GETTING STARTED

IPAD COMPATIBILITY
Below are the iPad Models and iOS compatible with Salesforce CRM:

iPad Models	iOS 14 & Above
12.9-inch iPad Pro 3rd generation (2018 model and beyond)	✓
12.9-inch iPad Pro 2nd generation	✓
12.9-inch iPad Pro 1st generation	✓
11-inch iPad Pro (2018 model)	✓
10.5-inch iPad Pro	✓
iPad 9.7" (2017 and beyond)	✓
iPad Air 3 (2019 model)	✓
iPad Air 2	✓
iPad mini 5 (2019 model)	✓
iPad mini 4	✓

To see iPad Model and Software details, follow these steps below:
1. Open your iPad device Settings App
2. Tap on "General"
3. Tap on "About"
4. Software version, Model Name, and Model Number will display

Note that as of January 2022, Family Heritage Division no longer supports Android mobile devices. Other devices not on the compatibility list will experience errors or be unable to experience full CRM functionality and features.

BROWSER SETTINGS
Salesforce CRM requires an internet connection for use as this is a web browser based system. In addition, there are several settings that are required to use the CRM system otherwise a user may experience errors.

For iPad mobile devices, the Safari web browser must be set as the Default Browser App.

If there are no other web browsers installed, Safari will already be set at the Default Browser App on iPads. **If another web browser, such as Google Chrome, has been installed on the mobile device then follow the steps below to change the Default Browser App to Safari:**
1. Open your Device Settings App
2. Scroll down and tap on the current web browser app (i.e. "Chrome")
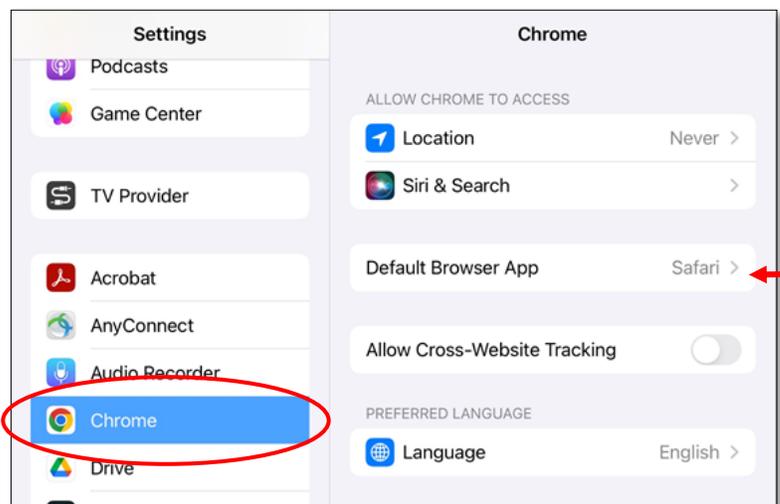
3. Tap on "Default Browser App"
4. Tap to select "Safari"

OTHER REQUIRED SETTINGS

The following steps outline how to update the iPad mobile device settings that are required for access to all of Salesforce CRM pages and functionalities.

Safari Browser App Settings:
1. Open your iPad device Settings App
2. Scroll down and tap on "Safari" to open up the app settings
3. Under the General section, turn off "Block Pop-ups" option (should not be green)
4. Under the Privacy & Security section, turn off "Prevent Cross-Site Tracking" and "Block All Cookies" (should not be green)
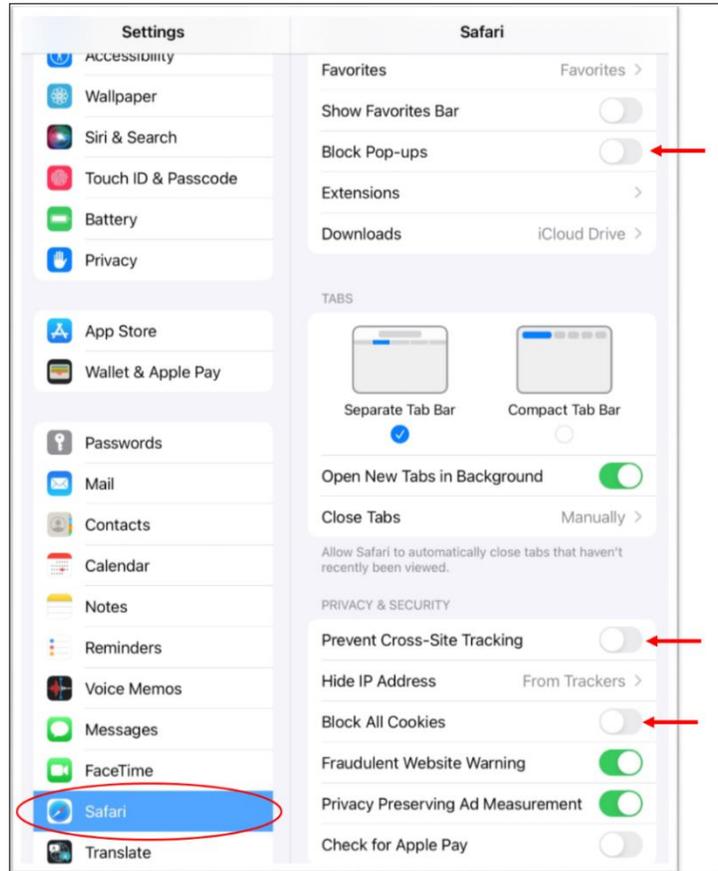
SETTINGS FOR OPTIMIZATION

