i360 Pro Summer '20
UAT Documentation

i360 Pro Summer '20 – Version 30.5

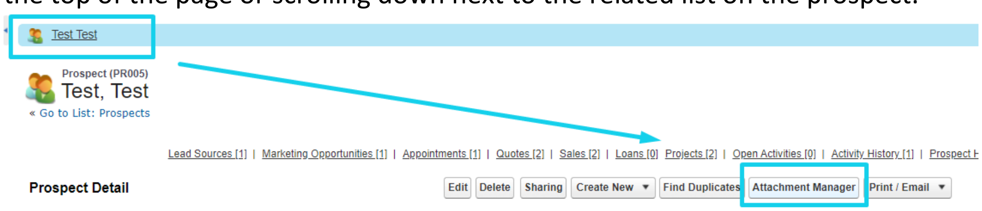
Overview: improveit 360's Pro Summer 2020 Release focuses on new feature functionality that leverages Salesforce's lightning web component technology, an interactive Zendesk bot built in the user interface and many of smaller enhancements and bug fixes.

Product Enhancements

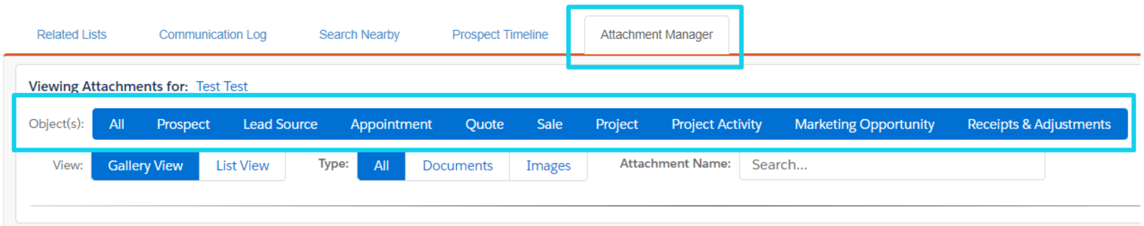
1) Attachment Manager

   The Attachment Manager is an action across the following objects that allows users to filter and search for documents and images to easily see their thumbnails and data: Prospect, Lead Source, Marketing Opportunity, Appointment, Quote, Sale, Receipt & Adjustment, Project and Project Activity.

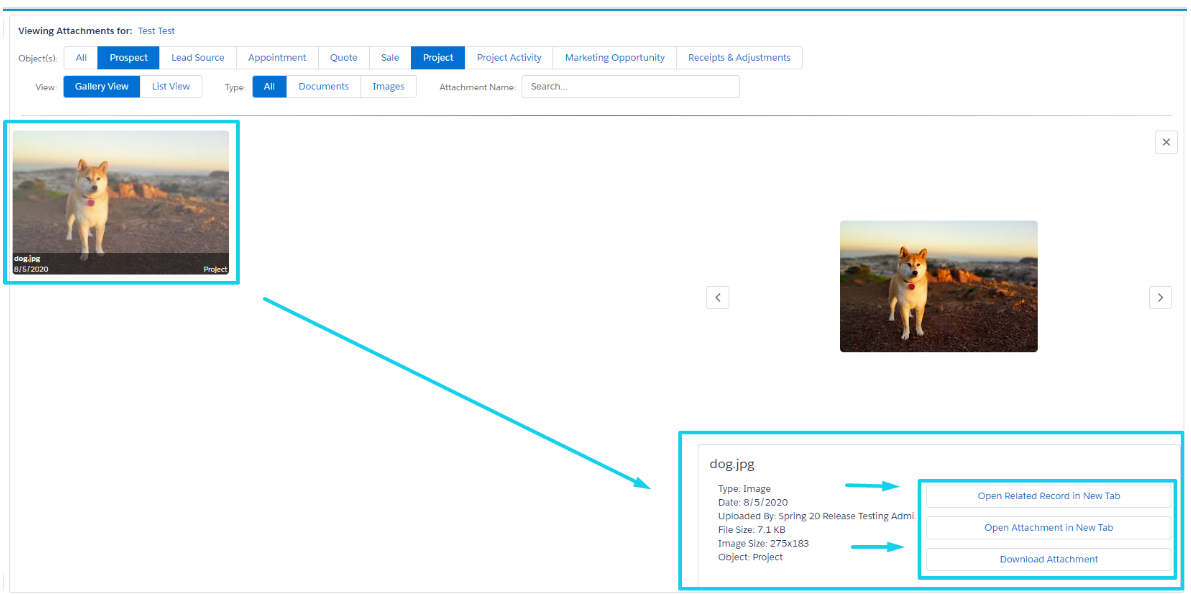
   a. Navigate to any of the following objects to upload an image or document sample: Lead Source, Marketing Opportunity, Appointment, Quote, Sale, Receipt & Adjustment, Project and Project Activity.
   b. In the breadcrumb trail navigate back to the related Prospect record and open the Attachment Manager. You can access the Attachment Manger in two places: buttons across the top of the page or scrolling down next to the related list on the prospect.



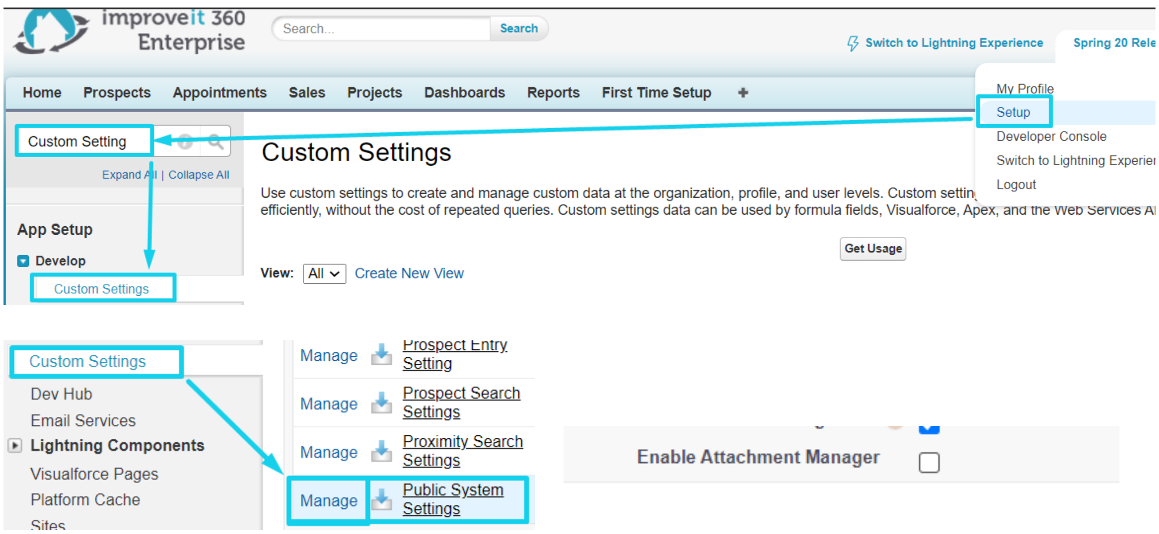
   c. To test filters, select the object button that you uploaded the image or document and ensure that it is now visible. Now deselect the object button to ensure the image or document is filtered out of the attachment manager.



