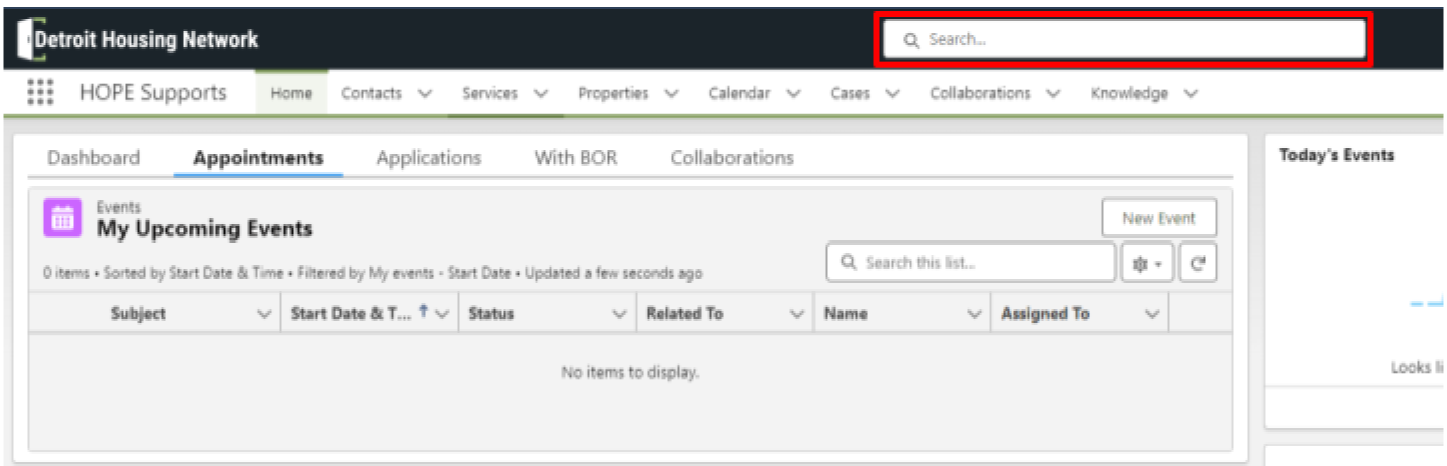
ADDING SERVICE FILES (INTAKE AND ASSISTANCE) TO A CLIENT IN SALESFORCE

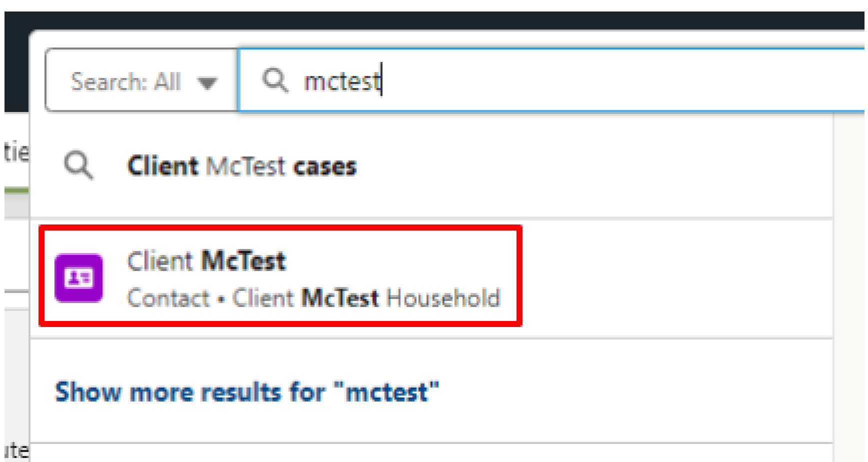
Salesforce has been set up to automatically add the client when a HOPE application service has been added to Quickbase. Some of the information still needs to be updated and service files need to be added in order to complete the HOPE application. Follow these steps to complete the client's account.

Step 1. Sign in to Salesforce.

