

UtahTherapeutics

3/2/2022

Lead Conversion User Testing Actions

Action	Notes	Completed?
<p>Launch the UTTHC - Health Cloud Console app.</p> <ul style="list-style-type: none"> Log into Salesforce using your credentials. Navigate up to the 3x3 grid (app launcher), on the top left of the navigation bar. Click and select 'UTTHC - Health Cloud Console' app. 		
<p>Create a New Lead.</p> <ul style="list-style-type: none"> From the navigation menu, select the 'Leads' Tab. Create a new Lead record using the 'New' button, and review fields and status. Note any needed fields or sections. Note what fields are important to each status. 		
<p>Convert the Lead to a Person Account.</p> <ul style="list-style-type: none"> Update the 'Lead Status' on the 'Lead Path' to 'Qualified/Converted'. Click 'Select Converted Status' on the Path. The Convert Lead page will pop up. Click convert. 		
<p>Review the Patient (Person Account) page layout.</p> <ul style="list-style-type: none"> Review the Person Account/patient record created and the page layout. Note what fields or sections are to be added. Note if there are any fields to be marked as required. Note the 'Type' picklist values. 		
<p>Add a new Medical Card.</p> <ul style="list-style-type: none"> On the Patient record page click the 'Related' tab. On the Related list click 'New' on the Medical Cards. Populate the fields with sample data and click 'Save'. Once saved, review the Medical Card page layout. Note what fields or sections are to be added. Note if there are any fields to be marked as required. 		