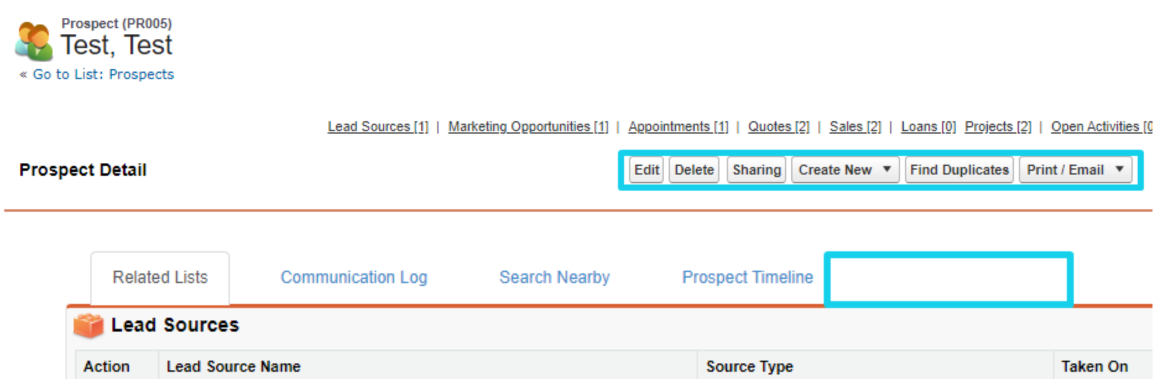
d. Finally, click on the image that you uploaded and make sure all the data and buttons underneath the image or document perform their respected action.
   i. Open Related Record in New Tab
   ii. Open Attachment in New Tab
   iii. Download Attachment



e. Lastly, navigate to Setup > Custom Settings > Public System Settings > Manage. Edit the custom settings and scroll down to 'Enable Attachment Manager' and uncheck the box.



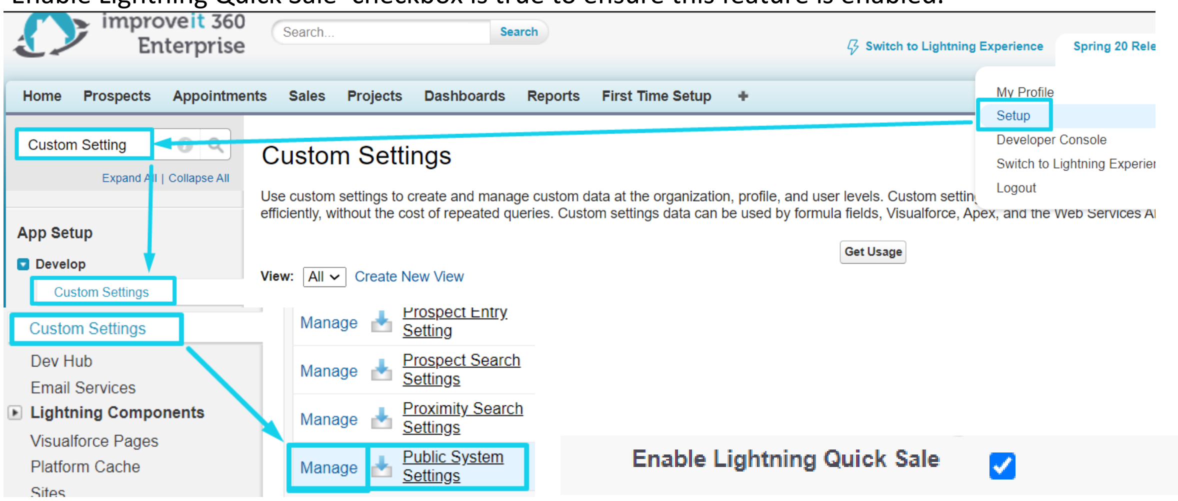
f. Navigate back to a Prospect and notice the button across the top and the related tab at the bottom are not visible.