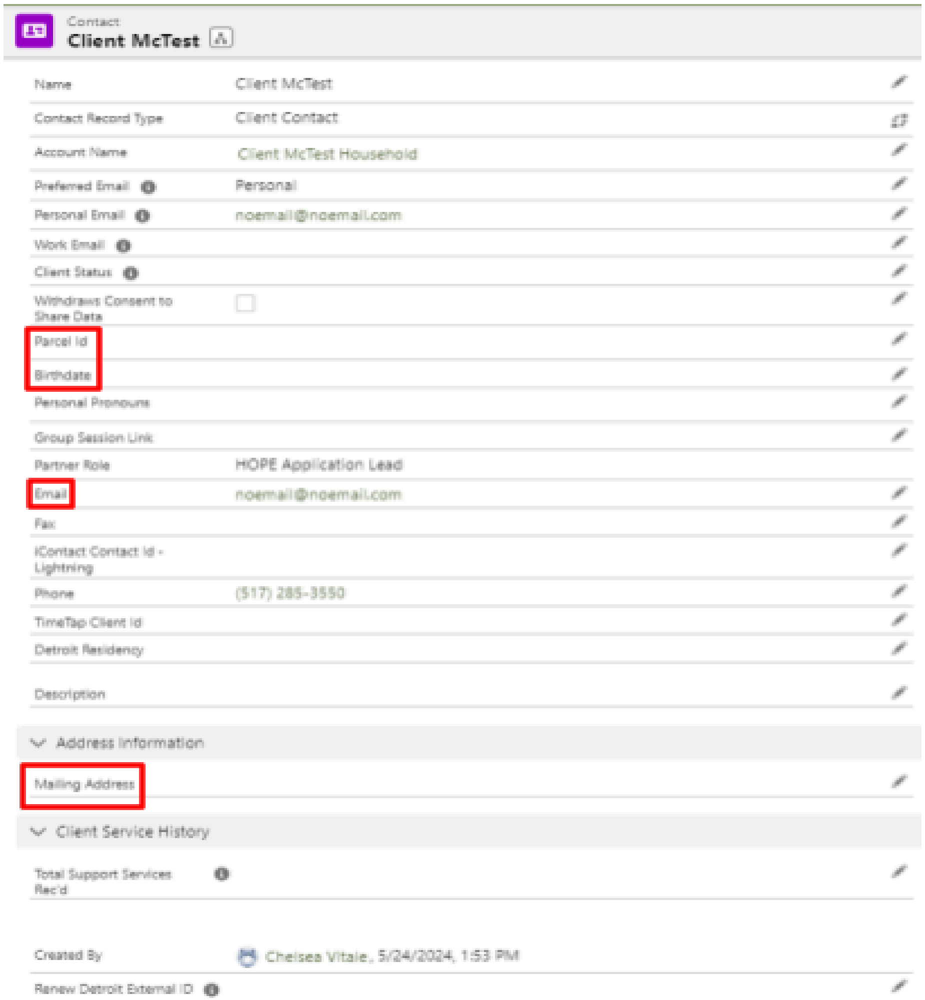
Step 2. In the search bar at the top of the screen, search for the client.



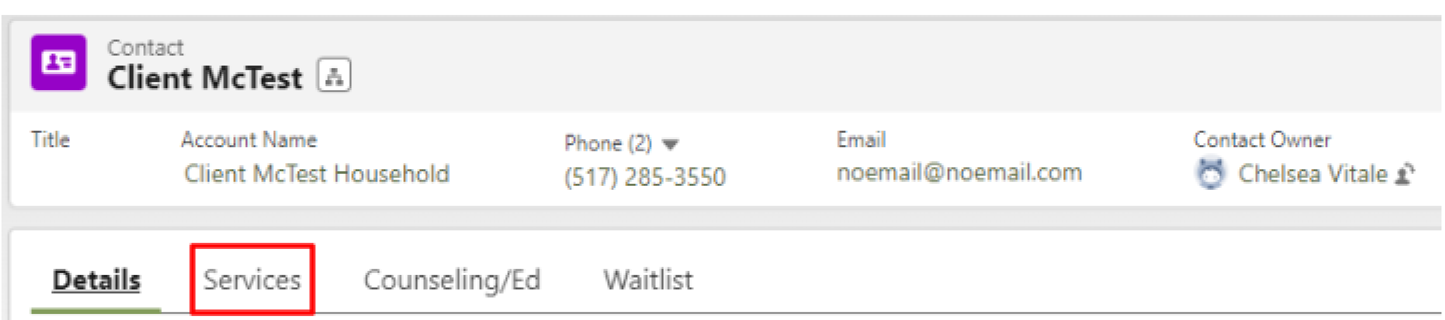
Step 3. Click on the purple contact icon that appears for the client.



