

SALESFORCE CRM USER GUIDE

FOR AGENTS & AGENCY BUILDERS

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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.

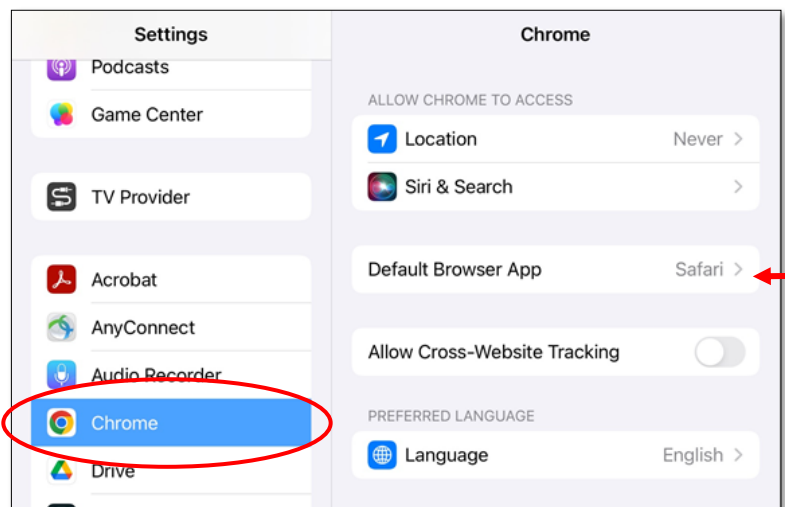
BROWSER SETTINGS

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")



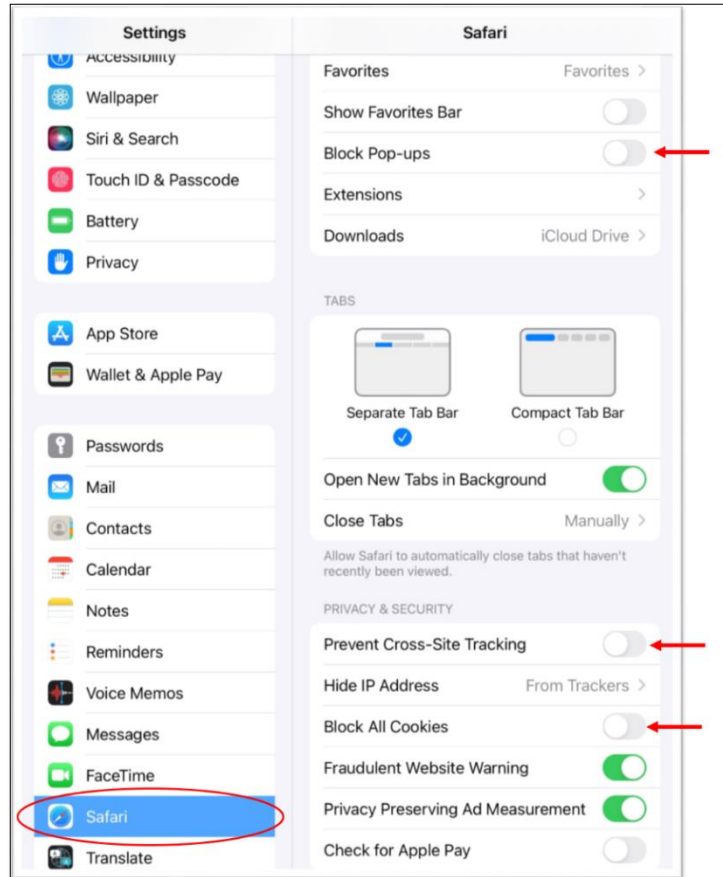
3. Tap on “Default Browser App”
4. Tap to select “Safari”

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)



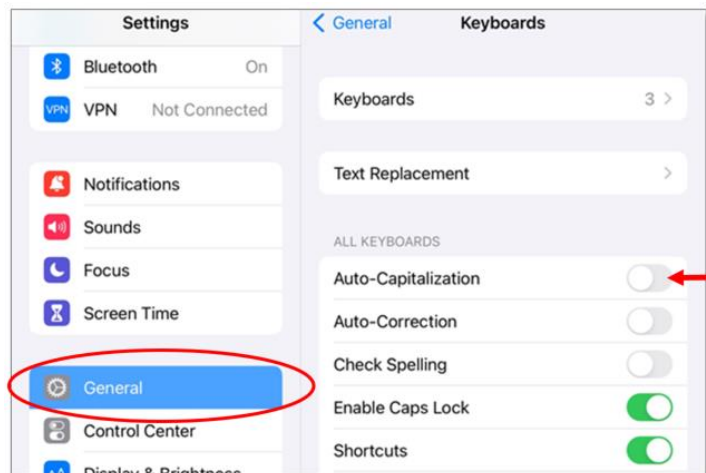
SETTINGS FOR OPTIMIZATION

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:

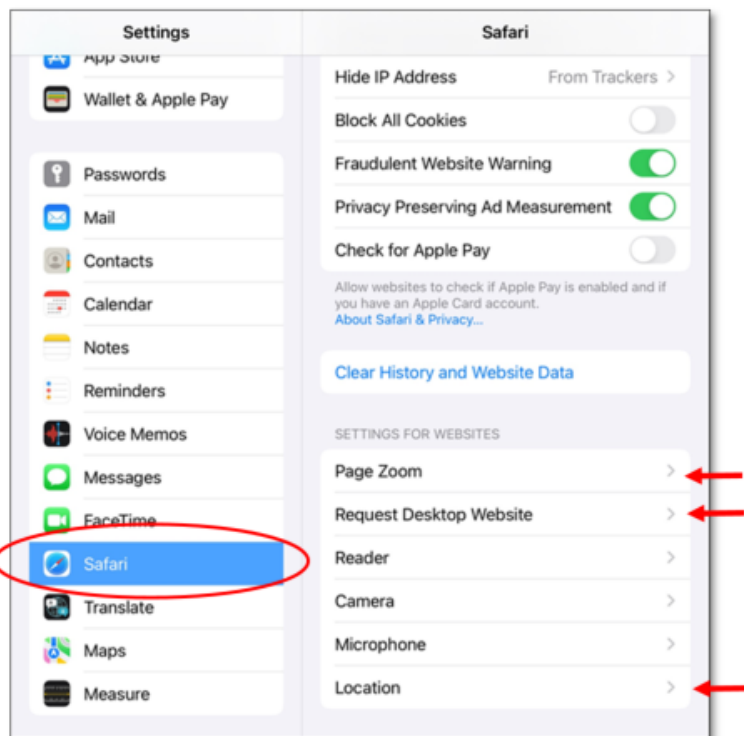
1. Open iPad device Settings App
2. Tap on “Safari” app settings
3. Under Settings for Websites section, tap on “Page Zoom”
4. Set page zoom to 75%

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”

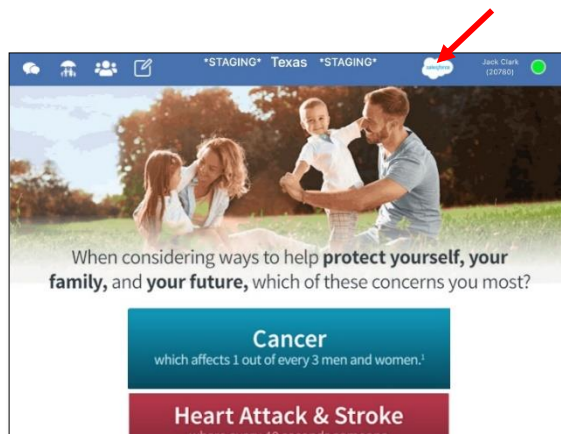


GETTING STARTED: LOGGING IN TO SALESFORCE CRM

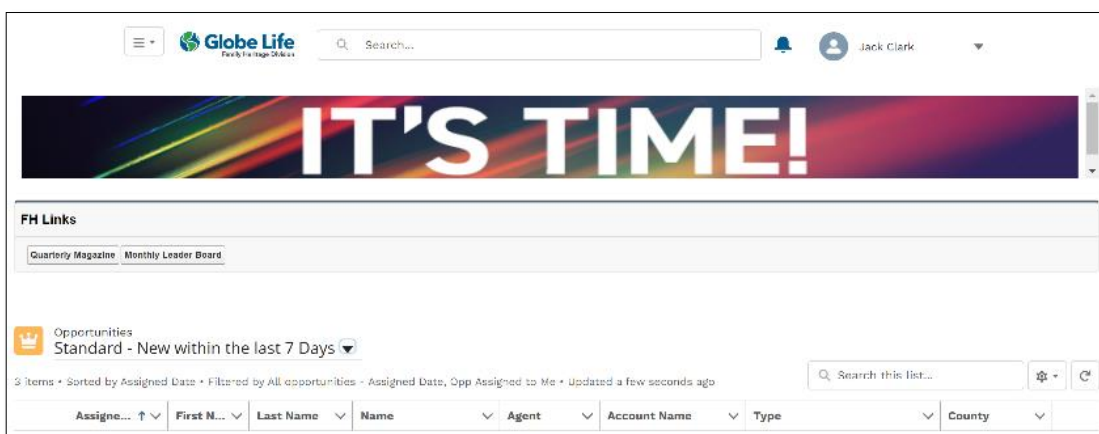
In order to log into Salesforce CRM, user must be connected to Internet. Salesforce uses the same credentials as your Mobile Sales App (MSA) which is your five digit agent number and password.

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 Salesforce Landing Page:

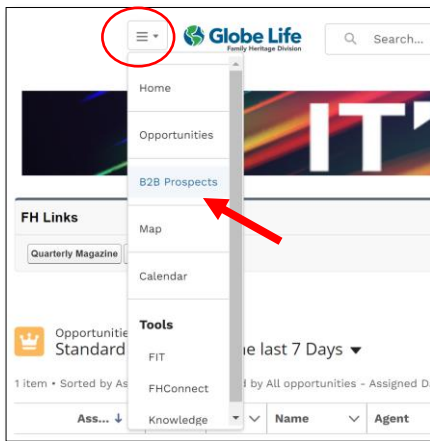


GETTING STARTED: INITIAL LOG IN TO B2B PROSPECTS (DATA AXLE GENIE)

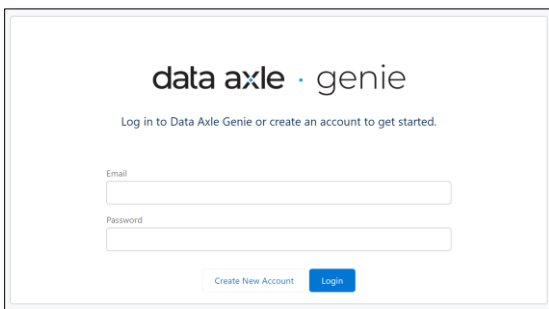
The first time a user accesses B2B Prospects page on a specific device or any time after clearing History and Website Data (clear cache), they will be prompted to log in. Once user has logged in, they will not need to re-enter credentials to access Data Axle Genie.

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):**

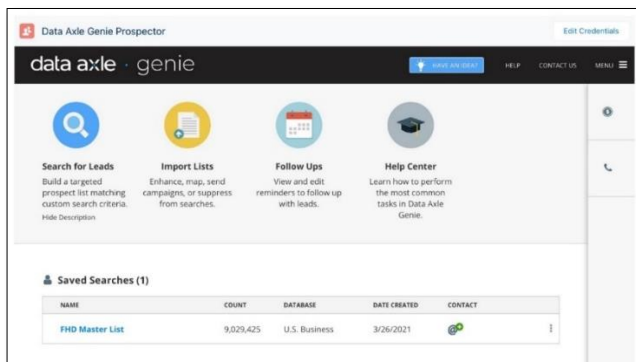
1. Once logged into Salesforce, tap on the left side Navigation Menu (next to the Globe Life Logo)
2. Tap on “B2B Prospects” to navigate to Data Axle Genie:



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**)

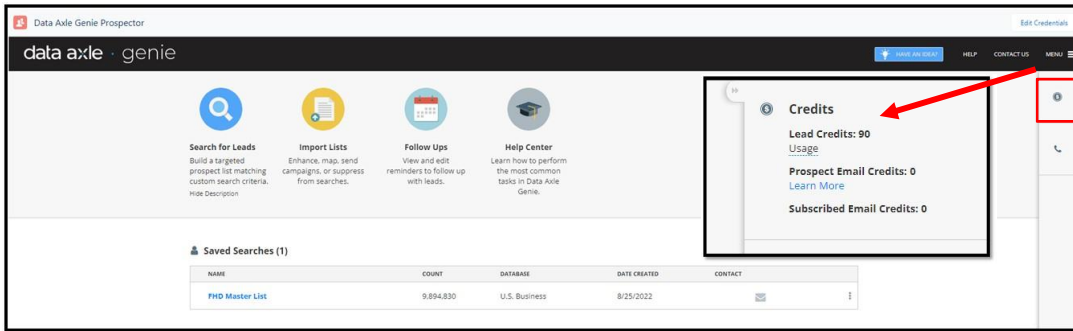


The Data Axle Homepage will display when successfully logged in:



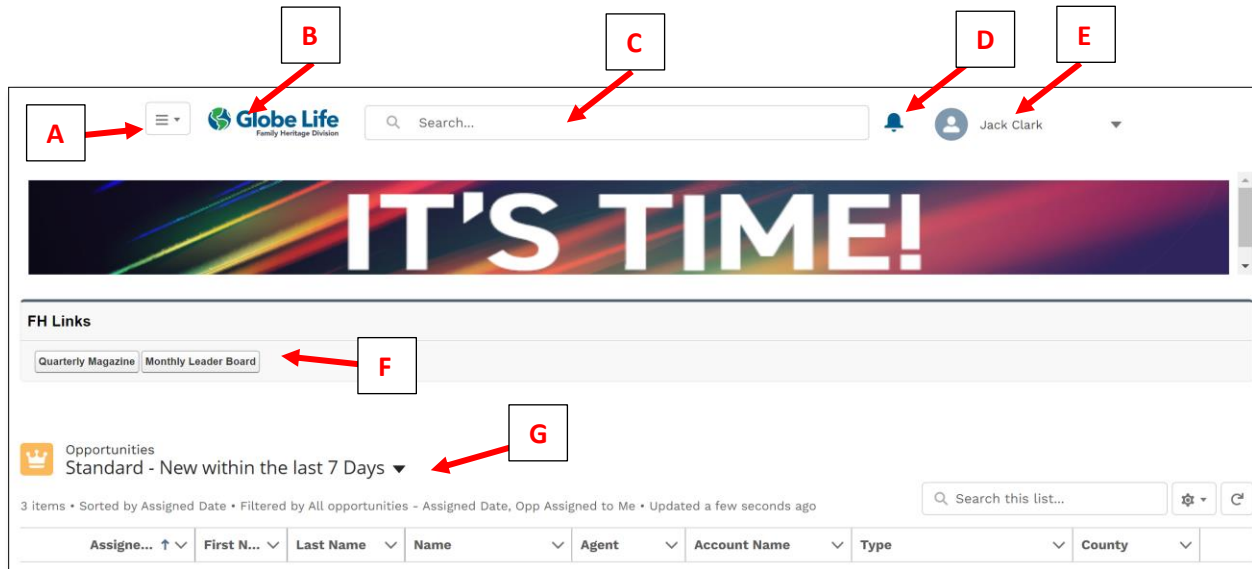
To view the amount of B2B Prospect credits you have, tap on the \$ in the top right hand corner, under Menu. A tab will open indicating the credits you have available.

Note: a user receives 100 B2B Prospect credits per week and what is not used of the 100 roll over to the next week and your credits continue to bank each week.



SALESFORCE HOME PAGE

Below is a diagram of Salesforce landing page which is the home page a user will first encounter after signing in:



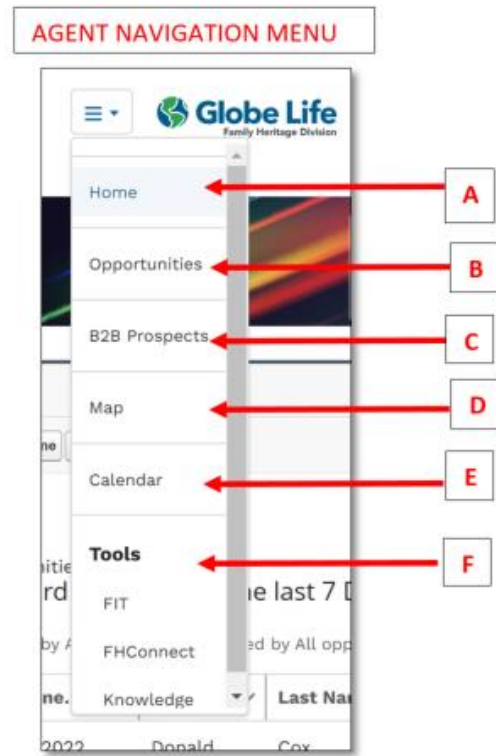
- A- **Navigation Menu:** Tap to see the various pages available in Salesforce such as Opportunities, Map, B2B Prospects, and Tools. Menu will have additional pages if role/permission in Salesforce is Agency Builders vs. Agent.
- B- **Globe Life FHD Homepage Icon:** Tap to return to the Salesforce landing page from any page you are currently at.
- C- **Universal Search:** Type a keyword to search all of Salesforce. Search for information such as referral name, policyholder name, address, City, etc.
- D- **Notifications:** Bell icon will display a red dot when a notification is available. Notifications are tied to Calendar items such as appointments and tasks.
- E- **Profile Dropdown:** Update Agent image or log out. Note that if agent information needs to be updated, such as address or phone number, contact AgentLicensing@globe.life to make changes.
- F- **FH Links:** Tap each button to view either the latest FHD Quarterly Magazine or Monthly Leader Board. Updates as needed.

- G- **Opportunities Listview:** View the latest Opportunities activity under the Standard-New Within the last 7 Days list view. Opportunities may include the following Lead Types: Termed, New Policy Follow Up, Claims, Referrals, etc.

NAVIGATION MENU PAGES

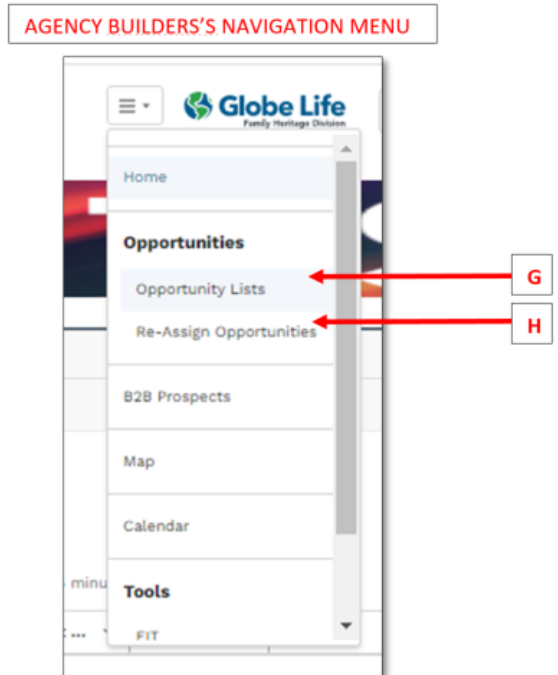
The top left dropdown menu is the Navigation Menu, which allows a user to view other available Salesforce pages according to their role/permission level in the CRM system.

- A- **Home Page:** This is the Salesforce landing page.
- B- **Opportunities Page:** This page organizes lead opportunities into various lists. View the Standard default lists or customize to create new lists.
- C- **B2B Prospects:** This opens the Data Axle Genie B2B Prospect page where a user can view, filter, and export business leads to Salesforce.
- D- **Map:** This opens the Salesforce Map page where a user can display various Map Layers for pushing the pins to the Mobile Sales App (MSA). Map also has functionality to optimize routes, load Residential Prospects, and customizable Map search Layers.
- E- **Calendar:** This opens the Calendar where a user can view or edit appointments that were set on the Opportunities Page. User can also view or edit Tasks and other activities.
- F- **Tools Section:** This section includes various links to the available learning portals like Fundamental Interactive Training (FIT), FHConnect, Cases (Under Construction) and the Knowledge Articles.



If a user's role/permission level is set by the Agency Owner (AO) or Agency Admin (AA) in Agency Maintenance Tool (AMT) to Agency Builder, then an additional Opportunities page will appear labeled Re-Assign Opportunities. **Note that user role/permission level in AMT is solely used for Leads Hierarchy assigning in Salesforce and is not reflective of the Career Track, commission structure, or team overrides.**

- G- **Opportunity Lists:** This page is the same as the Opportunities Page the Agents role has access to however, it includes additional lists that are specific for visibility into team opportunities.
- H- **Re-Assign Opportunities Page:** Designed for Agency Builders to facilitate Leads assignment to their Salesforce Leads Hierarchy. For example, a termed agent's active customers may have Open Opportunities for re-service (such as Claim, Term, or even Referrals as Lead Types). If an AO assigns this Open Opportunity to the AB, the AB can distribute such Opportunity to their own Leads Hierarchy. Learn more in the Resource Tab of FIT under the CRM section.



MENU: OPPORTUNITIES (AGENT) & OPPORTUNITIES LISTS (AB)

What is an Opportunity and a Lead?

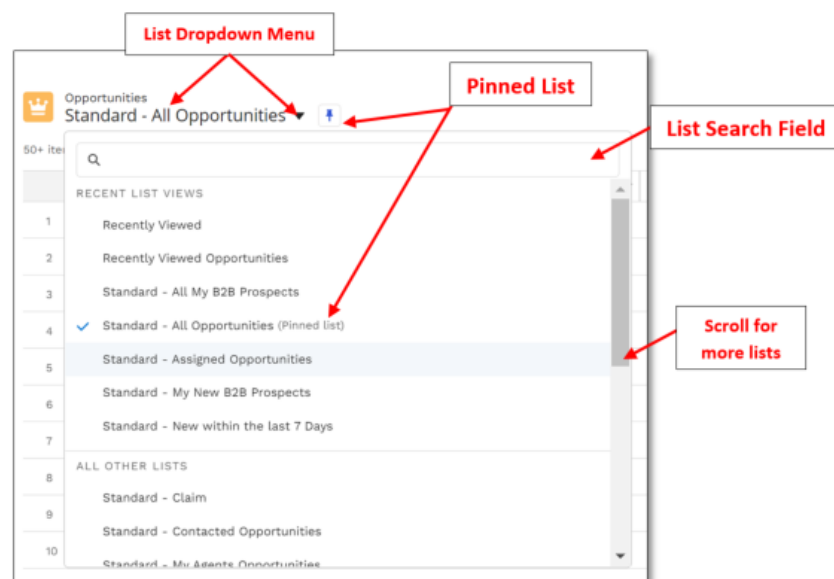
In Salesforce, an “Opportunity” means an opportunity to present to a Prospect with intention to make a sale or collect referrals from. Opportunities can come from various lead types such as the following:

- **Active Customers:** Policyholders who have active policies.
- **B2B Prospect:** Prospecting lead generated from Data Axle Genie and exported to Salesforce.
- **Claim:** Non-wellness benefit policyholder claims that has a policy paid claim.
- **New Policy Follow Up (NPF):** New policyholder that has had a policy made effective in the last 30 days. Opportunity will convert to an Active Customer lead type.
- **Orphaned:** Active and Termed policies whose original writing Agent and Agency Owner is no longer active with FHD.
- **Prospect Ad Hoc:** Prospect created manually in MSA.
- **Referral:** Prospect created manually in MSA from an Active Lead source.
- **Residential Prospect:** Residential prospecting data generated from the Salesforce Map.
- **Return of Premium (ROP):** Active policyholder whose policy has matured and has a ROP payment ready to be issued.
- **Termed Agent’s Active Customer:** Active policyholder whose original writing agent is no longer active with FHD.
- **Termed Policy (TERM):** A policy that terminates for reasons such as customer initiated cancellation, bank return item, non-pay, etc.
- **Termed Exclusive:** A policyholder that no longer has an active policy with FHD who terminates all policies, leaving no policies active with FHD.

Opportunities Lists

This page organizes lead opportunities into various lists for viewing ease. Lists are ideal for calling and setting up appointments for servicing before Pushing to Mobile via the Salesforce Map.

View the Standard default lists or customize to create new lists. To view the various lists available to a user, tap on the dropdown menu of lists. The list dropdown is dynamic in that it displays two sections that update according to use: Recent List Views and All Other Lists. Type in the list search field to find a specific list without needing to scroll to locate.



Standard List views

Standard List views are Opportunities organized into default lists. Each list will have specific columns shown that is most relevant to the list contents.

Below are the Standard List views for an Agent:

1. Standard- My Claims
2. Standard- My Contacted Opportunities
3. Standard- My Imports
4. Standard-My New B2B Prospects
5. Standard-My New Policy Follow up
6. Standard-My Opportunities
7. Standard-My Prospects
8. Standard-My Return of Premium
9. Standard-My Termed Agent Policies
10. Standard-My Termed Opportunities
11. Standard-My B2B Prospects

Below are the Additional Standard List views for Agency Builders:

1. Standard- All Claims
2. Standard- All Contacted Opportunities
3. Standard- All New Policy Follow Up
4. Standard- All Termed Opportunities
5. Standard- All Termed Agent Policies
6. Standard- All Assigned Opportunities
7. Standard- All Return of Premium
8. Standard- My Agents Opportunities
9. Standard- My Agents Prospects
10. Standard- My Agents Referrals
11. Standard- My Agents B2B Prospects
12. Standard- My Agents Prospects
13. Standard- My Claims
14. Standard- My Contacted Opportunities
15. Standard- My Imports
16. Standard-My New B2B Prospects
17. Standard-My New Policy Follow up
18. Standard-My Opportunities
19. Standard-My Prospects
20. Standard-My Return of Premium
21. Standard-My Termed Agent Policies
22. Standard-My Termed Opportunities
23. Standard-My B2B Prospects

Opportunities List Page Features & Functions

Outlined in this next section are several features and functions to assist in utilizing the Opportunities page lists and their respective Opportunity Page.

