Project Fixes

LeadCloser

Upcoming Renewable should be Upcoming Renewals

Change name of Weekly Reports to Work Reports

For reports I want to be able to look back at daily activity to compare. Please create that in the reports. Also I want to show reporting much better fancier. Ratio of how Call Answered to Not Answered per day on those reports.

Also on the Renewal date please remove the year part because I don’t want it to only do it once. I want it to go in that list every year until I have them in the S list. (People in the S list should not count towards Upcoming Renewals)

Example – June 10 is the renewal date I want them to pop into that list every year not just this year.

Encrypt the database!

Encrypt the phone numbers, addresses, License numbers, Birthdays, Notes I put.

Timivity

Questions should pertain to the Agency owner/Manager or individual to create only. Employees can only select from the Category selected and fill in the answers.

I have more coming. Havent fully checked

Update for Homepage

TCC

Haven’t really gone through yet. Will do soon.

Savify

Need a couple landing pages so I can direct Ads to those pages to then get them to convert to do the Auto Quotes or Home Quotes or Renters Quotes

Example will be a page dedicated to just Auto things that the call to action will be for them to do the Quote and no option for any other quote.

Same thing with Home and Renters.