# Title: Admin Experience - User Stories

#### **Decisions Taken**

* An Organization can contain only Sales360 accounts and nothing else [Beta]
* Only new customers
  + Upgrades from existing Freshsales customers is not part of the beta scope
* Custom roles are not part of the scope for beta
  + Eventually, custom roles can be defined in GA
* Omnibar functionality will not be available for Sales360 organizations.

#### **Phase - Beta**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Platform Component** | **Story** | **Team Owner** | **Status** | **Product Dependencies** | | | | **Comments** | **Phase** |
| **FreshSales** | FreshMarketer | **FreshChat** | **FreshCaller** |
| FreshID / Org | Make changes to the Org Structure to accommodate the changes needed for Sales 360   1. Create a new entity called Bundle 2. Create a foreign relationship between account & bundle 3. An organization can have only one Sales360 bundle 4. Hide Account Transfer link in the Org Dashboard 5. Show only the Sales360 account in the Org Dashboard and not all the accounts in the Org.   <https://freshworks.freshrelease.com/FRESHID/issues/FRESHID-3878> |  | DONE (#5 In Progress) |  |  |  |  | [Organization Structure for Bundles - I2P](/pages/createpage.action?spaceKey=PLAT&title=Organization+Structure+for+Bundles+-+I2P) | Beta |
| Omnibar | Org that contains Sales360 bundle shouldn't show omnibar.  <https://freshworks.freshrelease.com/FRESHID/issues/FRESHID-3881> |  | IN PROGRESS |  |  |  |  | [Organization Structure for Bundles - I2P](/pages/createpage.action?spaceKey=PLAT&title=Organization+Structure+for+Bundles+-+I2P) |  |
| Aloha | As a user, I should be able to signup for Sales 360 by filling a signup form.  <https://freshworks.freshrelease.com/FRESHID/issues/FRESHID-3879> | UFX | IN STAGING | Test Sales360 setup | Test Sales360 setup | Test Sales360 setup | Integrate Aloha v2 with Freshcaller | * Aloha needs to listen to the signup payload sent by the webops team and do the following tasks.     + Create all four accounts and link them to an organization   + Mark the organization as sales 360 account and disable omnibar for this organization | Beta |
| Aloha | At the time of Sales 360 Signup, create an organization and an Org Admin user in FreshID | UFX | DONE |  |  |  |  |  | Beta |
| Aloha | At the time of Sales 360 signup, send account provisioning requests to Freshsales, Freshmarketer, Freshchat and Freshcaller products with Org and User information | UFX | IN STAGING |  |  |  |  |  | Beta |
| Aloha | Based on the account provisioning response from the products, map these accounts to the organization created earlier | UFX | DONE |  |  |  |  |  | Beta |
| Aloha | Based on the account provisioning request from Aloha, all products to provision account and send the response back to Aloha with the newly created account details | Product Teams |  |  |  |  | * Implement Aloha integration | * Will not impact the existing spam check in place for Freshcaller Signups. * AFAIK, There are no blockers for Freshcaller to integrate Aloha v2 APIs | Beta |
| Role Management | Aggregate all the possible permissions across Freshsales, Freshmarketer, Freshchat and Freshcaller and create static role definitions inside all the products.  This static role id / name will be used to communicate a user's role inside Sales 360 whenever a user's role changes.  It is the responsibility of the product to identify the corresponding product-specific permissions based on the global role id / name. | Freshsales |  |  |  |  |  | Sudharshan / Srivatsan to consolidate all the possible permissions so that they can be stored inside UFX |  |
| User Management | Allow an admin to create a user in the existing as-is Freshsales UI with a role that is defined in the above step. | Freshsales |  |  |  |  |  |  | Beta |
| User Management | When a user is created, Freshsales should hit FreshID API with the user and role information. | Freshsales |  |  |  |  |  |  | Beta |
| User Management | UFX should offer an API to create user with a pre-defined role <https://freshworks.freshrelease.com/FRESHID/issues/FRESHID-3970> | UFX | DONE |  |  |  |  | UFX will update the existing CreateUser API to accept the role information as well | Beta |
| User Management | UFX should be able to successfully save the user's information and pass it to downstream services / products via central events <https://freshworks.freshrelease.com/FRESHID/issues/FRESHID-3970> | UFX | DONE | TBD | TBD | TBD | TBD | API endpoints for products or central events should be decided by the platform team after carefully considering the engg. challenges | Beta |
|  |  |  |  |  |  |  |  |  |  |