Request Testing/System Demo Call with Client/Broker

What is the Testing/System Demo Call?

Once the Client's system had been approved for client testing, the implementation team will walk the client through the system functionality and provide the client with the information needed to log in and begin testing.

Request the Testing/System Call and Save the Email

Utilize the email template on the smartsheet to set up a date and time for the testing/system demo call and save the email request in Salesforce and on the XDrive.

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 Project Management Folder