CDL MEMBERS – Admin

* 10-29-2015
* Add larger logo to top of login page "cdl36-members-login-logo.png" (done)
* Dashboard: delete: Potential Commissions ($0) (done)
* Dashboard: Change title “ Recent Leads” to Member Dashboard(done)
* "Add Client" at top should say "Add Company"(done)
* Need Link on the left side that says "Change of Address" this should open external window and link to <https://moversguide.usps.com/icoa/home/icoa-main-flow.do?execution=e1s1&_flowId=icoa-main-flow&referral=MG82>(done)
* Companies page: delete: Listing of Carriers your Agency is contracted with. (done)
* Companies page delete "0" and **Active Products**(done)
* **Companies Page change "Active Carriers" to be "Active Companies"**(done)
* **Companies page: Php file should be named "companies.php" and not** carriers.php(done)
* Page Title: change from Tampa Insurance to CDL 360
* Insert list of companies from excel document, will save as csv file. <https://www.dropbox.com/s/iyrhoaalmqeq4tv/cdl-360-companies.csv?dl=0>
* add timestamp to members table
* add time stamp to document table
* Members will Need profile Page (I can send details, it will be a photo and the registration information)
* Leads: Delete <http://winkbuddy.in/cdl/leadlist.php>from left (done)
* Edit CSS:

.row-fluid [class\*="span"] {

display: block;  
float: left;  
min-height: 30px;  
~~/\* margin-left: 2.12766%; \*/~~  
margin-right: 2.12766%;  
box-sizing: border-box;  
width: 500px;  
min-width:350px; }

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10-28-2015

* in reality to make this simple..... remove career.php and link "Companies" to this page "carriers.php" (done)
* "Carriers" - let's make that Companies and remove "Add Product" and change "add carrier" Add Company"(done)
* basicly your carriers page can be renamed to be companies(done)
* clientlist.php should be "members list"   
  - remove "coverage type"  
  - remove "Agent"  
  - Change "Client Status" drop down options to "verified" and " not-verified  
  -Remove "products" and remove "tags"(done)
* .navbar change min-height to 150px(done)
* Add smaller logo in place of the "cdl 360 text" "cdlmember360-dashboard-logo.png"(done)
* Add larger logo to top of login page "cdl36-members-login-logo.png" (done)

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Account Settings

Remove products and commissions >http://winkbuddy.in/tampa/productssetup.php(done)

Remove tags setup ><http://winkbuddy.in/tampa/account_tags.php>(done)

Remove Lead Routing Rule ><http://winkbuddy.in/tampa/lead_distributions.php>(done)

Remove ><http://winkbuddy.in/tampa/account_temperature_settings.php>(done)

Remove >http://winkbuddy.in/tampa/link\_builder\_categories.php

Need 2 Login Pages

Use the same current form, but make a copy called login\_admin.php

* 1. Current page is ok for users

Please clarify me more on this point.

We need to login pages (one for regular members and one for admin) - they should be titled member or admin at the top. You can copy the same form, just call one admin\_login

You can create a link to the" admin form" next to the "forgot password" link(done)

Need Registration Page

Use this (<http://winkbuddy.in/tampa/adduser.php>) but we will simplify a little.

Please also specify the fields name in add users what it should be or put as same as it is?

First Name:

Last Name:

Phone:

Cell:

Email:

Address:

City

State <<

Zip Code

Date Of Birth (mm/dd/yyyy):

Agent ID: << change to member id number < member cannot edit this, it can be a random number generated

Custom Value 1: << Drivers License Number

Custom Value 2: << CDL Number

Custom Value 3: << Company Name ( this should be drop down list of the companies in the database"

Custom Value 4: << Vehicle Type

Custom Value5: << Verified (this is for admin, it should be a "yes" or "no" drop down.

I need to add a form field for uploading 2 images, they can do it when registering or later.

Links & Files

1. Links and Files will be “Documents” (Need Upload form so the members or admin can upload documents specifically for users. Each user / member when created should also have a folder created with their first\_name\_lastname\_random\_number

Please specify doc extensions what kindo doc you want to upload like (pdf,csv , xls, etc)?

.jpg, .pdf, .doc, .png, .jpeg, .docx, .bmp

1. This page should show a list of all the files in the system and maybe who they have been assigned to.
2. Needs a basic search function
3. The database should have the file name, who assigned to (id number) and link to the upload location
4. Admin should be able to select a user from dropdown or search (not sure which one) and select a file to upload and it be assigned to that user/member

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* Change Tampa Insurance to CDL 360 (everywhere)
* Total Clients will be “Total Members” (done)
* Cold Leads will become “Active Members”
* Dashboard is going to be used to display all drivers in the system (these are users)
* Add Lead will be “Add Member”
* Delete Calendar from left side (done)
* Delete “Tags” (done)
* Remove Drips(done)
* Carrier info will become “Companies” (this page will need a basic form to add companies) – this needs to be the same list that displays in the drop down “Assign Carrier” (done)

Please specify Fields Name of forms.

* Remove Assign Agent.