

Activity #6

UC #1: Install “Salesforce Adoption Dashboards” & “User Access and Permissions Assistant” app exchange products in the org

- Enable Sales Dashboard Access to Sales Operations Head and Sales team

UC #2: Have a dedicated home page for Sales Operations head and Sales team members.

- Ensure Sales Dashboard is added to the home page
- Ensure approval records pending for approval are shown on home page

UC #3: Enable Field Tracking for Payment term, Hotel Account number and Hotel TIN.

Note: Create fields as needed on account obj

- Enable weekly audit report is sent all the members of Data Team

UC #4: Enable Chatter feed for Account Rating and Hotel Lat and long fields

UC #5: When Discount % is set > 5% , system should trigger approval to Sales Opearations Head