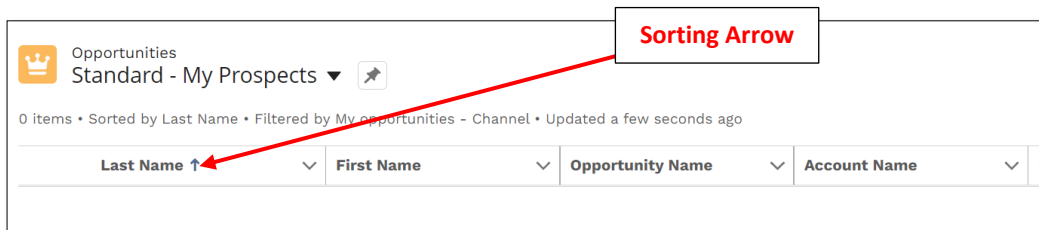
Search a List

Find information on a specific list by using the top right list search bar and typing in your search term. Example, searching for a specific County on Standard-All Opportunities List. Note that Agent, First name, and Last Name are not searchable terms.



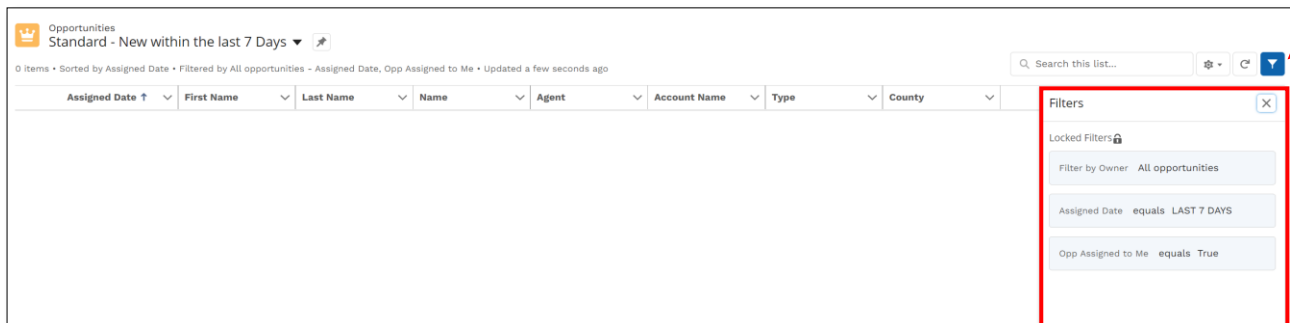
Sort a Column on the List

The list's columns can be sorted ascending to descending and vice versa. Tap on the column header for the Sorting arrow to display as the contents update on the list in ascending order (A to Z). Tap again on the upward pointing arrow to for descending order (Z to A). Sorting arrow will then display pointing downward. The sorting arrow in column header will point to denote ascending or descending:



View Opportunities List Filters

Each list has preset filters to help funnel the information in a more organized manner. To review what search filters are being used, be sure to have the list desired on the main page as the current list. Then tap on the Filters icon (appears as a funnel) to the far right of the list to display the filters panel:



Advanced Feature: Customize an Opportunities List

Standard Lists cannot be removed or edited however, they can be utilized as a base for a new customized list according to the user's needs. Customize list by filters and filter logic (greater than, equal to, contains, starts with, etc.) In addition, customize the order of columns, amount of columns (up to 10), and column fields to be displayed. The following sections outline how to customize an Opportunity List or create a new list entirely.

How to Create a New List or Clone an Existing List

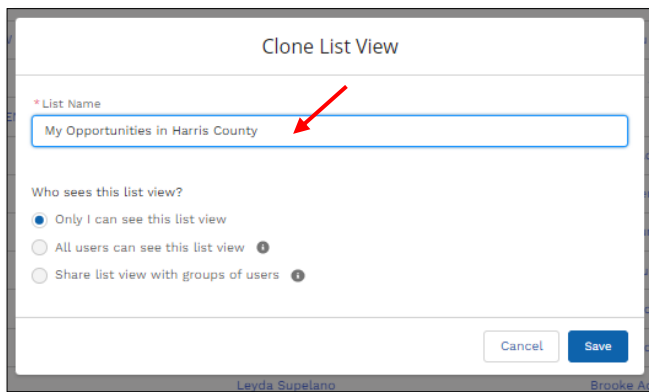
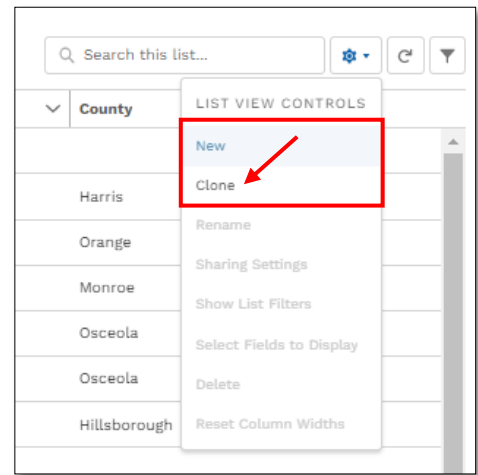
Create a completely new list view from scratch by tapping on the Filters icon to view the filters panel, then tap on "New" to select.

Alternatively, use the current list displayed as a base and tap on “Clone” to duplicate the list, retaining the current list’s filters. This will retain the current list’s filters, column order, and displayed column fields.

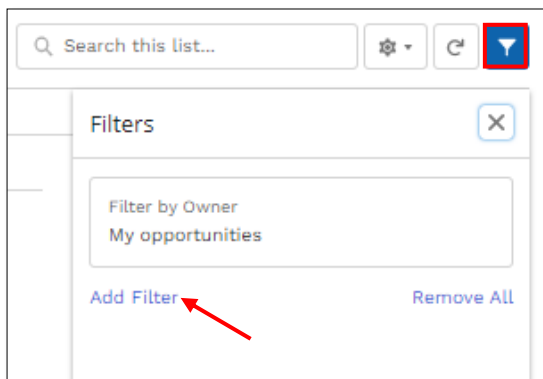
Note that Support is not provided for troubleshooting customized Opportunities Lists. If utilizing this advanced feature, as a best practice, Clone the list instead of creating a new list.

The next step is to name the list without using “Standard” in the title in order to be able to recognize the customized lists easily. Only the user who created the list will be able to view it. The list can always be renamed or deleted at any point if the list is no longer needed or if edited to fit other filtered criteria.

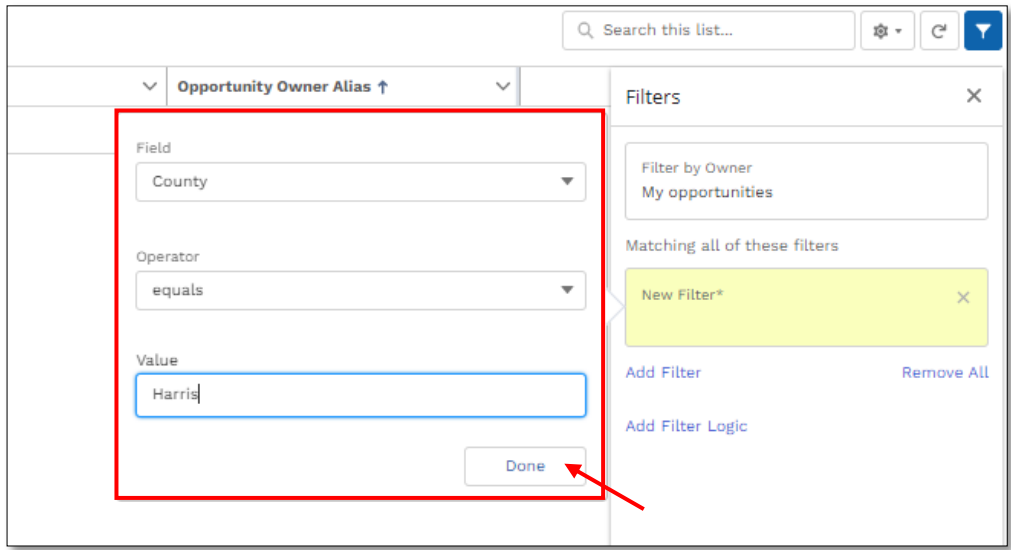
Tap on the “List Name” box, then begin typing to rename the list, then tap “Save” to continue:



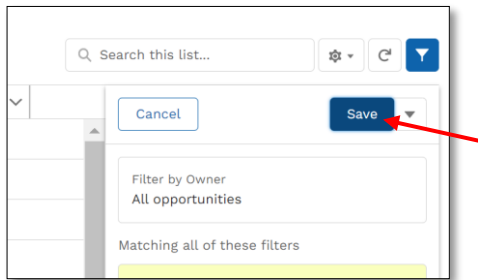
The new list will load on the page, displaying the new name. Tap on the Filter icon if filters panel is not already displayed on the far right side, then tap “Add Filter”:



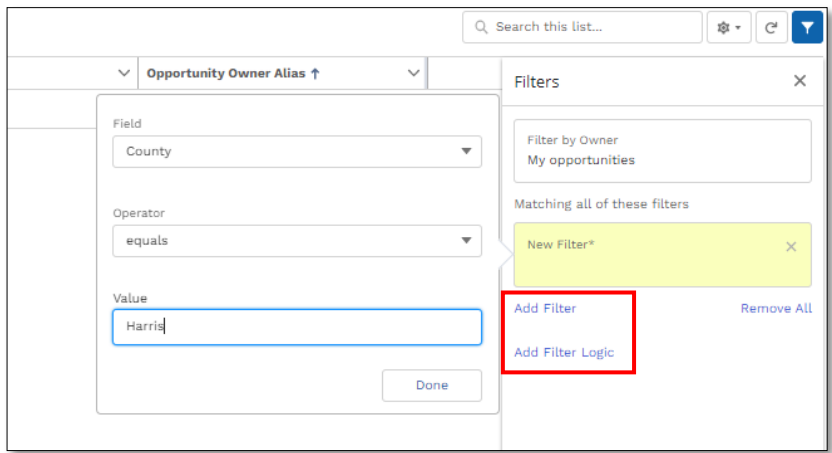
Next, begin to edit the filters according to the list parameters desired. In the example below, “County” is the field, Operator (logic) is “equals”, and the Value is “Harris” in order to display Opportunities in Harris County. Tap “Done” to continue:



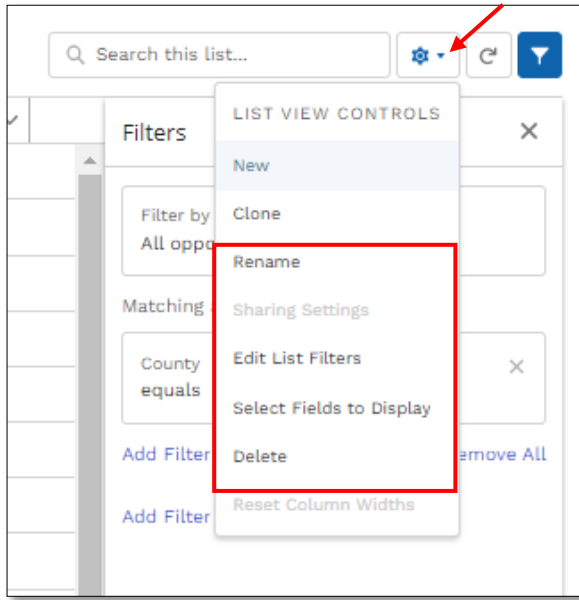
Then tap “Save” and page will update to the new filtered parameters:



Alternatively, continue to add an additional filter/filter logic by tapping on either “Add Filter” or continue by tapping “Add Filter Logic” if needed:



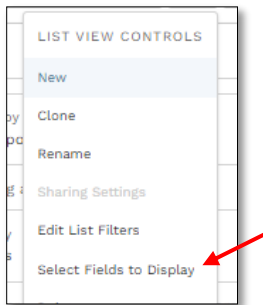
The newly created or cloned list will be available in the list view dropdown until it is deleted. At any point, the new list can be renamed, edited, and deleted by tapping on the List Settings icon to view List View Controls:



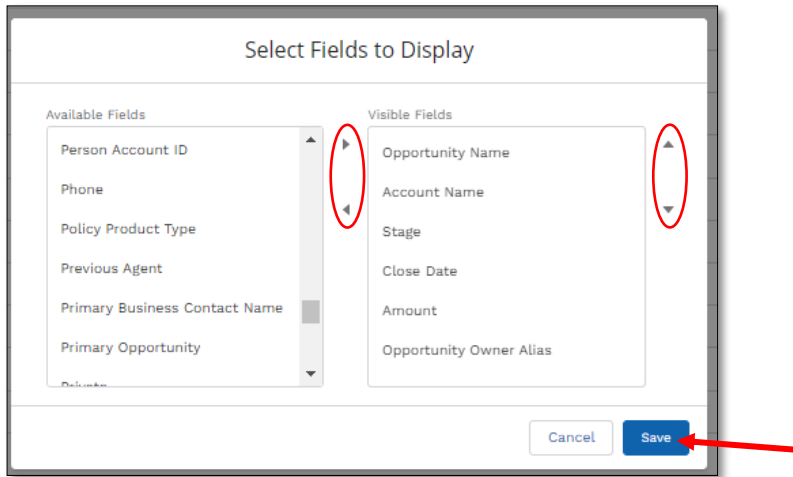
Note that once a list has been deleted, it cannot be undone. Only the Standard default Opportunities lists are locked for editing and cannot be deleted.

Edit Displayed Columns in New Created Opportunities List

Only New or Cloned lists can be edited. To edit a customized list's fields (the order and the columns), tap on the list Settings icon to open the List View Controls. Then proceed by tapping on "Select Fields to Display":



A new pop up window will appear in the center of the screen where up to 10 available fields can be added. Use the arrows in the center to move fields from the visible fields box to the available and vice versa. Use the arrows on the far right of the "Visible Fields" box to move the columns up or down the list. Tap "Save" when done:



It is important to keep the Opportunity Name (Lead) and Account Name (Person Account) fields on a list since each hyperlinks to another page relevant to Opportunity and/or insurance policy details. Removing those fields are not recommended.

Recommended Customized Opportunity Lists

Here is a list of Opportunity list ideas for customizing to the user’s needs:

- Clone “Standard- My Opportunities” then add in the following fields: Assigned Date, Days Since Last Activity, Last Activity Date, and Last Activity Type.
- Clone “Standard-My Referrals” then add in the following fields: Phone Number, Notes, Created Date, and Days Since Last Activity.
- Clone “Standard- My Opportunities” then add in Original writing Agent, Original Writing Agent Status, and Assigned Date. Update the Filter for “Type (2nd Type on the list) contains Orphaned and Termed Exclusive.
- Clone “Standard- My Termed” then add the following fields: Closed Date, Assigned Date, and Sent to MSA.

Pinned List

Pin a favorite list as the default list that populates first on the Opportunities List view page. Pin by selecting on a specific list from the Opportunities dropdown, then tap on the thumbtack icon next to the list dropdown:



It will turn the thumbtack icon from gray to blue denoting the list is now the pinned list:



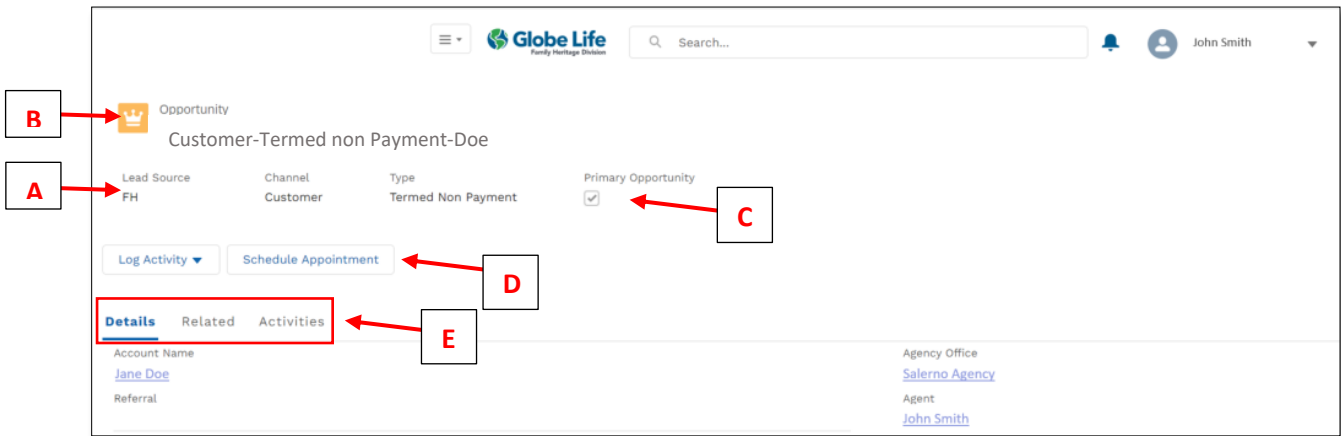
A user can change their pinned list at any point, an unlimited number of times.

Opportunity Page

Each Opportunities list has a hyperlinked Opportunity page which will contain additional information on the specific lead such as demographics, contact information, and activities. The page will display various information according to the type of lead the Opportunity is. Opportunities are not retro-active, as such

Opportunities from the past will not be available. For example, if a user was added to Salesforce June 1st, they would not see Opportunities dated prior, such as a customer that Termed May 1st.

Below is a diagram of an example Opportunity Page for a Termed policyholder due to non-payment:



- A- **Opportunity Name** is a hyperlinked page on Map and in Opportunities lists which display additional information on the lead. The name will display the Channel type, the Lead type, and the last name of the Opportunity’s lead.
- B- **Lead source details** will display where the lead originated from. Here are a few common combinations of lead sources available in Salesforce:

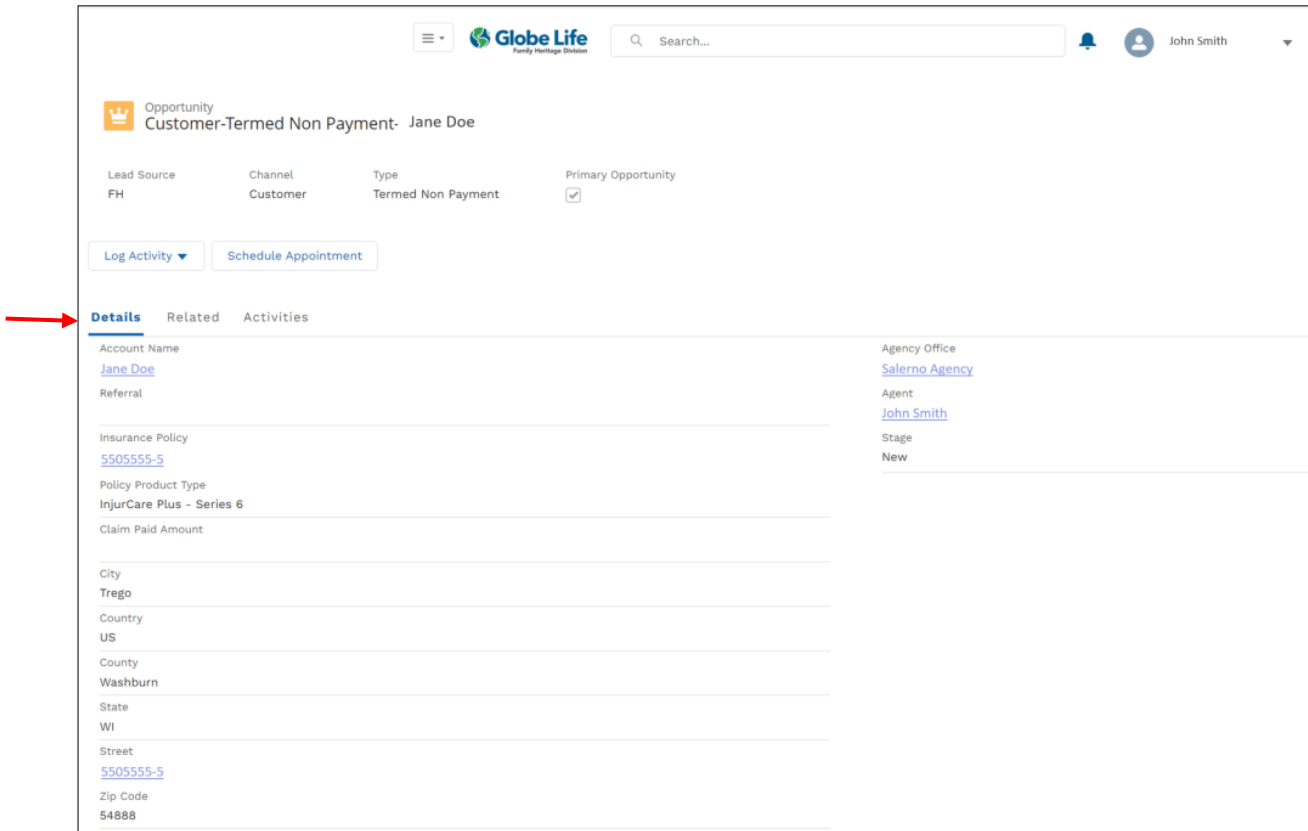
Source	Channel	Type
Agent	Prospect	Ad hoc
Agent	Prospect	Residential
Agent	Referral	Referral
Data Axle	Prospect	B2B
FH	Customer	Active
FH	Customer	Claim
FH	Customer	New Policy Follow Up
FH	Customer	Return of Premium
FH	Customer	Termed Customer Initiated

- C- **Primary Opportunity Indicator** will be check marked if lead is the master Opportunity. One Prospect or Customer (Person Account) may have several Open Opportunities for the agent to push to MSA. For example, a customer may term three of their four policies, thus each policy cancellation will trigger an Open Opportunity (one per product cancelled). The three Open Opportunities will display on the Person Account Page. **Note that only the Primary Opportunity has the ability to set activities and appointments in the Salesforce system. If Primary box is not checked, “Set Appointment” and “Log Activity” buttons will not display.**
- D- **Log Activity and Schedule Appointment buttons** can be tapped to capture activity in the history of the lead as well as display on the Calendar, and Salesforce Map under “My Appointments” Standard My Appointments Map Layer. **Only Primary Opportunities will display those two Task/Event buttons as options.**
- E- **Opportunity Tabs** will contain additional information relevant to the lead such as Details, Related Activities, and Historical timeline (Activities).

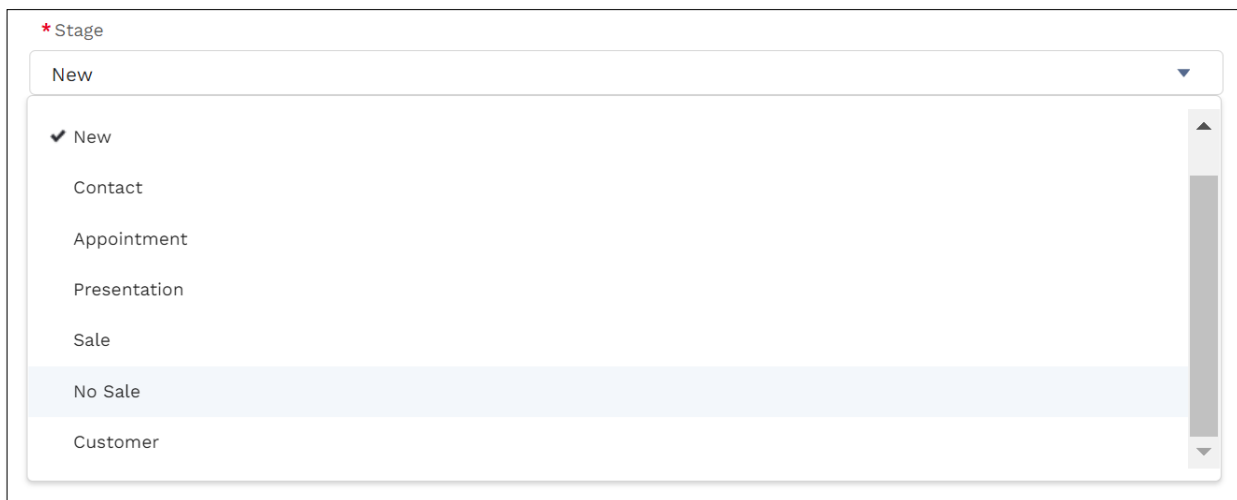
Opportunity Details Tab

The first section of the Details tab will include relevant information according to the type of lead such as address, contact information, policy information, and assignment information. The tab will have three

additional sections which are each collapsible for simple viewing: Account Reference, Activity, and Assignment. The Opportunity can be viewed by anyone in the agent’s lead hierarchy such as an Agency Builder, Agency Admin, and Agency Owner. Only the agent assigned to the Opportunity can work the lead through to Mobile Sales App (Push to Mobile).



In the first section, other than lead information, the top right area displays which Agent has been assigned the Opportunity as well as what Stage it is currently in. The Stages are linked to the Opportunity (lead) that is Pushed to Mobile, automatically updating the Stages based on the activity (dispositions) recorded in MSA:



The Stages of an Opportunity will coincide with the Disposition Activity of the Mobile Sales App to facilitate the life cycle of a Lead. Below is a table displaying how the Stage is related to the MSA Activity and Disposition:

Activity	Disposition	Salesforce Stage
Lead Added	Lead Added	New
Contact Made	Follow Up Day Follow Up Evening	Contact
Not Contacted	Bad Address Follow up Day Follow up Evening No Answer	
Appointment Contacted	Rescheduled Declined	Appointment
Appointment Not Contacted	Bad Address Follow up Day Follow up Evening No Answer	
Presentation Incomplete	Follow Up Declined	Presentation
Presentation Complete	Presentation Complete Follow Up Declined	
Pending Sale	Awaiting Email Signatures	Sale
Sale	Application Complete	
No Sale	Follow Up Declined	No Sale (Closed)
NA	Payment Made	Customer (Active Policy)

Here is a practical scenario as an example of how the Stage works in tandem with MSA: an Orphaned lead is Pushed to Mobile from the Salesforce Map. The Mobile Sales App’s Leads Page is opened and user manually syncs using the “Sync Leads” icon.

Once the specific Orphan lead populates, in the “More” information area the Lead History will display “Lead Added”. Activate the Lead and when a product demo is begun the lead history will update to Presentation (chart above).

If the demo is completed through to the demographics page but, the Prospect declines, tap the “X” on the Active Lead Header to clear the lead and disposition to Decline. The lead history will then update to Declined and upon the next sync. Salesforce will update the Orphan Opportunity record with a Stage of “No Sale” thus closing the Opportunity.