There are additional setting configurations that will optimize the Salesforce CRM experience and help address commonly reported settings issues. **Follow the steps below to optimize your device settings.**

Device Settings for Keyboard:
1. Open iPad device Settings App
2. Tap on "General"
3. Tap on "Keyboard"
4. Turn off "Auto-Capitalization"
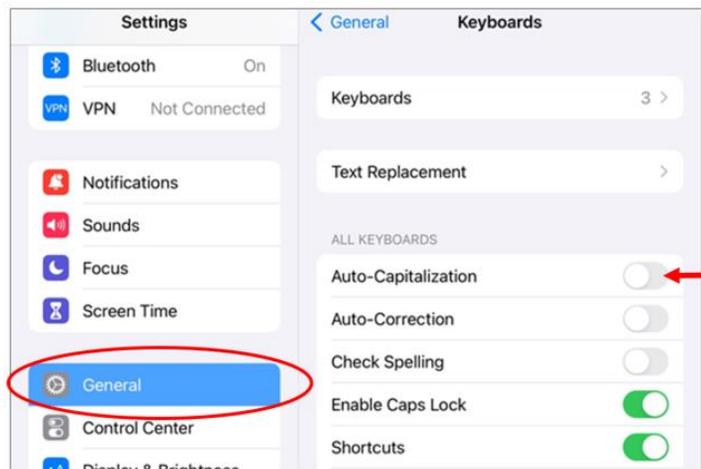
Device Settings for Websites- Page Zoom:
1. Open iPad device Settings App
2. Tap on "Safari" app settings
3. Under Settings for Websites section, tap on "Page Zoom"
4. Set page zoom to 75%

Device Settings for Websites- Desktop Website:
1. Open iPad device Settings App
2. Tap on "Safari" app settings
3. Under Settings for Websites section, tap on "Request Desktop Website"
4. Under Location Access on All Websites, select "All Websites"

Device Settings for Websites- Location:
1. Open iPad device Settings App
2. Tap on "Safari" app settings
3. Under Settings for Websites section, tap on "Location"
4. Under Location Access on All Websites, select "Ask"
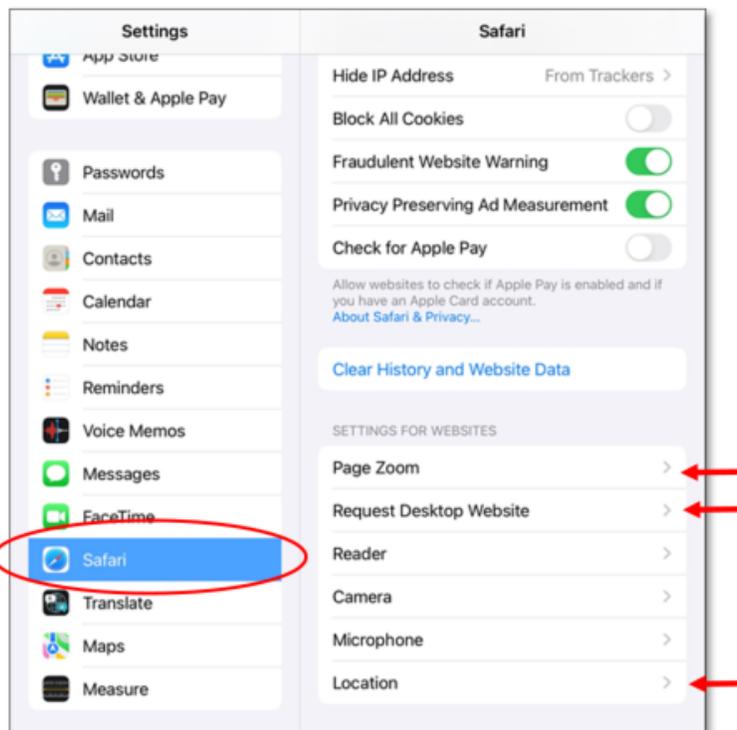
GETTING STARTED: LOGGING IN TO SALESFORCE CRM

In order to log into Salesforce CRM, user must be connected to Internet. Salesforce uses the same credentials as your Mobile Sales App (MSA) which is your five digit agent number and password.

