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.

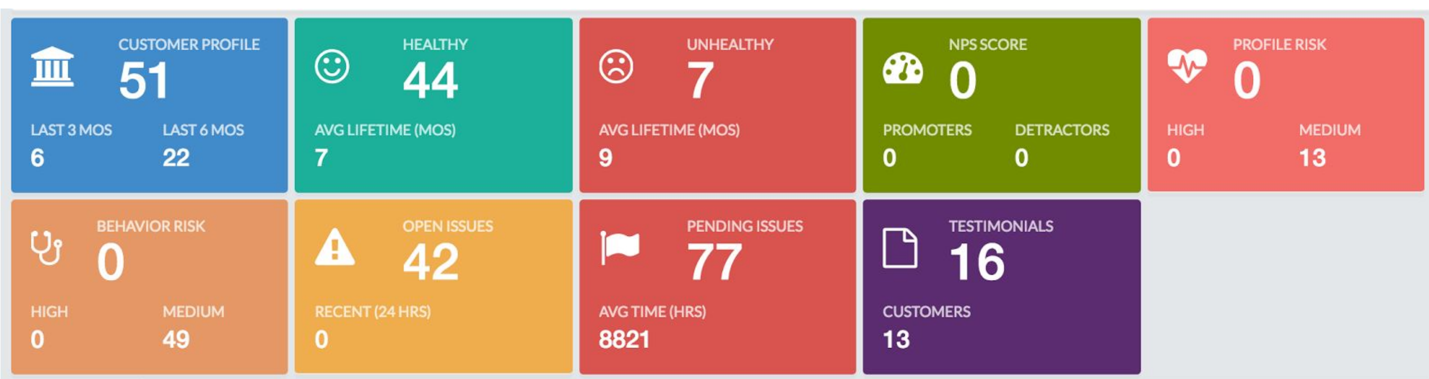
To Add:

- 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

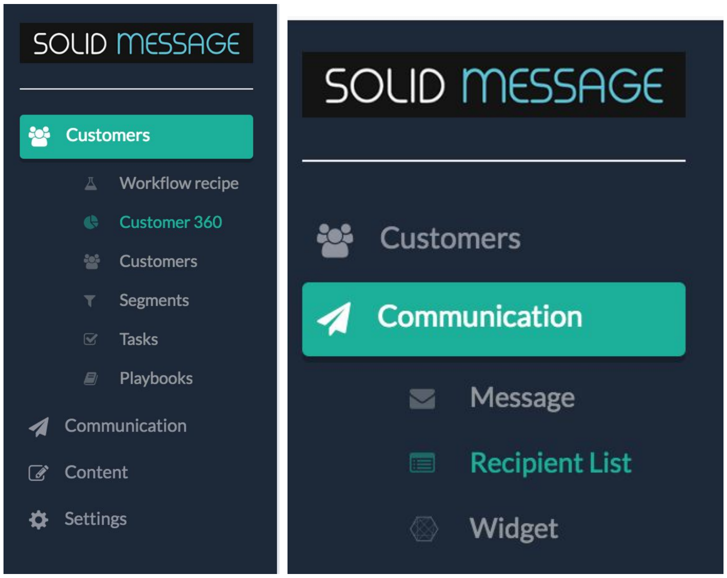
1. Add a 10th tile here so it doesn't look broken or a gap in error