Once that Opportunity is Closed, since it’s no longer needed, the record will be removed from the Salesforce Map, the Reassign Opportunity Page, and Opportunity list view page.

Note that the Disposition can also be manually updated on the Leads Details Page in Mobile Sales App. Refer to the Mobile Start-Up Guide for more detailed step by step information.

Opportunity Details Tab: Account Reference Section

The next section on the Details tab is the Account Reference area where the contact information for the Opportunity resides:

Account Reference
Account Phone 555-555-5555
Account Mobile
Account Email hifive@aol.com

Opportunity Details Tab: Activity Section

The next section is the Activity area which outlines the last activity status, activity type, last activity date, and other relevant activity information to help an agent determine how recent the last contact may have been with this lead. Additionally, this is where the Notes from MSA will populate on the Opportunity:

Activity	
Opportunity Name Customer-Termed Non Payment- Doe	Appointment Date
Activity Status Stale	Last Activity Date 1/26/2022
Last Activity Type New	Days Since Last Activity 99
Last Activity Lead Assigned	Application Sale Amount
Last Action Lead Assigned	Total Application Count
Last Disposition New Opportunity	
Notes	

If an Opportunity is tied to an active customer, the Application Sale amount and Count will be displayed.

Opportunity Details Tab: Assignment Section

The final section of the Details tab describes information on the “Assignment.” This means it will display who the original writing agent was for the policy, who was previously assigned the Opportunity, who the current agent assigned is, and any other relevant additional information below:

Assignment	
Assigned By	Unassigned Date
Assigned Date 4/6/2022	Unassigned Reason
Original writing agent John Smith	Close Date 7/6/2022
Previous Agent	Referred By
Current Agent John Smith	

Note that Opportunities of policies sold before August 2021 will not have the Assignment Section displayed however, the Person Account’s Insurance Policy pages will show relevant information.

Opportunity Close Dates

On the Opportunity Details tab, under the Assignment section, a Close Date will be displayed. Either the Prospect from the Open Opportunity has been sold a policy (Stage is Sale), declined (Stage is No Sale), or the Opportunity has timed out (i.e. Termed lead types). For example, the Termed Lead Types have a close

date of 90 days, therefore an assigned agent must service that Lead before the set close date. After an Opportunity has closed, it will no longer be available to Push to Mobile for servicing. Opportunity may be reassigned if AO/AA deems necessary. Once an Opportunity closes, the Closed Date, under the Assignment Section of the Opportunity Details Page, will update to the date it was actually closed (i.e. if closed due to Sale, the close date will update to the date of Sale):

▼ Assignment

Assigned By	Unassigned Date
Assigned Date 4/6/2022	Unassigned Reason
Original writing agent John Smith	Close Date 7/6/2022
Previous Agent	Referred By
Current Agent John Smith	

Opportunity Related Tab

The second tab of the Opportunity relays additional information regarding Activities:

John Smith

Opportunity
Customer-Termed Non Payment - Doe

Lead Source: FH | Channel: Customer | Type: Termed Non Payment | Primary Opportunity:

Log Activity | Schedule Appointment

Details **Related** Activities

Open Activities (0)

Activity History (2)

Subject	Name	Task	Due Date
Lead Added	Jane Doe	<input checked="" type="checkbox"/>	1/26/2022
Lead Assigned		<input checked="" type="checkbox"/>	1/26/2022

Activity Details (1)

Activity Detail	Activity Date	Activity	Disposition
JD-T2805	1/26/2022	Lead Assigned	New Opportunity

Opportunity Activities Tab

The third tab of the Opportunity relays information regarding Activities however in a timeline format:

John Smith

Opportunity
Customer-Termed Non Payment -Doe

Lead Source: FH | Channel: Customer | Type: Termed Non Payment | Primary Opportunity:

Log Activity | Schedule Appointment

Details Related **Activities**

Filters: All time • All activities • All types
[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

▼ January • 2022 4 Months Ago

- + Lead Added
 Integration Admin had a task with [Jane Doe](#) Jan 26
- + Lead Assigned
 You had a task Jan 26

No more past activities to load.

Person Account Page

The Opportunity page will have several hyperlinks in a blue font color that denote the link can be tapped to access a new page related to the hyperlinked words. The first hyperlink on the Opportunity page is “Account Name.” Tapping on the link will open the Person Account page which is globally accessible on Salesforce.

The Person Account page displays additional information on a policyholder much like the Opportunities page. On an active customer’s Person Account page, insurance details will only be visible for the viewer is the assigned agent so be sure to only use the Person Account page if the Opportunities or Policies are assigned directly to you.

Opportunities are the leads that are sent to Mobile Sales App via the Salesforce Map. The Opportunity is the record being worked, while the Person Account will give additional information if needed.

To view the Person Account page, tap on the name link under the “Account Name” section of the Opportunity Details page:

The image shows a screenshot of the Salesforce mobile app interface. On the left, the Opportunity page is visible, showing details for 'Customer-Termed Customer Initiated- Smith'. A red arrow points from the 'Account Name' link 'Jon Smith' to the Person Account page. The Person Account page for 'Jon Smith' is shown on the right, displaying contact information and a list of Opportunities and Insurance Policies. Two red text boxes with arrows point to the 'Opportunities (2)' and 'Insurance Policies (3)' sections of the Person Account page.

Opportunity Details:

Lead Source	Channel	Type
FH	Customer	Termed Customer Initiated

Person Account Details:

Jon Smith
Email: [redacted] Phone: 555-555-5555 Mailing Address: 555 S. 1st St, Anywhere, TX, United States

Opportunities (2)

Opportunity Name	Stage	Policy Product Type	Amount
Customer-Termed Customer Initiated	New	InjurCare Plus - Series 6 - ICRP	
Customer-Termed Customer Initiated	New	InjurCare Plus - Series 6	

Insurance Policies (3)

Policy Number	Effective Date	Status	Base Product Series
1636169-	8/18/2021 7:00 PM	Active	CancerCare Plus - Series 6
1390654-	2/11/2020 6:00 PM	Terminated	InjurCare Plus - Series 6
1390655-	2/11/2020 6:00 PM	Terminated	InjurCare Plus - Series 6 - ICRP

Annotations:

- If you are the assigned Agent or if Agent is in Lead Hierarchy, open Opportunities will be visible & accessible
- If you are the assigned Agent on the Policy, Insurance Policies will be visible & accessible

Note that the icon next to the Person Account page title is different to help distinguish from the Opportunity page:

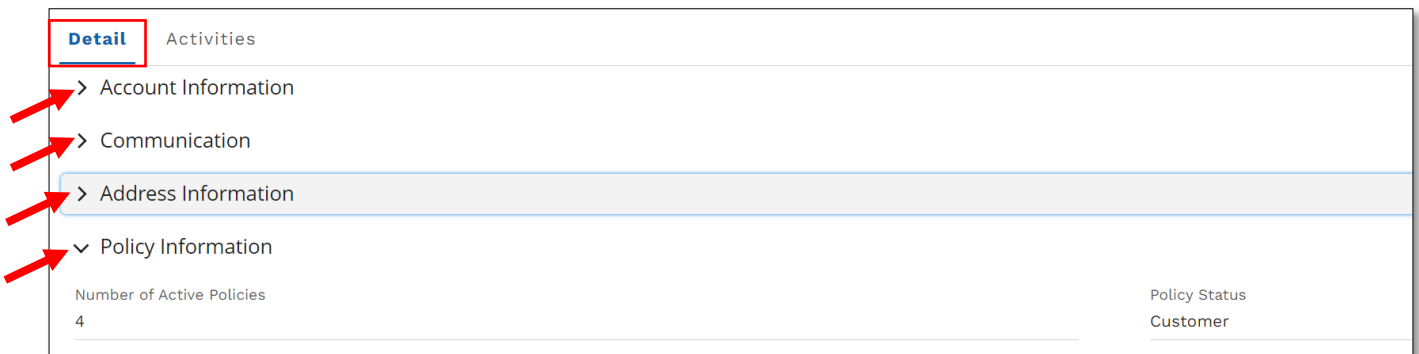


This difference will help in determining which Page is being viewed at that moment.

Person Account- Details Tab Sections

The first tab on the Person Account is the Details tab, is divided into four sections: Account information, Communication, Address information, and Policy information.

Each section is expandable and collapsible by tapping on any of the arrows next to the labels of the section:



If viewer is unable to see insurance policy details under the “Insurance Policies” page, however does see a count in the Policy Information section displayed under “Number of Active Policies,” then the viewer is not the Agent of the Account. The viewer should only contact if there are Open Opportunities assigned to them under the “Opportunities” section of the page.

The second tab on the Person Account called Activities, displays a timeline of the person like the Opportunities Page Activities section does. It visually keeps track of the history of the account.



Agency Builder Assign Opportunity from Opportunity Page (AB Only)

As an Agency Builder, an additional function is available on the Opportunity details page at the top right corner of the page labeled “Assign Agent.” The button on this page allows for the specific Opportunity being viewed to be reassigned to another Agent within the Agency Builder’s Salesforce lead hierarchy that was set in AMT.

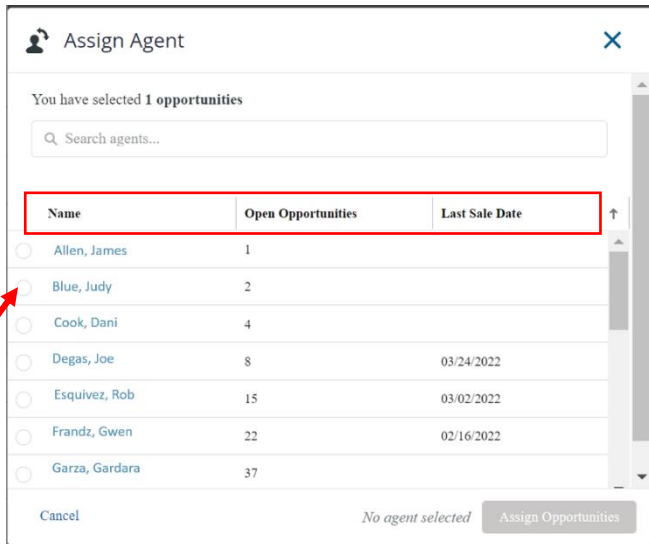
If reassigning several Opportunities, it is recommended to tap on the Navigation Menu to open the Re-Assign Opportunities page where multiple Opportunities can be assigned simultaneously.

An Agency Builder can assign an agent’s Opportunity only if required (i.e. if instructed by Agency Owner or Agency Admin).

To utilize, tap on the “Assign Agent” button:

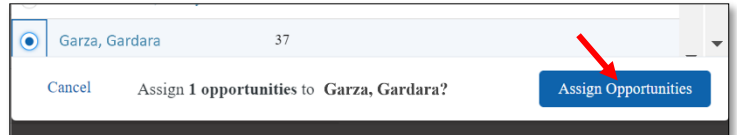


The Assign Agent panel will open. The AB can then search for an agent in their assigned Lead Hierarchy, select an agent to assign the Opportunity to, view number of Open Opportunities an agent has, as well as view the Last Sale Date of the agent.



To select an agent, tap on the blank circle to the left of the agent name.

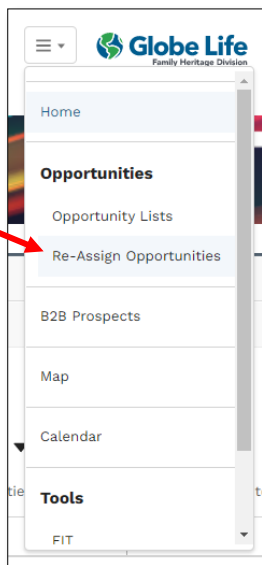
Once an agent is selected from the list, the bottom “Assign Opportunities” button will turn blue. Tap the button to proceed with selection:



Note: Feature is only to be used if instructed by the Agency Owner/Agency Admin. Best practice is to reassign from the “Re-Assign Opportunities” page instead of from the “Detail Page.” Any reassignments are recorded on the Opportunities and Person Account pages under Activities tab for Opportunity history tracking. Work with your Agency Owner to understand the guidelines for Opportunity reassignment within your agency.

MENU: RE-ASSIGN OPPORTUNITIES PAGE (AB ONLY)

As an Agency Builder (AB) in the Agency Maintenance Tool (AMT), the role/permission level has been set by the Agency Owner/Agency Admin so that there is visibility over the Salesforce Lead Hierarchy. An “Agency Builder” in Salesforce is specifically related to team visibility and lead assignment capabilities. The Salesforce role/permission level does not coincide with the Professional Career Track or reflect Commission levels or compensation.



As a Salesforce AB, the key responsibility is to disperse leads assigned to the team by the Agency Owner/Agency Admin. As such the AB’s Navigation Menu will include an additional page labeled “Re-Assign Opportunities” for lead hierarchy assignments. Tap on “Re-Assign Opportunities” in the menu to proceed to the page.

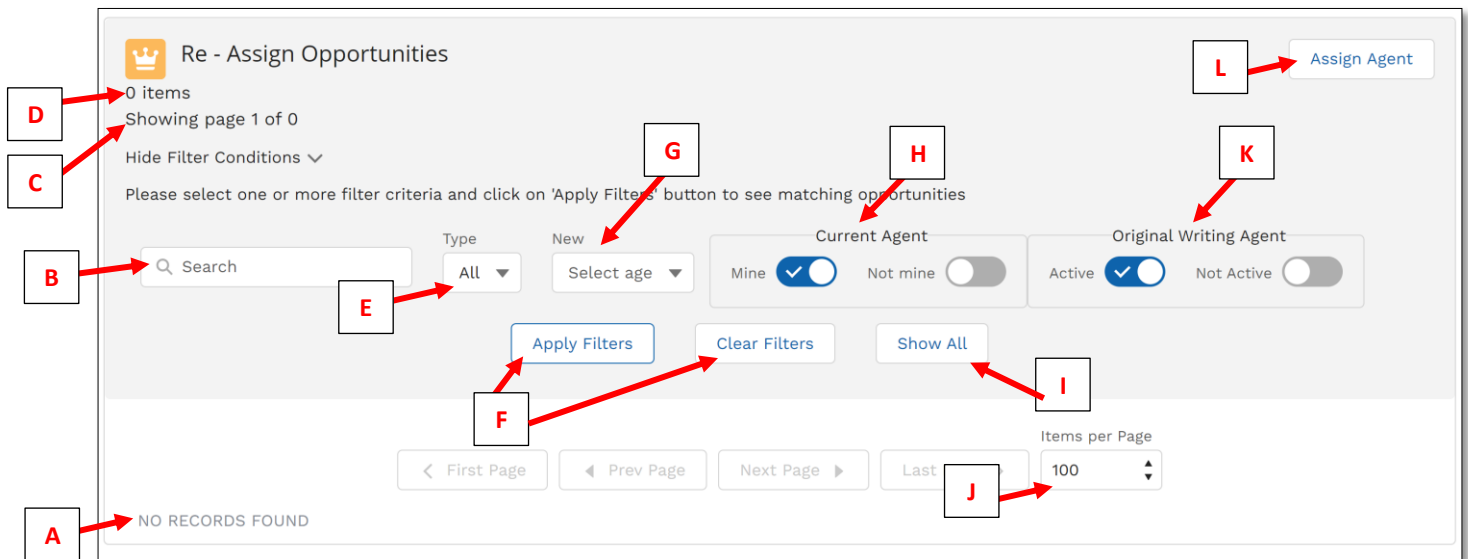
Each AB will have visibility into all of their Agents that have been set in AMT by the AO/AA. The Re-Assign Opportunities page will include all Open Opportunities of the Agents in the Salesforce Lead Hierarchy including the following types of leads: Claims, New Policy Follow Ups, Orphaned, Termed Exclusive, Termed, Referrals, Ad hoc Prospects, and more. A lead has the ability to be reassigned to another agent within the AB’s Lead Hierarchy.

If an AB is assigned a set of leads from the AO/AA, they would utilize this page to disperse the leads that show as assigned under the AB’s name. It is not recommended that an AB reassigns leads that are actively being worked by the agents in their lead hierarchy or any leads unless instructed to do so by Agency Owner.

Re-Assign Opportunities Page (AB Only)

This page is designed to facilitate Open Opportunities assignment which can originate from the Agency Owner/Admin or directly from Home Office. Such Open Opportunities include: previously assigned Stale leads, Orphaned leads, Termed Exclusive leads, Termed Agent Policies, and more.

Below is the Re-Assign Opportunities page when first accessed from the Navigation Menus or when “Clear Filters” button is tapped:



- A- **No Records Found** will display when page is initially utilized, filtered results have no records that fit the criteria of conditions, or when Clear Filters button is used.
- B- **Search Bar** can search any information of the columns on the page.
- C- **Showing page # of #** will update once filters have been applied, displaying the number of page the AB is reviewing at that time.
- D- **# Items** will display the count of records (Opportunities) that fit the filter conditions.
- E- **Type** is a dropdown where AB can select what Type of Lead the Opportunity is based on.
- F- **Apply Filters/Clear Filters** buttons will either set the filter conditions to search the Open Opportunities available that fit the conditions requested or will clear the conditions to begin anew.
- G- **New** dropdown can be set to “All”, “Last 7 Days,” or “Last 30 Days” to assist with newly assigned leads either from Agency Owner/Admin or directly from Home Office.
- H- **Current Agent** conditions filter will allow AB to include or exclude Opportunities where the current agent is themselves or others from within their respective Lead Hierarchy.
- I- **Show All button** will display all possible Open Opportunities, bypassing the condition filters.
- J- **Items per Page** menu will allow the AB to update how many Opportunity records display on the page. The recommendation is to keep at 100 items per Page to allow page to load efficiently.
- K- **Original Writing Agent** conditions filter will allow AB to include or exclude Opportunities where the original writing agent (Opportunities tied to Policies only) is either Active (Status is ACT, PHLD, POK) or Not Active (TERM or RVSD). If both are left not toggled on, page will search for Blank Status (such as lead types of MSA Referrals and MSA Prospects Ad Hoc).
- L- **Assign Agent** button will allow however many Open Opportunities selected on the page to be assigned to a single Sales Professional in the AB’s respective Lead Hierarchy.

The conditions area must have a selection under “Type” and “New” as well as a minimum of one “Current Agent” filter set and one “Original Writing Agent” filter set, in order to properly apply filters and display records. Search is not required and can remain blank if not needed. Both “Current Agent” and Original Writing Agent conditions filters can be toggled on as well:

Please select one or more filter criteria and click on 'Apply Filters' button to see matching opportunities

Type
All ▼

New
All ▼

Current Agent
 Mine Not mine

Original Writing Agent
 Active Not Active

How to Re-assign Opportunities (AB Only)

As an AB, it is important to reassign leads AO/AA has assigned to the AB and disperse them via their Lead Hierarchy. Follow these steps to identify leads for reassignment. In the example below, we are looking for Opportunities assigned to AB from Agency Owner.

First set the condition filters:

1. Type = Orphaned
2. New = All
3. Current Agent = Mine (i.e. the AB)
4. Original Writing Agent = Not Active

Tap on “Apply Filters” for list to filter and populate in a table below the conditions area:

OPPORTUNITY NAME	AGENT	ORIGINAL WRITING AG...	ORL...	TYPE	STATE	COUNTY	CITY	ZIP CODE
48 Clark... FH-Customer-Orphaned-CL...	Smith, Joe	Huntsman, Henri	RVSD	Orphaned	TX	Collin	Melissa	75454
49 Thom... FH-Customer-Orphaned-Th...	Smith, Joe	Dena, Saig	TERM	Orphaned	TX	Dallas	Plano	95094
50 Prenti... FH-Customer-Orphaned-Pr...	Smith, Joe	Larver, See	RVSD	Orphaned	TX	Collin	Plano	75023
51 Hawki... FH-Customer-Orphaned-Ha...	Smith, Joe	Buarve, Qrad	RVSD	Orphaned	TX	Harris	Houston	77047
52 Hawki... FH-Customer-Orphaned-Ha...	Smith, Joe	Cedrick, Daro	RVSD	Orphaned	TX	Harris	Houston	77047
53 Hawki... FH-Customer-Orphaned-Ha...	Smith, Joe	Huntsman, Henri	RVSD	Orphaned	TX	Harris	Houston	77047

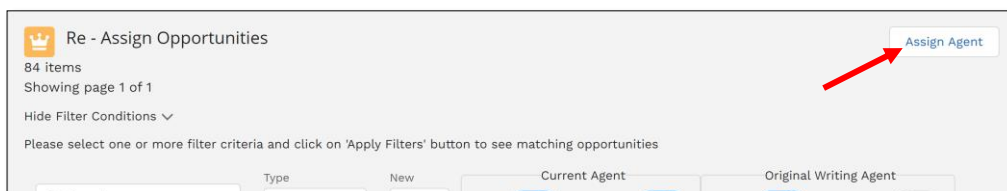
Will display as “No Records Found” if the set Filter Conditions result in no records fitting those parameters:



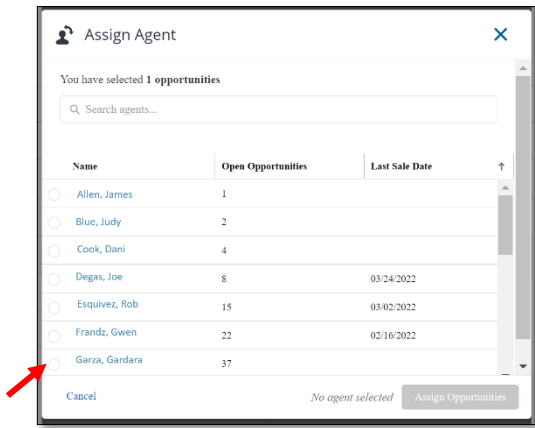
Next, select the Opportunity to be assigned to another agent in the AB’s Lead Hierarchy:

50 <input checked="" type="checkbox"/>	Prenti... FH-Customer-Orphaned-Pr...	Smith, Joe	Larver, See	RVSD	Orphaned	TX	Collin	Plano	75023
51 <input type="checkbox"/>	Hawki... FH-Customer-Orphaned-Ha...	Smith, Joe	Buarve, Qrad	RVSD	Orphaned	TX	Harris	Houston	77047

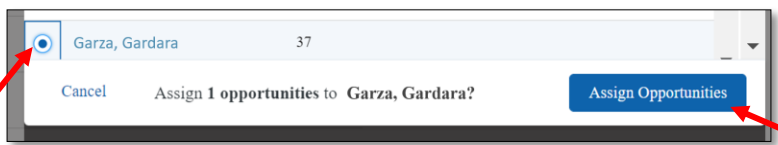
Then tap on the “Assign Agent” button at the top right of the screen:



The Assign Agent box will appear on screen displaying just as it does when assigning an Opportunity from the “Opportunities” list view pages (AB only):



Tap the empty circle next to an agent’s name to select for assignment, which will turn the “Assign Opportunities” button to blue. Tap on the button to complete the Opportunity assignment:

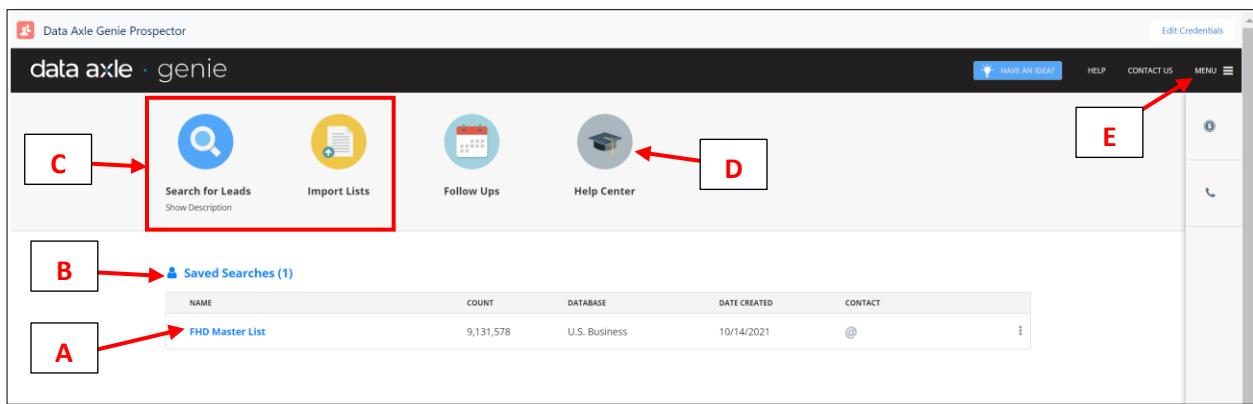


MENU: B2B PROSPECTS (DATA AXLE GENIE)

In the Navigation Menu, tap on “B2B Prospects” to be directed to the home page of Data Axle Genie. This web page is where B2B prospect data is filtered, searched, and exported from. If this is the user’s first time tapping on “B2B Prospects” from the Navigation Menu, then review the “Getting Started” section of this guide to ensure the required device Settings are configured, verify if iPad is compatible, and understand the login credential process.

Exporting B2B Leads to Salesforce

After initially signing into B2B Prospects for the first time, the Data Axle Genie homepage will display:



- A- **FHD Master List** is the pre-saved formatted list filter requirements set.
- B- **Saved Searches** area will display saved filtered lists.
- C- **Search for Leads and Import Lists** icons will always display here however, using these lists will not include the required filters and formats by the CRM system so as such they should not be utilized. Using these features may cause errors or issues affecting the visibility of those leads in Salesforce.

- D- **Help Center** is managed by Data Axle Genie and can include helpful information however, this Salesforce guide specifies the key information required for filtering and exporting B2B Leads from Data Axle Genie to Salesforce and then Pushed to Mobile.
- E- **Menu** will expand additional options that are helpful for tracking what leads have been exported (export history), where they were exported to (Salesforce or other), and to re-export again if needed.

