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ARBOLA

Vendor Maintenance Salesforce Training Plan

(Agenda for Training Videos)

January 2024

Training Plan

1. Getting Started

Login

- The Homepage
- Navigation
 - Customizing Tab Order

2. View and Locate Expertises

- List Views
 - Selecting
 - Pinning
 - Searching (search box)
- Global Search box
 - Recent Items
 - Specific Searches for Expertises, Contacts, Etc.
 - Advanced Searching

3. Expertise - Online "Application" interchangeably with "Expertise"

Vendor rec an email the application was rec.

- Select application from the "submitted" list view (Behavioral Health Specialist) NOTE: Resubmitted applications: Resubmitted list view. This applies anytime during the process that an application is sent back to the vendor.
 - Intro to Related List and expertise page layout
 - Hover Contact (Open Contact & Account)
 - Edit detail screen Expertise (Status = Application Review)
 - Confirm State employee section (state employee. key business business with the state)
 - If yes,
 - Activity panel - Displays emails and the files attached
 - Licenses related list
 - Attached Files related list (open file) (resume, license)
 - Attach new files to the Attached Files Related List
 - Activity Email or Expertise (Status = "Counsel Review")
 - Counsel Review
 - Vendor receives an email with instructions to correct and resubmit.
 - When resubmitted, the application will display in the Resubmitted list view.
 - If no,
 - Activity panel - Displays emails and the files attached
 - Licenses related list
 - Attached Files related list (open file)
 - Activity Email or Expertise (Status = "Credential Review")

Training Plan

- Vendor will receive an email "Ready for billing setup".
 - Note: The application will return to vendor maintenance and the status will automatically update to DocuSign.
 - Statuses will need to be changed manually for the work done offline.
 - Status fields - Active = Vendor is set up "NOTE: Welcome email will be sent"
 - Expertise History
4. Create New Expertise (Attorney) paper application
- New Expertise form
 - Create Contacts and Accounts (Required fields)
 - Status = Application Review
 - Business Information -
 - Enter BBO # and Check BBO
 - Vendor code is required to become an active vendor
 - Admitted to the Mass Bar - field must be populated to move the application to Insurance Review.
 - Additional Questions - After a vendor becomes active, they can provide additional information (expertise record).
 - Panels
 - Attached Files - Insurance
 - Languages
 - Notes
 - Activity - Email
 - Expertise Status should be changed to insurance review to proceed