

send it.

Customer: 13 Secrets Contact Account No: 1004 Items: 3 Open Memo ID: 1

Status	Contact	Date	Due Date	Days Open	Days Over Due	Doc ID	Memo ID	Line	Inventory	Itemcode	Description
Open		13-Nov-23	13-Nov-23	16	- 16	386049	3564	1	Jewelry	X12R2306B003	18TT Yellow Diamond Ring
Open		13-Nov-23	13-Nov-23	16	- 16	386049	3564	2	Jewelry	X12R2306B010	18TT 2.87 Ctw w/ 1.30 Ctw Orange Diamond Ring
Open		13-Nov-23	13-Nov-23	16	- 16	386049	3564	3	Jewelry	X12R2305H016	18KW 2.74 Ctw DIAM w/0.56ct Pear Fancy Light orange Pink IF Ring with

Previous 1 Next

should be double with 8 adjustable

should be able to adjust this much & 7/16 should wrap to 1/2 with

* should be able to reduce with this much

* NO wrapping instead can show ...

ask smay ??

Have even description and where description visible

➤ New Lead Page.

Company

Lead

Purpose In Regards To

First Name

Last Name

Email

Telephone

Expected Sale (\$) Sale Likelihood

less than 20%

Under \$500

20-50%

\$500-2000

50%

\$2k-\$5k

50-75%

\$5k-20k

100%

\$20k-50k

\$50k+

Next Point of Contact

When To Contact
Date Time

* All Locations *

Description

Date Contacted
into

Time Contacted
into

C.

SharePoint x 2023 - One x All Items 27 x Dia Price G x Dia Price G x Mail - Rast x Admin x RightClick x + -

simplexdemo.com/admin/admin_customer/customer_list?year=2023&per_page=10&exposure=0.0#

SimplexDiam - Doc... Reset Password - O... RightClick Log In

Add Appointment

Customer Name*
13 Secrets

First Name*
Last Name*

Email*
Telephone*
(912) 484-0985

Visit Us At*
Office

Purpose*
Sell To Us

This is In Regards To*
Diamonds

Date*
11/30/2023

Time*
09:47 AM

Message

→ This shouldn't auto populate

→ This shouldn't auto populate

Date Contacted (Auto)

Time Contacted (Auto)

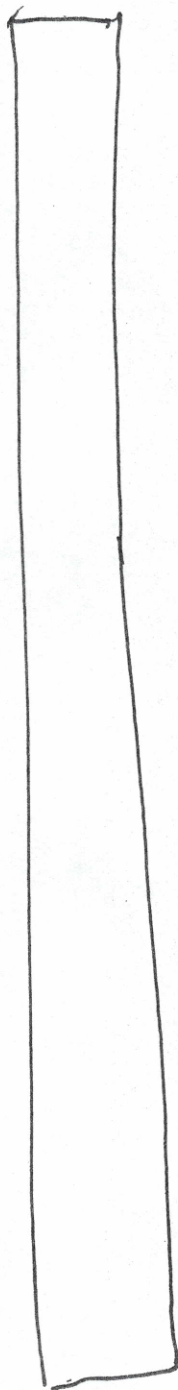
Add Appointment

13 Secrets

10:46 AM 11/30/2023

Message

B.2



↳ This is whole page

Date contacted
(Auto populate)

Time contacted
(Auto populate)

Add Task

↳ In center

SharePoint x 2023 - OneD x All Items 27 x Dia Price Gr x Dia Price Gr x Mail - Rasha x Admin x RightClick x +

simplexdemo.com/admin/admin_customer/customer_list?year=2023&per_page=10&exposure=0.0#

