**Date:** 04/07/2014

**Attendees:** Henry, Jigar, Sneha

**Discussion Items:**

1. Submissions Wizard Update ticket on Trello. It’s nice to have feature but not include.
2. Confirmation of formula to calculate Match %.

* (Score / No of parameters having values) \* 100

1. Modifications Requests

* Submission Wizard Changes
* Send Attachments takes the user to a blank page when there are no attachments
* Min Monthly Deposits should be changed to Monthly Deposits on the Opportunity page.
* Submission Wizard – The monthly deposits should be filtered on less than equal to Min Monthly deposit.
* Add buttons to the Accounts where record type is Merchant
* Remove the Repeated Map button on Merchants
* Atleast 1 field needs to be populated for Match % else display a “Missing Info” error
* Potential Funding Amount formatting, add commas. Calculation error.
* On multiple attachments screen redirection should work based on from where the page was invoked.
* Offers Wizard
* Error message needs to be fixed.
* Create Contract
* Page needs to have a header.
* Manage Renewals
* Paid % column header needs to be modified to Payoff %
* Term column needs to be placed after Payback Amount.
* Dashboards Idea
* Renewal should be Renewals and centre aligned
* Title needs to be changed to MCA Home. Make it the default landing page.
* Order:  
  Leads/Prospects | Opportunities/Deals | Renewals | Commissions   
  Syndication | Bank Programs| Transactions | Dashboards  
  Activities | My Inbox |
* Activities/Task: <https://na10.salesforce.com/007>
* Bank Programs| instead of Bank Programs
* The name of the icons should be center aligned
* Change icons for Renewals, Opportunities & Syndication and smaller icons
* Opportunity Page
* Increase the height of the grid buddy page
* Receivables and Payables should be an auto number
* Funding Application
* Owner fields should be coming from Contact

1. The following changes would be performed after the demo

* Submission wizard - Add link to multiple Opportunities when Opportunities are created using the Create Opportunities button.
* Manage Renewals - Display Opportunity records which were new but closed lost

**Action Items**

|  |  |  |
| --- | --- | --- |
| **Sr. No.** | **Action Item** | **Owner** |
| 1 | All cosmetic changes as suggested by Henry for the following   * Submission Wizard Changes * Offers Wizard * Create Contract * Manage Renewals * Dashboards Idea * Opportunity Page * Funding Application | Sneha |