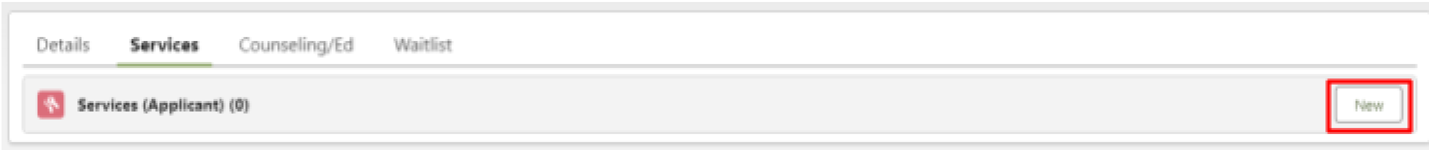
Step 4. Update anything on the client's Contact page that did not automatically populate from Quickbase, such as the parcel ID, birthdate, email and mailing address.



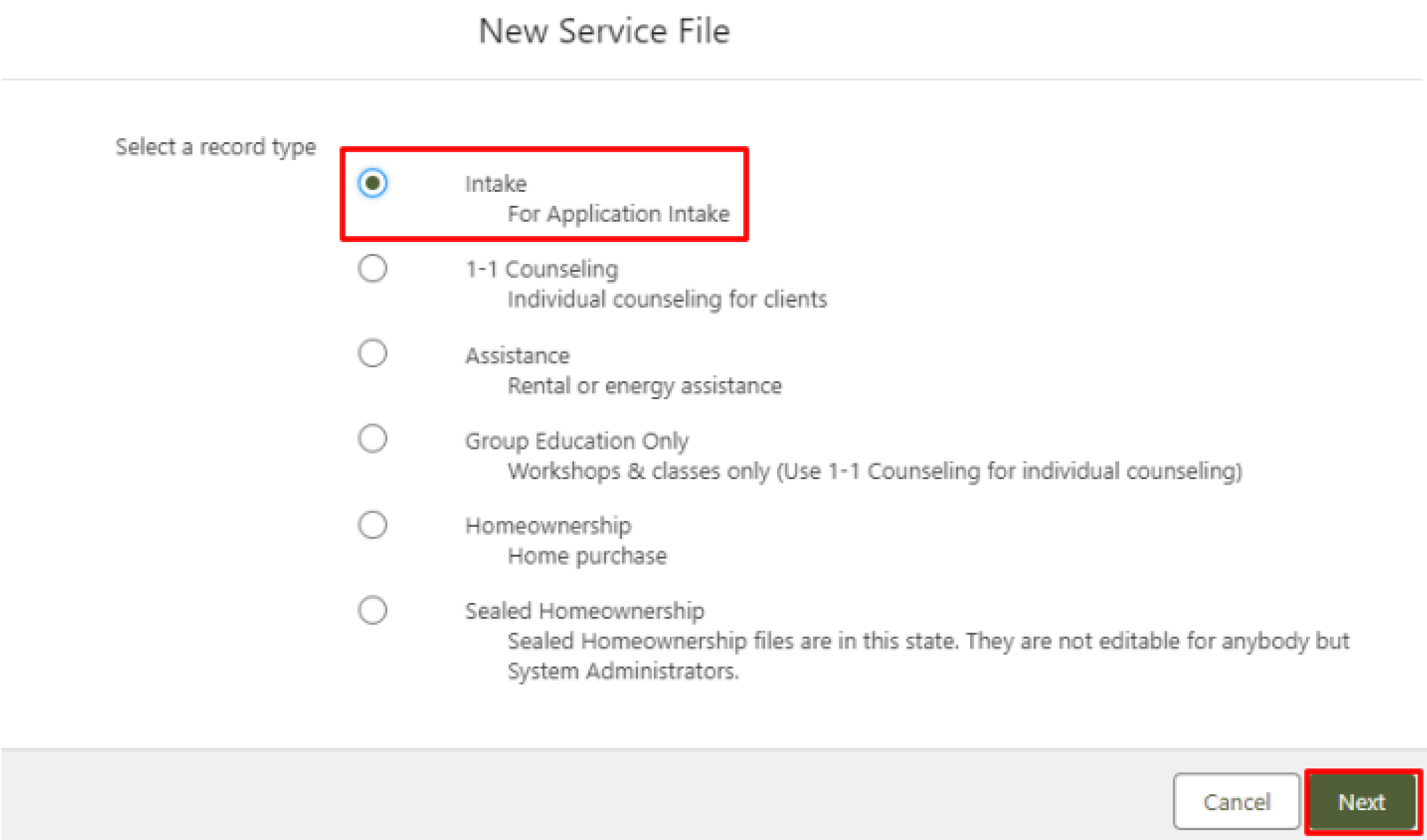
Step 5. Underneath the client's name at the top of the page, click on "**Services**"



Step 6. On the right side of the "**Services (Applicant)**" box, click "**New**"

