**Date** – 03/25/2014

**Attendees** – Henry, Jigar, Jina, Sneha

**Discussion Items**

1. Walkthrough and demo of the developed functionalities for the MCA Application to Henry
2. The following changes were suggested by Henry in the existing MCA functionality

* Prepare source field documentation for Funding Screen
* Reduce the dollar Size on Lead rating

1. Transactions Visualforce Page modifications

* Remove the record type field from the page
* Remove multiple Account fields from the page
* Status picklist should only have the following values - Pending / Completed
* Save button should exist on top and in the Transaction Line Item section of the page
* Change the datatype for Transaction Name to Auto number

1. Funding Screen modifications

* Fed Tax Id field should be made a Number
* Create Conga button should send an email to the email recipient. Need to create a lookup on Opportunity to Merchant.

1. Submission Wizard screen modifications

* Add the % Match feature for Bank Programs. Create a progress bar using a formula field and add to the grid on the Submission Wizard screen.
* Provide estimates for a custom Grid Buddy screen’s development.

1. MCA Packaging

* Prepare a list of all existing features developed for MCA App and share with Henry.
* Need to identify the core features for creating the package with all the fundamental functionalities for MCA.
* The MCA App would be packaged such that all the functionalities except the Funding Screen would be a part of the base package. The Funding Screen would be an extension as the customer may need modifications to the same.
* The following functionalities would be a part of the MCA Base Package.
* Banking and CC Entry Wizard.
* Activity Count trigger on Lead
* Submission Wizard.
* Transaction Page along with changes
* Renewals
* Admin Page.
* Reports and dashboards

1. Imperial Advance engagement

* Need the effort required to package the MCA functionalities for the Base Package and Extensions and share with Henry.
* Prepare a schedule of the items in the Imperial Advance SOW that would require custom development
* Henry intends to start work on this item this week. Needs confirmation on when the offshore dev team can start work on the same.

**Action Items**

|  |  |  |
| --- | --- | --- |
| **Sr. No.** | **Action Item** | **Owner** |
| 1 | Code modifications for MCA functionalities, Transaction Page, Funding Screen and Submissions Wizard. | Sneha |
| 2 | Prepare package of MCA App for Imperial Advance | Sneha |
| 3 | Renewals functionality development | Sneha |
| 4 | Match % implementation | Sneha / Jigar |
| 5 | Prepare a timeline for all functionalities of Imperial Advance that would require custom development | Jigar |
| 6 | Share the effort required for packaging the core features and the Funding Screen functionality of the MCA App | Jigar |