Saved Searches

This section stores not only the main FHD Master List but also the customized saved searches the user filters. As the new filtered search lists are saved, they will populate under this section and can be removed if no longer needed or edited by tapping on the three dots icon:



NAME	COUNT	DATABASE	DATE CREATED	CONTACT
Miami Zip Code 33128	226	U.S. Business	5/10/2022	@
FHD Master List	9,131,578	U.S. Business	12/1/2021	@

FHD Master List

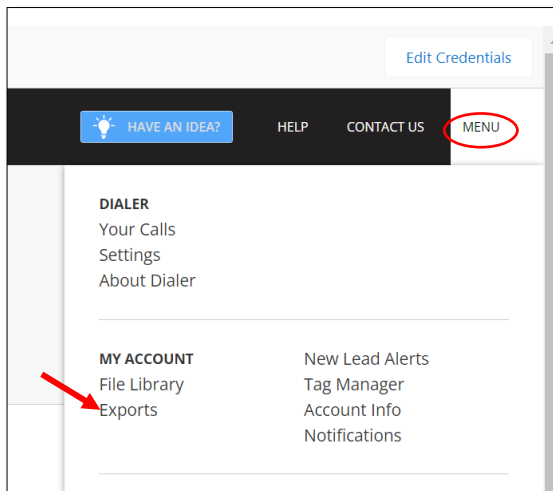
This list includes all the business prospect data available for exporting to Salesforce in the correct pre-formatted filtered criteria. It is the foundational list to build a customized filtered search. For this reason, it's important to always keep the FHD Master List and not edit or delete it:



NAME	COUNT	DATABASE	DATE CREATED	CONTACT
FHD Master List	9,131,578	U.S. Business	10/14/2021	@

Data Axle Genie- Menu Options:




The Data Axle Genie Menu is where the previous Export history is available. To view, tap on Menu then tap on Exports under My Account:



A list of previous exports will display showing the date of export, the name the user saved the export as along with the quantity of leads that were exported to Salesforce. Important to note that exporting to Salesforce is not pushing to Mobile. The B2B prospect would still need to be sent to MSA.

Export History

You can download or print a previously purchased list.

Select Date  Select Date  All  Filter

DATE	NAME	DATABASE	QUANTITY	TYPE	
5/9/2022	75072 Leg Med 5/9/22	U.S. Business	7	Salesforce	...
5/9/2022	5922 allen texas	U.S. Business	5	Salesforce	...
5/9/2022	75070 5/9/22	U.S. Business	8	Salesforce	...

Naming an export is optional however, as a best practice, name according to the type of filters used for the search to easily identify the type of leads from the export. For example if the exported search was for business in Dallas county within the 75234 zip code that have under 20 employees in the Nursing home industry, then a recommended name of the export would be “Dallas 75234 <2 Emp Nursing Homes.”

Important to note that the exporting process is 60 minutes before the B2B Prospects populate on the Salesforce Map under the Standard Layer Folder -Prospects (B2B) map layer. If leads do not populate after 60 minutes, contact CRM Support for assistance. After the B2B prospects have loaded in Salesforce, then a user can proceed to send those leads into the Mobile Sales App with the Push to Mobile function.

Data Axle Genie List Page

Below is the diagram of what a user will see after tapping on the FHD Master List. The user will also see the same page after using their own saved search that they’ve filtered based off the FHD Master List:

The screenshot shows the Data Axle Genie interface for the 'FHD Master List'. At the top, there are navigation links for 'U.S. Businesses' and 'FHD Master List', along with a 'HAVE AN' button and 'HELP', 'CONTACT US', and 'MENU' options. Below this is a 'Filters' section with buttons for 'Executive Present', 'Bought Records', 'Phone Numbers', and 'Mailing Address'. A 'CLEAR ALL' button and 'CRITERIA' are also visible. The main area displays '8,880,366 Records' and 'LIST OPTIONS' (Save, Export) and 'CAMPAIGNS' (Display Ads, More). A table lists businesses with columns for BUSINESS NAME, EXECUTIVE INFO, PHONE, and ADDRESS. A preview box for '2 Sisters Svc LLC' is shown on the right, displaying contact information and options like 'Call', 'Find Similar', 'Nearby Businesses', 'Contacts', 'Notes', and 'Follow Ups'.

- A- **Initial business listing of FHD Master List** which will default to all states, starting with Alaska, before list is personalized with own filters. The list includes the first four sortable columns of information.
- B- **Total amount of businesses** with information in the Data Axle Genie Database. This will update according to the personalized filters.
- C- **Filters button** when tapped will open the Filters area where the list can be customized according to a personalized search criteria.
- D- **Filters bar** demonstrates what filters are applied to list below it. Note that the four preset filters are required for Salesforce formatting (no action should be taken with these filters in green).
- E- **List Options** will display two icons: “Save” and “Export.” The first button allows the filtered personalized list to be saved so that it shows as an option on the homepage of Data Axle Genie (next to FHD Master List). The second button allows the selected business leads to be exported to Salesforce.
- F- **Data Axle Genie Page View** has several page viewing options: Insights, List, Details, and Map. The fourth option, Map, only displays once a list has additional personalized filters.
- G- **Preview box** will populate additional business information details when a business name is tapped on the list.
- H- **List Column Options** when tapped will supply additional options to remove or add information columns such as SIC Codes, Employee Size, Sales volume, etc.

How to add Personalized Filters for a Saved Search

Follow these next steps to customize the FHD Master List by saving a new Saved Search with custom filtered criteria. Those Saved Searches can be utilized at a later date, time and time again, until the entire list has been exported to Salesforce. This will save time so that the Agent does not need to keep filtering the FHD Master List over again with the same search criteria previously filtered by.

After logging into Salesforce and tapping on “B2B Prospects” from the Navigation menu, tap on the FHD Master List:

Saved Searches (1)

NAME	COUNT	DATABASE	DATE CREATED	CONTACT
FHD Master List	9,131,578	U.S. Business	10/14/2021	

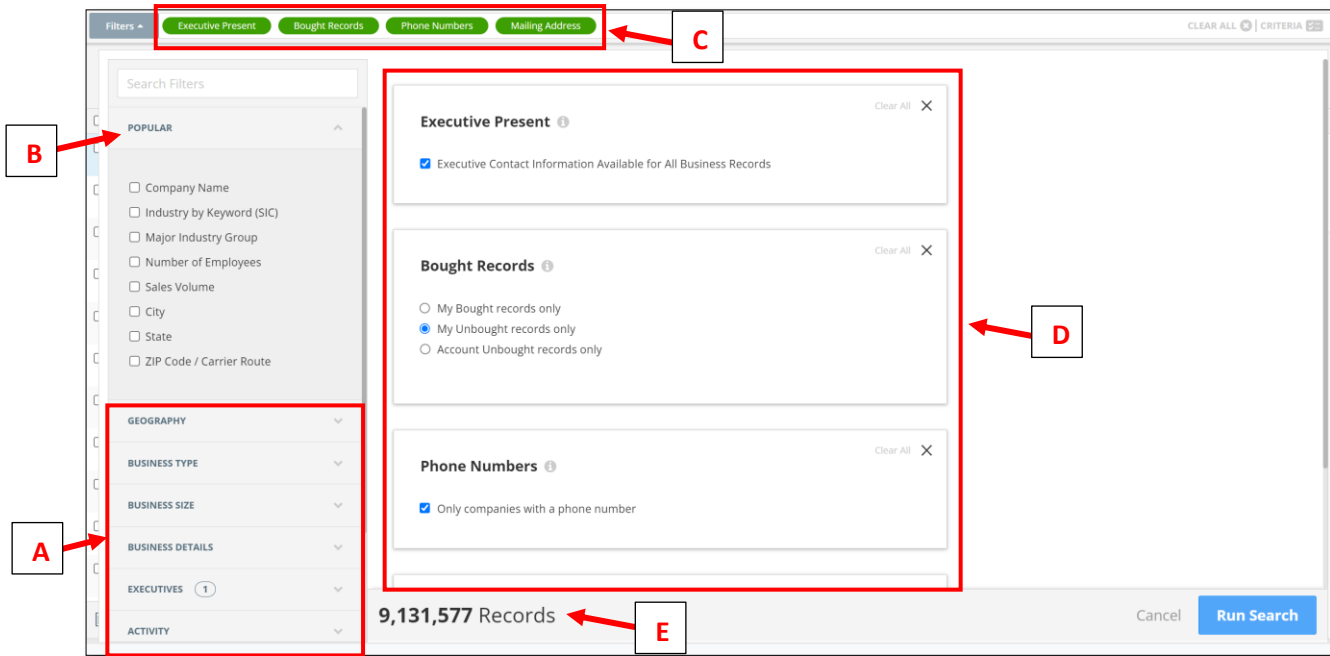
The Data Axle Genie list page will open. Confirm the page has the four preset filters:

These are the four required filters that every list must adhere to at all times or exported list will not populate in Salesforce:

- Executive Present
- Bought Records
- Phone Numbers
- Mailing Address

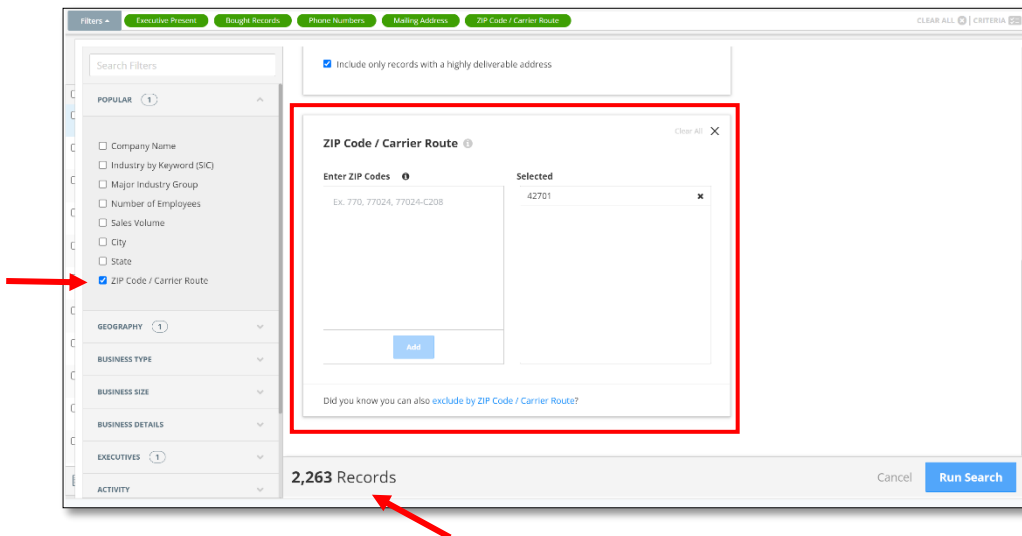
To add additional filters, personalized to prospecting needs, tap on the Filters button at the top left of the page, to the left of the required filters:

The Filters page will open, where additional search criteria can be elected and set:



- A- **Additional filters** that have the required preset selections that are not to be altered.
- B- **Popular filters** is the area with search criteria options to be used for customizing a list. This is the only area that should be utilized for filtering the FHD Master List to create a new custom list.
- C- The **filters bar** should always display the four required preset filters: Executive Present, Bought Records, Phone Numbers, and Mailing Address. As new search criteria is added, this bar will update accordingly to match the newly selected filters (i.e. Zip code, City, State, Number of Employees, Industry, etc.)
- D- **Filter details area** is where the user can specify further and set details (i.e. Zip code is 78744, Businesses with number of employees less than nine, etc.)
- E- The **record count area** will update according to the Prospects available for exporting that fit the new filter criteria. Important to note, this number may show Zero if all records (B2B prospects) from this exact search have already been exported previously to Salesforce. This helps agents avoid from sending the exact same Export duplicate times.

Now in the “Popular” section of the filters, tap on the box next to each filter criteria desired:



The checkbox will appear next to the selection and the filter details area will open to the right of the screen for further specifics.

In this example, we have selected “Zip Code” and had added in a specific zip code for the search, displaying 2,263 Records.

When ready to proceed with criteria, tap on the Run Search button to return to the previous page:

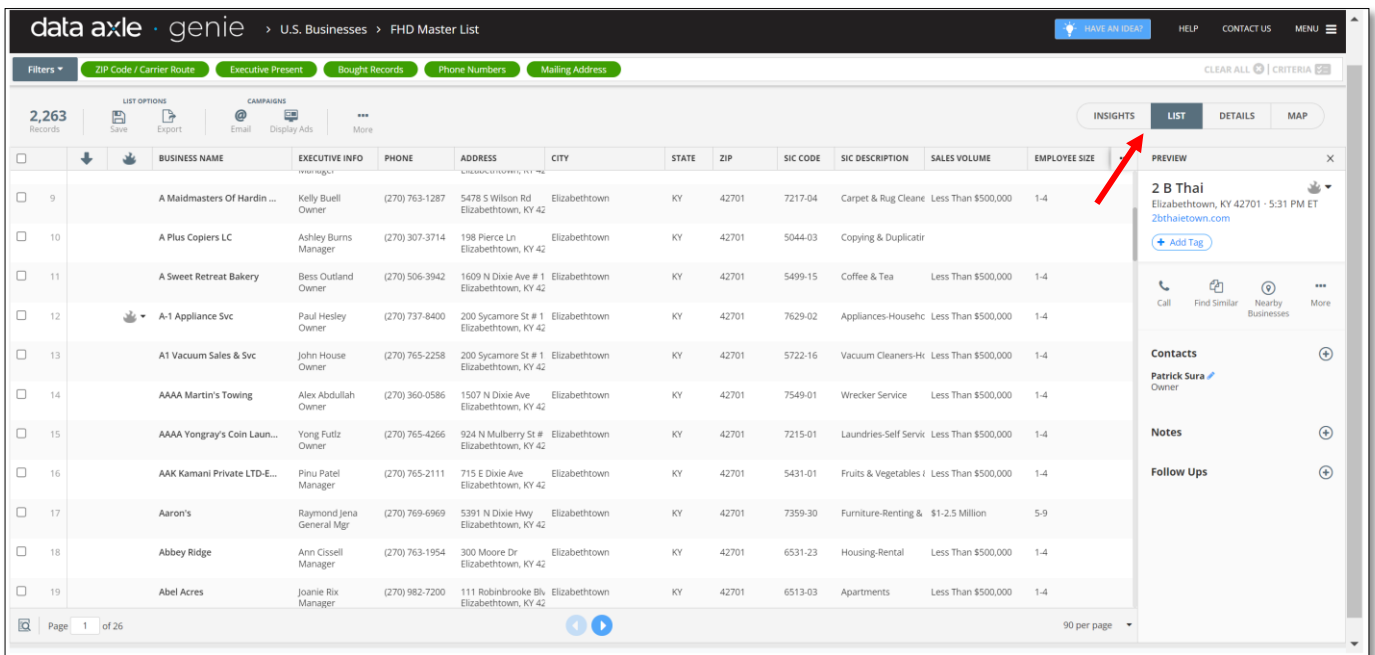


In tablets, if the screen show the Run Search button hidden, attempt to scroll down on the page and tap on the top of the light blue Run Search button. This will still run the search, returning the user to the List view page option:



If this is not the initial use of the filtered list, and after searching criteria, the record results display as “0 Records” this means the user has already exported all the leads within those filtered search parameters. Adjust the filters again for additional new results.

After tapping on “Run Search,” the page will automatically return to the List view page. User can now sort through list and tap on the boxes next to the business names to select however the recommended best practice is to view this filtered search list in a visual format on a map. List View:



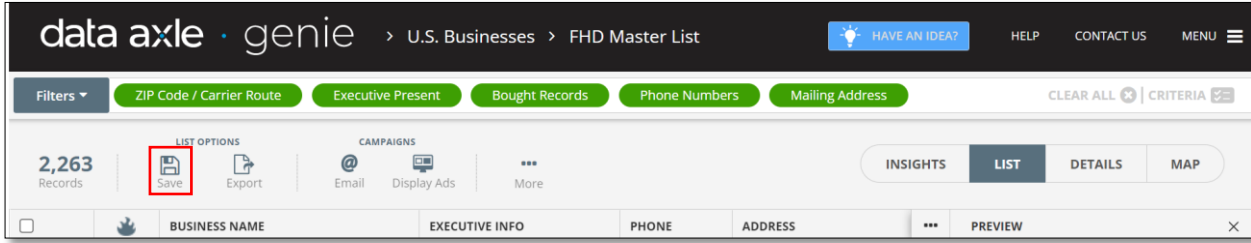
Save Filtered List to Saved Lists

Once a list has been customized, it can be saved for future use to save time for user. This customized list can be saved so that it populates on the Data Axle Genie homepage near the FHD Master List:

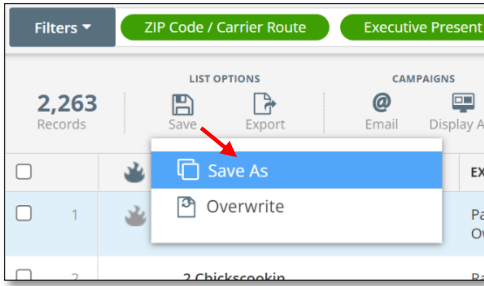


Be sure the Database column always displays “U.S. Businesses” otherwise the list is not set correctly.

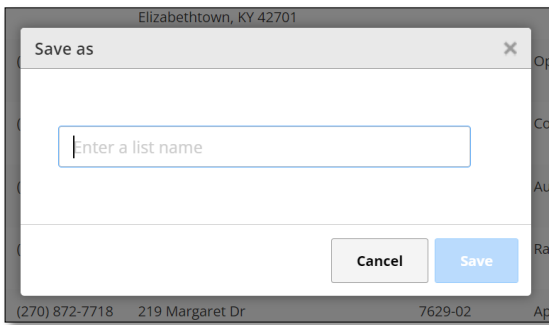
Follow the next set of steps to save new filtered list. Under the List Options area, tap on the “Save” button:



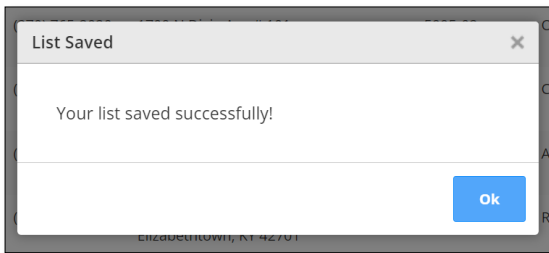
Additional Save options will open, tap on “Save As” to proceed. **Note, the “Overwrite” option will completely overwrite the FHD Master List which is not desired. Only use the “Save As” option.**



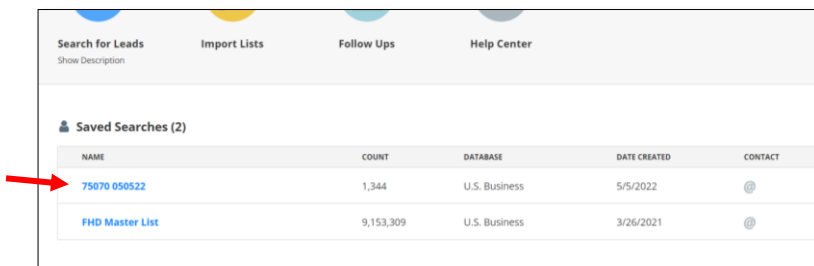
Now, in the next pop up window, enter in the Saved Search name according to the filters set (i.e. Zip code) then tap “Save” button:



Tap “Ok” at the next pop up window to proceed:

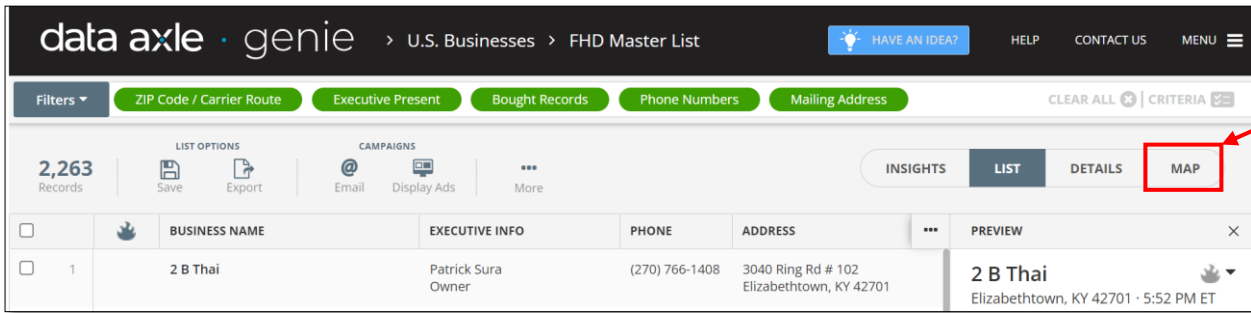


You have now successfully saved a customized filtered list for future use. Continue to select business prospects for exporting to Salesforce in the next section. The Saved Search will display alongside the FHD Master List on the Data Axle Genie Home page:

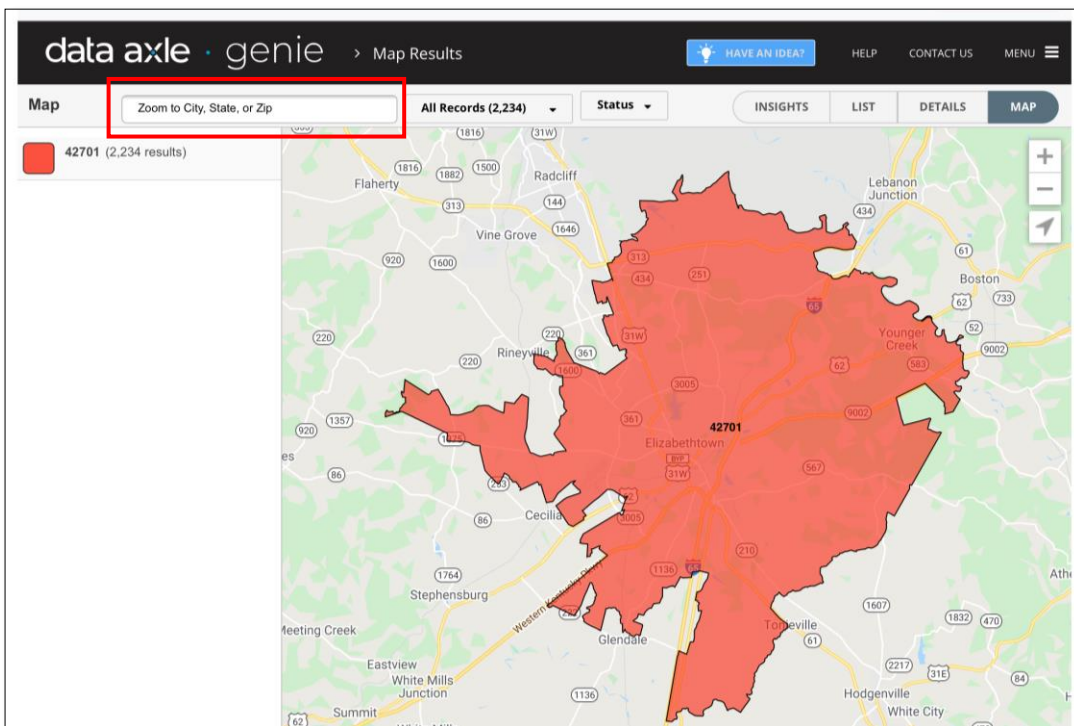


Select Business Prospects (Pins) for Exporting to Salesforce

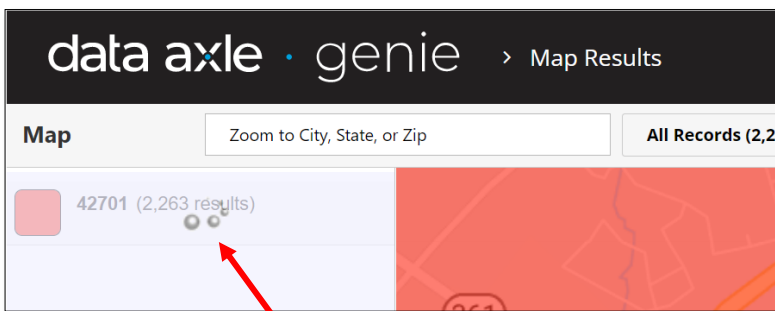
After filtering the FHD Master List or after tapping on a previously created Saved Search filtered list, tap on “Map” at the top right-hand corner in the Page View Options:



A new page will begin to load, displaying the map area where the B2B prospects within the set filters are located. Zoom in closer to the location, pausing to allow the page to calibrate upon each movement on the map (i.e. if user zooms in closer, or moves around the map). A user can also type in the City, State or Zip code in the Map view Search Bar (red box below) to move the map efficiently:

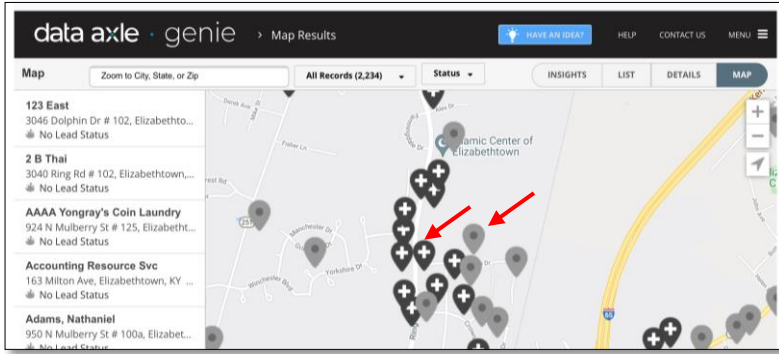


Here is an image of the page processing on the map. Allow for a pause in between each map movement so the live data has sufficient time to recalibrate (processing icon will display):



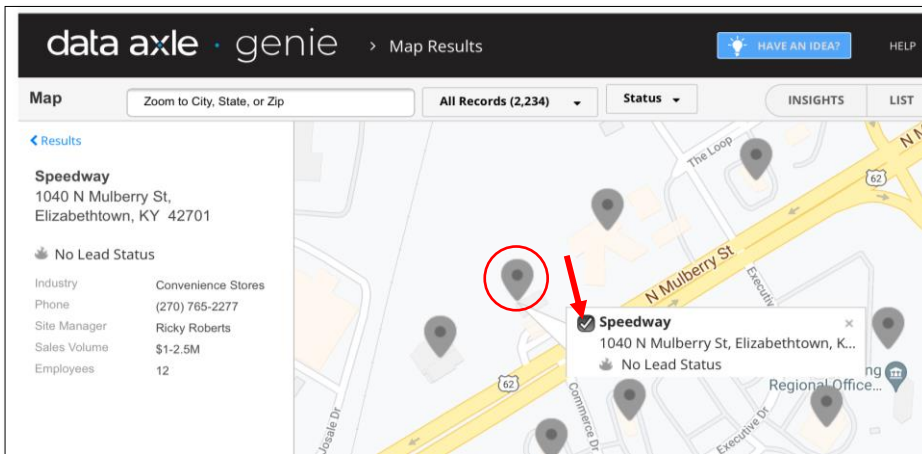
It is recommended that a stable and strong internet connection is utilized while executing this process.

