

## Demo 1 & 2 Account Additions

### Overview:

Have dummy data behind the system, so activity, health scores, engagement, support tickets, Social tab, projects tab, milestones, calendar, tasks, actual email templates that look designed and not plain text are all filled in, so when we do a demo, everything is populated.

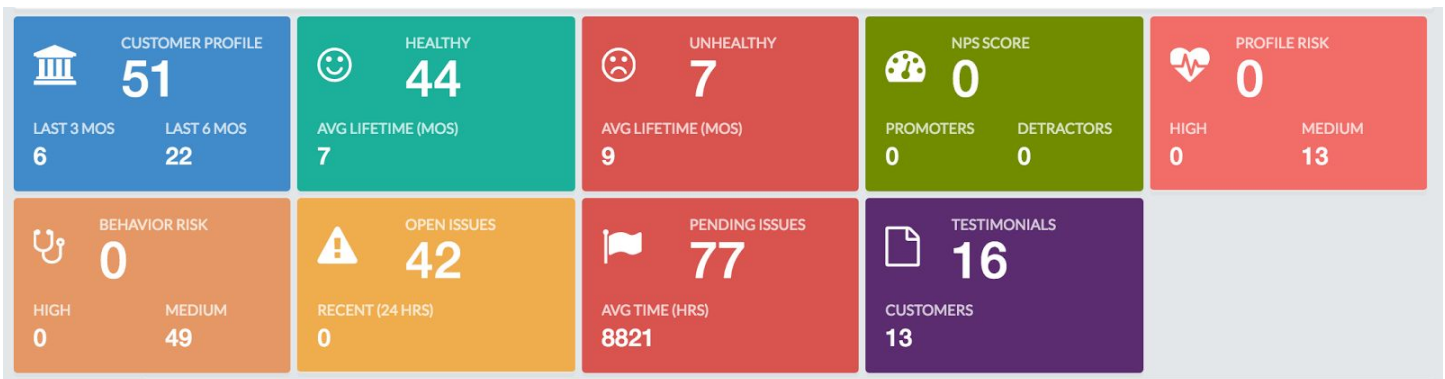
### To Add:

- iCharts: Customer Journey
- Tracks: updated walkthrough
- Any customized features that will look impressive

We need to add the Customer Journey feature like iCharts, an example version of Tracks so we can show how the progress tracker would look, and any other useful customizations that have been done in other accounts.

In iCharts, their graph that can click variables on and off, a large graph that shows health over time

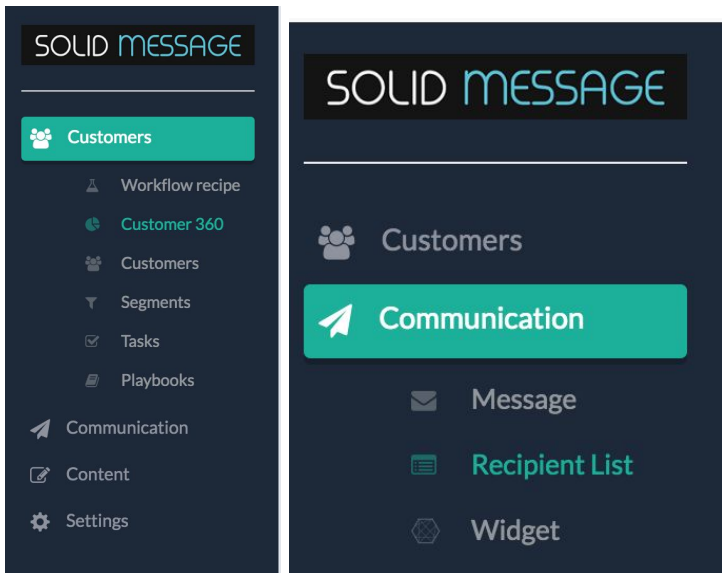
1. Add a 10th tile here so it doesn't look broken or a gap in error



2. "Workflow recipe" should be "Workflow Recipes", and be located between Tasks and Playbooks

