

Send Notification to Sales

Using the email attachment from the smartsheet, reach out to sales with the kick off call date and time. If the meeting is tentative follow up when the meeting has been confirmed. File this communication in Salesforce and on the XDrive.

Save in Salesforce

1. Pull up the implementation project
2. Attach the notification email under the notes and attachments section

Save on the XDrive

1. Navigate to the New Client Folder
2. Attach the notification email to the Client Sign Off folder