Continue to zoom in slowly until map pins begin to populate on the map and the panel on the left will display basic business prospect information (name and address; Lead Status not utilized):

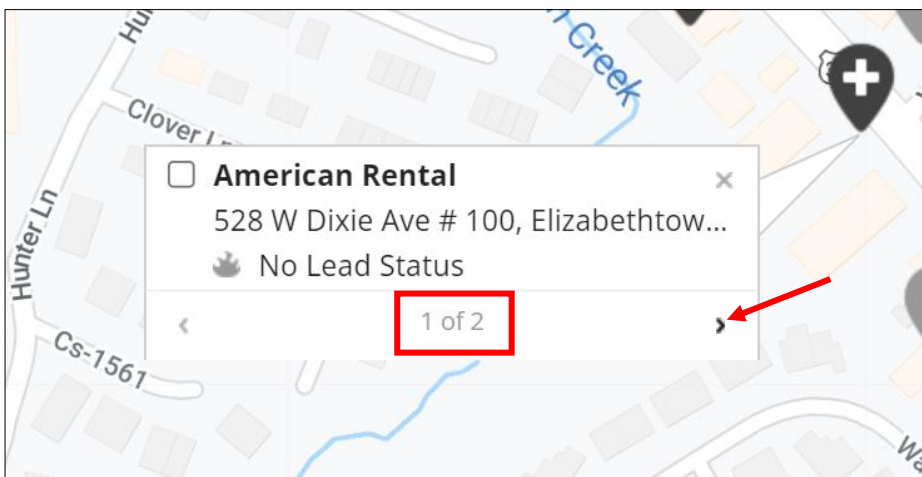


The black pins with a cross on them mean there are several businesses at that address such as suites. Light gray pins with a dot on them denote there is one business at that address.

Tap on a single pin to view details, then tap on the box on the tooltip next to the name of the business to select it for exporting which will also add a checkmark to the box:

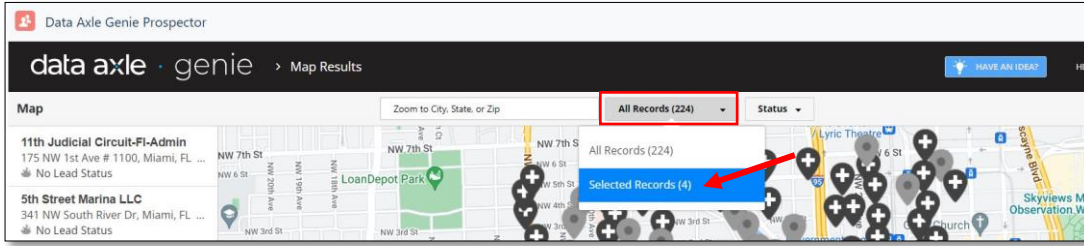


To select a pin with multiple businesses at the same location, tap on the darker colored pin and arrow right to view other businesses. Tap the blank box to checkmark on each business (same pin) to select as usual. Continue to select businesses as needed:

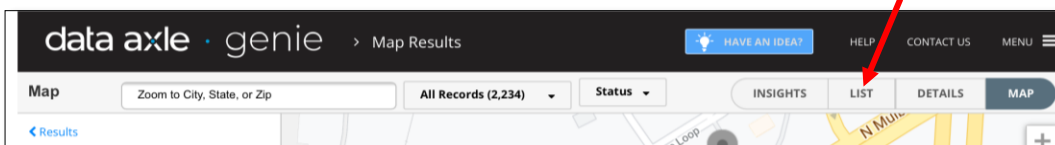


As you select business pins for export, the checkmarks will remain in place unless they are unchecked.

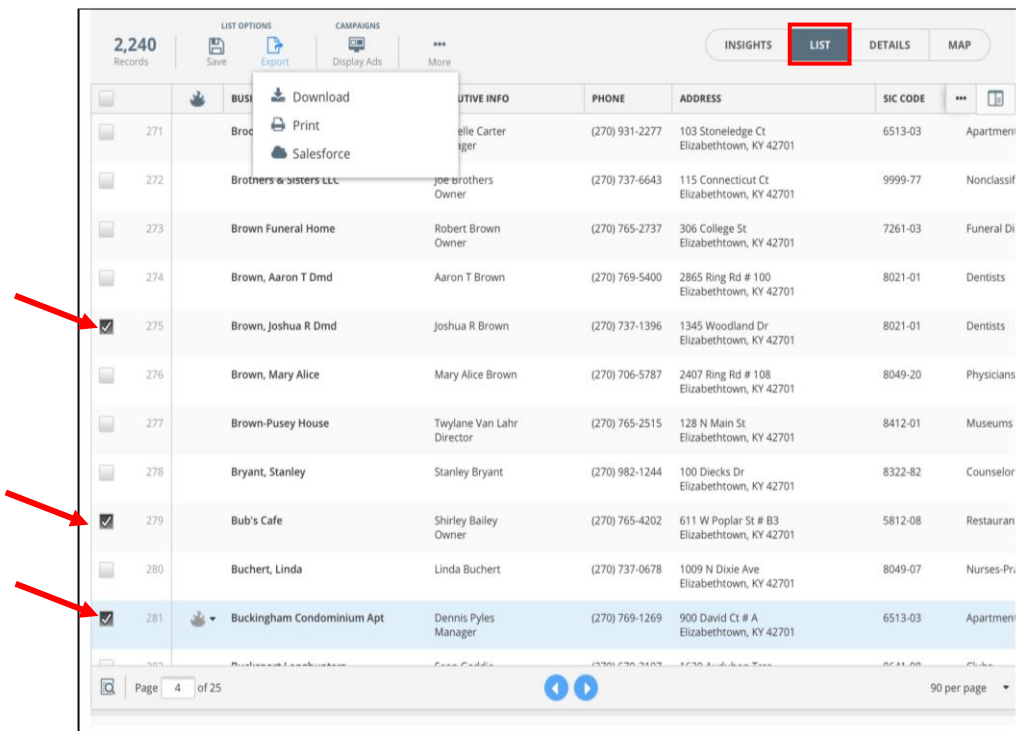
To review which Businesses have been selected use the dropdown found on the header by tapping then selecting the “Selected Records” option, updating the map with only the check marked businesses:



Now that at least one specific B2B Prospects has been selected, at the top right hand corner, in the Data Axle Page View Options, tap on “List” to return to the list view (selected businesses will remain check marked):



The list will update with the selected B2B Prospects showing a checked box and the Page View Options will have “List” displayed:

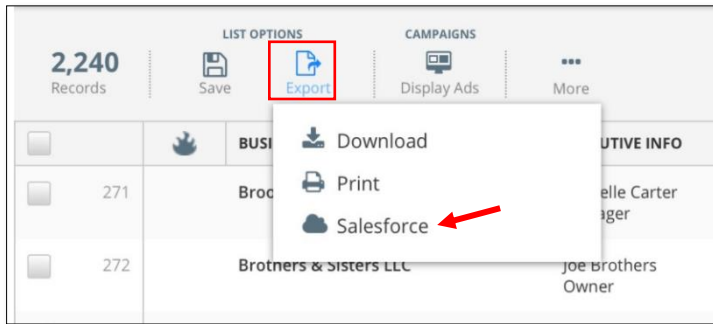


Continue to select leads from the list if desired or continue to the next steps to export leads out of Data Axle Genie to Salesforce.

Export Selected B2B Prospects to Salesforce

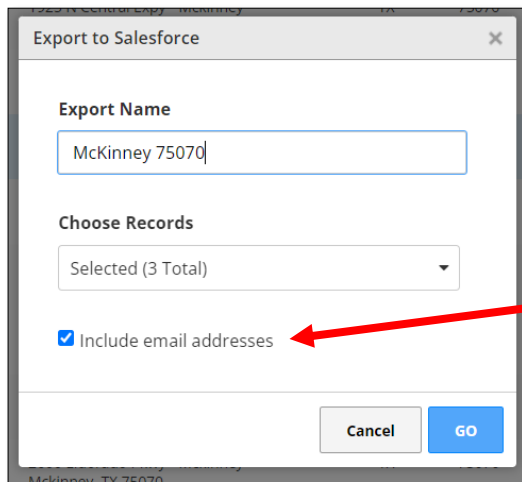
After selecting the specific B2B Prospects from the previous steps, under “List Options”, tap on “Export.” The button will turn blue as displayed in the image below.

This will reveal three additional options for Export. Tap on the “Salesforce” option to proceed:



Important: “Download” or “Print” will not send the B2B leads to Salesforce or MSA.

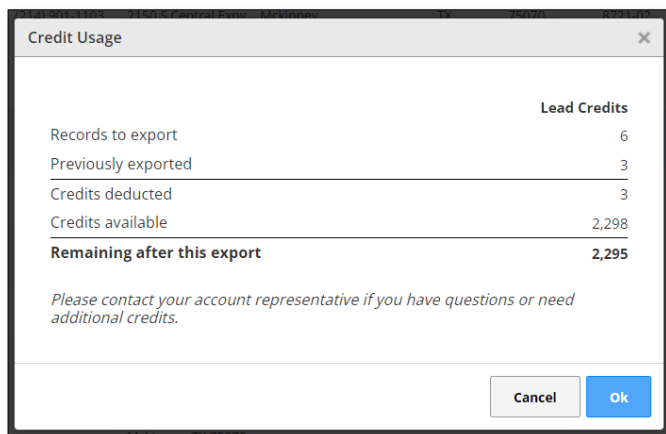
Once the Salesforce option is selected, a pop up window will appear with the option to Save the Export name. It’s recommended to name with details of what specific filters were used so that the export file will be easy to identify in the future in the My Exports section of the Data Axle Genie Menu. The example below shows the City and Zip code as the name. The window will also confirm the number of selected records (i.e. Business leads). Uncheck the “Include email addresses” selection, then tap “Go”:



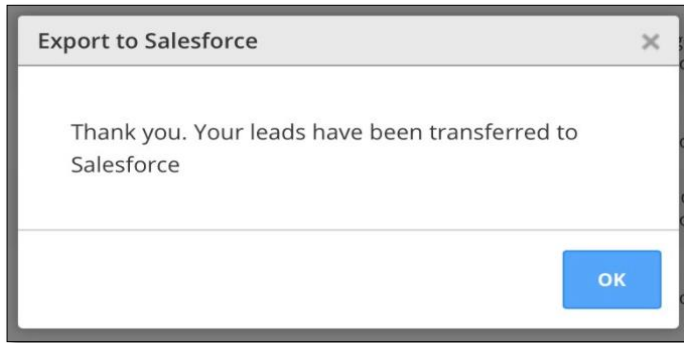
IMPORTANT: Uncheck this box before tapping “GO”

Important: If the “Include email addresses” box is not unchecked before tapping on “Go” an error may appear or leads may not be exported to Salesforce or show that there are no credits despite credits being available. If error was received, return and attempt to export again with the box unchecked.

The next pop up window will appear displaying the number of credits being exported along with credit (leads) usage. 100 lead credits will be added weekly. Lead credits accumulate weekly and will roll over. Tap “Ok” to proceed:



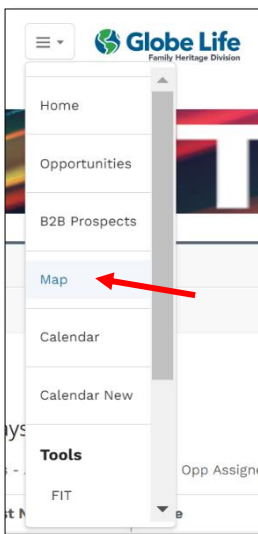
A final confirmation message will appear. Tap “OK” to proceed:



This will conclude the process of exporting B2B leads to Salesforce. Remember there is a 60 minute processing time before recently exported B2B leads populate on the Salesforce Map for Pushing to Mobile.

MENU: SALESFORCE MAP

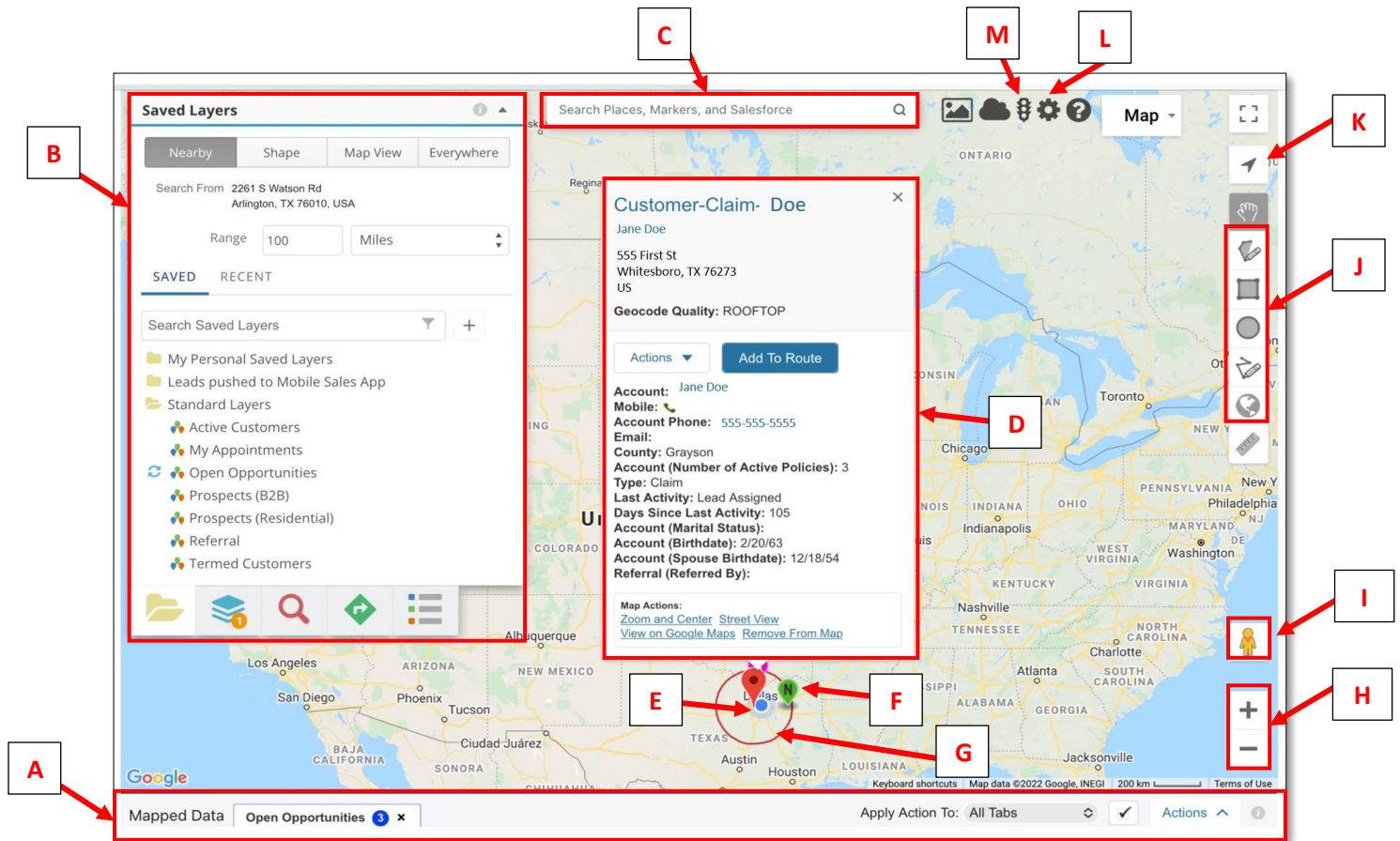
One of the most useful tools in Salesforce is the Map which is utilized to see Lead Opportunities and Active Customer Policies in a visual manner. Some of the key functionality of the Map is the ability to Push to Mobile and ability to optimize a work Route that can be sent to a mobile phone (connected with Google account). The Map is set up for the user based on the AMT assigned role/permission level by having folders/layers that can display Opportunity, Policy, or Prospect pins organized by map folder and layers. Additionally, the Map displays a list of loaded map pins, facilitating ease of reviewing information with the purpose of pushing relevant leads to Mobile Sales App. This section will cover the Map’s layout, control panel, actions available (Push to Mobile and Routing), as well as best practices.



From the Navigation Menu, tap on “Map” to view the Salesforce Map.

As a best practice, the Map is best viewed with the tablet oriented in “Landscape Mode” and at 75% Screen Zoom. The Map has two User Interface (UI) settings, the recommended use is the Desktop UI version. If the map on your screen does not match the image examples on the next set of pages, refer to the available FIT Video on how to update the Map User Interface (UI Preference) settings.

Below is a diagram of how the Map is organized in Desktop UI:



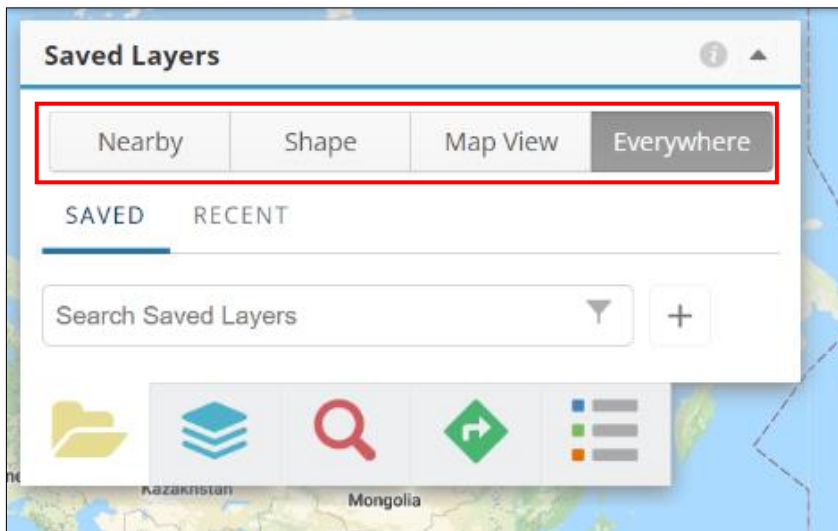
- A- Map list** will be available once Map layers have been loaded and will remain hidden at the bottom of the screen until user scrolls (far right side) down. Map list expands and collapses by touching the middle of Map list bar and slowly dragging fingertip in an upwards motion.
- B- Map control panel** is what Salesforce will use to understand what parameters the user is wanting to see populate on the Map. It controls the search area, the map folders and layers, as well as the various additional icons at the bottom of the panel.
- C- Map Search Bar** will search the map for locations, pins, and Salesforce Opportunities to move the location pin and map view right to the specific area.
- D- Pin Tooltip** will display when any loaded Map Pin is tapped. The tooltip will show different information based on the type of lead. It will also have Actions (Load, Push, & Route).
- E- Current location** will display a blue dot and a location red marker if GPS enabled.
- F- Map Pin** icons come in many colors that coincide with the Lead Type. They also match the Map Pins (for non-custom pin markers only) on the Mobile Sales App Leads Map.
- G- Radius** will display if GPS is enabled and is denoted by a red circle.
- H- Zoom** in or out buttons can be tapped or user can gesture with fingertips (pinch and release).
- I- Street View** icon will display a Google image of the exact street view of the area.
- J- Shapes editor** icons control how the Map Shapes are set.
- K- Current Location** icon will move the map to center on your current location if GPS is enabled.
- L- Map Settings** icon can be used to switch between Desktop UI preference and Mobile UI preference on a Map. Desktop UI is the preferred version to use.
- M- Traffic** icon will add traffic data onto the Map (as a GPS Map app does).

Map Settings

Tapping on the Setting icon will open the Settings panel. Though there are many settings available for the Map, the key ones have already been set to default to conform to a Family Heritage Division Sales Professional needs. Therefore it is not recommended to make changes unless required.

Map Control Panel

In Desktop User Interface (UI) of Map, the Map Control Panel appears on the upper left side. The options available for map viewing are at the top of the panel:



“**Nearby**” is useful when GPS is enabled and in the field. Example scenario is if agent Approaching/Pre-Approaching in a residential or commercial area and prospect names are needed for the street the agent is currently on. Using this option will also allow user to set range in miles of the search radius.

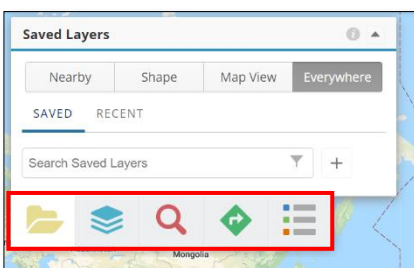
“**Shape**” is used when a created territory has been already established using the Shape Editor. Tap on Shape and load Map Shape from the “My Personal Saved Layers” folder.

“**Map View**” will use the window/screen of the browser as the search area for the map. If no records are found, zoom out on the Map to expand the search area then attempt loading layers again.

“**Everywhere**” is the recommended option for when first learning how to utilize the Map. This option casts a wide net showing up to thousands of pins on the Map.

Map Controls: Tabs

There are five icons at the bottom of the Map Control Panel that will update the panel based on the tab that is open:



- **Saved Layers** Tab is the icon of the folder.
- **Mapped Layers (Stacked Layers)** Tab is the blue icon of the stacks.
- **Search** Tab is the red icon of the magnifying glass.
- **Route** Tab is the green icon of the diamond with an arrow.
- **Legend** Tab is the multicolored icon of a bulleted list.

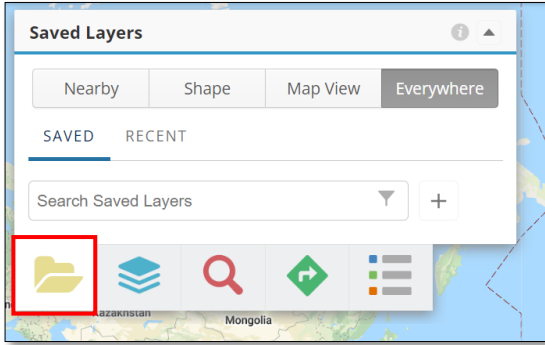
The sections that follow describe each specific tab’s purpose and use.

Map Controls: Saved Layers Folders Tab

Each folder has information that corresponds to Opportunities, Prospects, or/and Policies. As a reminder here are a few of the lead type of each:

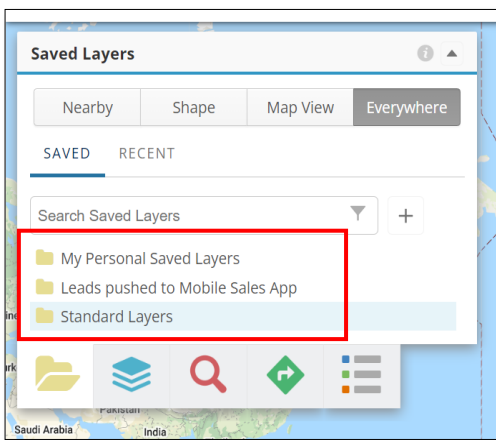
- Opportunities- Claims, New Policy Follow Up, ROP, Termed, and Orphaned
- Prospects- B2B Prospects, Residential Prospects, Ad Hoc Prospects, and Referrals
- Policies- Active Customer and Termed Agent’s Active Customers

Tap on the Folder icon to view available Saved Layers by expanding the panel (tap again to collapse):

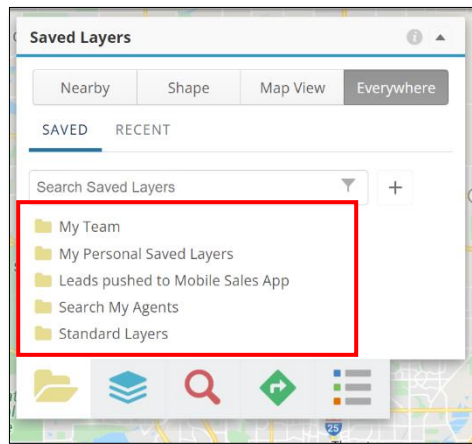


Once expanded, the Layer Folders will display based on the set role/permission level:

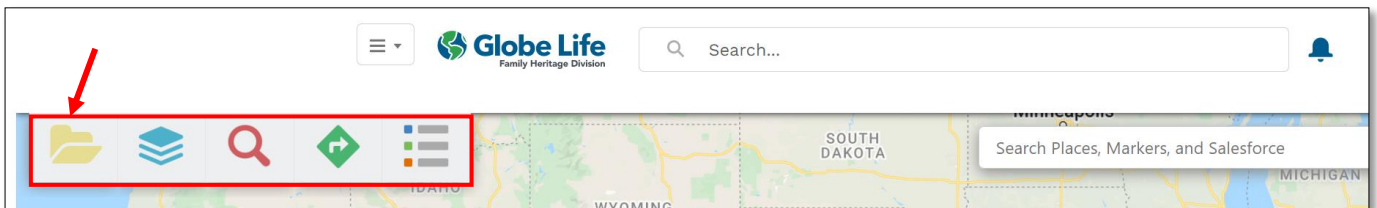
Agent's Saved Layers Folders



Agency Builder's Saved Layers Folders

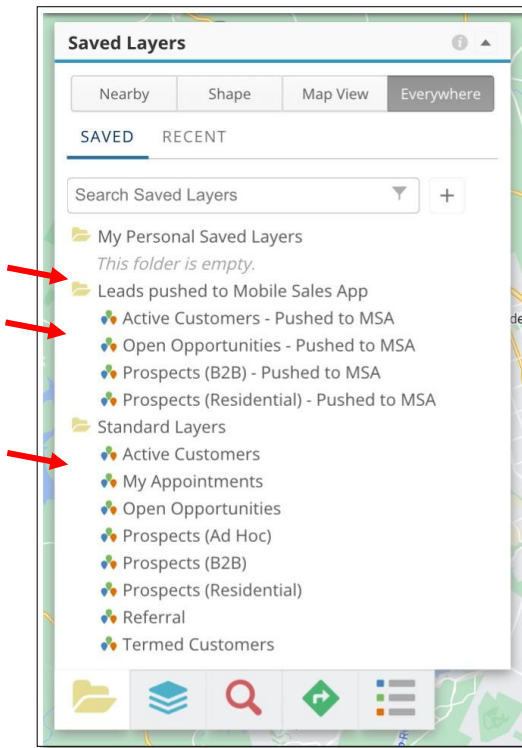


If Map Control Panel is collapsed closed, like the image below, just tap on any tab icon to expand again:



Tapping on any Map Folder will expand folder to reveal the data set map layers available for loading onto the Map. Tapping on the same expanded Folder will collapse the row.