Demo 2: Stg 2 - Surveys has been completely deleted

We need to rename the list in Demo1 and Demo 2: Surveys, Messages, Recipient Lists, Widgets

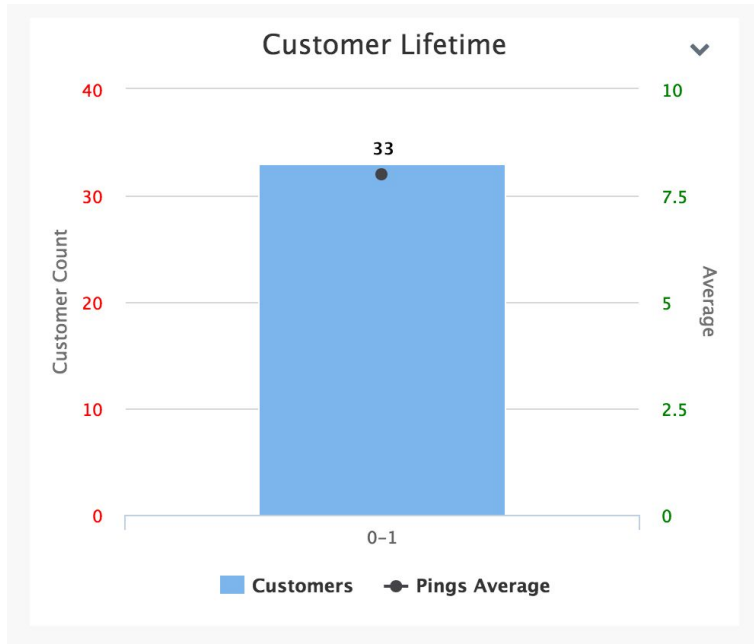


3. The Social Tab needs to be filled in with LinkedIn updates

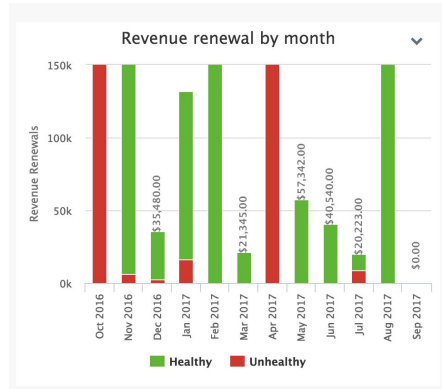
Maybe we can have some updates that never change?

Summary	Cohort	Renewals	Tickets	Calendar	Social	Tasks	Projects
Platform updated in May.							
					Created Updated Jun 06, 2016 22:05		
Call for a meeting to discuss next steps.							
					Created Updated Jun 06, 2016 22:02		
Contract due soon. Contact for renewal.							
					Created Updated Jun 06, 2016 22:00		
Inactive for over a month. Requires follow-up with customer.							
					Created Updated Apr 07, 2016 21:38		
Release of second platform update next month							
					Created Updated Apr 07, 2016 21:01		
Pilot will be due soon. Arrange a meeting to discuss on next step.							
					Created Updated Apr 07, 2016 20:12		
Require some customisation to the system							
					Created Updated Apr 07, 2016 19:12		
t4							
					Created Updated Feb 25, 2016 12:21		
t3							
					Created Updated Feb 23, 2016 13:52		

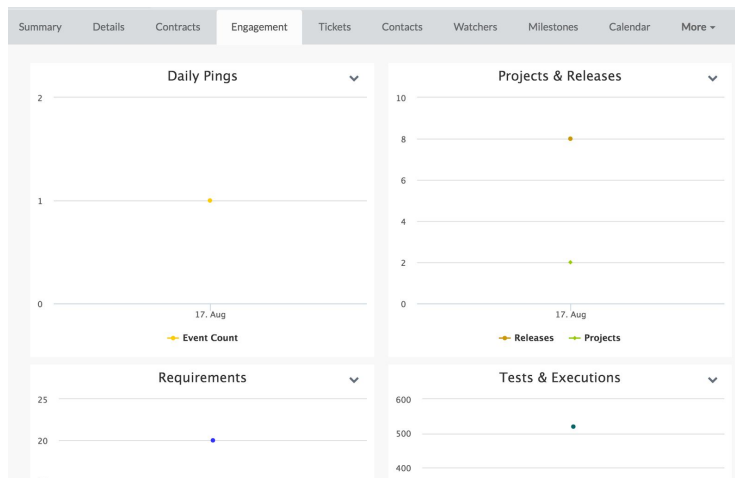
4. Add customers with older lifespans (Currently, it only shows customers with lifespans of <1 year



