

Family Financial Tracking™ in Salesforce (SF)

Agenda

Welcome and Overview of Salesforce

- Resource site: <http://www.foc-network.org/>
- FFT Help Desk: fftfocus@lisc.org

Employment Services

First and Subsequent Sessions:

- a. Record a Service Entry
- b. Add Entities
- c. Add/update an Education/Training Program Record
- d. Add a Degree/Certificate/License Record
- e. Add/update an Employment Record
- f. Add Test Assessment(s)

Income Supports Services

First and Subsequent Sessions:

1. Record a Service Entry
2. Make sure a new Budget and/or Balance Sheet Assessment is recorded, if applicable

Financial Services

1. *First Session:*
 - b. Record Assessments:
 1. Financial Health
 2. Credit Report
 3. Budget
 4. Balance Sheet
 - c. Create an Action Plan
 - d. Record a Service Entry
2. *Subsequent Sessions:*
 - a. Take new assessments to record changes:
 1. Financial Health
 2. Credit Report
 3. Budget
 4. Balance Sheet
 - b. Update Service Entries

Q&A / Review

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