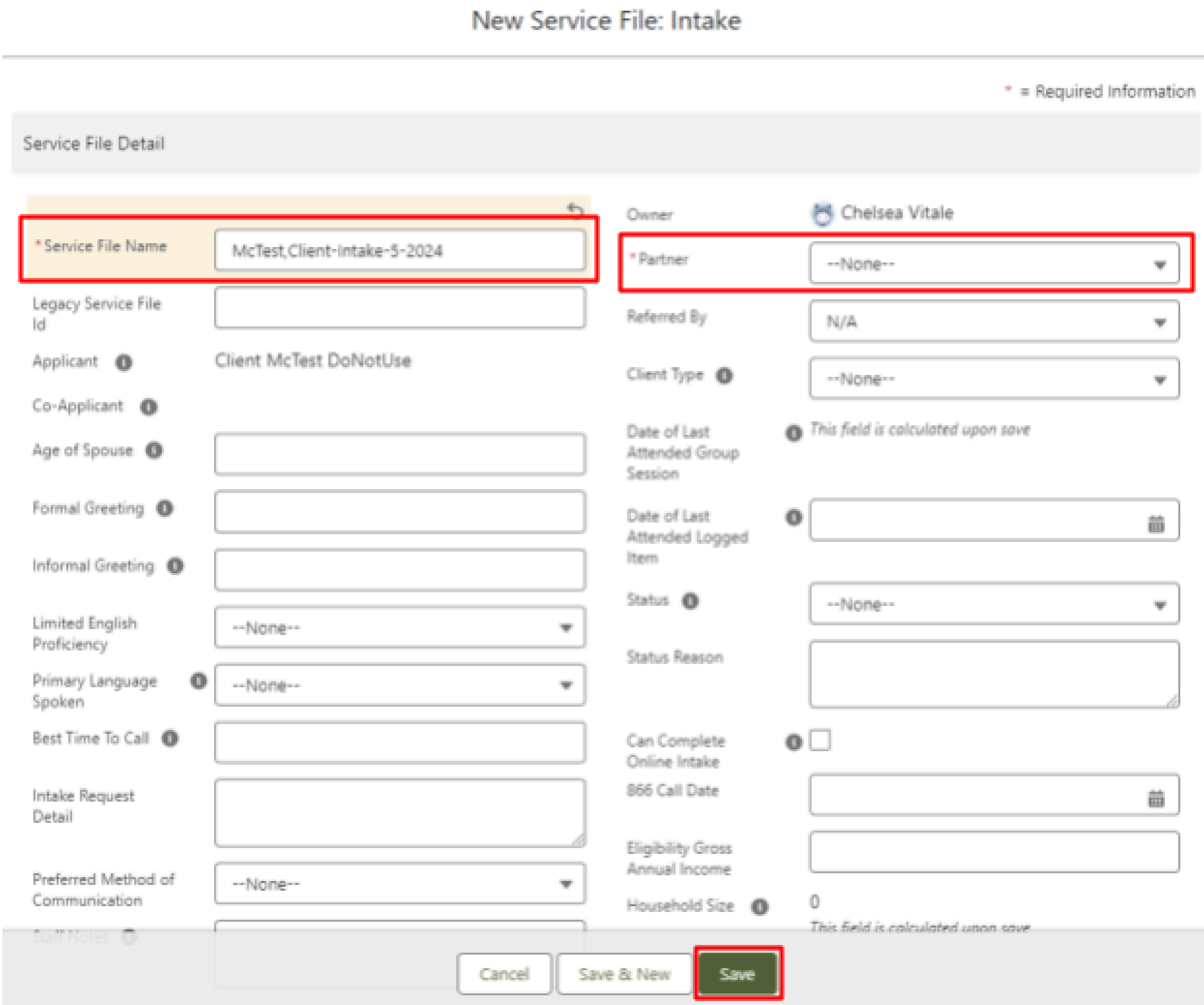


Step 7. Select "**Intake**" and then click "**Next**".



Step 8. When the "**New Service File: Intake**" page pops up, select "**Accounting Aid Society**" as the partner and name the "**Service File Name**" with the following format, then click "**Save**":

Last name,First name-Intake-number of current month-year
Ex: McTest,Client-Intake-5-2024



Step 9. Click on the intake file that gets created.

Step 10. On the right side of the screen, find the "**Create Assistance Service File**" section. Select "**HOPE**" for the **Program Type** and "**Accounting Aid Society**" as the **Assigned Partner**, then click "**Next**".

Once you are ready to begin the HOPE application, click on **Launch HOPE Application** in the top right corner of the Assistance Service File.