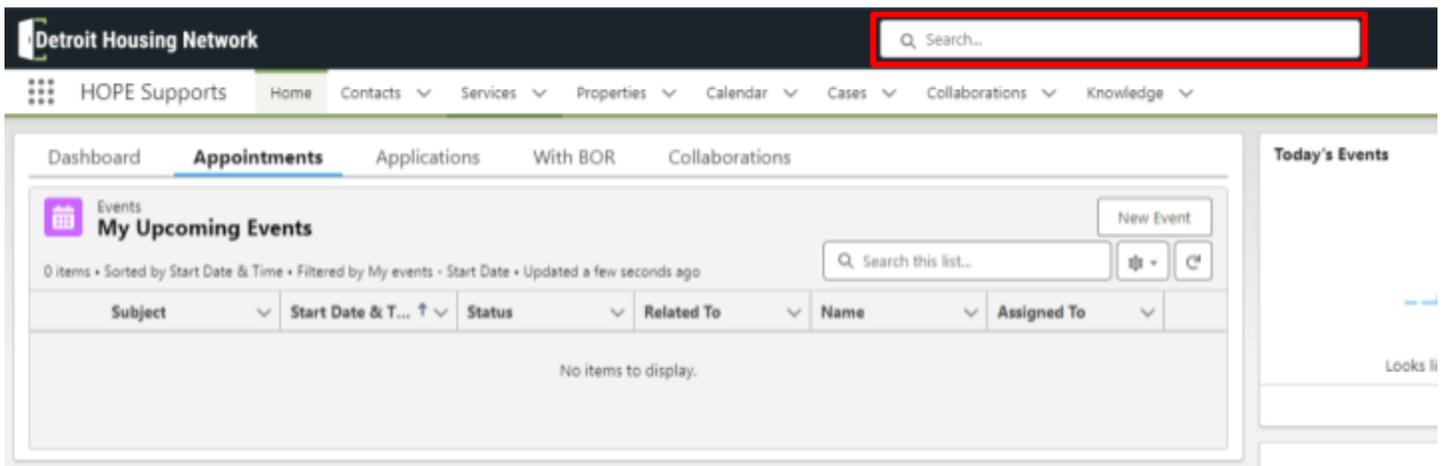


ADDING SERVICE FILES (INTAKE AND ASSISTANCE) TO A CLIENT IN SALESFORCE

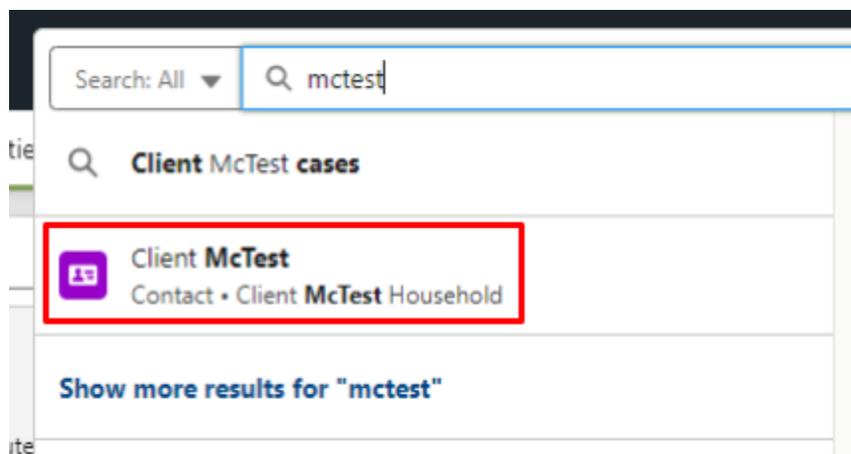
Salesforce has been set up to automatically add the client when a HOPE application service has been added to Quickbase. Some of the information still needs to be updated and service files need to be added in order to complete the HOPE application. Follow these steps to complete the client's account.

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.

The screenshot shows a contact profile for 'Client McTest'. The fields are as follows:

Name	Client McTest	/
Contact Record Type	Client Contact	EF
Account Name	Client McTest Household	/
Preferred Email	Personal	/
Personal Email	noemail@noemail.com	/
Work Email		/
Client Status		/
Withdraws Consent to Share Data	<input type="checkbox"/>	/
Parcel Id		/
Birthdate		/
Personal Pronouns		/
Group Session Link		/
Partner Role	HOPE Application Lead	/
Email	noemail@noemail.com	/
Fax		/
iContact Contact id - Lightning		/
Phone	(517) 285-3550	/
TimeTap Client id		/
Detroit Residency		/
Description		/
▼ Address Information		
Mailing Address		/
▼ Client Service History		
Total Support Services Rec'd		/
Created By	Chelsea Vitale, 5/24/2024, 1:53 PM	
Renew Detroit External ID		/

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

The screenshot shows the top of the contact page with the following information:

Title	Account Name	Phone (2)	Email	Contact Owner
	Client McTest Household	(517) 285-3550	noemail@noemail.com	Chelsea Vitale

Below this is a navigation bar with the following tabs:

- Details
- Services
- Counseling/Ed
- Waitlist

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



Step 7. Select “**Intake**” and then click “**Next**”.

New Service File

Select a record type

- Intake
For Application Intake
- 1-1 Counseling
Individual counseling for clients
- Assistance
Rental or energy assistance
- Group Education Only
Workshops & classes only (Use 1-1 Counseling for individual counseling)
- Homeownership
Home purchase
- Sealed Homeownership
Sealed Homeownership files are in this state. They are not editable for anybody but System Administrators.

Cancel

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

New Service File: Intake

* = Required Information

Service File Detail

* Service File Name	McTest,Client-intake-5-2024	Owner	Chelsea Vitale
Legacy Service File Id		* Partner	--None--
Applicant	Client McTest DoNotUse	Referred By	N/A
Co-Applicant		Client Type	--None--
Age of Spouse		Date of Last Attended Group Session	<i>This field is calculated upon save</i>
Formal Greeting		Date of Last Attended Logged Item	
Informal Greeting		Status	--None--
Limited English Proficiency	--None--	Status Reason	
Primary Language Spoken	--None--	Can Complete Online Intake	<input type="checkbox"/>
Best Time To Call		866 Call Date	
Intake Request Detail		Eligibility Gross Annual Income	
Preferred Method of Communication	--None--	Household Size	0 <i>This field is calculated upon save</i>

Cancel Save & New **Save**

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

Details **Services** Counseling/Ed Waitlist

Services (Applicant) (1)
1 item • Updated a few seconds ago

	Service File Name	Record Type	P
1	McTest DoNotUse,Client-intake-5-2024	Intake	

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**”.

Create Assistance Service File

* Program Type ⓘ
HOPE

* Assigned Partner
Accounting Aid Society

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.

Service File
McTest DoNotUse,Client--5-2024

Follow Map Sharing Delete Launch HOPE application Send Complete Disclosure

Applicant: Client McTest DoNotUse | Status: Inquiry | Application Complete Date: | Account Type: Assistance