

R2 Release Backlog

Objective: Add Equifax data, predictive analytics, and a new color palette into the demo platform.

RELEASE	COMPONENT	USER STORY	ACCEPTANCE CRITERIA	EST	NOTE:
R2	lead exchange	As a user, I want to be able to search for leads from California Equifax data (companies & contacts)	search results include only data provided by Equifax criteria displayed represents available CA Equifax results only	4	assumption: Data is in SQL DB
R2	platform	As a user, I want to be able to view accurate lead detail pages for each company in my search results	from the search results page, click a result > lead detail page is displayed > data is accurate and complete per the Equifax record data	1.5	
R2	lead search	As a user, I want to be able to refine and expand my search results by \$ Value	execute a new search > on the search results page, display criteria: "\$ Value" > selections are displayed according to the Distance (e.g. \$0-100k, \$100k-250k, \$250k-500k, \$500k-\$1mil, +\$1mil) > select your target deal size > results are refined or expanded accordingly	1.5	This criteria will be based on modeled data in the system. For this release, we're hoping for mocked up data only
R2	lead search	As a user, I want to be able to refine and expand my search results by Age of Business	execute a new search > on the search results page, display criteria: "Age of Business" > selections are displayed according to the Size of Business (e.g. 0-30 days, 30-60 days, 60-90 days, 90-120 days, +120 days) > select your target time to close values > results are refined or expanded accordingly	1.5	This criteria will be based on modeled data in the system. For this release, we're hoping for mocked up data only
R2	platform	As a SalesCo admin, I want to be able to easily edit these attributes via CSS stylesheet (see Style Outline PDF)	siteBG:#400px vFade #9DA290 to #BDC1B3 / pageBG:#FFFFFF / navBG:#DDDDDD / podBG:#FFFFFF / listBG:#F3F7F3 podColor:#CCCCCC / solidHR:#CCCCCC / dottedHR:#CCCCCC / navHR:#666666 p1Button:vFade #A0BD9C to #84A97F, border:#8DB089 / p2Button:vFade #ACACAC to #949494, border:#9B9B9B bodyText:#333333 / lightText:#999999 / podTitles:#333333 / buttonText:#FFFFFF / links:#669966 / lightLinks:#999999	4.5	meet to discuss the solution after initial discovery
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POC	platform	As a Beta user, I want to be able to access SalesCo as a tab within my Salesforce instance with single sign-on	Sign into Salesforce as a disabled SalesCo user > SalesCo tab is available / display disabled message Sign into Salesforce as an enabled SalesCo user > SalesCo tab is available / functionality is available	5	
POC	org services	As a SalesCo Admin, I want to be able to view a list of organizations	TBD (pending technical specification)	3	
POC	org services	As a SalesCo Admin, I want to be able to set up a new organization for access to SalesCo	TBD (pending technical specification)	3	
POC	org services	As a SalesCo Admin, I want to be able to create a new organization	From the organization list page, click "Add Organization" > access "manage organization" page > enter organization name, street address, city, state, zip, phone number, primary contact f.name, l.name, and email address > click save > confirmation message appears > new organization is created and listed on the organizations page.	3	
POC	org services	As a SalesCo admin, I want to be able to "manually work through a new customer checklist, and configure each item on the backend"	TBD: provide more info	3	
POC	org services	As a SalesCo Admin, I want to be able to edit an existing organizations information, and configuration settings	TBD (pending technical specification)	3	

POC	org services	As a SalesCo Admin, I want to be able to create a new Level 1 role within an organization	TBD (pending discussion with Mark re: organizational hierarchy)	3	
POC	org services	As a SalesCo Admin, I want to be able to create a new Sales Manager role within an organization	TBD (pending technical specification)	3	
POC	org services	As a SalesCo Admin, I want to be able to create a new Sales Rep role within an organization	TBD (pending technical specification)	3	
POC	org services	As a SalesCo Admin, I want to be able to disable a user in an organization	Set a user to "enabled" > the SalesCo tab appears in Salesforce, and all activities are available. Set a user to "disabled" > the SalesCo tab does not appear in Salesforce (activities are unavailable)	3	
total story points >				45	capacity: 280/sprint