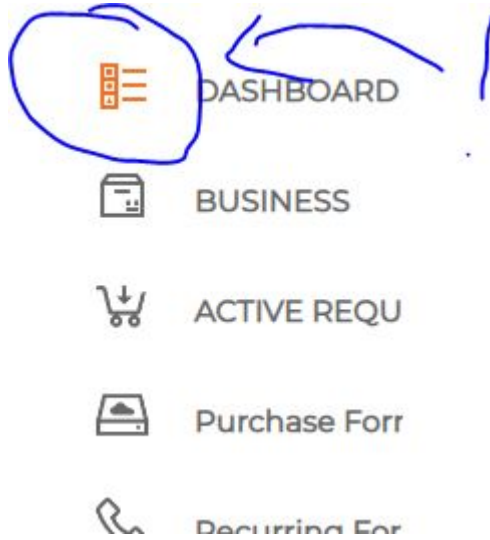# Admin Dashboard Changes

DASHBOARD

BUSINESS

ACTIVE REQU

Purchase Forr

Recurring For

Can we stop this from being orange all the time.

And instead making things orange when people click on them...

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- DASHBOARD
- BUSINESS
- ACTIVE REQUESTS
- Purchase Form
- Recurring Form
- Lead Gen Accounts
- Lead Gen Users
- Business Users
- Configuration
- Setup Direct Debit

PKSOL

Pending Lead Request	0
Completed Lead Request	1
Pending Sales Request	0
Completed Sales Request	0

VIEW MORE

When you click on view more. It should only show the lead requests for that particular business… NOT ALL OF THEM!

DASHBOARD

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Setup Direct Debit

Pending Request

| Pending Request | Completed Request |

Pending Request

Show 10 entries

Search:

Date	RequestType	Price Per Lead	Quantity	Leads	Payment Status
No data available in table					

Showing 0 to 0 of 0 entries

Previous Next

Can we make these change colour
depending which one you are on...

DASHBOARD

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Completed Request

Pending Request | Completed Request

Completed Request

Show 10 entries

Search:

Date	RequestType	Price Per Lead	Quantity	Total(excl VAT)	Leads	Payment Status
2019-02-12	Lead	200	100	£ 20000	View	Paid

Showing 1 to 1 of 1 entries

Previous 1 Next

When I click View, it should show the list of leads that were generated for that request.

So in this one it should show 100 leads...

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Pending Request | **Completed Request**

Completed Request

Show 10 entries

Search:

Date	RequestType	Price Per Lead	Quantity	Total(excl VAT)	Leads	Payment Status
2019-02-12	Lead	200	100	£ 20000	View	Paid

Showing 1 to 1 of 1 entries

Previous | 1 | Next

Can we make it so that the admin can edit the requests...

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- ▤ BUSINESS
- ✔ ACTIVE REQUESTS
- ▤ Purchase Form
- ○ Recurring Form
- ▤ Lead Gen Accounts
- ▷ Lead Gen Users
- ▤ Business Users
- ▷ Configuration
- ▤ Setup Direct Debit

Pending Request | **Completed Request**

Completed Request

Show 10 ▾ entries   Search:

Date	RequestType	Price Per Lead	Quantity	Total(excl VAT)	Leads	Payment Status
2019-02-12	Lead	200	100	£ 20000	View	Paid

Showing 1 to 1 of 1 entries

Previous 1 Next

Please show a £ sign

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Activate Requests

Show 10 entries   Search:

Request By	Date Placed	Order #	Type Of Request	Package	Quantity	Price Per Lead	Total	Action
Admin	2019-02-13	1	Lead	Gold	100	500	£ 50000	✏️

Showing 1 to 1 of 1 entries   Previous 1 Next

Please add £ sign

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Activate Requests

Activate Requests

Show 10 entries

Search:

Request By	Date Placed	Order #	Type Of Request	Package	Quantity	Price Per Lead	Total	Action
Admin	2019-02-13	1	Lead	Gold	100	500	£ 50000	

Showing 1 to 1 of 1 entries

Previous 1 Next

Edit button doesnt work? Please fix

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Purchase Form

New Purchase Form

Date Placed

2019-02-14

Request Type

Select Request Type ▾

Package

Select Package ▾

Quantity

Cost Per Lead

Total(Exclude VAT)

Comment

Good calendar now… please change
'Date Placed' to 'Start Date'

Submit

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Purchase Form

New Purchase Form

Date Placed
2019-02-14

Request Type
Select Request Type

Package
Bronze

Quantity
10

Cost Per Lead

Total(Exclude VAT)
0

Comment

Submit

Thats good… now can you please make sure it does autofill

This needs to say 'Total (excluding VAT)'

Also, please make sure it autofills with quantity x cost per lead...