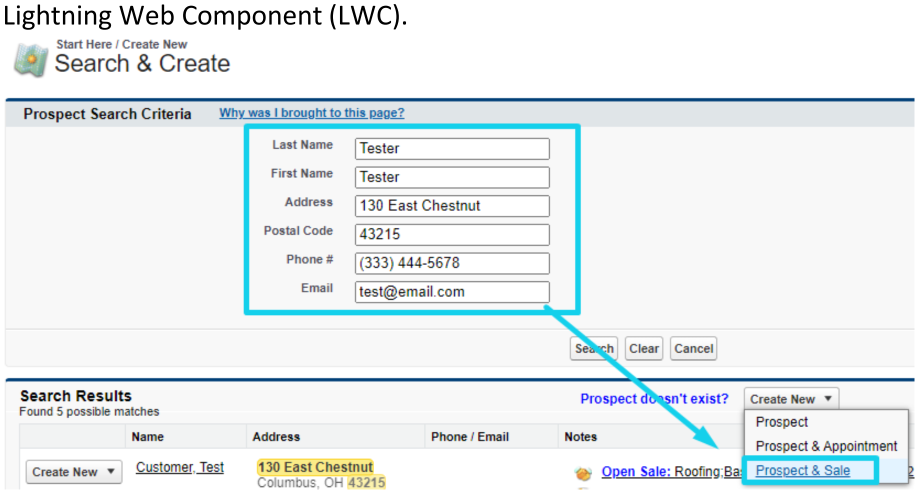
2) Quick Sale

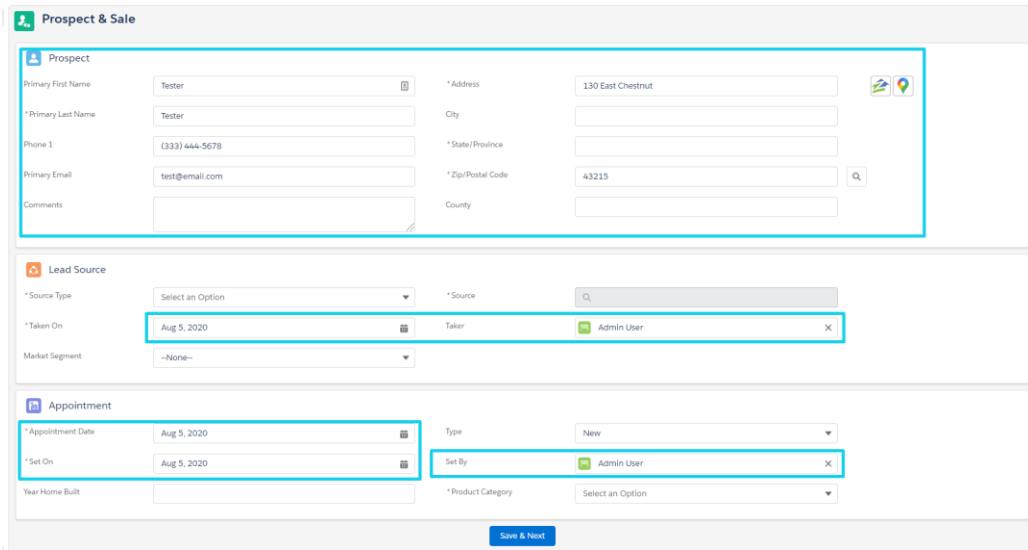
The ability to start at Search & Create and land on the sale page brings users a friendly way to create all the necessary records up to the sale page for a quick sale.

a. Navigate to Setup>Custom Settings> Public System Settings>Manage and ensure that the ‘Enable Lightning Quick Sale’ checkbox is true to ensure this feature is enabled.

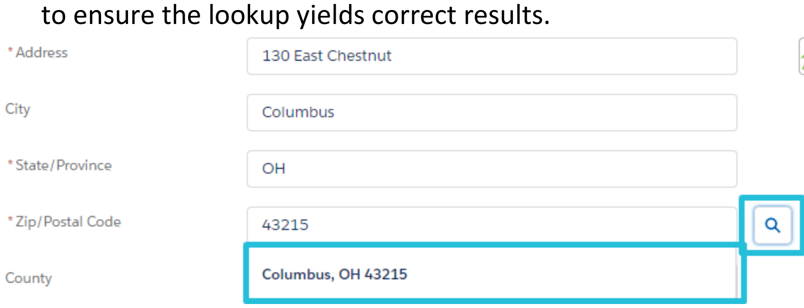


b. First populate all the fields in the search and create component from the home page and click Go. Once the results are shown, click the Create New drop down and select Prospect & Sale. Ensure all the fields you populated in search and create are also filled in the Quick Sale Lightning Web Component (LWC).



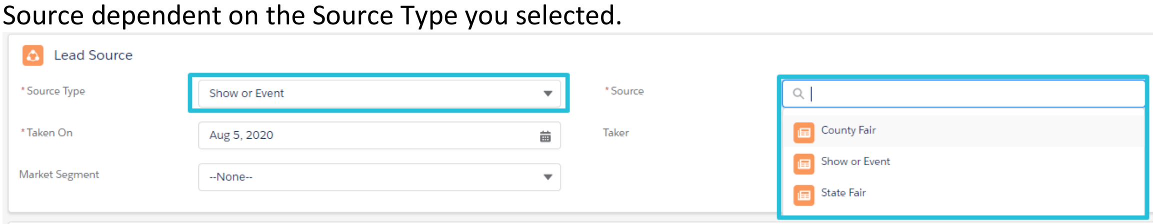


c. To the right of the Prospect section type in a known zip code and click the magnifying glass to ensure the lookup yields correct results.

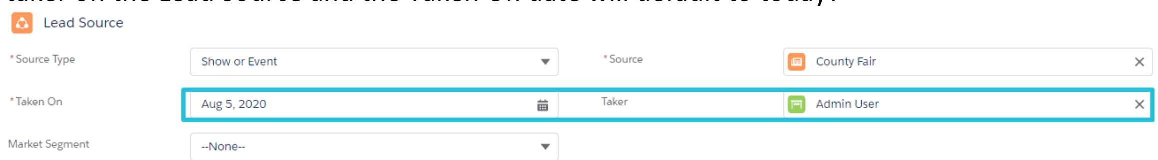


d. Scroll down to the Lead Source section of the Quick Sale LWC. Here we want to test the source type/source dependency as well as the taker being the logged in user.

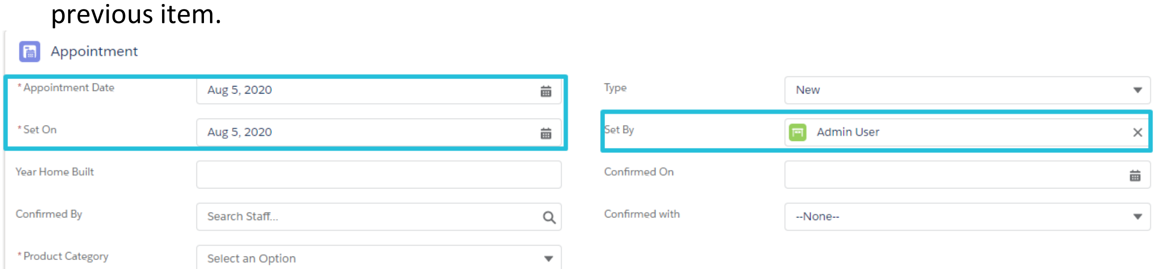
e. Select a source type (i.e. Show or Event) and the only sources that can be chosen are the Source dependent on the Source Type you selected.



f. Whomever you are logged in as while performing this testing should be defaulted to the taker on the Lead Source and the Taken On date will default to today?



g. The last section to test is the Appointment section. The Appointment Date and Set On fields should default as Today. The Set By should default to your logged in staff member like the previous item.



3) Prospect Timeline

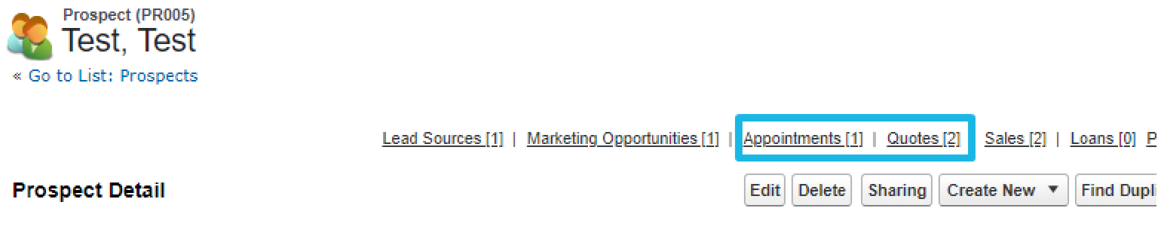
The Prospect Timeline is a new accordion style component that orders key objects by specific dates and allows you drill down on data without navigating away from the prospect page.

Note: The objects and the key dates determining their order are below.

