User Registration:

1. What permissions are assigned to self-registered users
2. Impersonation between SF and Any point. Do new users get replicated in Mulesoft? How does this work? What are the mappings of profiles etc?
3. How are cases created? Process builder?
4. When is an account created for corporate? When the organization is registered or after it has been approved? What’s the approval process?

Branding and Template

1. Access to all these components? HSBC doesn’t have access yet.

Content Management

1. What is the search functionality supposed to do? Does it search based on record type
2. Case study order? What controls that? Date/Last change?
3. Are they able to inject their own coding (Java script etc..) or does it have to be LWC?

API management

1. API’s in exchange are external objects. Are they synced in real-time with Salesforce?
2. Do the ext data objects persist in Salesforce platform or do they exist in any point.
3. What API’s can be used for app creation? What determines which apps show up?
4. Is ACM available in app exchange?

When creating a case, there is a dropdown that lists API’s. However the list is not the API’s we expect. Where is it coming from?

A screenshot of a cell phone

Description automatically generated