Follow these steps to sign in to Salesforce CRM:
1. Sign on to Mobile Sales App (MSA) with user credentials: Username is the five-digit agent number and personal password (use the "Forgot Password" link if password has been forgotten or needs to be reset). This password will also be the same one used for accessing www.FHLConnect.com.
2. Tap on the Salesforce icon (cloud icon) on the top right of the MSA Homepage (must be connected to the Internet in order to access and all required Settings have been already configured).
3. Sign on to Salesforce with the same user credentials used for MSA and follow the prompts (i.e. PIN code etc.)
4. The landing page is the Salesforce Homepage displaying the annual theme banner, FH Links, and the Opportunities list "Standard- New Within Last 7 Days":
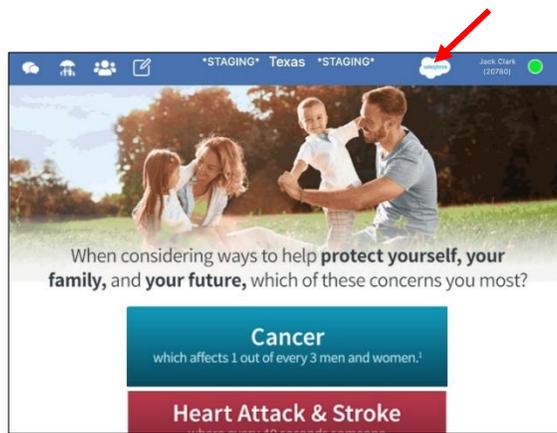
Agent and Agency Builder Saleforce Landing Page:
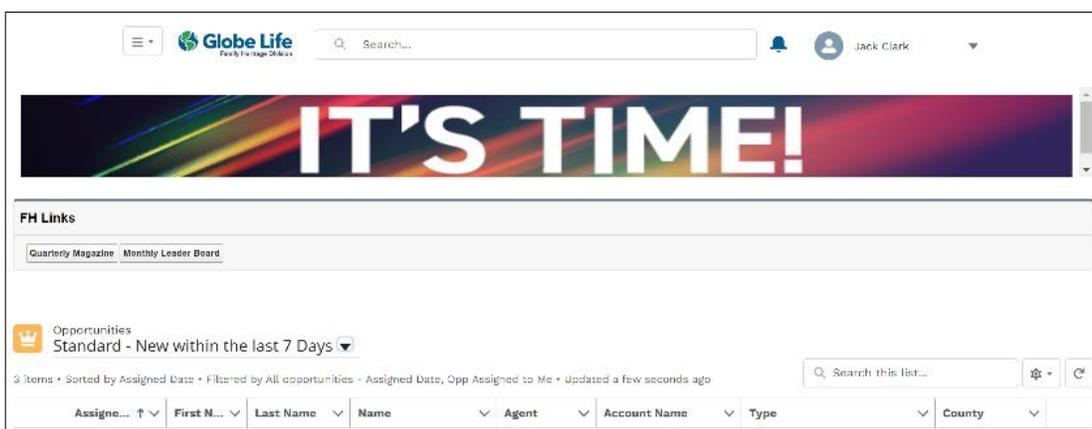
GETTING STARTED: INITIAL LOG IN TO B2B PROSPECTS (DATA AXLE GENIE)

The first time a user accesses B2B Prospects page on a specific device or any time after clearing History and Website Data (clear cache), they will be prompted to log in. Once user has logged in, they will not need to re-enter credentials to access Data Axle Genie.

Important: Once Salesforce access has been granted, a Data Axle Genie account will be set up with the email address used for Agent Licensing so there is no need to create a new account. **Follow the steps below to login to B2B Prospects (Data Axle Genie):**

1. Once logged into Salesforce, tap on the left side Navigation Menu (next to the Globe Life Logo)
2. Tap on "B2B Prospects" to navigate to Data Axle Genie:
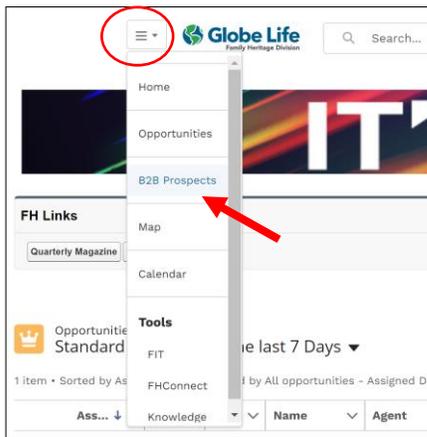
3. Type in the Email address (this is the email address on file with Agent Licensing)
4. Type in the initial Password: genie123 (this is case sensitive, all lowercase, no spaces)
5. Tap "Login" (Important: Do not create a new account)
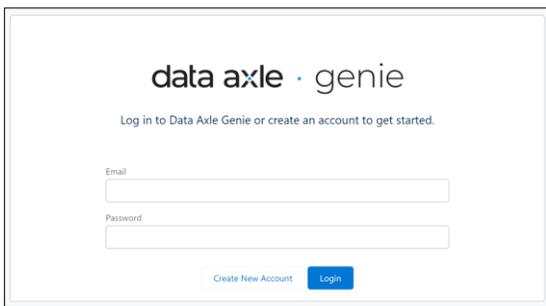
The Data Axle Homepage will display when successfully logged in: