

Business Requirement Use Cases

Internal

- Operates in multiple location (Georgia, Tennessee, Virginia, North and South Carolina, and Florida.)

Use Cases:

- Sales Processes
- Sharing Rules

- Need to have end user support.

Use Cases:

- Flows
- Queues
- Escalation Rules
- Web-to-case
- Chatter

- Use the data gained to have actionable reports to help them grow and focus.

Use Cases:

- Reports & Dashboards
- Queues

- As much help as possible to lower the training overhead.

Use Cases:

- Knowledge
- Community for internal

Customers

- New client facing website incorporates customers to find doctors in network and set up appointments.

Use Cases:

- Flow
- Mobile
- Web-to-Lead
- Validation Rules
- Auto-response Rules

- Client dealing with certain conditions to be able to interact, creating online support groups overseen by a professional.

Use Cases:

- Knowledge
- Community for external

- Chatter

Partners

- Able to log in and see requested appointments.
 - Able to accept and deny appointment requests.

Use Cases:

- Homepage
- Mobile