Both Agents and Agency Builders will have the following Map Folder Layers:



- **My Personal Saved Layers**

Data sets based on customized map layers created by the user. Will remain empty until user creates a personal data set layer. This is also where the created Shapes will be stored for use on the Map. A user can have unlimited layers in this folder as well as Shapes.

- **Leads Pushed to Mobile Sales App**

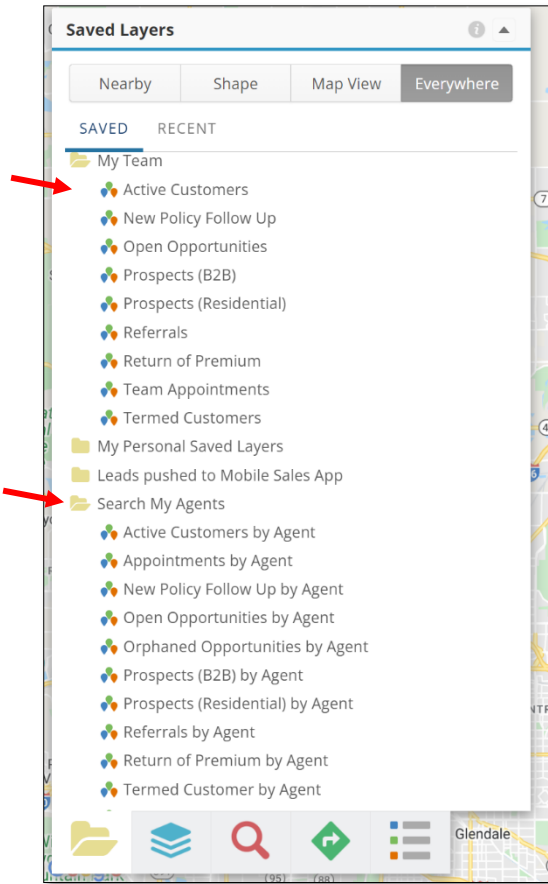
Data sets based on what was sent to MSA in the last 24 to 48 hours (set by type of lead). Active customers-Pushed to MSA will display Pins on the map for 48 hours after being pushed as well as Open Opportunities-Pushed to MSA, and Prospects (B2B)-Pushed to MSA. For 24 hours after being Pushed to Mobile the Prospects (Residential)-Pushed to MSA layer will display Pins on the map. After the time limit these layers will be reset.

- **Standard Layers**

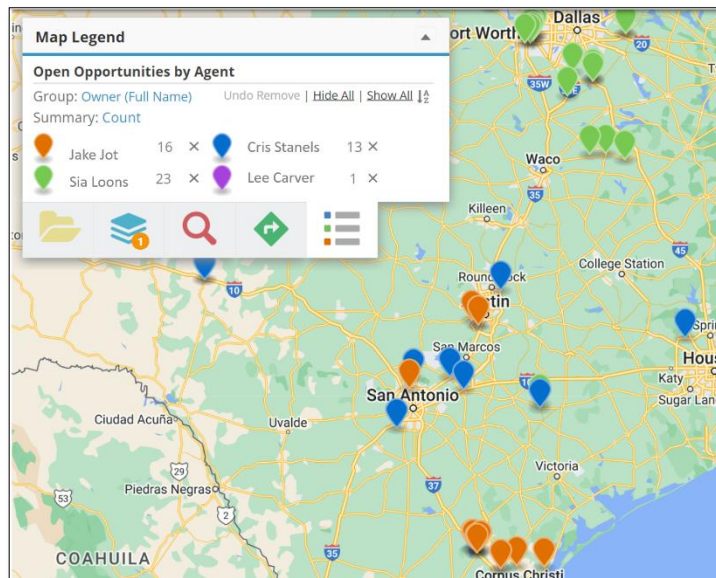
Data sets that are based on key open opportunities, prospect data, and customer policy info. This layer is grouped according to the

lead types. For example, the Open Opportunities layer contains: Claims, New Policy Follow Up, Active Customers already pushed to mobile with activity in MSA, Orphaned, Termed Exclusive, and Termed Agent Active Policies. To learn more about what each map layer contains continue reviewing this section.

Agency Builders will have the following additional Map Folder Layers:

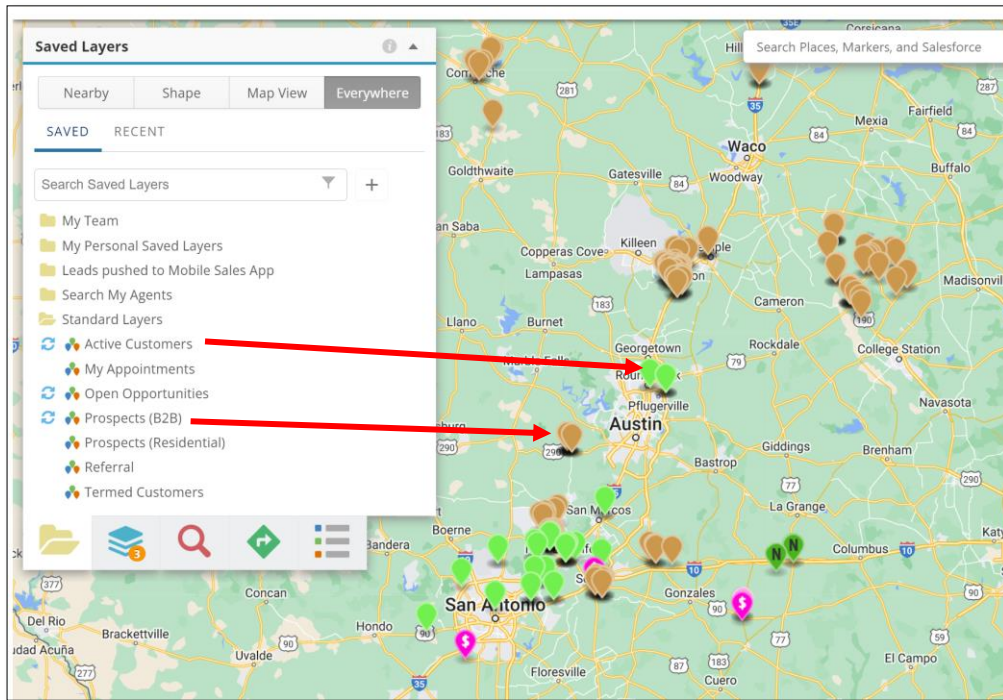


- **My Team-** data sets that exclude the AB’s own opportunities, prospects, and policies.
- **Search My Agents-** same data set as My Team except the pins will randomly assign each agent a color across all data set layers (i.e. if Agent’s pin is purple, all layers will open with the same pin color). To view what colors correspond to what Agent, tap on the Legend icon:



Display Map Layers

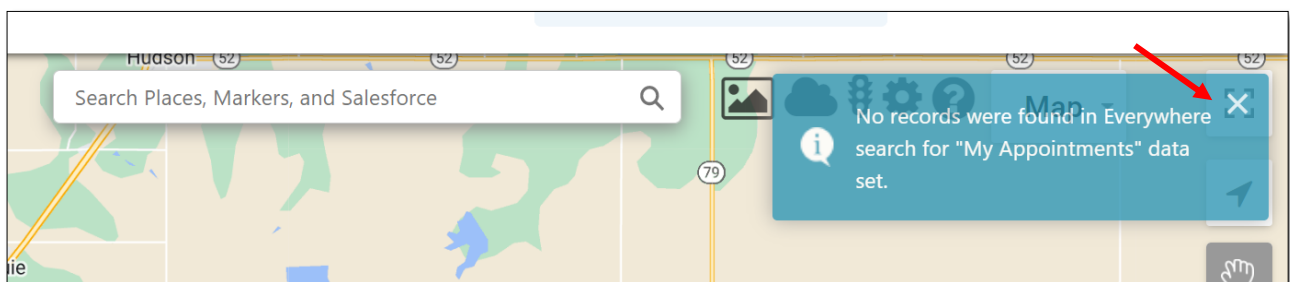
On the Folders tab, tap on any Folder icon to expand the selection, then tap on the name of the Map Layer in order to load onto the Salesforce Map:



Depending on which Map Layer is loaded, various leads in the form of Map Pins will begin to appear. User can load one layer or multiple layers according to their needs. A Layer will show as loaded on the Map Control Panel by displaying the Refresh icon:









If there are no records available on the selected Map Layer a brief message will flash at the top right corner of the Map:



Note: This message can come up if “Map View” option is set unintentionally. For example, the Map is zoomed on the State of Alaska, user is wanting leads in Texas but the Map is set to search only the “Map View.” To correct, select the “Everywhere” option and tap on the desired Map Layer again. Alternatively, use the Map Search Bar to move the Map to a specific area.

Map Pins

Each Pin marker that populates on the map is a lead record that could be either an Open Opportunity, Active Policy, or Prospect. The table below demonstrates which Pins correlate to each Lead Type:

Pin	Type of Lead	Description of Lead (Opportunity)
	Active Customer	Personal Book of Business where Agent is the Original Writing Agent.
	Active Customer Opportunity (MSA)	User has pushed Active Customer Opportunity to Mobile Sales App and Dispositioned it.
	Active Customer Reservice	Manually assigned by the AO/Admin from the Salesforce Map. Closes after 31 days.
	Termed Agent Active Customer Reservice	Manually assigned by the AO/Admin from the Salesforce Map. Closes after 31 days.
	Termed Agent Active Policy Opportunity	Automatically created leads that get reassigned by the AO/Admin.
	New Policy Follow Up	Populates 30 days after the Effective Date. Closes after 31 days.
	Orphaned	Original Writing Agent or AO is no longer active with FHD.
	Claims	An Active Customer has been issued a Claim payment (not a Wellness Benefit Claim).
	My Appointments	Appointments user has set in within Salesforce. Last 7 days only.
	Return of Premium	Active Customers that have reached their Money Back Maturity date and a Return of Premium has been issued.
	Prospect B2B (Data Axle Genie)	Business Prospect sourced and exported out Data Axle Genie to Salesforce. After 120 Days with no Activity ever recorded on the Opportunity will close and clear from the CRM System but will still be available to re-export from Data Axle Genie.
	Prospect Residential Married	Residential Prospect, sourced from Salesforce Map, whose marital status is Married.
	Prospect Residential Single	Residential Prospect, sourced from Salesforce Map, whose marital status is Single.
	Prospect Ad Hoc (MSA)	Prospect data captured in Mobile Sale App.
	Referrals (MSA)	Referral data captured in Mobile Sale App.
	Termed Exclusive	Customer whom has cancelled all existing policies with FHD. Closes after 90 days.
	Termed- Customer Initiated	Customer initiated cancellation of existing policy. Closes after 90 days.
	Termed-Non Payment	Policy cancelled due to no payment. Closes after 90 days.
	Termed-Bank Return Item	Policy cancelled due to bank return. Closes after 90 days.
	Terminated	Policies no longer active with FHD. Closes after 90 days.
	Pushed to Mobile Sales App	Opportunity has successfully been pushed to Mobile Sales App. Resets after 24-48 hrs.
	Imported	Leads that were manually imported by the AO/Admin on behalf of the Agent.

A user may not have all lead types available on the Map. The Layers also all exclude Closed Opportunities. To view what the Map Layer is filtering and displaying, quickly tap on the three vertical dots on the specific Layer immediately after tapping:

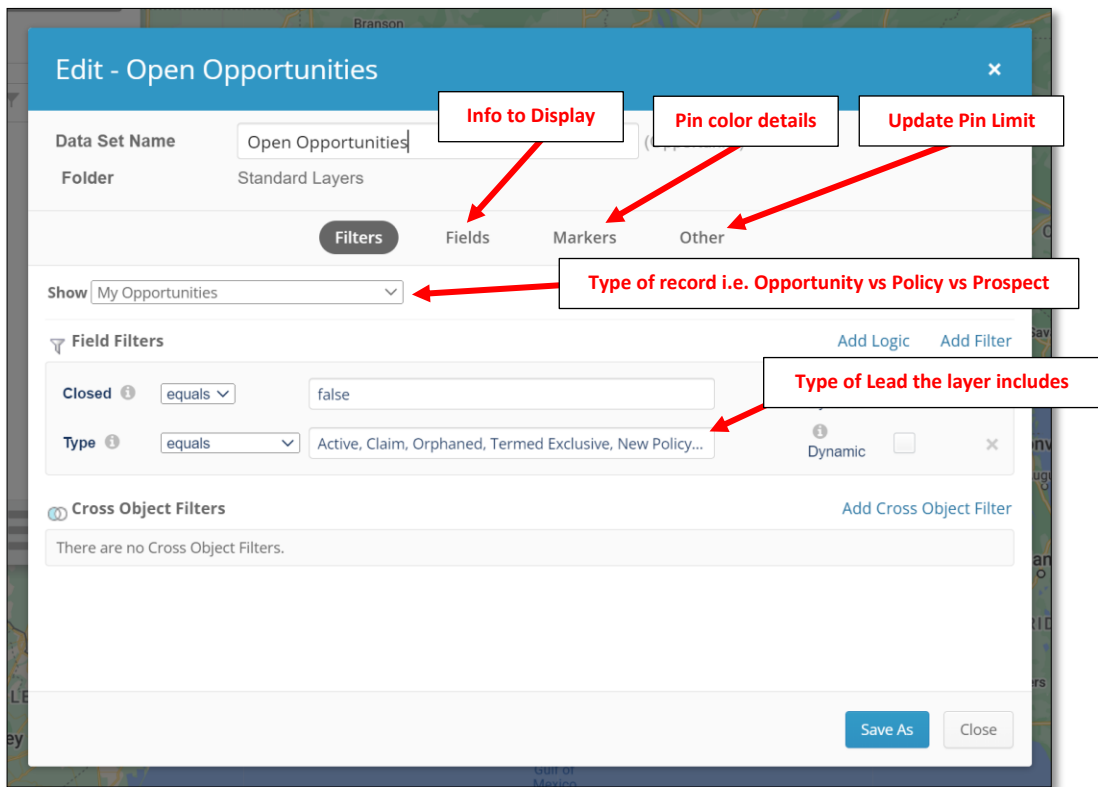


Then tap “Edit Data Set”:



(Note that tapping on the “Enable Auto Loading” option sets the elected Map Layer to auto-load every time a user opens their Salesforce Map, regardless of map viewing option.)

An “Edit” box will appear on center of screen where user can review the data set details:

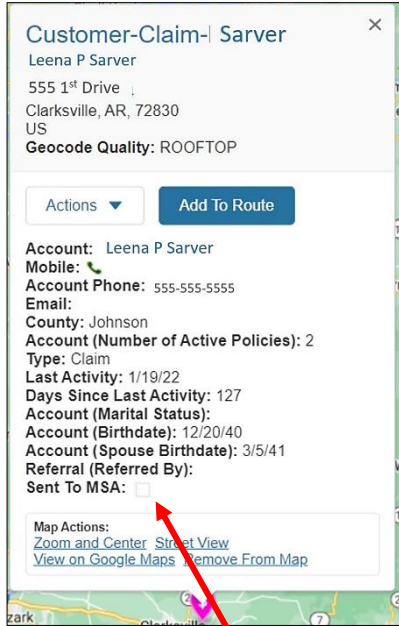


Note: Default Map Layers are locked for editing however new Map Layers can be created using the same “Edit” box that can be edited by the user. Continue to final portion of the Map section to learn more.

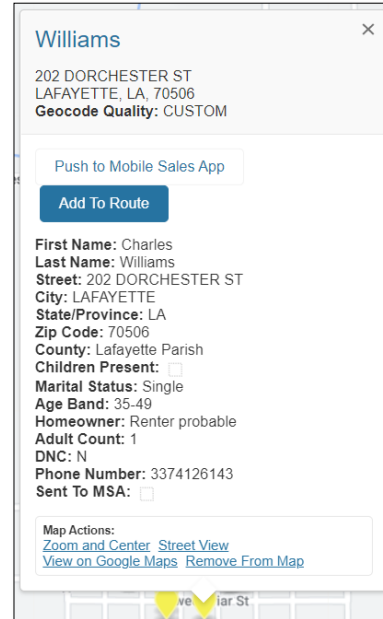
Map Tooltip

Each Map Pin, when tapped, reveals a Tooltip pop up with overview information about the Lead. Tooltips may appear slightly different or have different information completed according to the Lead Type. For comparison, view the example the Tooltip images below that display differently:

Claim Opportunity Tooltip:

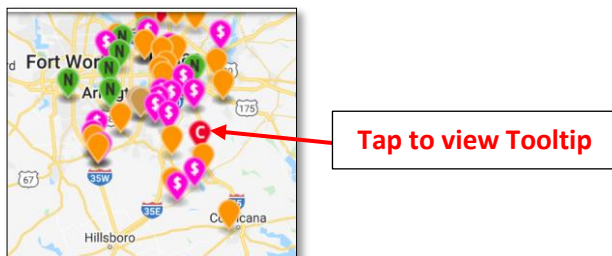


Residential Prospect Tooltip:

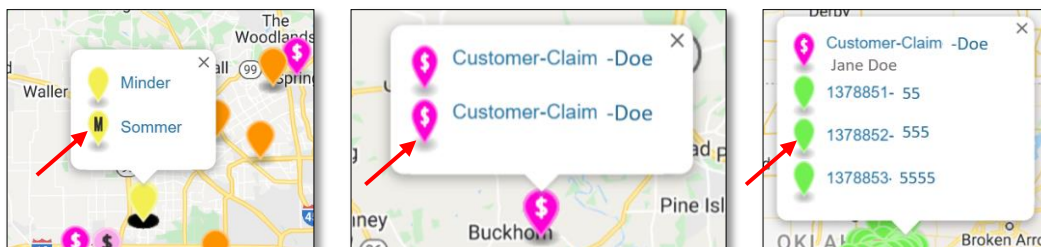


Note that the “Sent to MSA” indicator at the bottom of the Tooltip will be checked if lead was Pushed to Mobile and map layer was refreshed. The indicator resets at 11:59 pm the following day only for Active Customer Policies and Residential Prospects. For all other lead types the indicator will remain checked. Indicator is not available for “My Personal Saved Layers.”

Tap on a displayed map Pin to view the Tooltip:



If a Pin is tapped and two records display, select one of the records to continue to the Tooltip:



Pin Tooltip: Actions Button

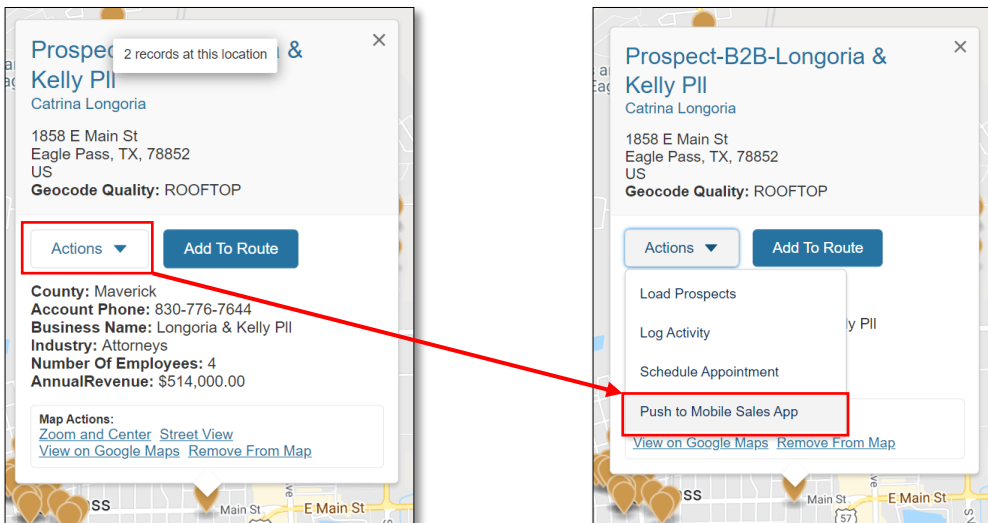
Each pin Tooltip will have Actions button available however, *placing* may vary depending on the Lead Type. Tooltips allow users to Load Prospects (Residential), Log Activity (call or drop by), Schedule Appointments (which sync to MSA Leads Page), and Push to Mobile Sales App.

Not all Lead Types will display the previous options, such as Active Customer vs Residential Prospects example below:

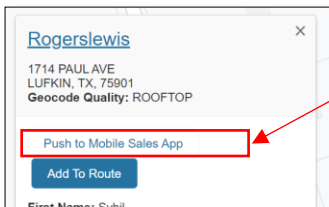


Actions: Push to Mobile Button (Pushing One Pin to MSA)

Send a Lead record to Mobile Sales App by using the “Actions.” Tap on any non-residential prospect Pin displayed on the Salesforce Map to view the Tooltip. Then, tap on the “Actions” button to display the Action-“Push to Mobile Sales App”:

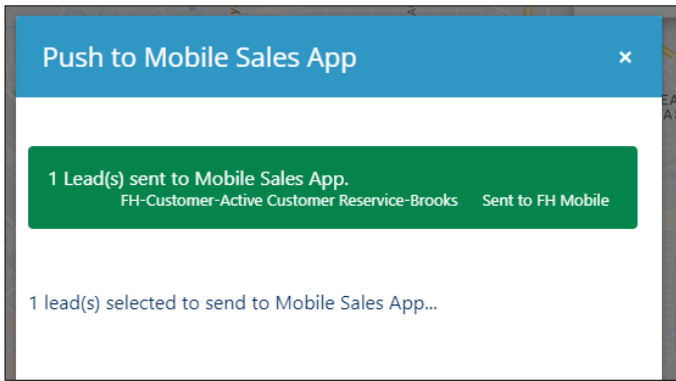


Prospect Tooltips will not have an “Actions” button but a direct “Push to Mobile Sales App” button:

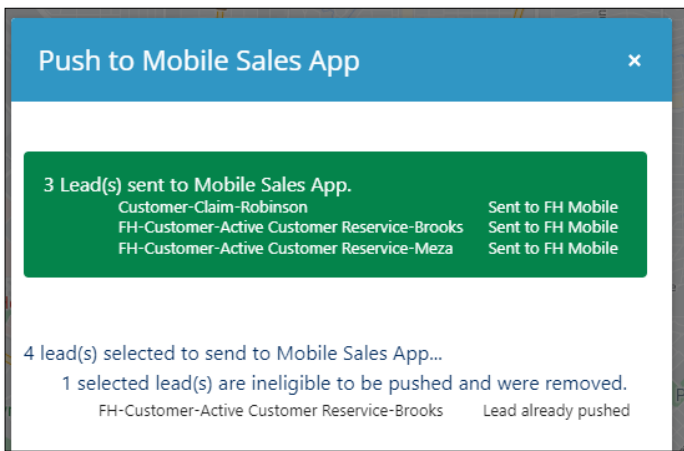


A confirmation will display allowing the user to view if the Push was successful, which Leads were unable to be pushed, as well as the reason why they were not sent.

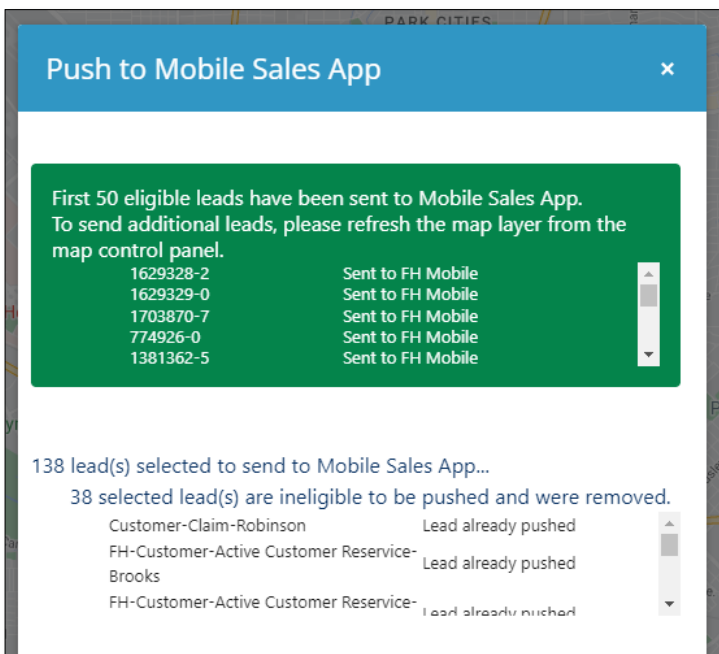
Below is an example of a Success Message with no errors:



Example where not all the Leads were successfully sent (reason: one lead already pushed to mobile):



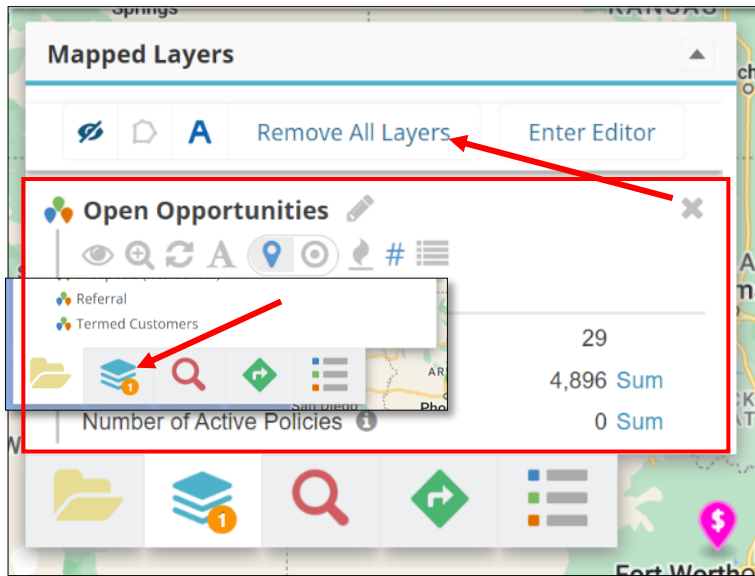
Up to 50 leads can be Pushed to Mobile at one time. If more than 50 leads are selected (up to 1,000 records), the system will send the first 50 eligible leads:



To send more of the selected leads, re-tap from the Actions menu “Push to Mobile” until all selected leads are sent. After a successful Push, user can now complete the process by returning to Mobile Sales App’s

Lead Page to manually Sync Leads, downloading the newly pushed leads from Salesforce. Refer to the Mobile Start-up Guide for more information on how Leads Management works in MSA.