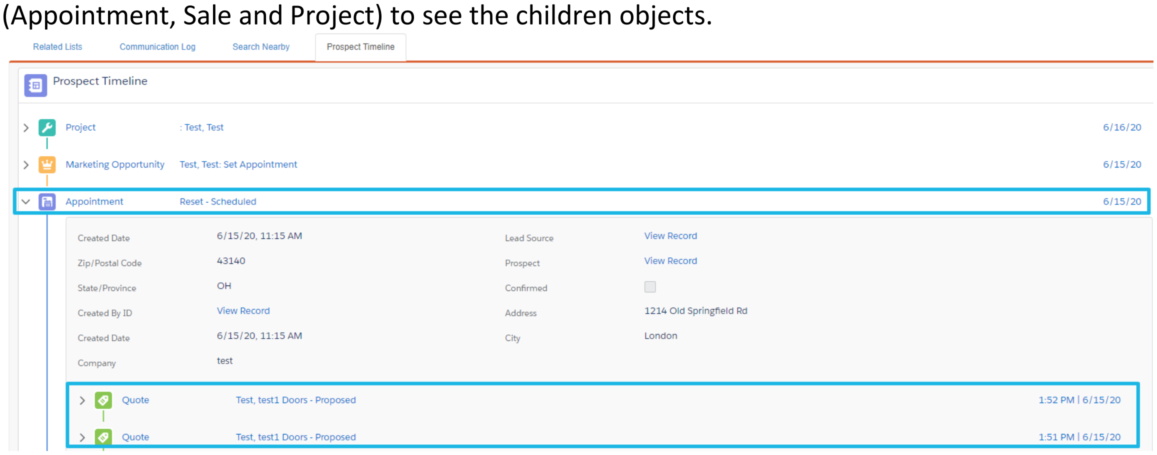
- Lead Source: Take On
- Marketing Opportunity: Due Date
- Appointment: Appointment Date
- Quote: Created Date
- Quote Item: Created Date
- Sale: Sold On
- Sale Item: Created Date
- Receipt & Adjustment: Received
- Project: Project Start Date, if Project Start date is blank the create date will be used
- Project Activities: if the type is “Appointment” the Start date will display and order the Project Activity, if the Start date is blank the timeline will default to the created date. If the type of Project Activity is a “Task” the Due date will display and order the Project Activity, if the Due date is blank the timeline will default to the created date.
- Project Costs: Created Date
- Purchase Orders: Created Date
- Tasks: Due Date

- Event: Start Date Time
- Note: Created Date

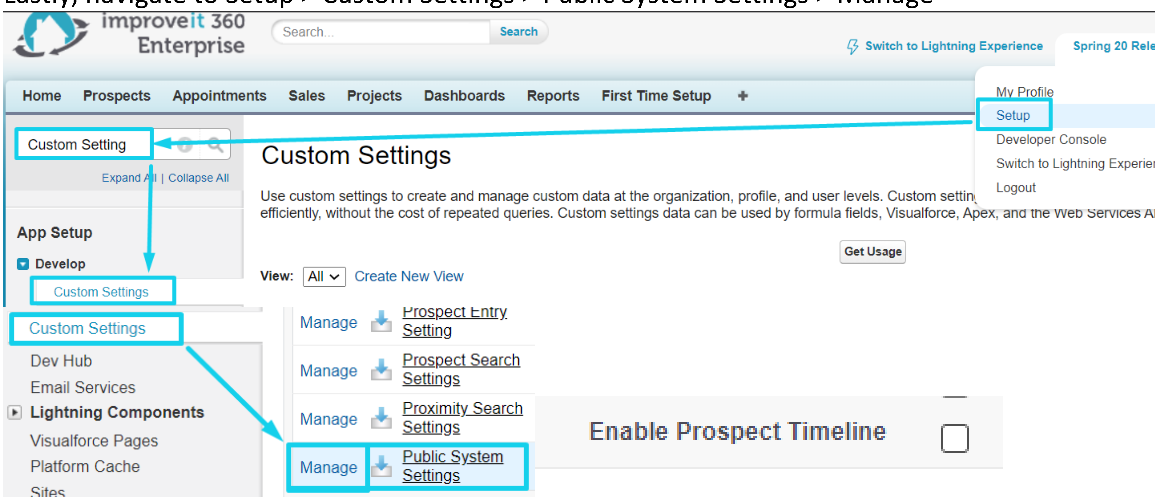
b. Select a Prospect that has an Appointment with a Quote, a Sale with a Receipt & Adjustment and Project with a Project Cost and Project Activity. You may need to create some of these records if the prospect and related data does not exist.



c. Navigate back to the prospect page and scroll down to the related tabs section. Open the Prospect Timeline Tab and ensure that all the objects in the previous step are in the timeline and ordered according to their key date in step (a). Expand the Parent Objects (Appointment, Sale and Project) to see the children objects.

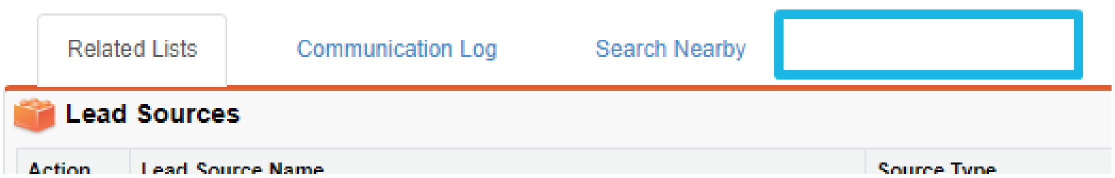


d. Lastly, navigate to Setup > Custom Settings > Public System Settings > Manage

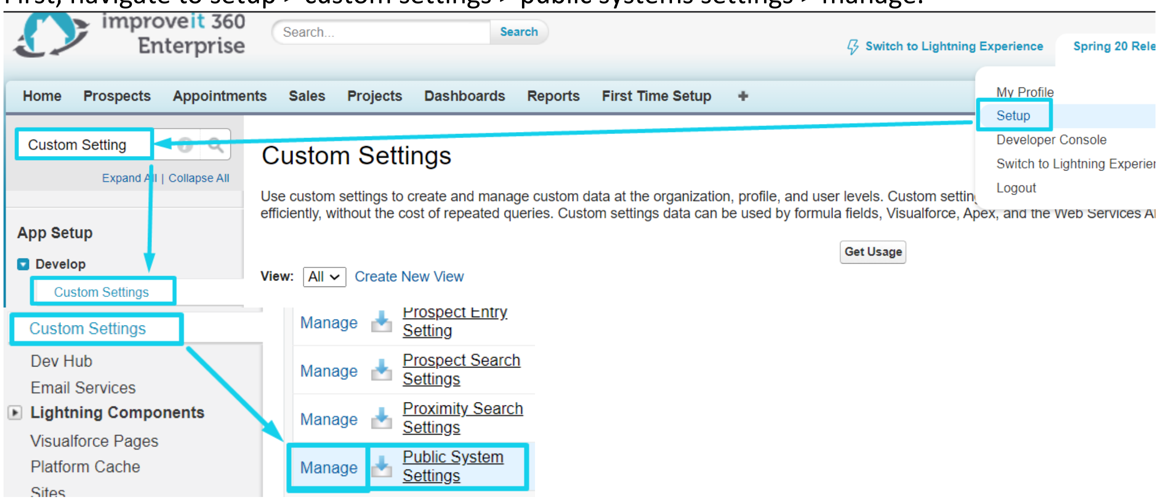


e. Ensure that the ‘Enable Prospect Timeline’ checkbox is false.

