The following documents the updates required based on the testing of the QuickStart application in comparison to the requirements documents [PowerPoint mockup and MS Word “requirements” document]. The notes here provide the “high-level” description of what needs to be fixed – please refer to the requirements documents for the exact details for each of the steps.

1. QuickStart\New Customer
   1. Move “Opportunity Status” field to left side of page, below “E-mail” field and above “Opportunity Name” field
      1. Must incorporate workflow steps identified in requirements documents
   2. Collapse “Sales Rep Last Name” and “Sales Rep First Name” into one field called “Sales Rep” and make it a drop down selection box that includes ONLY those members of the logged in user’s Franchise
   3. On the right hand side of the page, insert “Win Probability Percent” after “Estimated Opportunity Value” and before “Next Step”
   4. On the right hand side of the page, insert “Weighted Opportunity Value” after “Win Probability Percent” and “Next Step”
   5. On the right hand side of the page, move “Next Contact Date” from the far right column and insert it after “Next Step” and have that be the last item in that column
   6. On the right hand side of the page, move “New Appointment” and “Appointment Source” to the top of the far right column
   7. In the far right column, insert “Training Course Location” below “Training Course Name” and above “”Class Head Count”
   8. Save functions do not work at all like the requirements
2. QuickStart\Edit
   1. The edit features do not work like the requirements document specifies
   2. For the “Company Name” field, the population of the list of companies within the drop down should be in accordance with the requirements document
      1. NOTE: When the list of companies is provided, there should NEVER be a duplication of the company name within the list
   3. Save functions do not work at all like the requirements