Workflow



13.12.2016

workflow



SQUARESPACE

- > Contact form

- > Registration form

- Contact joins mailing list

MailChimp

- Member info goes to Google Sheets

- All mailchimp contacts become SF "friends" (leads)

- A lead added to SF is pushed to Mailchimp list

Google Sheets

- Member becomes contact + account

salesforce

- Mailchimp Emailing using SF contacts

OneDrive

- > documents repository

- All documents attached to contacts (individual photo consent form, child evaluation…)

Office 365

- Email tracking (link to contact)
- Contact and account creation from email
- SF plug in Outlook

- Contact creation / update in QF
- Invoice created based on membership and class
- In SF, payment status

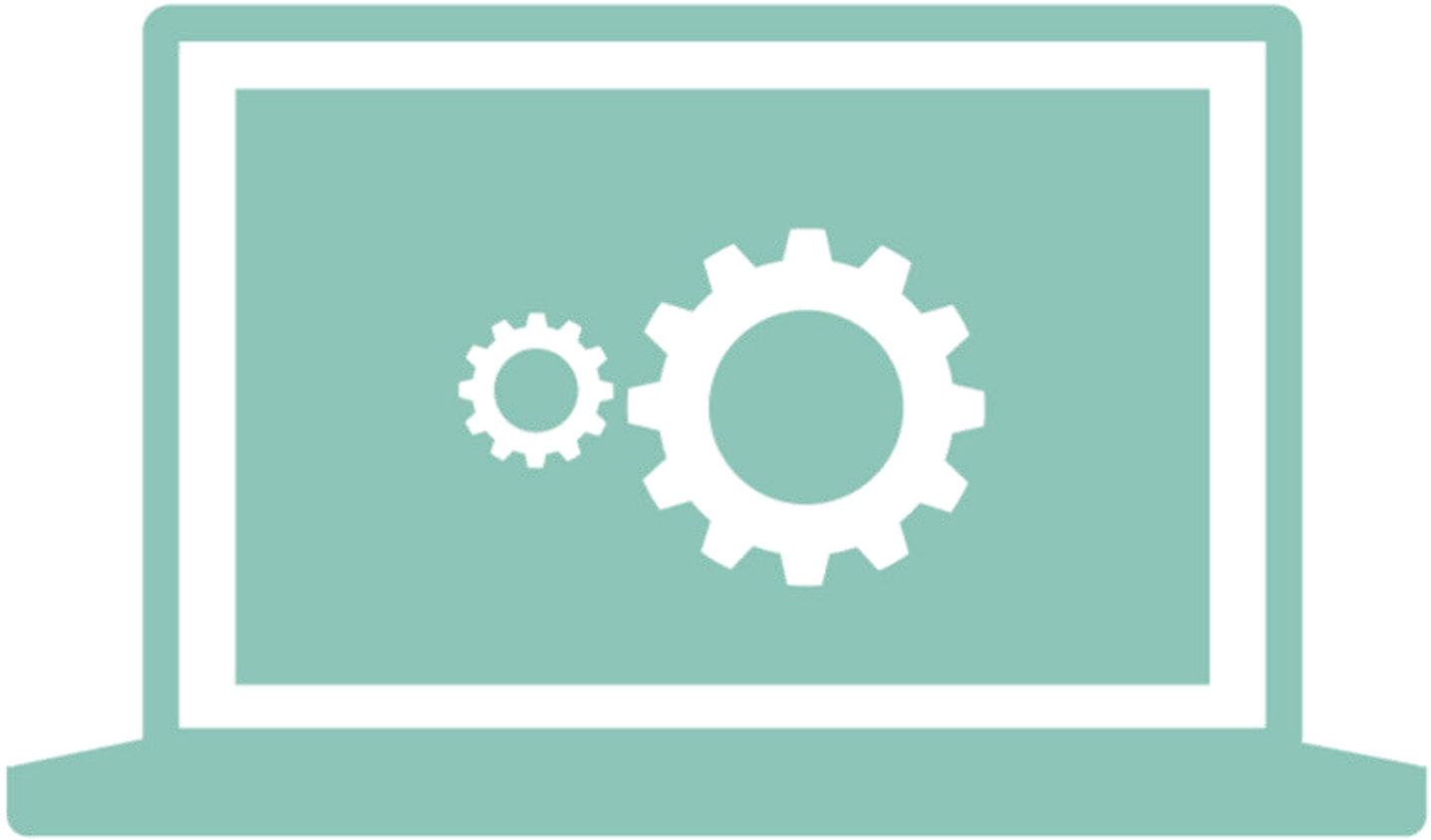
QUICKFILE



http://www.quickfile.co.uk/

	XS Extra Small	S Small	M Medium	L Large	XL Extra Large
Number of ledger entries [more info]	Up to 200	201 - 500	501 - 1000	1001 - 4000	4001 or more
	FREE			£45 + vat (per year)	
Professional Invoicing	✔	✔	✔	✔	✔
Fully Branded Client Area	✔	✔	✔	✔	✔
Purchase/Receipt Management	✔	✔	✔	✔	✔
Banking Automation	✔	✔	✔	✔	✔
Estimates/Quotations	✔	✔	✔	✔	✔
Full Multi-Currency Support	✔	✔	✔	✔	✔
Reporting	✔	✔	✔	✔	✔
See our full feature list					
Over 400 Integrations				✔	✔
No Adverts				✔	✔
Advanced Customisation				✔	✔
Segmented Profit & Loss				✔	✔
Invoice Revision History				✔	✔
Sent Email Log				✔	✔
Enhanced bulk invoice entry				✔	✔
Keyboard Shortcuts				✔	✔

demo



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Merci!