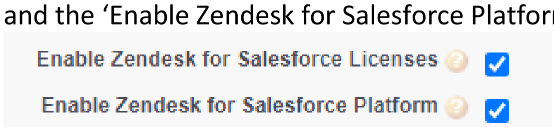
f. Navigate back to a prospect page and notice the Prospect Timeline is not visible.



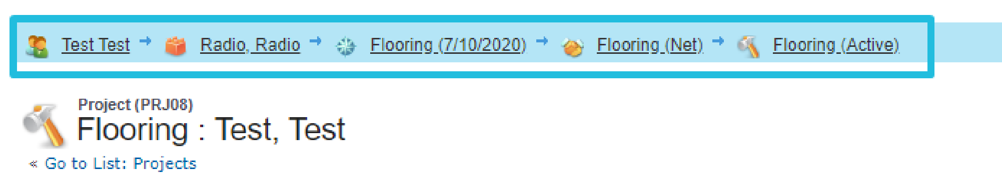
4) Zendesk Bot
    a. The Zendesk Bot has been embedded across improveit 360's object model to ensure immediate access to support articles and our support team.
    b. First, navigate to setup > custom settings > public systems settings > manage.



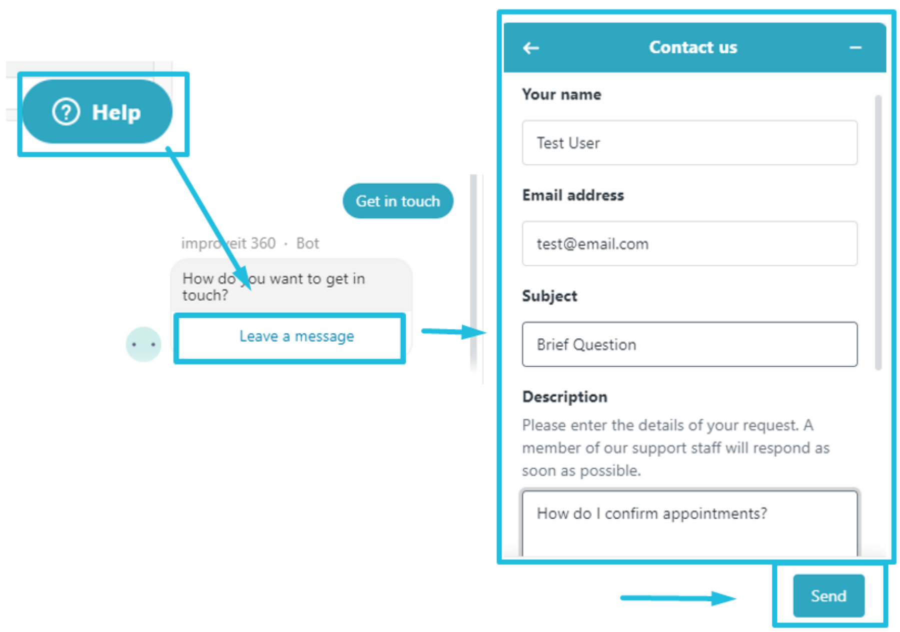
        i. Edit Public System Settings and ensure the 'Enable Zendesk for Salesforce Licenses' and the 'Enable Zendesk for Salesforce Platform' checkboxes are True.



    c. Select a record in the breadcrumb trail to test the Zendesk bot.



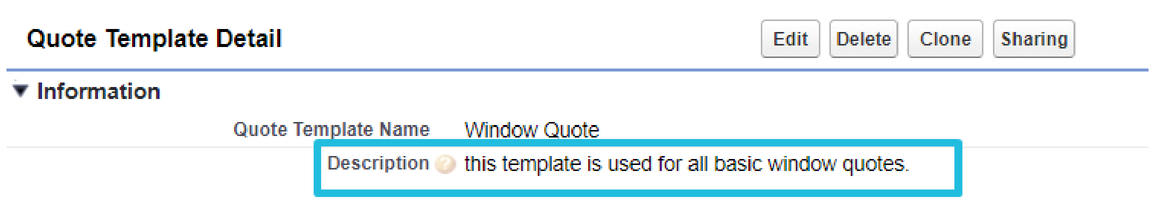
d. In the bottom right-hand corner, you will see the Zendesk bubble. Click to open the bot and then ask a question. After choosing to 'Get in Touch', put in a sample ticket.



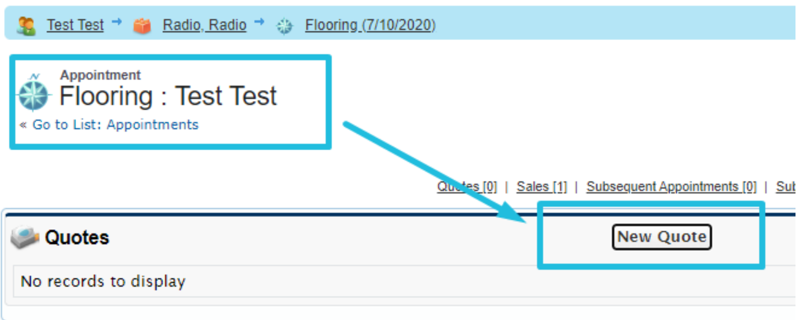
5) Quote Description Updated from Quote Template Description

a. Improveit 360 has enhanced the selection of a quote template so the description is copied into the quote description after selecting a template.

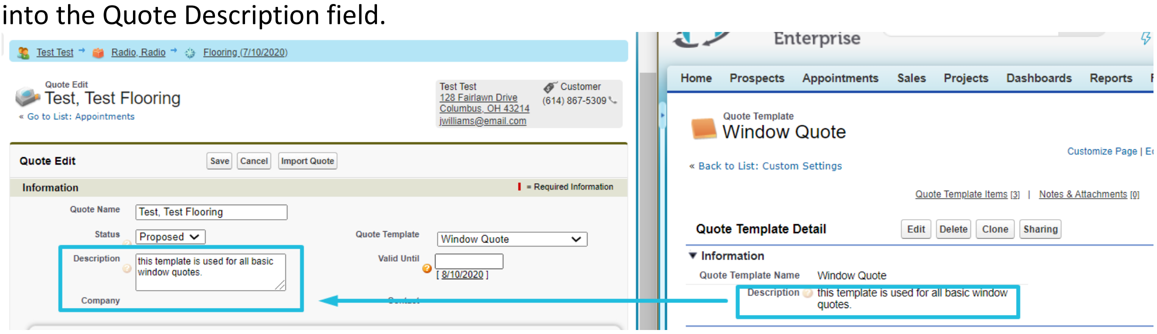
b. Start by creating or ensuring a quote template exists that has a description.



c. Navigate to an appointment and click "New Quote".



