

	Sales Manager	Sales Rep	Administrator
Dashboard			
Charts:	√	√	
Quarterly Activities-weeklywise projection of opportunity & quote Amount	√	√	
SparkLine chart- summary of opportunity & Quotetotal	√	√	
Opportunity Summary- Shows a weekly graph of estimated revenue vs quoted revenue	√	√	
Doughnut chart -Actual Vs Planned Revenue	√	√	
Side by side chart- Opportunity Vs Quotes Vs Contract	√	√	
Recent Activities			
Contracts- Shows top 5 recent Contracts and can be navigated to the contract details	√	√	
Quotes - Shows top 5 recent Quotes and can be navigated to the quote details	√	√	
Opportunities - Shows top 5 Recent opportunities and can be navigated to the opportunity details	√	√	
Create Quote by selecting opportunity & Pricelist - A new Quote is Created.	√	√	
Opportunity List			
Filter Opportunities - Filter enabled for every column	√	√	
Search Opportunities - Global search & column level search.	√	√	
Export Opportunities - Export selected/all data to excel.	√	√	
View Opportunity -can be navigated to the opportunity details	√	√	
Create Quote from Opportunity	√	√	
Pagination - can change the page size dynamically.	√	√	
Contract List			
Filter Contracts - Filter enabled for every column	√	√	
Search Contracts - Global search & column level search.	√	√	
Export Contracts- Export selected/all data to excel.	√	√	
View Contracts - can be navigated to the opportunity details	√	√	
Create Opportunity from Contract	√	√	
Create Quote by selecting opportunity & Pricelist.	√	√	
Quote List			
Filter Quotes - Filter enabled for every column	√	√	
Search Quotes - Global search & column level search.	√	√	
Export - Export selected/all quotes to excel.	√	√	

View Quote - can be navigated to the Quote details	√	√	
Create Quote by selecting opportunity & Pricelist.	√	√	
Quote			
Edit quote - applicable for only drafted quotes.	√	√	
Submit quote - Submit the drafted quote and it goes for approval.	√	√	
Roll back Quote - Rollback the changes made for any drafted quote.	√	√	
Copy quote - Creates a new copy of the same quote which is in draft status.	√	√	
Recompute- Recalculate the Quote Amount once line items are added/removed or discount got changed.	√	√	
Show logs- Shows all edits made in the quote and its line items before last save.	√	√	
Approve Quote - Quotes with the status 'In Approval' can be approved.	√	√	
Reject Quote - Quotes with the status 'In Approval' can be rejected.	√	√	
Accept Quote - It is used to accept the published quote.	√	√	
Cancel Quote - Quotes with the status 'In Approval' can be Cancelled.	√	√	
View Exceptions based on the rules - Shows all the Exceptions for the quote.	√	√	
Revise Quote - In Approval quotes can be revised for any changes.	√	√	
Download Quote - Quotes can be downloaded.	√	√	
Publish Quote	√	√	
Publishee Accept - Published Quote can be accepted by the Publishee.	√	√	
Publishee Reject - Published quote can be rejected by the publishee.	√	√	
Create Order -Create order once quote is published.	√	√	
Quote Line Items			
Add Products - Products can be added as Quote line items.	√	√	
Add Spool - Group multiple products into a Spool & add as a line item.	√	√	
Re-order Serial No - rearrange the line items according to Serial Number.	√	√	
Add Write-In Product - can add a write in product as line item.	√	√	
Delete Line Item - delete selected/all line items	√	√	
Bulk discount - Apply discount for All, Line items or Spool items.	√	√	
Bulk Markup - Apply bulk Markup for select or all products	√	√	
Discount Log -shows all edits made to the discount in line items since the last save	√	√	
Discount History - shows the discount history even after saving the quote	√	√	
Add IB Assets for Renewal Quotes - It is used to add IB assets product.	√	√	

Co-Terminate the added IB Assets	√	√	
Admin Dashboard			
Usage Metrics - It shows the graph of Logins vs Password reset.			√
Recent Users- Shows the recent logged in user with the logged in date.			√
User Stats- Shows the details of the selected user from the Recent users grid.			√
User Management			
Sort Data - Sort the grid based on individual columns.			√
Grid - Shows the list of users having access to the application			√
Form- Shows the details of the selected user from the grid.			√
Welcome icon- To send a welcome mail to the selected user from the grid			√
Unlock - To Unlock the locked user			√
Lock - To lock the user			√
Save - It is used to create a new user.			√
Delete - It is used to delete the selected user.			√
Create - It is used to clear the form.			√
Application Settings			
Form - Here you can change the settings for the application.			√
Price Lists			
Sort Data- Sort the grid based on individual columns.			√
Filter - Filter the Pricelist based on name,currency and date.			√
Refresh- refresh the Pricelist grid data.			√
Delete Row - Delete selected row from the Pricelist grid.			√
Add Row - Add a row to the grid.			√
Deactivate - Deactivate the selected Pricelist from the grid.			√
Activate - ACTivate the selected Pricelist from the grid.			√
Rules			
Sort Data- Sort the grid based on individual columns.			√
Search data- Search based on individual columns.			√
Refresh Grid- Refresh the rules configuration grid data.			√
De-Activate Rule- Deactivate the selected rule.			√
Activate Rule- Activate the selected rule.			√

Create Rule- Create a new rule.			√
Validations			
Sort Data- Sort the grid based on individual columns.			√
Filter Validation- Filter the Validation rule based on Rule Name,Entity name etc.			√
Search - Search based on individual columns.			√
Refresh - Refresh the validation rules grid data.			√
Delete row - Delete selected row from the validation rules grid.			√
Add Row - Add a row to the grid.			√
Approvals			
Sort Data- Sort the grid based on individual columns.			√
Search - Search based on individual columns.			√
Filter Approvals - Filter the Approvals grid based on Name,Version and created date.			√
Refresh Approvals- It is used to refresh the grid data.			√
DeActivate Approval - It is used to Deactivate any activated approval from the Approval Grid.			√
Activate Approval- It is used to Activate any Deactivated approval from the Approval Grid.			√
Add New Approval - It is used to add a new record to the approvals grid.			√