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

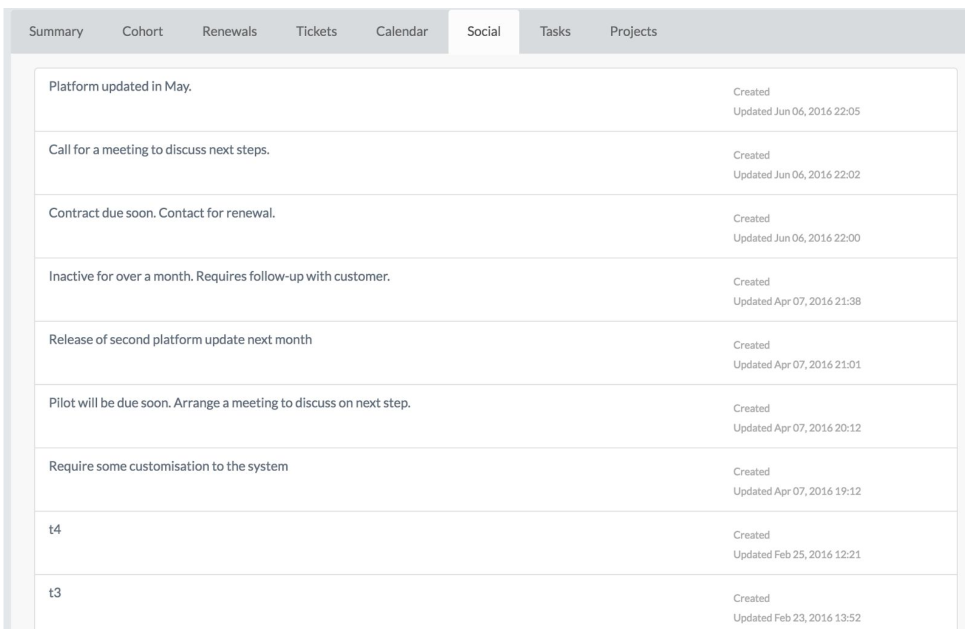
Demo 2: Stg 2 - Surveys has been completely deleted

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

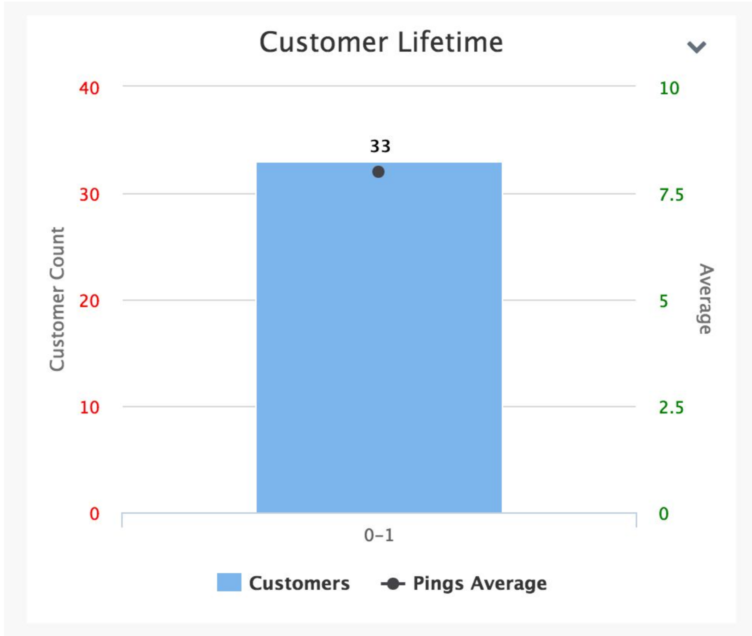


3. The Social Tab needs to be filled in with LinkedIn updates

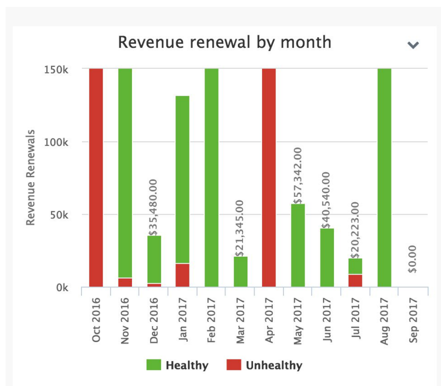
Maybe we can have some updates that never change?