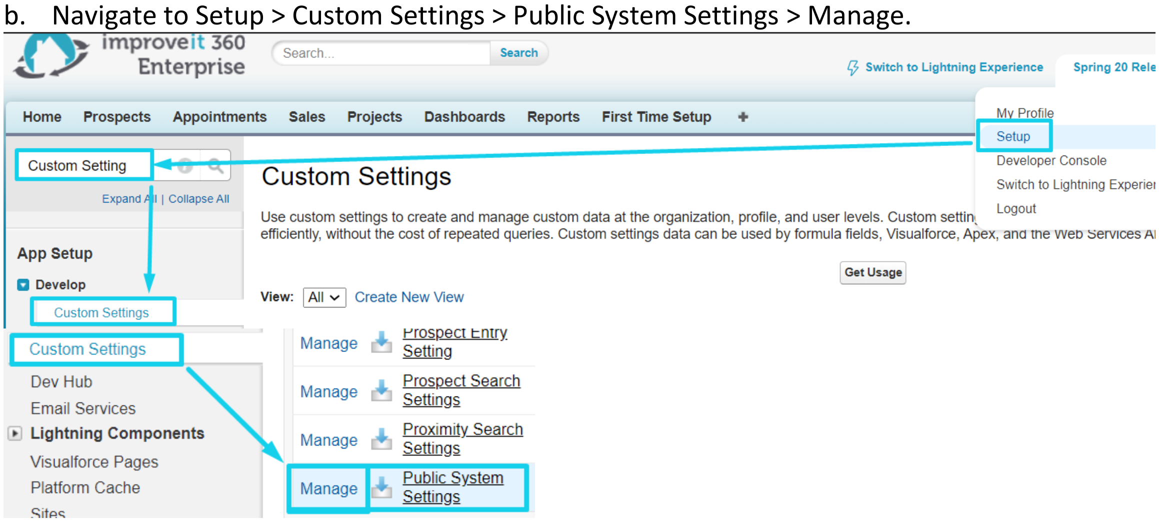
d. Select the Quote Template from step (b) to test the Quote Template Description is copied into the Quote Description field.



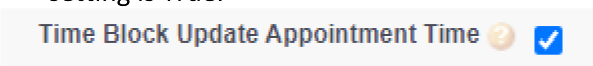
6) Time Block Start Time Now Updates Appointment Time to Match

a. improveit 360 customers now have the option of having the Time Block Start Time automatically fill in the Appointment Time.

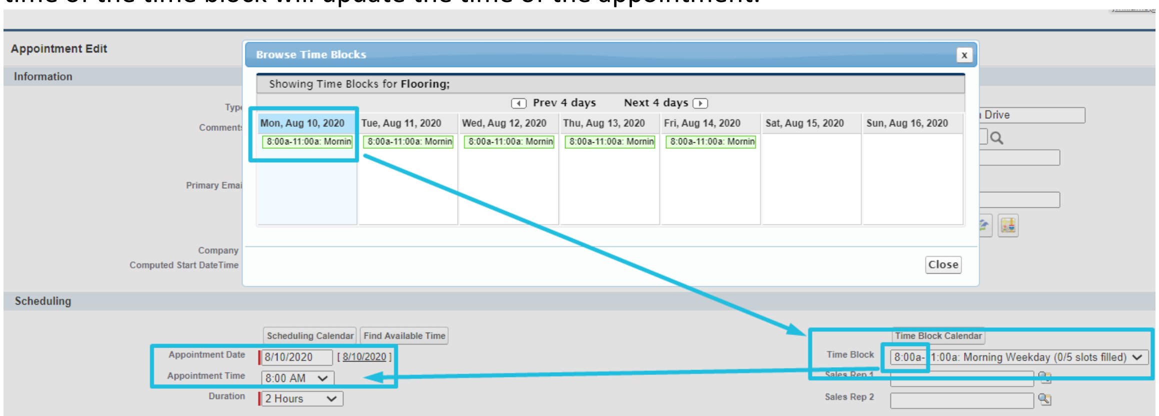
b. Navigate to Setup > Custom Settings > Public System Settings > Manage.



c. After Editing the Public System Settings ensure the 'Time Block Update Appointment Time' setting is True.

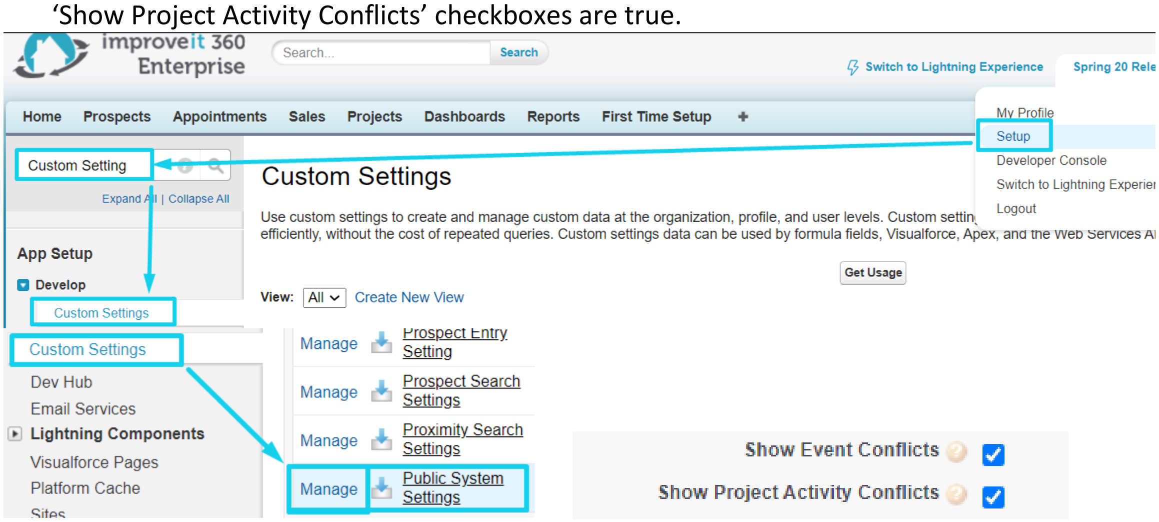


d. While Scheduling an appointment you'll notice after selecting a Time Block that the start time of the time block will update the time of the appointment.

