# 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
  + Found it by accident haha
* 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
  + MIght have to make a profile for hr accounts? Just don’t want to remove permissions
* Multifactor check outside of office IP (email function of some kind)
* Password change required, last 4 pwords cant be used
* Chatter external licence?

# Object Manager & Lightning App Builder (20)

* Implement ERD
* Distiguish 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 catagories
  + 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)

* Quick way of communicating between contacts+ support reps, not email, visible on support page
  + Some sort of tab which allows for messaging
  + Most likely a messenger app, don’t klnow what is specifically available on SF, but should be easy to find
* Support tickets >2 days old forwarded/assigned to alexandra
  + If current date-ticket add date >=2 &&status is new, assign to alexandra and change status to in progress
    - A daily check for status of Support tickets
* Queue for support tickets with a role for support specialists which can be assigned to other later (if not already there)
  + Queue which assigns jobs to the two specialists
    - If performence or breakdown, automatically assign to alexandra
    - Only question is if this means it bypasses the queue or if it can only be accessed by alexandra
* US would like to send emails when tickets are accepted
  + On change or similar of status field, send email to contact’s email
* US would like an email sent to create a ‘case’
  + Send email to email inbox to track cases
    - Create dummy email, no way am I using my own inbox for this
* US would like to ensure expert understanding, create categories to store info about issues
  + tabs /fields are installation error, capacitor overheat, missing part, and faulty charge capture
  + Seems just like a text fild for each?
    - I think its a bit more than that, but the wording isnt super clear to me
* Status for support tickets are New > Accepted > In Progress > Delayed > Closed (Success) > Closed (Failed)
  + Have input validation that these are the only acceptable values or just have a picklist
  + Probably have the user input a new end date/duration if delayed is selected

# Productivity & Collaboration(7)

* Mobile branding to match company colors
  + I guess just make sure that the colors of pages are the provided hex codes?
  + I’m not sure why mobile display settings would be different, but seems straightforward
* US wants Certifications and work orders to be put on calendars and have tasks related to them
  + Probably add start date/expected end date on calendar, other specifics tbd
  + ‘To be able to be put on calendars’ kinda weird wording, feels like its would be an event, ex. On setting to in progress, add data to work order calendar
* CEO would like to be able to make announcements to entire company
  + Probably just add an announcement tab somewhere with a bow w/ recent announcements from CEO
    - Maybe functionality to pin important ones to top

# Data & Analytics Management(14)

* Write a document for backing up data options
  + …I guess this isn’t implemented then, my first thought is backing up data at the end of every work day, deleting after a week to make room for new ones
    - Maybe keep friday\* records a little longer for larger rollbacks
      * \*just cuz end of week, no specific reason to be friday
* Next payment due date should always be in future
  + Simple validation rule
* Payment amount should never be more than amount needed
  + Also validation, although may be complicated depending how payments are received
* Report window
  + MOney owed, # of ‘hot rated businesses’,money of reimbursements
    - I don’t know how ‘hot rated businesses is defined, but should just be a table, I really one you can expand to see specifics about where the numbers are from
      * MOney owed, whichs orders are those, which businesses ARE ‘hot rated’, which companies are being reimbursed
* Report when money owed is >10% is still left to be paid
  + Probably make this check when a payment is received, whether its an email or in-client tab is not specified
* Import sample data
  + I assume this just means for this category or whatever, probably necessary to do for demonstration to some extent

# Workflow & Process Management(16)

* Reimbursement requests should go through a manager first, and then a manager
  + Seems like when person creates reimbursal request, send to hierarchical manager. Then add to a finance queue(since it doesn’t specify)
* Thank you email
  + On last day of month, send email to ‘hot rated businesses’
* Engineers sould be given read access on certified solar products
  + Most likely have a function to add read access when a person gets a certain certification, but I’m not 100% sure if that would work, because I don;t knwo if a permission set for every product would be necessary for that implementation
* When next payment date due, send reminder email
  + If payment amount<payment due && payment due date - current date ==2, send payment reminder email
    - As opposed to payment due thing, may be better to have a variable for payment plan payments, depending how the variables work, because if it is paid in installments, a paid amount won’t necessarily be the total amount, so that or something like ‘monthly due amount’ and ‘amount paid this month’ on top of total due/paid
* An engineer should be emailed when assigned a work order
  + I assume a function can be attached to the action of assigning a work order, if not, a running check seems super inefficient