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## Activity Share Enhancements: Case Access by Firm ID

# FIRELIGHT BASE

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Platform

**ACTIVITY SHARE ENHANCEMENTS: CASE ACCESS BY FIRM ID**

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# iConnect Design Approach - Activity Share

## Enhancements: Case Access by Firm ID

### Project Overview

The Group setting for Case Access by Firm ID is used to provide office staff and assistants in an organization access to activities based on the firm ID/rep code passed over during the SSO process.

## 1 Activity Share: Case Access by Firm ID

The Group setting for Case Access by Firm ID is used to provide office staff and assistants in an organization access to activities based on the firm ID/rep code passed over during the SSO process. Currently, the office staff is required to search for the individual cases in "All Activities". Adding the ability for the office staff to view activities shared based on firm ID/rep ID will provide an efficient process for locating the activity.

### ***Acceptance Criteria***

- Groups, App, Share/Transfer/Case Access, "Case Access by Firm ID" setting is supported in activity share.
- Activities shared across the firm ID/rep ID identified via SSO process allows user to access activity in the "Shared Activity" tab.
- To test this requires 2 steps:
  - Enable the feature in the Admin Tool under Groups: Share/Transfer/Case Access: check 'Case Access by Firm ID'
  - Login via SSO