Feature	Select if ...
Mobile App: Activate Location-based AJ Update Reminder (*OSR)	Outside Sales Rep (OSRs) wants the mobile app to remind them to create an activity journal once they are parked at a customer's business. Not recommended if the person is sensitive to anything that feels "like big brother" is watching.
Email: Send Daily AJ & Opportunity follow-up Notifications (*OSR)	OSR wants an email in the morning as a reminder of all the sales calls and opportunity follow ups due that day.
Email: Send Daily Activity Journal Summary (*OSR)	OSR wants a summary of all the sales calls documented in activity journals from the day before.
Email: Send Daily all-sales-team Activity Journal Summaries	OSR wants to see all activities on his accounts anyone on his sales team made the day before in a summary format.
Home Page: Show Activity Journal follow ups for sales team	OSR wants the ability to toggle on his homescreen and see just what activity journal follow ups he has due and what his sales team members also have due. This tends to overwhelm reps who need less clutter. It works well for anyone on your team who is an eagle eye at helping team mates keep track of things.
Home Page: Show Opportunity follow ups for sales team	OSR wants to toggle his homescreen and see just what opportunity follow ups he has due and what his sales team members also have due. This tends to overwhelm reps who need less clutter. It works well for anyone on your team who is an eagle eye at helping team mates keep track of things.
General: Do not allow user to create company records	Owner wants only one person (or certain people) in the company to create new company records so the naming convention is the same and all details like address and website are complete. It would restrict the user from creating companies on the fly with little details and force someone else in the company to create the company record on request.
General: Allow user all CRM access regardless of sales team (use with caution)	Owner does not want visibility to companies, contacts, opportunities and does not want to add this user to sales teams but does want user to see all CRM data, regardless of their sales team membership. The cautionary thought is that when this user looks at the companies, contacts and especially the opportunities list, it will not be filtered to their accounts only. It will be a full list of all data in the system.
Activity Journals: Do not show Generic Notes	Owner wants accurate end-of-month reports for manufacturers without risk of mis-drected comments. If the generic notes on activity journals is visible, reps tend to mistakenly put information there instead of the proper field under the manufacturer's name which is how the credit for that sales call is tracked. In a majority of the cases, when generic notes is visible it is misused and causes hours of activity journal clean up. There is a manufacturer-type record with "[your company name] - DOCUMENTS" in the instance that can be used for notes about a long-time contact retiring or sponsoring a golf tournament that can be used for notes as well and will not affect the principal's monthly reports. If the generic notes are turned, and the team knows how to use it appropriately, the comment made there is replicated on all the reports of the other manufacturers also discussed on that sales call. An example is, three lines are presented to support a new building in development. To say, "the project is a 500-unit apartment complex we are bidding for all plumbing fixtures" would be appropriate if it were replicated on the faucet, tub, and toilet suppliers.
Companies: Restrict export of Company master records	Owner does not want staff or sales rep to download company list. If this is selected, the user will not have an export button on their company list page.

Note:Some of the features will take effect from the next user login