SimplexDiam - Docu... Reset Password - O... RightClick Log In

Add Task

Customer Name*
13 Secrets

Subject*
Priority*
High

First Name*
Last Name*

Email*
Telephone*
(912) 484-0985

Assigned By*
Person assigning the task
Assign To* → Assigned To
Nothing Selected

Task*
Enter task

This is in Regards To*
Nothing Selected → Change to select from below

Date*
11/30/2023
Time*
09:47 AM

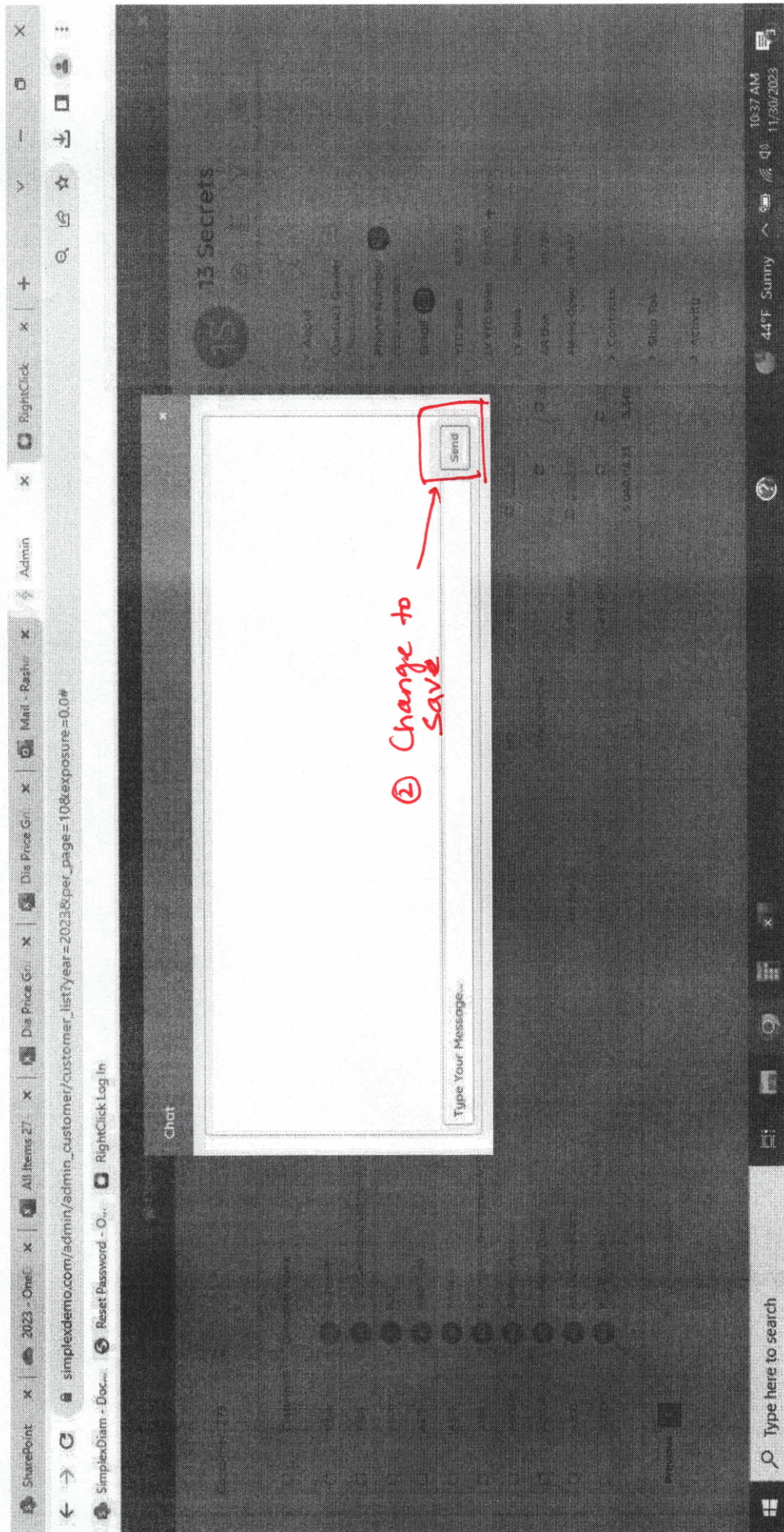
Due Date*
Due Time*

Buttons: Add Task, My Open Tasks

Priority Dropdown Menu

- ① Add Task rename to Current Task (This should work as tab and not button.) Check Hubspot.
 - ② My Open Tasks as a Tab
 - ③ Priority dropdown options :
 1. Urgent (End of Day)
 2. Immediate (24 Hours)
 3. Important (48 Hours)
 4. This Week
 5. End of Next Week
- End of Month
End of Quarter
End of year

A



(1) Change Chat to Add Notes

(3) Name of the User should also show in Notes along with date and time.