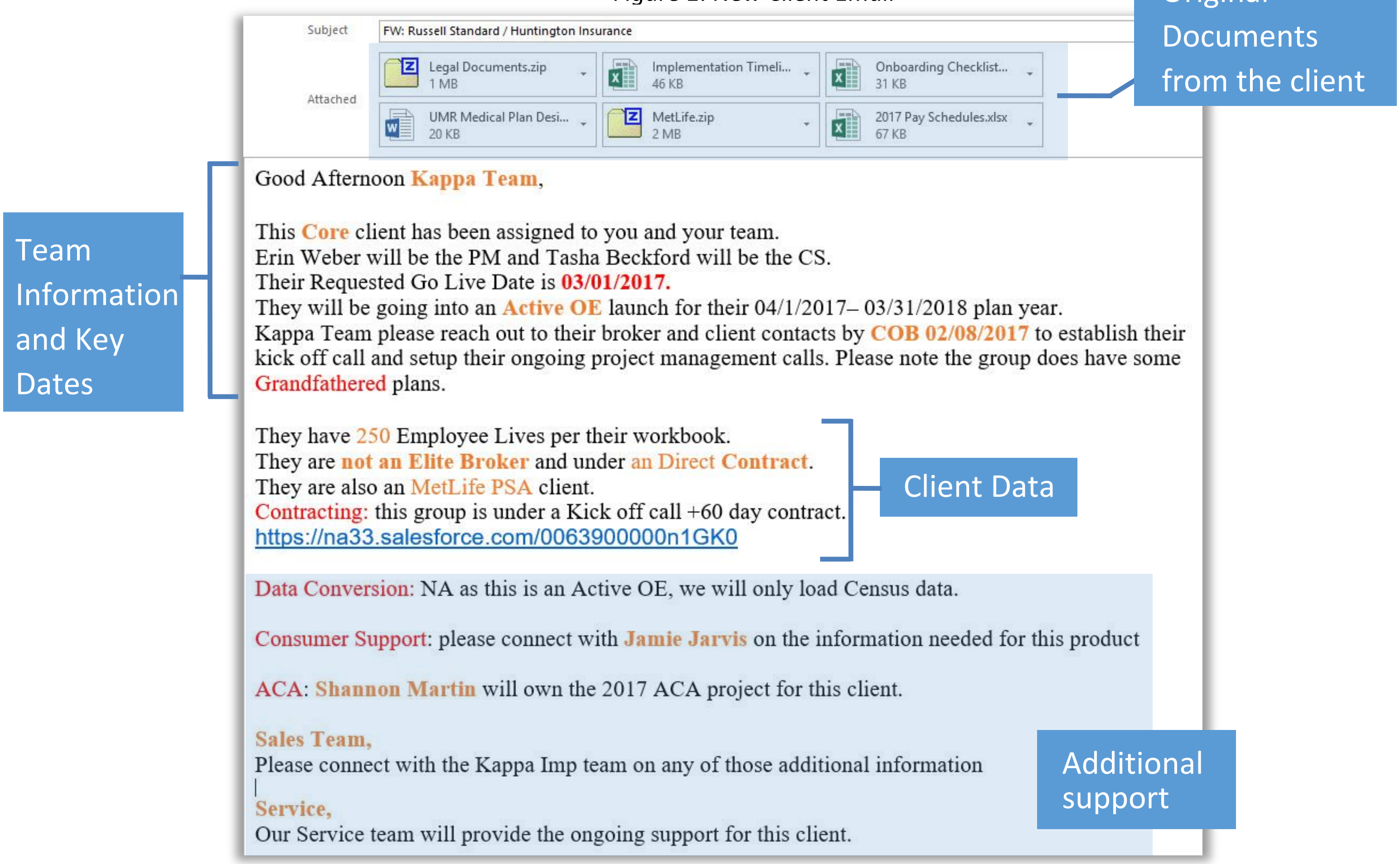
Saving the Documents in the New Client Email

What is the New Client email?

The New Client email contains important dates and information pertaining to the client's configuration. Once Onboarding has verified the information from sales, the new client email is sent to the implementation team.

Figure 1: New Client Email



Save the Original Documents

The original documents from the client need to be saved in Salesforce under the Implementation project and on the XDrive in the new client folder.

Salesforce:

1. Pull up the client in Salesforce
2. Select Projects from the top menu bar
3. Click on the Implementation Project
4. Save the original documents under the notes and attachments section

OR

1. Type in the project number
2. Save the original documents under the notes and attachments section

XDrive:

1. Follow the path: **X: Company/PlanSource/Clients**
2. Locate the new client folder

   Note: Remember to search for the client under the broker's name
3. Click on the Implementation Folder
4. File the documents under Configuration in the Original Documents sub folder