Save Receipt Confirmation Email with Training Reminder

Send the Receipt Confirmation Email

Once you receive the signed and completed implementation wizard, utilize the email template on the smartsheet to send to the client confirming acceptance of the document . The template will also include a reminder for the client to enroll in the basic and advanced training for the benefits administration system. Completion of the training is required prior to the system demo and testing call.

Save the Receipt Confirmation Email

The receipt confirmation email 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 under the notes and attachments section

OR

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