Activity #9

UC #1: Sys admins would like to see a faster way to search and freeze users

- the system should provide an option to the admins to lookup active users in the system
- Upon click on ok , the system should automatically freeze the user
- Ensure this option is available only for sys admins on home. No one else should have this option

UC #2: When an new user having role ‘Data Analyst’ is created ensure the system is automatically adding the following permission sets to user(s).

- All Access to Accounts
- All Access to Opportunites

Ensure if user role is changed from “Data Analyst” to something else, the above permission sets should be removed

UC #3: Build a simplified screen to quickly create hotel partner record from home page. Screen should have Account Name, Billing Address. Ensure simplified screen is visible only to Sys. Admins and Custom:Standard platform user - Sales Manager profile users

UC #4: Sales & Marketing team members would like to see a way to distinguish leads captured by Sales vs marketing teams. Introduce an option in lead that enables team to capture “lead procured by” value. Possible options would be Sales , Marketing

UC #5: Whenever a new lead is created with Lead source as “web” & “lead procured by” marketing then the system should automatically add the lead as a member of campaign named ‘Website Campaign”

UC #6: Contract Management team would like to ensure the system stops Sales Users delete a contract when it is in draft state and associated to an account. A message stating “Contract cannot be deleted when associated with account ” should be displayed

UC#7: Introduce a new contract status named “Archive” and a field to capture ‘Archive Reason’.
System should ensure “Archive Reason’ is updated with details when an user is marking contract status as Archive

UC#8: Introduce a new field on Case object to capture how many times a closed case was reopened. Ensure system updates “# of times Case Reopened” field automatically whenever a closed case is reopened.