**Super Records changes still required**

**SUPER RECORDS LOG IN SECTION**

**LEAD SECTION**

Nick – Reason is still shown regardless. Also, once Not Successful is selected, it is only when I try update lead does it tell me it’s required but it still updates and goes back to the lead list. I have to go back into the specific lead to add a reason.:  **In testing (working)**

**NG: Not working at present.**

Nick- Industry keeps going to last field, regardless of selection. Missed mentioning this in last batch of issues.**DONE**

**TASKS SECTION**

Nick – When we create a task, the sub activity we can choose from should show the sub activity related to that master activity. **DONE (DHIRAJ)**

Nick – Can we add a field to each Master Activity and each Sub Activity called “Display in Practice View” - if this option is selected, then that master activity or sub activity will display in the practice view for “Client Type” and “Job Type” – if not selected, will ONLY display in Super Records. If selected, it will display in both.**DONE (DHIRAJ & DISHA)**

**OTHER ITEMS**

Nick - Viral’s log in still goes to original view instead of lead view. Also, can’t see any section where we can assign default view. : **Working**

**NG: Can we also add an option for each user (in Administration section) where we can choose the default page to display?**

**PRACTICE LOG IN**

**QUERY TABS**

Nick – the confirmation is good, however not so good when answering more than 1 query. The green confirmation comes up for first one, but then you don’t know whether the next answer has saved too or whether it’s the same confirmation from the first one. Is there another option for confirmation? Maybe a pop up?**- DONE (DISHA)**

**NG. Issue is when you answer first query then second one it clears the green tick from the first one. This could potentially be confusing for clients. Also, if you answer first query, but then add more text and save again, you aren’t sure if second answer was saved. Not sure of best solution for this, which is why I liked popup option. Instead of a separate column, can we have a pop up saying “Answer Saved” if they click “SAVE” or “All Answers Saved” if they click “SAVE ALL”**

Nick – can we have a “save all” button to save all query answers? **- DONE (DISHA)**

Nick- There is a symbol before each query with ? in a box.**–DONE (DISHA)**

**SUBMIT A NEW JOB**

Nick - Client Type should populate for the list of Master Activities, but ONLY display the Master Activities which have been selected to “Show in Practice View”**- DONE (DISHA)**

Nick - Job Type should populate for the list of Sub Activities under the Master Activity selected in Client Type. It should not show Sub Activities of other Master Activities. It should ONLY display the sub activities which have been selected to “Show in Practice View”**- DONE (DISHA)**

**NG: This doesn’t work properly. At present only shows the sub activities under the Master Activity for SMSF Related Work. Instead, this field should not have anything available until the Master Activity has been selected in the Client Type section. Once Master Activity is selected in Client Type, this field should populate with all of the sub activities under that specific Master Activity, which have been selected to show in practice view.**

**GENERAL**

Nick – Some buttons/links do not change the mouse pointer when you mouse over. Eg. Logout, Add, Cancel, etc. Please ensure buttons make mouse pointer change icon to same as a link. ” **- DONE**

**NEW THINGS – PRACTICE VIEW**

1. Can we remove the button for Job List? After consideration, this page is not very useful. Let’s remove.
2. Can we add a button (i.e. on main menu) for Add New Client? This should take you straight to the add new client screen.
3. Can we make Client List button say “View My Client List”
4. Sequence for buttons should be;
   1. Add New Client
   2. Submit a Job
   3. View All Queries
   4. Pending Jobs
   5. Completed Jobs
   6. View My Client List
5. PROBLEM: It is very easy to create a duplicate entry for clients (i.e. create duplicate client records). How can we avoid this?