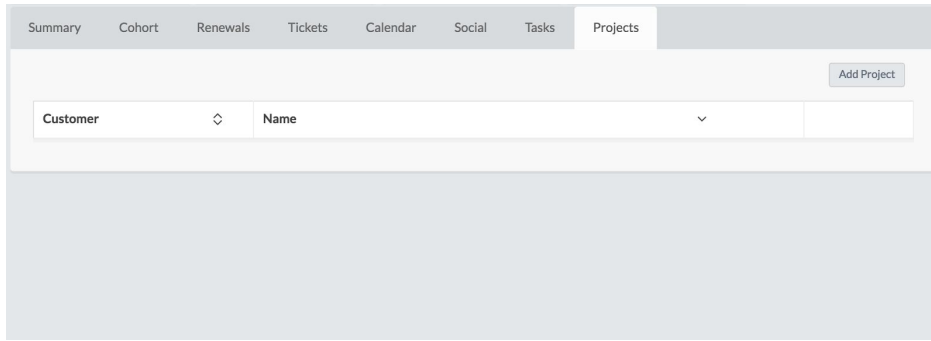
5. Revenue seems to be going over (may need to just change it in the customer profiles directly)



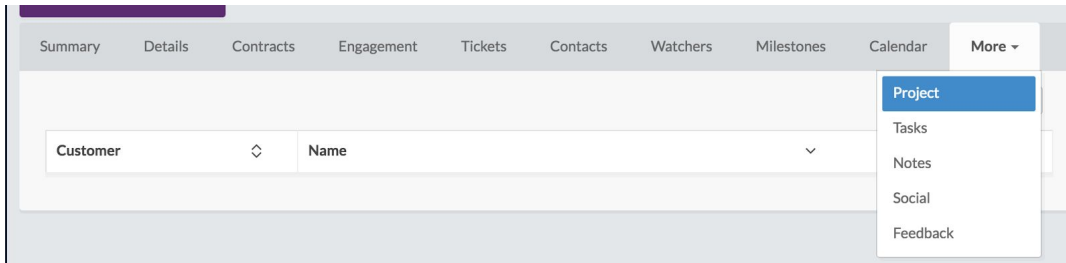
5b. Engagement data for all accounts is non-existent



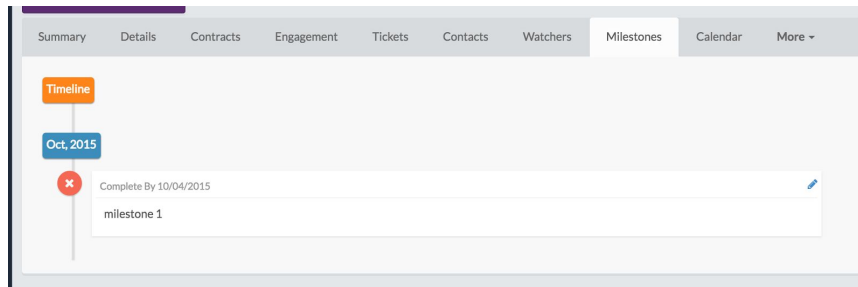
6. Projects: Seems like it's just adding larger goals?



7. Customer Profiles - rename Project tab -> Projects.



8. Input some Milestones in Settings



Additions from Marketing - Tasks, Calendar events, Sample QBR Notes, Sample past meetings