Receive Signed and Completed Implementation Wizard

Save the Signed and Completed Wizard

Once you receive the signed and completed implementation wizard, the email and the Configuration Report needs to be saved in Salesforce under the Implementation project and on the XDrive in the 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 email and configuration report under the notes and attachments section

OR

1. Type in the project number
2. Save the email and configuration report 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 email and the configuration report in the Client Sign Off folder