

## Family Financial Tracking™ in Salesforce (SF)

### Agenda

#### Welcome and Overview of Salesforce

- Resource site: <http://www.foc-network.org/>
- FFT Help Desk: [fftfocsupport@lisc.org](mailto:fftfocsupport@lisc.org)
- Entities (service providers, employers, educational institutions, etc.)

#### 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

#### 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. Record Work/Education Supports

#### Outbound Referrals

1. Add/update an Outbound Referral

#### Q&A

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