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Purchase Form

New Purchase Form

Date Placed

2019-02-14

Request Type

Select Request Type

Package

Bronze

Quantity

Cost Per Lead

Total(Exclude VAT)

0

Comment

Submit

Something is wrong.. The comment field moves when you click in it...

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DASHBOARD

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Recurring Form

New Recurring Form

Start Date
~~Date Placed~~

Request Type

Sales

Level

Bronze

Quantity

2

Cost Per Request
~~Cost Per Rquest~~

Total (excluding VAT)

0

How Often

Every Two Weeks

Comment

Can we make sure that this request form auto creates at the time period they ask for... happy to make it so that its just monthly recurring if needed?

Submit

DASHBOARD

BUSINESS

ACTIVE REQUESTS

Purchase Form

Recurring Form

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Lead Gen Accounts

Show 10 entries

Search:

ID	Lead Gen User	View Lead Requests
16	Lead_Gen	View

Showing 1 to 1 of 1 entries

Previous 1 Ne

The 'View' button needs to take you to the ONLY the leads that this lead generator has submitted...

DASHBOARD

BUSINESS

ACTIVE REQUESTS

Purchase Form

Recurring Form

Lead Gen Accounts

Lead Gen Users

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Lead Generators

Add Users

Lead Generators

Name	Email	Phone	Status	Action
Lead_Gen	lead_gen_user@gmail.com	4685465246		

These both need to work...

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Add Users

Business Users

Name	Email	Status	Action
PKSOL	business_user@gmail.com		

These both need to work...

Lead Gen Dashboard Changes

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ACTIVE REQUESTS

Submit a Request

My Billables

Setup Direct Debit

Submit A Lead

Select Order #   This should say 'Select Order'   Customer Name

Selec Order #

Request Type   Package

Add this in please   Business Name   Point of Contact

Phone Number   Email Address

Comment

Submit

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ACTIVE REQUESTS

Submit a Request

My Billables

My Submitted Leads

Show [10 ▾] entries

Search: [_____]

Date	RequestType	Price Per Lead	Quantity	Total(excl VAT)	Leads	Payment Status	Lead Status
2019-02-12	Lead	200	100	£ 20000	View	Paid	Completed

Showing 1 to 1 of 1 entries

Previous **1** Next

This needs to show the list of leads they
have submitted...

Business (customer) Dashboard Changes

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Date Submitted	Type	Cost Per Lead	Quantity	Total (excluding VAT)	Payment Status
2019-02-12	Lead	100	200	£ 20000	Paid

When you click on this, it should show you the list of leads that were submitted for this order...

Comment

Submit

Submit

PPC
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- ACTIVE REQUESTS
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- Setup Direct Debit

New Recurring Form

Date Placed

Request Type

Select Request Type ▾

Level

Select Package ▾

Quantity

Cost Per Rquest

Total(Exclude VAT)

Comment

Submit

How Often

Select Option ▾

Same as Admin Recurring Form...

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- ACTIVE REQUESTS
- Completed Requests
- Setup Direct Debit

| Pending Request | Completed Request |

Pending Request

Show 10 ▾ entries   Search:

Date	RequestType	Price Per Lead	Quantity	Leads	Payment Status
No data available in table					

Showing 0 to 0 of 0 entries   Previous   Ne

Same as Admin Active Requests…

HOWEVER, it should only show this businesses active requests obviously...

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- Dashboard
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- Recurring Form
- ACTIVE REQUESTS
- Completed Requests
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Pending Request   Completed Request

Pending Request

Show 10 entries

Search:

Date	RequestType	Price Per Lead	Quantity	Leads	Payment Status
No data available in table

Showing 0 to 0 of 0 entries

Previous   Ne

Same as Admin Completed Requests…

HOWEVER, it should only show this businesses active requests obviously...

We are getting there!