



Salesforce Process Summary

When someone makes an **enquiry** – enter them into Salesforce as a new **Contact** – if someone from Allowah needs to follow up their enquiry – assign them a task.

Create an **account** (for **each client / patient**) – if they don't already have one.

Assign a **related contact** (**parent / guardian / case worker**)

Create an **opportunity** (**Service Agreement**)

- put in the **dates**
- add the **products** (**services** to be provided)

Complete the opportunity once the Service Agreement is agreed with parents – this will create a **contract**

- Print a Service Agreement to be signed

When someone makes a **booking** – we **create an order** (from a contract)

From the appropriate contract, create an order

- enter **dates**
- add **products**

When they **come in** – **complete the order** and it will create a service claim

If they **cancel the booking**, we need to go in to the **order and cancel it**, instead of completing it.



Important Terms

Accounts: are the individual patients / clients we provide services to

Contacts: are the parents / carers / guardians of the children we service as well as our donors and supporters

Opportunity: is something that we will get money from e.g. a Service Agreement

Contract: is something that gets created when a service agreement is closed / signed

Order: is a booking for a service e.g. Physio session, overnight accommodation – an order is created when a booking is made and then once the client comes in and has had their service delivered, the order is completed in Salesforce.

Service Claims: are automatically created when an order is completed

Claims are then used by Barrie to interface with the NDIS system so that we are paid for the service