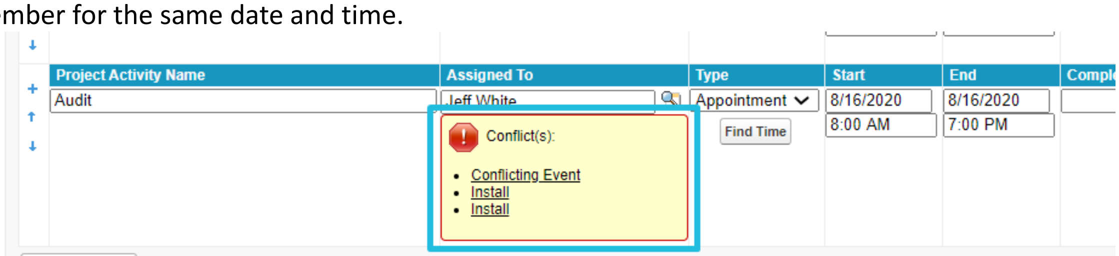


7) Project Activity and Event Custom Setting
During the scheduling process of Project Activities customer can now turn on/off the Conflict pop-up that shows when another project activity or event conflicts with the one being scheduled.
Note: this setting is currently global for all users and profiles in this release. improveit 360's next release will enhance this setting to respect user and profile specific settings.

a. To ensure the setting is enabled Navigate to Setup > Custom Settings > Public System Settings > Manage > Edit the Public System Settings. Ensure that 'Show Event Conflicts' and 'Show Project Activity Conflicts' checkboxes are true.



b. First, we'll need an already existing project activity and event assigned to a staff member and when scheduling a second project activity you will select to assign to the same staff member for the same date and time.



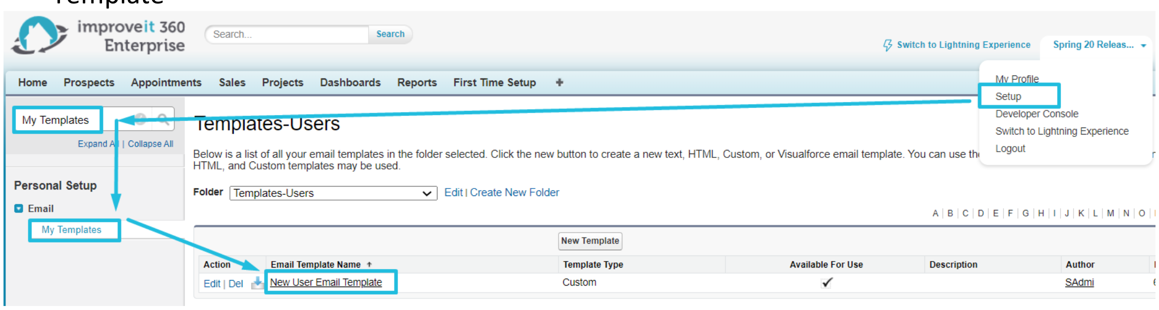
c. You will notice the conflicting project activity and event will be displayed in an alert message next to the project activity you are scheduling.

d. Next, navigate back to the Public System Setting from step (b) and turn the 'Show Event Conflicts' and 'Show Project Activity Conflicts' checkboxes to False.

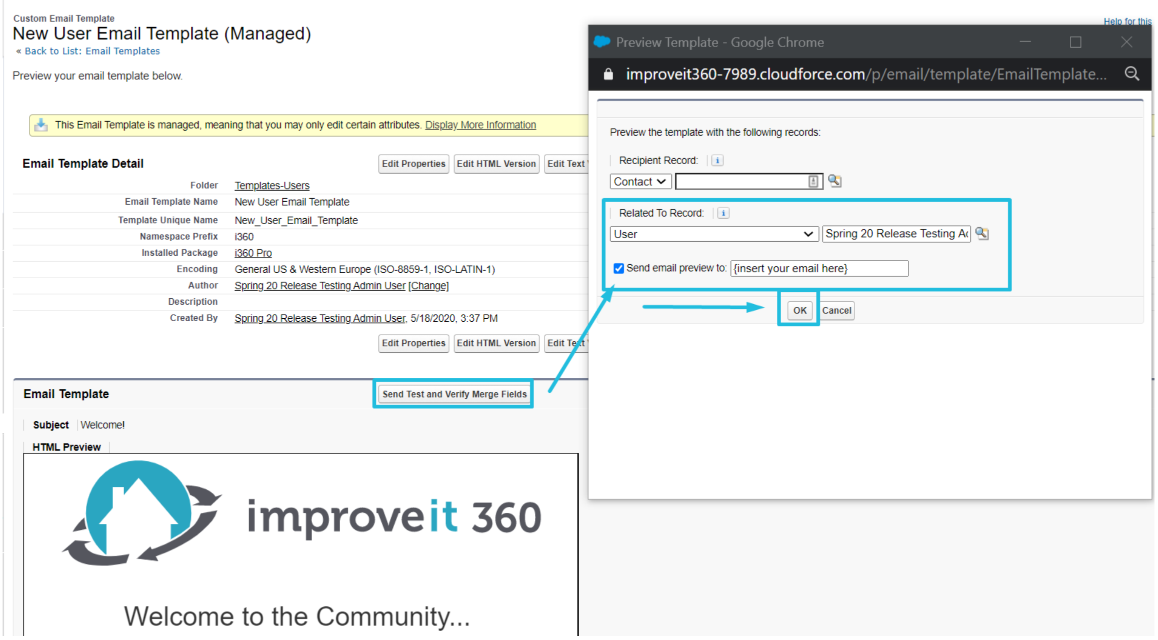
e. Follow step (c) again for scheduling a project activity to a staff member that has a conflicting project activity and event. Now you will not see the alert message!