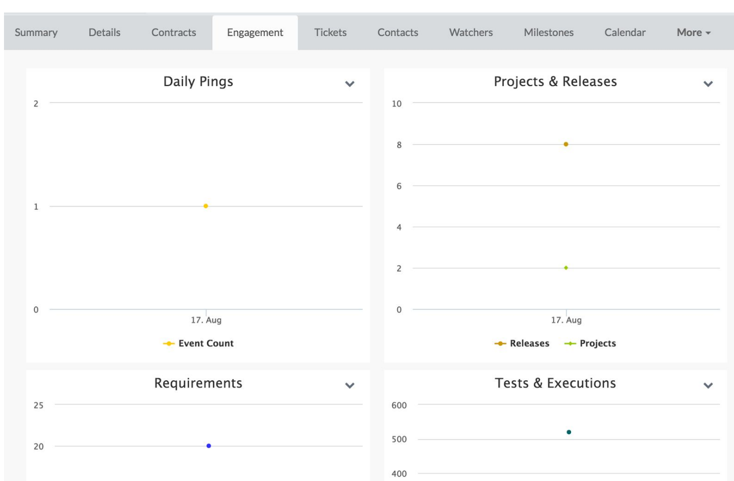
4. Add customers with older lifespans (Currently, it only shows customers with lifespans of <1 year



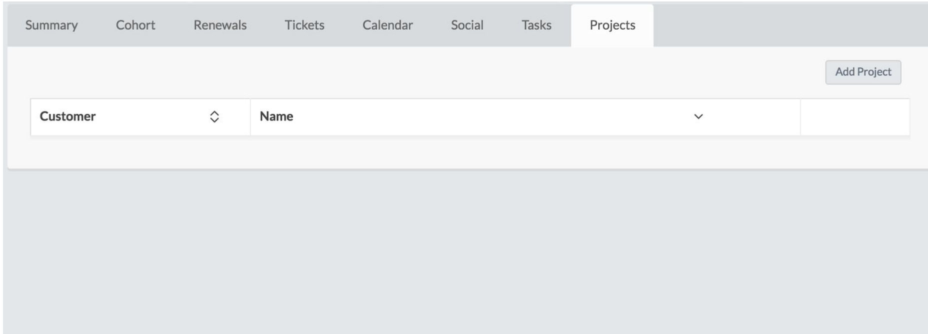
5. Revenue seems to be going over (may need to just change it in the customer profiles directly)



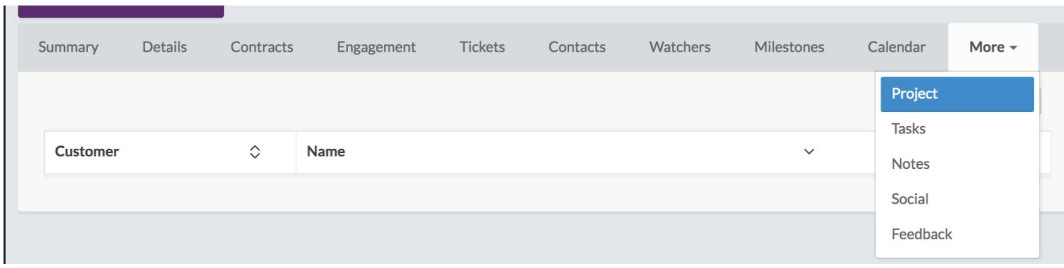
5b. Engagement data for all accounts is non-existent



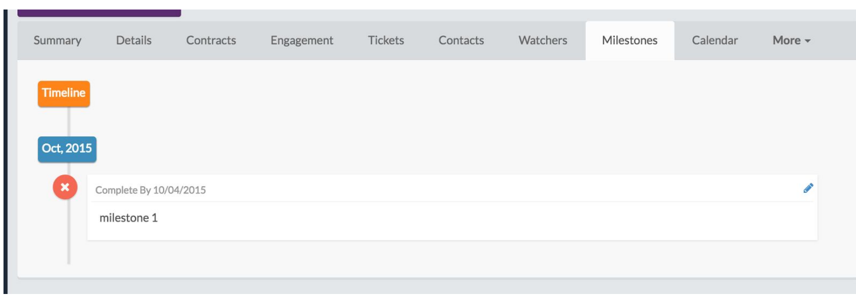
6. Projects: Seems like it's just adding larger goals?



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