Map Control Panel: Mapped Layers (i.e. Stacked Layers icon)



The second icon at the bottom of the Map Control Panel is the Mapped Layers icon (also referred to as “Stacked Layers” icon). When at least one layer is loaded onto the Map, the icon will display the layer loaded count within an orange circle. Tap on the icon to view the Mapped Layers Tab where a Summary of each layer loaded:

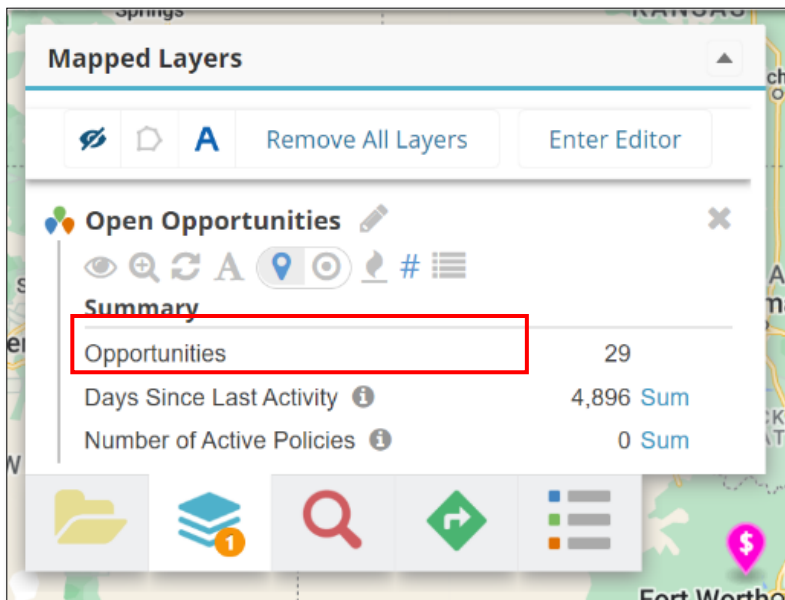
The Mapped Layers will display the number of Opportunities (records) on the specific layers, a sum of the Days since last activity of those Opportunities.

If data set map layer loaded is a Policy layer (i.e. Active Customers Map Layer) it will show a sum of the number of policies.

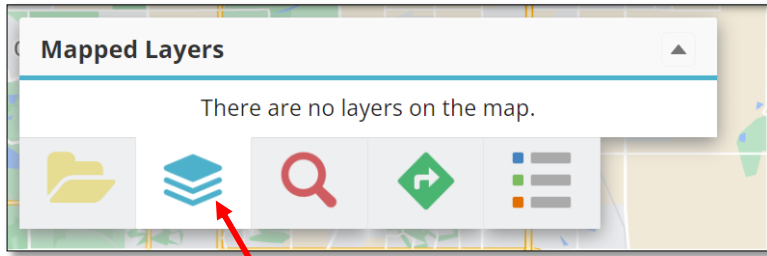
To remove a layer from the Map tap on the “X” at the corner of each layer’s summary. To remove all layers, tap on the “Remove All Layers” button at the top.

The pins of that layer will then be removed from the Map.

On the Mapped Layers Tab, each layer will also have settings options available. The default setting will be for pins to display on the Map:



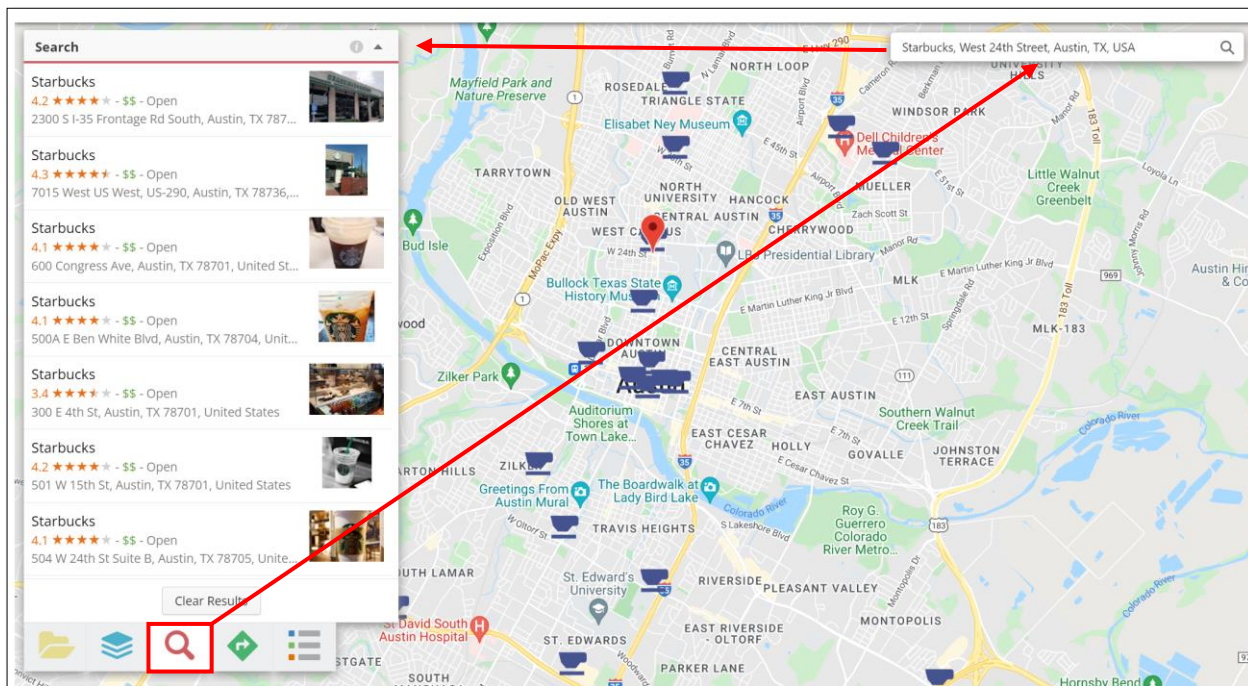
When there are no layers loaded on the Map, the tab will display the Mapped Layers icon with no orange circle with a number and the message will state “There are no layers on the map”:



Map Control Panel: Search

When the Map Search bar is utilized to search a location, the Search tab will display the various search results and the Map will display icons based on what is being searched.

The example below demonstrates that “Starbucks” is being searched. The results of where all the Starbucks are, is displayed on the map with the “coffee cup” icon. The results also display in the Search tab in a list format:

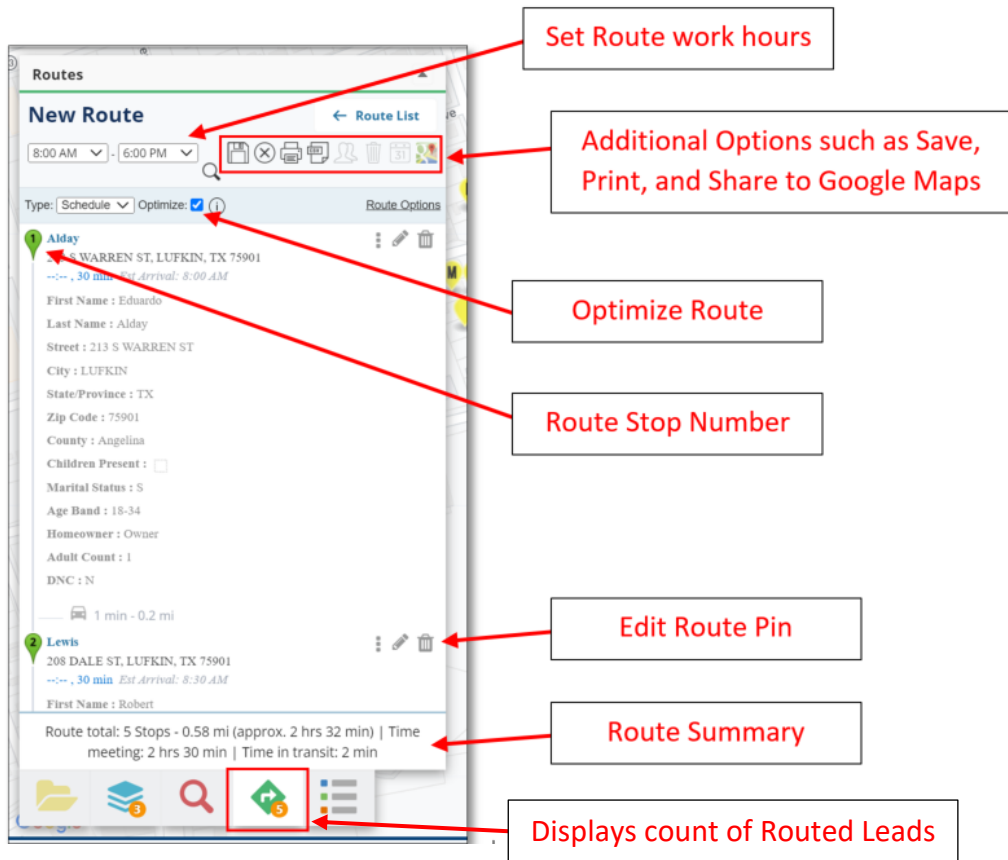


Using the Search Bar will also display underneath the bar the various Salesforce records that match on the Map. It will also move the Map to the location that is being searched, such as County.

This is a great tool to use when searching for a specific Lead or to avoid manually zooming in and out.

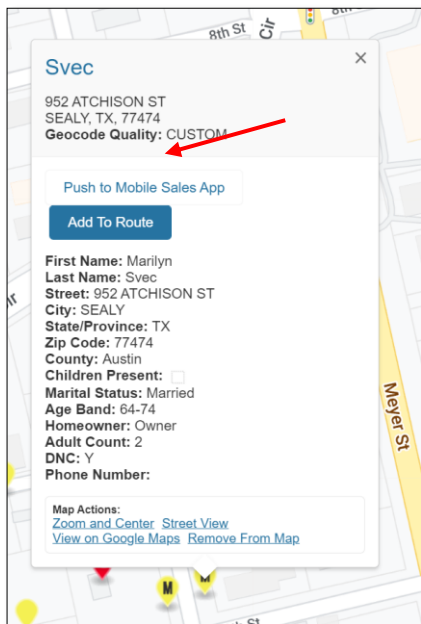
Map Control Panel: Routing

Once Leads (Pins) have been added to a Route, when Route icon on the Control Panel is tapped the New Route will populate where a user is able to set the route schedule, optimize the route, edit the route, save, print, share to Google Maps, and view additional details.



Create a Route:

Load your Layers onto the Map, then tap on a specific pin to review the Tooltip. Then tap on “Add to Route” button:



A green Confirmation message will appear at the top right corner:



Continue to add as many Pins (Leads) as needed to your Route.

A route line with numbered pins will begin to display. A red numbered Pin will denote the final stop on the Route:

Routes

New Route

← Route List

8:00 AM - 6:00 PM

Type: Schedule Optimize: Route Options

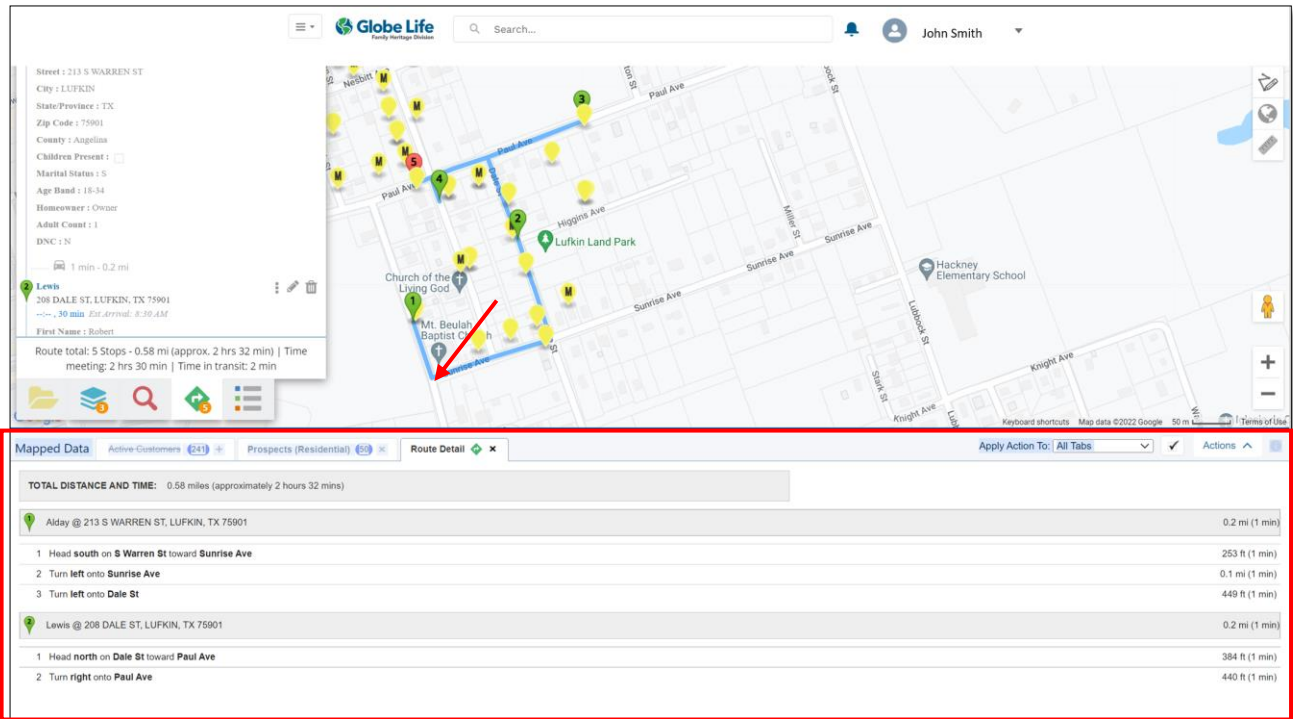
- 1 Alday**
213 S WARREN ST, LUFKIN, TX 75901
---, 30 min Est Arrival: 8:00 AM
First Name : Eduardo
Last Name : Alday
Street : 213 S WARREN ST
City : LUFKIN
State/Province : TX
Zip Code : 75901
County : Angelina
Children Present :
Marital Status : S
Age Band : 18-34
Homeowner : Owner
Adult Count : 1
DNC : N
1 min - 0.2 mi
- 2 Lewis**
208 DALE ST, LUFKIN, TX 75901
---, 30 min Est Arrival: 8:30 AM
First Name : Robert

Route total: 5 Stops - 0.58 mi (approx. 2 hrs 32 min) | Time meeting: 2 hrs 30 min | Time in transit: 2 min

Route Stop Number

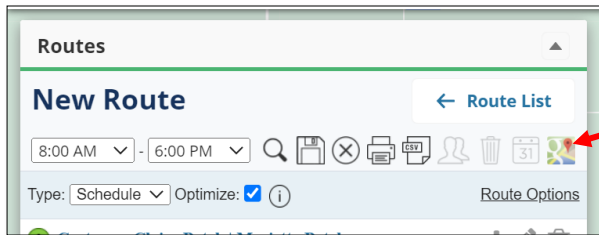
Route: Map List

At the bottom of the map screen, in the Map List, where the Layers Tabs will display, a “Route Detail” Tab will populate which displays additional information regarding the Route in a list format showing information on the travel distance as well as travel time:

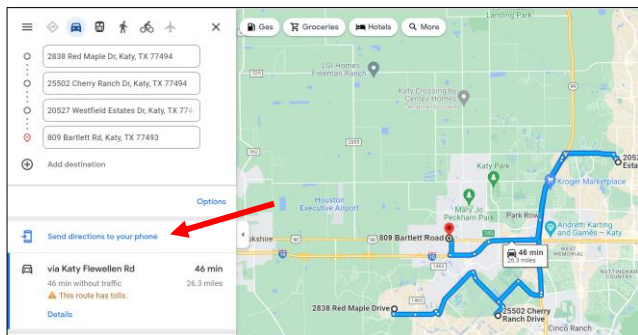


Share a Route to Mobile Phone

One of the useful features of the Salesforce Map is the ability to share the created Route to a Google account. If there is a mobile phone connected to the Google account, the Route can be sent to the Google Maps App on the phone and used to navigate to each of the Leads. Tap on the Google Map icon:



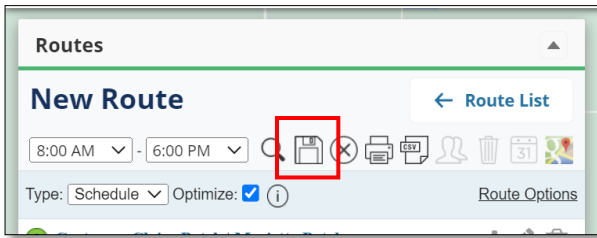
A new web browser window will open (Google Maps) and tap on “Send directions to your phone” link:



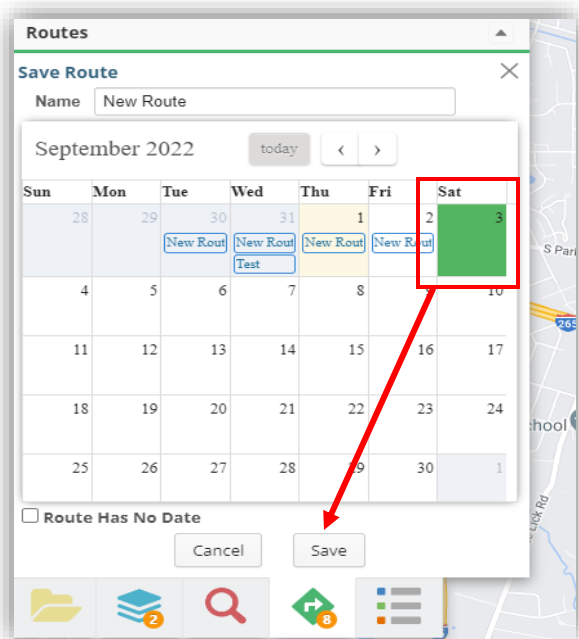
A pop-up window will appear, if user’s Google account is connected, where the mobile phone connected to the Google account can be selected.

Save a Planned Route

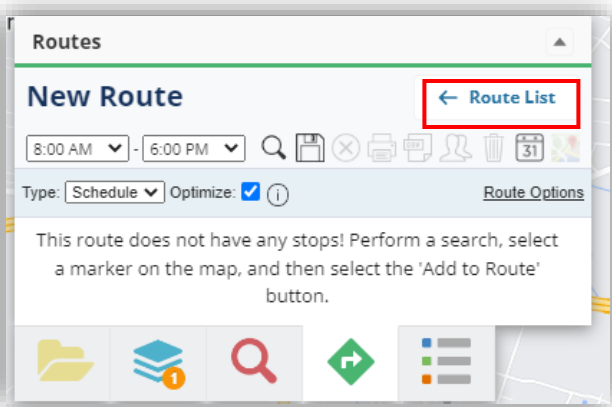
Once the user has their route mapped, they then have the ability to save their route by tapping on the “save icon”, second icon to the right under New Route.



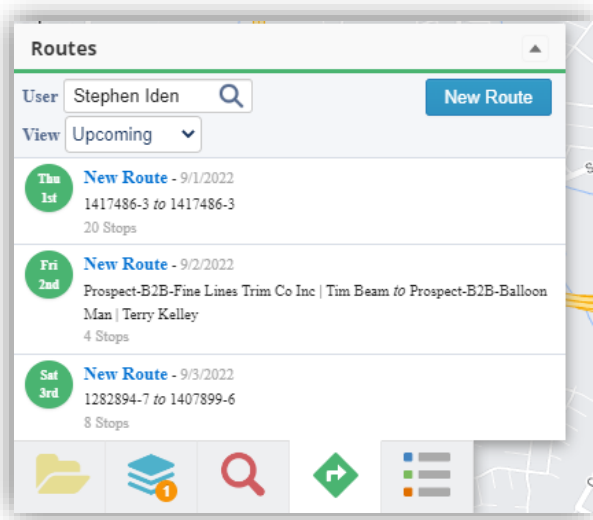
Upon tapping the save icon, the user will then be promoted to select a date on the calendar in which they would like to save their route for. Tap on the date intended for the route to be worked and it will turn to green. Then tap save at the bottom of the calendar.



To view the saved route, tap on Route List in the top right hand corner.

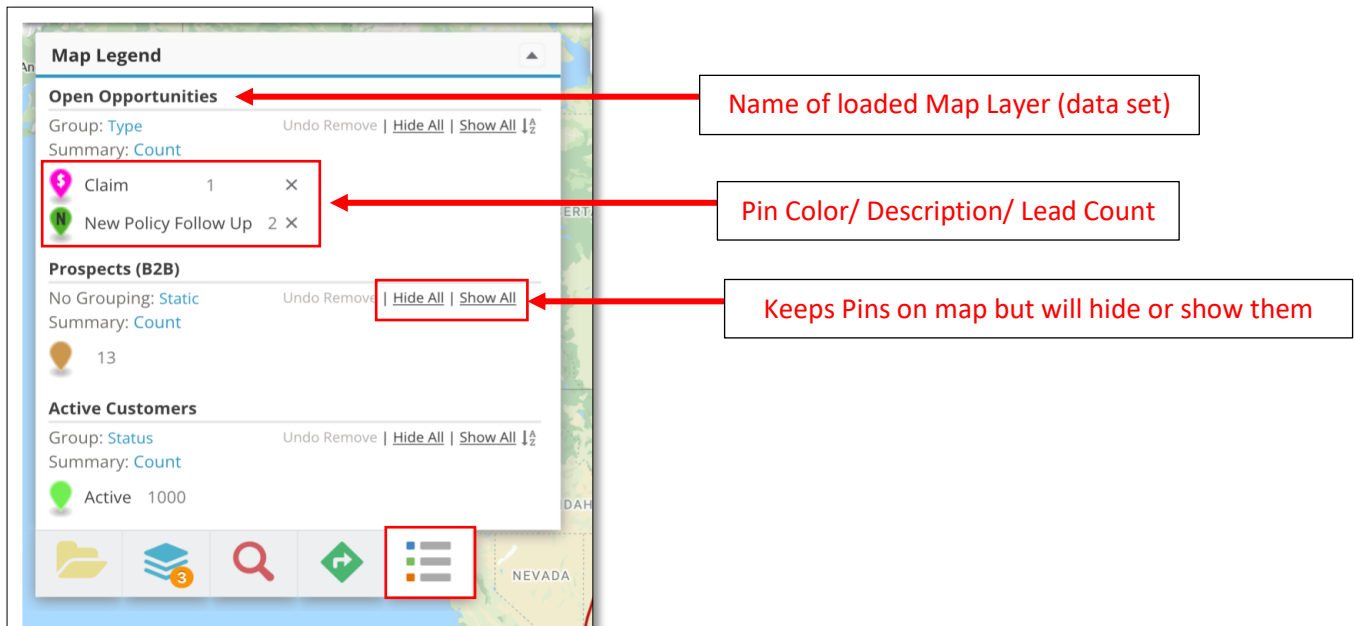


To reopen a saved route, tap on the route wished to be viewed and it will appear back on your Salesforce Map.



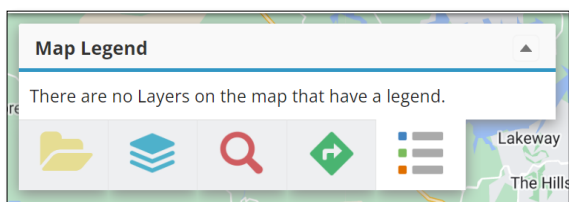
Map Control Panel: Legend

The Map Legend tab is useful for reviewing what the loaded Pin markers are and how many of each are on the loaded Map Layers:



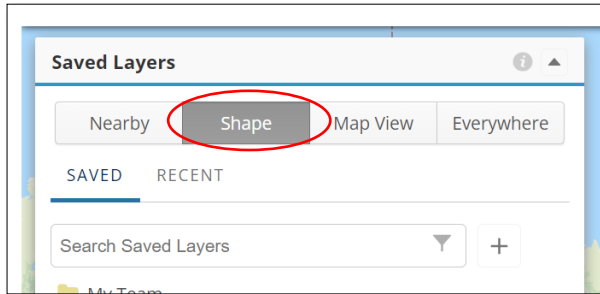
Remember, the maximum number of records that display at a given time on a single Map Layer is 20,000 so the count will never exceed that amount despite Sales Professional potentially having more. Users can create a personalized map layer to increase the amount of markers (Pins) displayed if needed.

If no layers are loaded on the Map, the Legend will appear as so:



Map Shapes

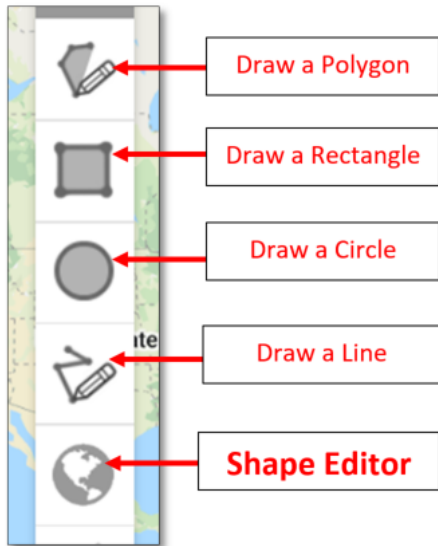
The Salesforce Map has a feature that allows a user to create outlines of areas on the Map, like territories, that can save time when searching for Pins in a targeted area. Shapes are great for Trainmores where a Sales Professional repeatedly returns to a specific area for prospecting. This makes it so that when a user opens the Map, instead of loading layers with the “Everywhere” option, they can use the “Shape” option and select any created Shape that works for them. Tap on “Shape” to use:



To use the “Shape” option, there must already be Shapes ready to be used in the “Personal Saved Layers” Folder.

