YYYY
* Replace Notifications for admin with the activity stream.

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

* Processing should be yellow. Remove Pending as an option. It is replaced by Processing. done
* The Processing status should just say Processing. Remove “(Default instead of Pending)” that was supposed to be just for clarification. done
* For clarification, these are the statuses and their colors. done
  + Processing done
    - Yellow
  + Waiting on Funds done
    - Yellow
  + Action Required done
    - Red
  + Company Signing done
    - Grey
  + Pending Fee Payment done
    - Green
  + Completed done
    - Green
  + Cancelled done
    - Grey
* In the color boxes for the Overview, don’t include the total, cancelled or completed for admin. done
* For agents, don’t include the total or cancelled boxes. done

<http://206.189.126.187/yair/public/agent/home>

* Have the option to choose from an existing client or add a new one. Discuss (done)
* Change Client Information to “Add New Client” done
* Replace “Name” with “First Name” and add “Last Name” done
* The Birthday field only allows future dates. Make it allow typing of dates. No calendar pop-up needed because it is a past date. done
* Remove the drop-down boxes for Country and State. Those will be just text boxes. done
* Change “Zip” to “Postal Code” done
* The order for the address fields should be as below: done
  + Address Line 1 done
  + Address Line 2 done
  + City done
  + State done
  + Postal Code done
  + Country done
* Success Pop-up for Adding Client Information should say “Client added successfully” done
* Add a Dollar sign before the Sales Amount field so people will know not to type it. Make the field numbers only with 2 decimal places. done
* Success Pop-up for second screen should say “Sales information added successfully” done
* On step 3, I uploaded a document, then pressed the back arrow, then pressed the forward arrow to get back to the upload screen. The original file I uploaded did not show there, so I uploaded a file again. When I submitted the sale, both files showed in the Uploaded Documents. Please make the third step show what has been uploaded even if the back button is pressed.
* When I enter information, but do not click submit for Submit New Sales, the sale disappears and I cannot go back to edit it. done

<http://206.189.126.187/yair/public/agent/referral>

* In the second sentence of the instructions, change “contacted” to “contracted” done
* Replace Name field with First Name and Last Name fields. done
* Make email field require a real email with an @ sign done
* Make compensation % a number field only done
* Change “Cancel” to “Clear” and have it clear the fields done

<http://206.189.126.187/yair/public/agent/notification>

* The agent was notified of their own sale. They should only get notifications when their downline is contracted and when one of their sales’ status is changed.
* We want there to be an option to have notifications sent by email. This can go in the Profile drop-down Menu under Profile and above Logout. It would say Preferences and it will have notification preferences that they can receive by email.

Add a Clients Page like the one added to Admin. done

Agents would only be able to view Clients they have submitted. done

When agents look at their downlines, there is a Sales Done by Agent tab. Add a “Clients Submitted by Agent” tab so the upline can view their downline’s list of clients. done