8) New User Welcome Email Rebranded
Note: each email provider interprets images and links differently so depending on your provider you may only be able to test certain parts of this email template.

a. The 'New User Email Template' has been rebranded to have the most updated improveit 360 logo and embedded training video.
b. Navigate to Setup > My Templates > Folder = Template-Users > select the 'New User Email Template'

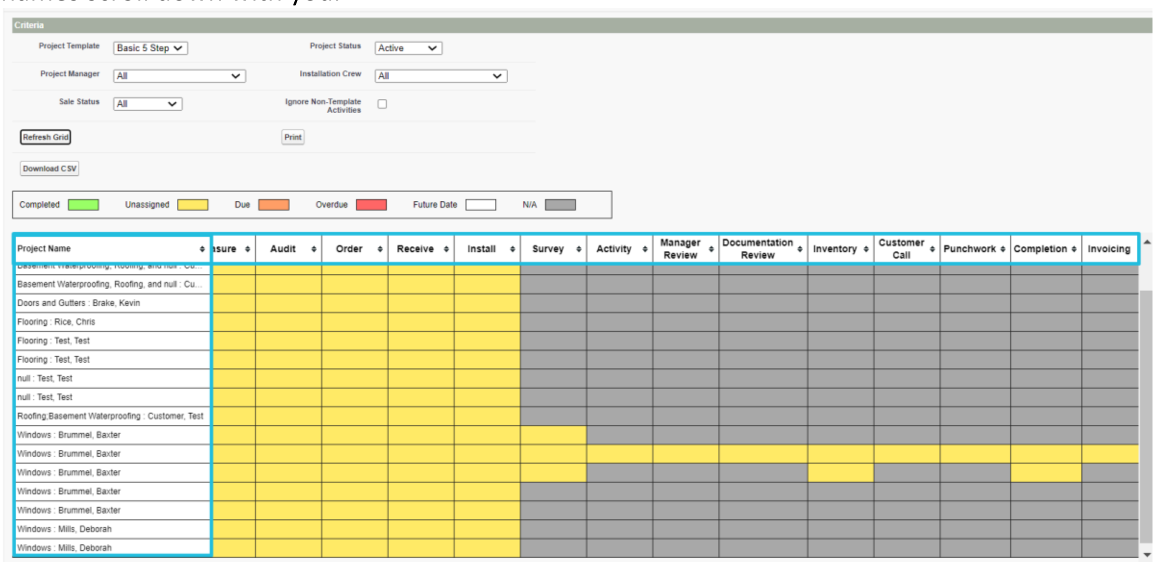


c. Click 'Send Test and Verify Merge Fields' and send to your email. Ensure that the image and link are updated.



d. Notice the New images and link to training video!

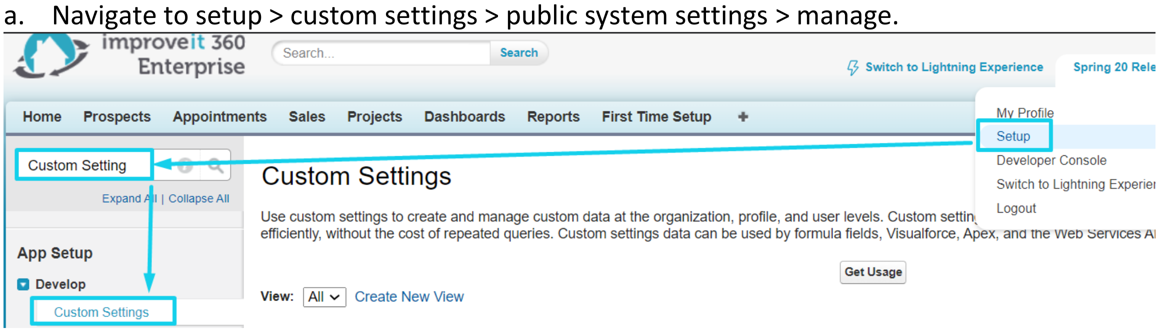
9) Product Grid Sliding Column/Row Header
   a. The Production Grid tab now has scrolling Column and Row headers so that users can have many projects vertically and many non-templated project activities horizontally and still see the projects across the left and the project activity names across the top.
      You may need to create a project template and a few projects using that specific template to test this. Once you have enough data prepared navigate to the Production Grid Tab in the '+'.
   b. Start scrolling either down or left and notice the project scroll right and the project activity names scroll down with you.



Defect Fixes

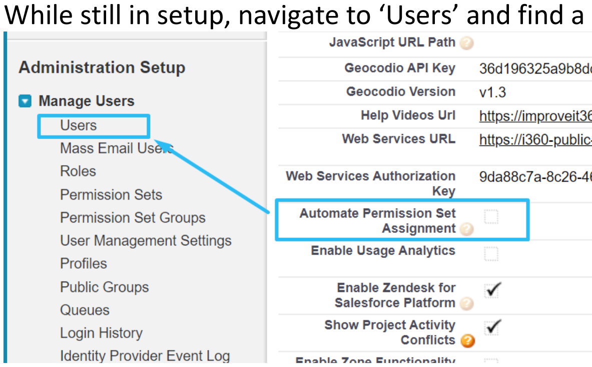
10) Permission Set Automatically Assigned
Detail: All users assigned to the Salesforce User Licenses were automatically being assigned the Administrator Permission Set. A new custom setting checkbox, customers can now bypass this automation, thus defining their own administrator licenses.

a. Navigate to setup > custom settings > public system settings > manage.

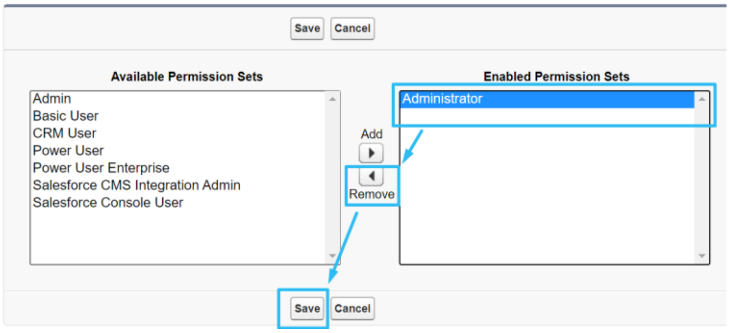


b. Ensure that the public system setting labeled ‘Automate Permission Set Assignment’ is unchecked.

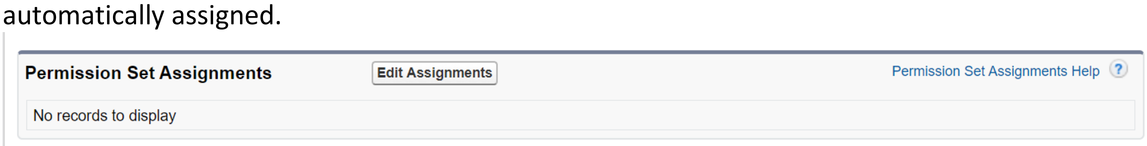
c. While still in setup, navigate to ‘Users’ and find a user assigned to a ‘Salesforce’ user license.



d. Scroll part way down the user page and Edit Assignments. Remove the Administrator Permission set.



e. Click and Run First Time Setup while keeping this user open in a new tab. Following the completion of First Time Setup, navigate back to the user in which the Administrator Permission Set was first removed and notice the Administrator Permission Set was not automatically assigned.



11) Project Activity Drag and Drop Times Maintained
    a. The Staff Calendar when in the ‘day by staff’ view and dragging and dropping a project activity to another staff member would revert to default 12:00 AM – 12:00 AM.
    b. Find a project activity on the staff calendar and drag it to another member and notice the start and end times are maintained through the rescheduling.