

Config and Setup(20)

- Create a conversion from primary USD currency variable to new won and yen versions, Ideally use an API for up-to-date conversion (function field)
- Change Fiscal Year to start in february, should be as simple of finding the correct date variables
- User link expiration change to 1 day exp instead of 7, probably a number change somewhere
- Add 5 employees and give them appropriate roles and profiles to meet requirements
 - Okay apparently this isnt required somehow? Still 10 pts
- Add functionality to certifications so that (people with the right privacy settings) they can be added/edited from the homepage
- Login restriction during setup
- Hr login restriction
- Multifactor check outside of office IP (email function of some kind)
- Password change required, last 4 pwds cant be used
- Chatter external licence?

Object Manager & Lightning App Builder (20)

- Implement ERD
- Distinguish between household accounts and business accounts (should just be extra object/field in account object)
 - hide/show relevant fields to each type
- Hide 'next action date' on work orders when completed
- Money owed =cost- paid(variable approved)
 - Maybe add a pending payment variable as well?
- Clear up record view for engineering team
- Reorganize records tab for noted fields
- Create certification records page
 - Include all users w. Certifications
 - Include all products a certification is for

Sales and Marketing Applications(12)

- Opportunity is affecting a current marketing campaign?
 - Honestly dont know what this one means
- Prompt to add solar products to opportunity when it does not have them included
 - ~ if no solar products, create popup/ new field to add solar products
- Work order banner regarding status
 - Maybe dependent on people/team associated currently

- Premier set of prices @ 15% discount
 - Depending on how often this is used/ how it is implemented, could be function or manual calculation, probably preferring the former
- Modify Opportunity Pipeline, Add new categories
 - Hot, 95% chance
 - Best-case
 - Warm
 - Cold
 - Remove negotiation/review
 - Charity cases to not be on pipeline until won (low value/clutter)

Service and Support Applications(11)

Continue tomorrow (row 41)

Productivity & Collaboration(7)

Data & Analytics Management(14)

Workflow & Process Management(16)