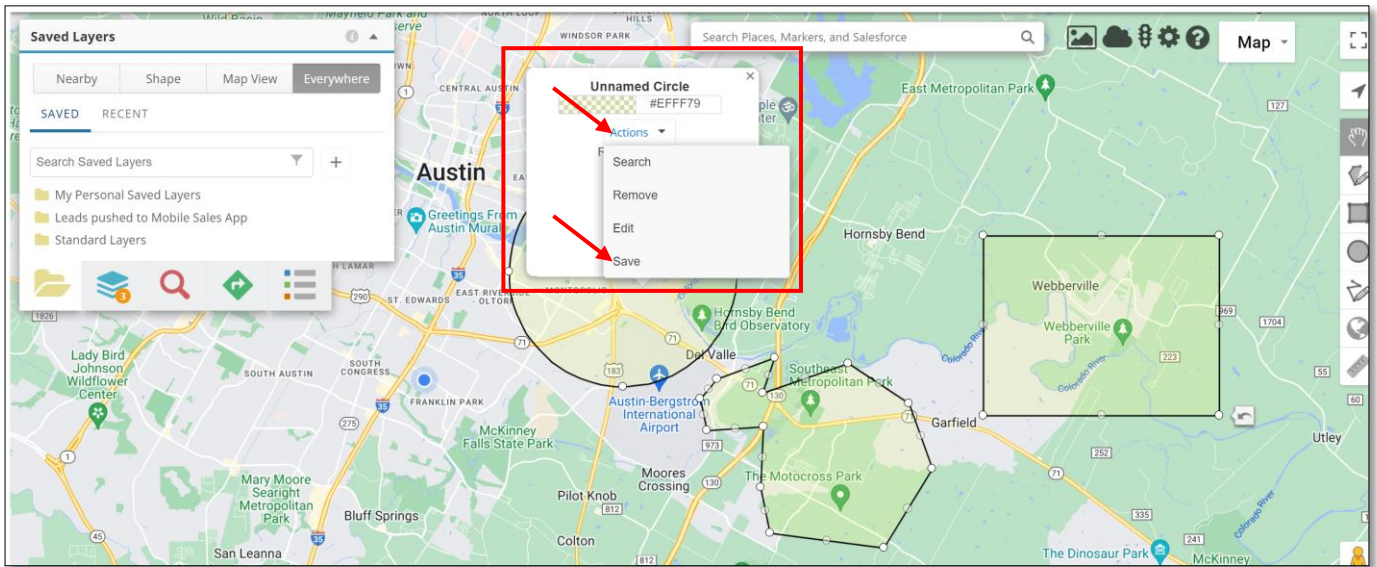
Map Shape Settings

To create a Shape, a user can select any of the Shape Settings icons on the far right side of the Map screen. The Shape icon will draw a different shape based on which is selected. Shape Editor will use pre-set boundaries (i.e. County, zip codes, etc.) to draw the shape and is the recommended feature to use.

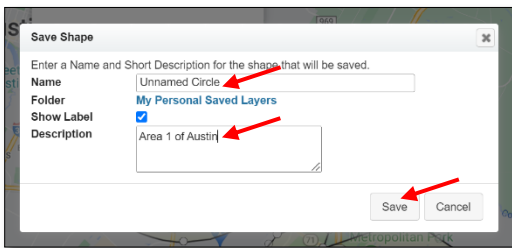


Create and Save a Rectangle or Circle Shape

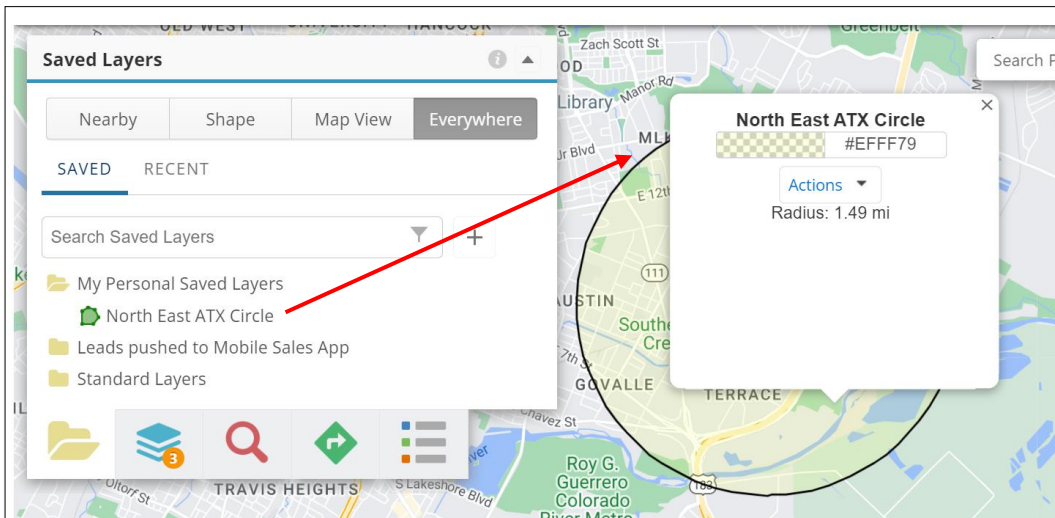
The process of creating a standard rectangle or circle Shape is easily accomplished by tapping on either the “Draw a Rectangle” or “Draw a Circle” icon. The user will then be able to tap on an area of the Map and drag to form a Shape. Once a Shape is formed, tap on the Shape to view the “Unnamed Shape” pop-up box, the tap “Actions” to select “Save”:



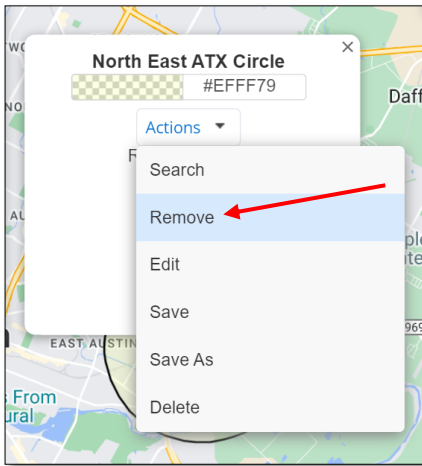
After tapping on “Save,” the “Save Shape” pop-up box will appear where the Shape can be named and description added. Be sure to checkmark the “Show Label” box first, then tap “Save” button:



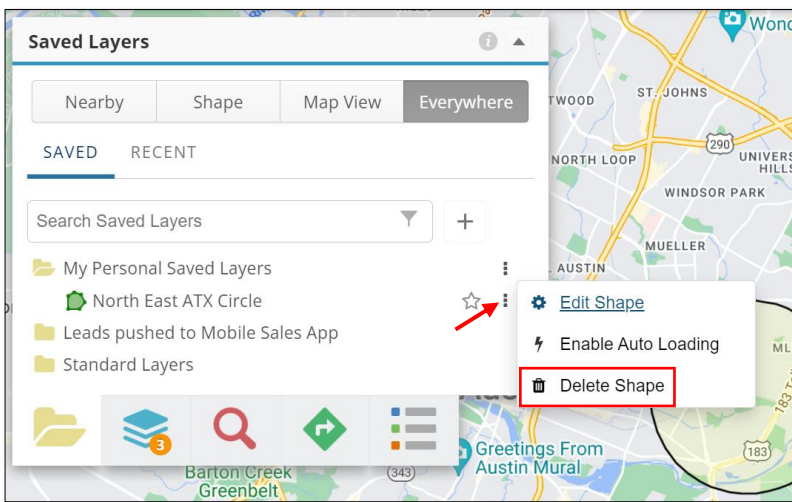
The saved Shape will appear under the “My Personal Saved Layers” folder:



To remove the Shape from the Map, tap on the Shape, then tap on the “Actions” dropdown to select “Remove”:

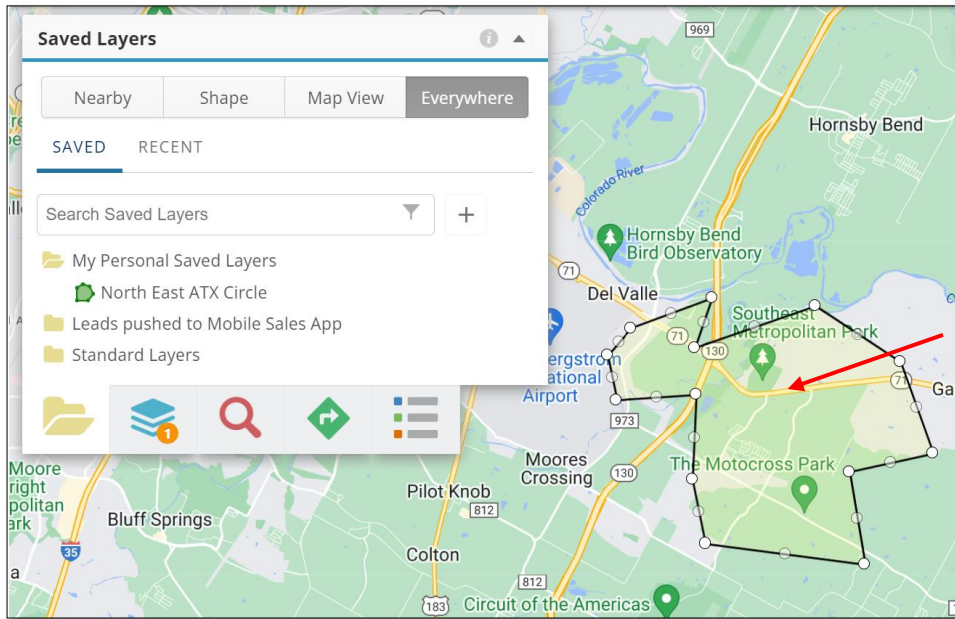


The Shape will remain saved in the “My Personal Saved Layers” until deleted from the Folder:



Create and Save a Polygon Shape

The process of creating a Polygon Shape is similar to creating a standard shape (circle or rectangle) however, tapping and dragging will create one side of the Polygon Shape. Continue tapping and dragging, adding on sides of the Shape until user completes the Shape by connecting the final side to close the Shape. Any Shape can be created like so:

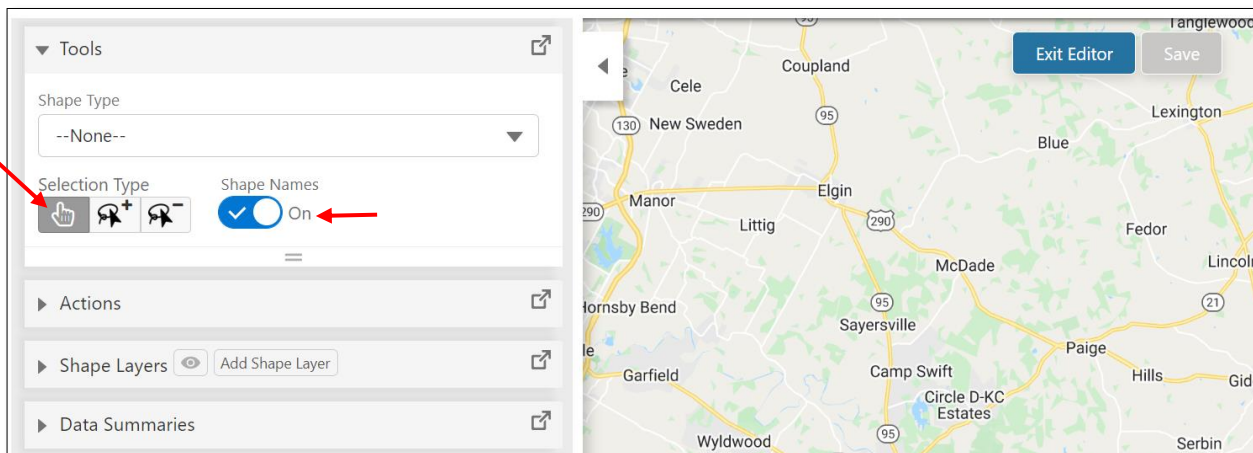


Create a Shape with Shape Editor

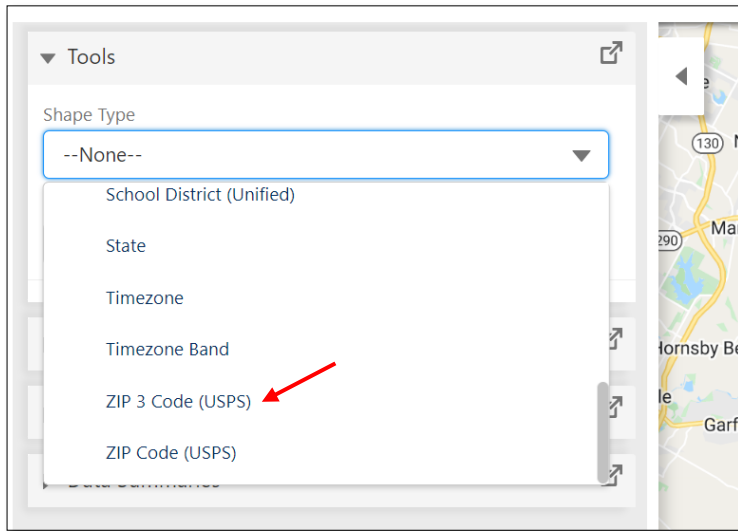
The final method of creating a Shape is by utilizing pre-set Shape Types (i.e. Zip codes, District lines, State lines, etc.) To use this method, move and zoom to area on Map where the shape is needed. Then tap on the “Shape Editor” icon (i.e. “Add Geo Library Shape”) to allow the Editor to load:



Confirm the Selection Type as “Click toggle” and Shape Names set to “On”:



Then, tap on the Shape Type dropdown and select a pre-draw boundary shapes (i.e. State, County, Zip Code, etc.):



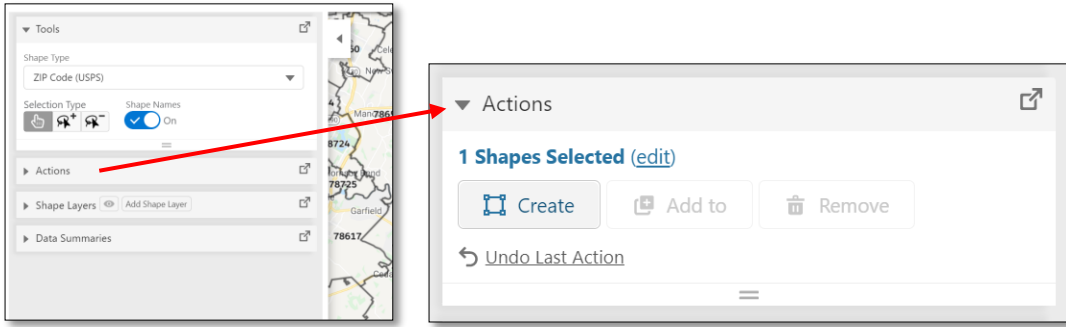
Now, on the Map, based on how zoomed in or zoomed out the Map view screen is, various pre-set boundary shapes will populate. Since “Shape Names” was selected, the shapes will have labels to help easily identify them. For example this image demonstrates USPS Zip Codes:



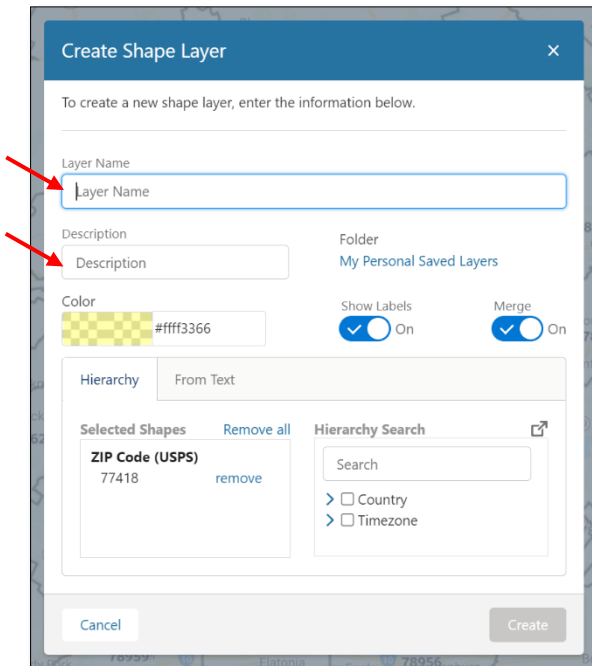
Select one or more boundary shapes by tapping on each, turning their boundary line red. Tap the same shape again to deselect. Example below demonstrated Zip codes displayed and a single one has been selected as the shape to save (in red):



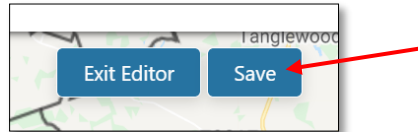
When shape(s) have been selected, open the “Actions” options and tap on the Create button:



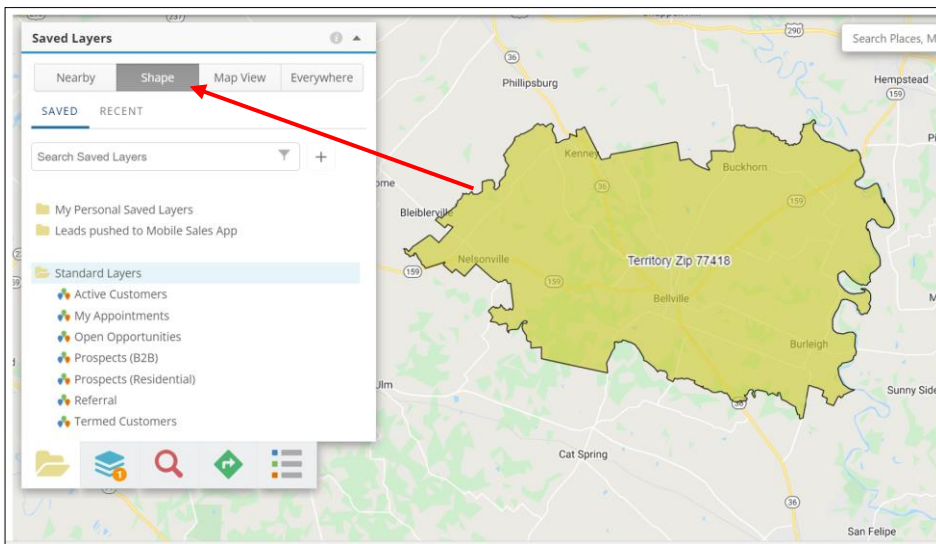
Enter additional information to help identify the Shape easily in the future and for customization (Layer Name and Description). Explore the various options available such as shape color or selected shape areas) then tap “Create” button at bottom of pop up window to continue.



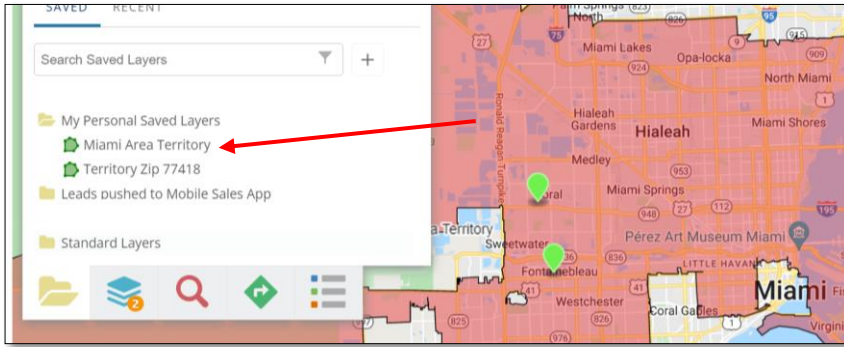
When done, tap “Save” button first, then “Exit Editor” button to continue working on Salesforce Map:



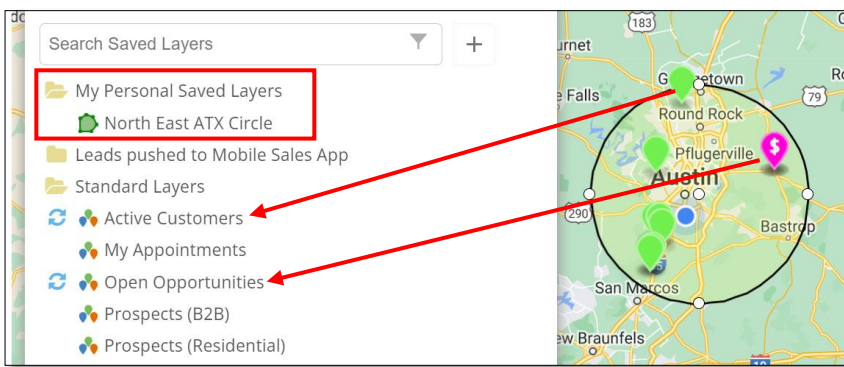
Newly created Shape will now be available on Map when “Shape” viewing option is utilized:



The Shape can be used in the future and will be found under the “My Personal Saved Layers” Folder in the Map Control Panel along with any other saved Shapes:



To use Shape, set the Map controls to search “Shape” then load a Shape first on to the Map. Now load data set map layers, such as “Standard Layer- Open Opportunities” and Pins will only populate within the selected Shape:



For more information on how to use the Shape Editor refer to this website:
<https://customers.geopointe.com/s/article/Create-Shapes-with-the-Shape-Editor>

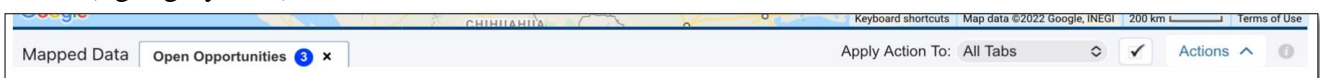
Map List Features

Salesforce Map is a great feature for viewing Leads in a visual format on a single map. However, an additional feature is available at the bottom of the map screen to view data in a list format.

Map List remains hidden until needed. Though the Map List is always available at the bottom of the Map screen, it is only useful when at least one Map Layer is loaded.

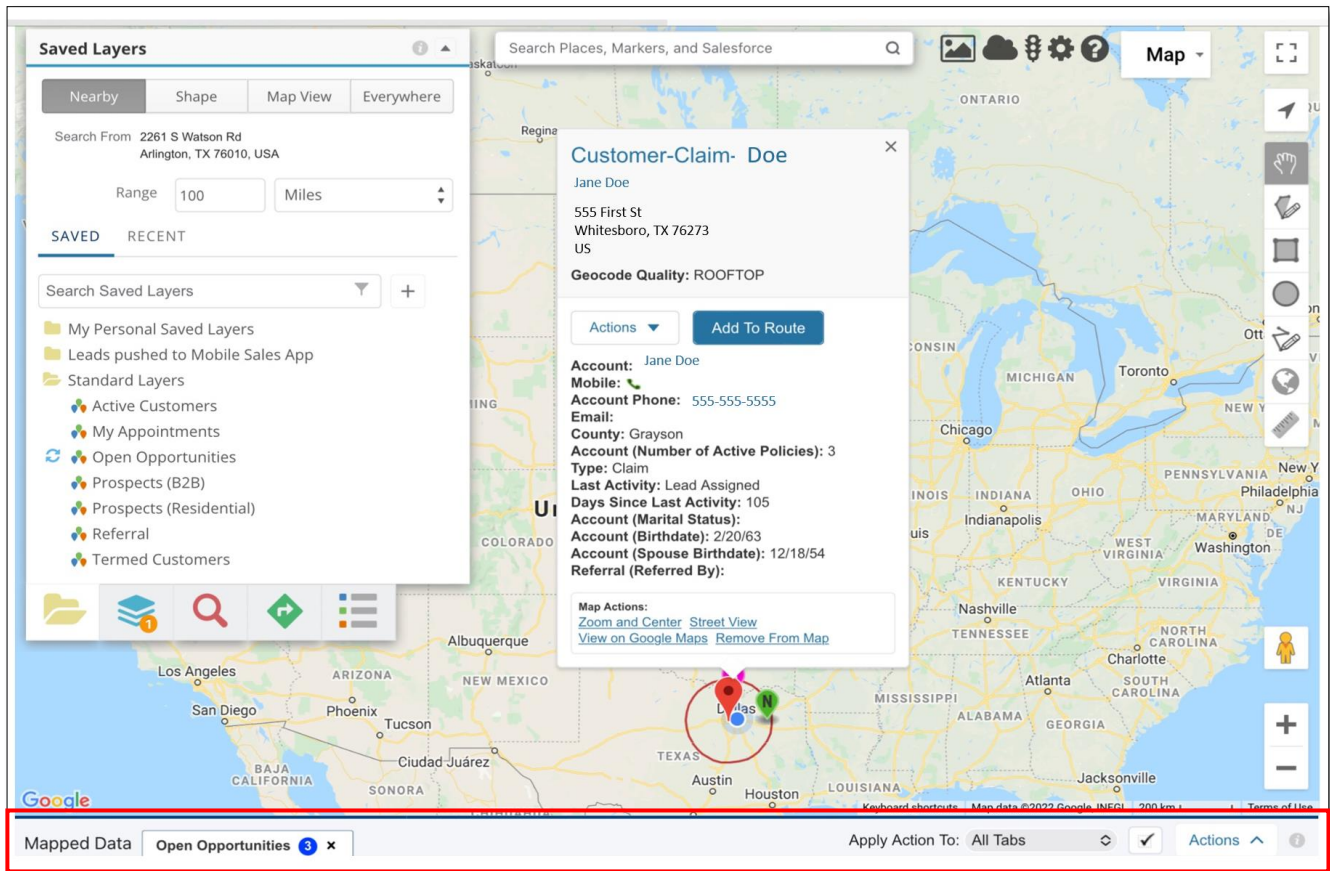
The best practice for using the Map List is to have the iPad screen orientation set horizontally to “Landscape.” This will grant more space to view the Map to the fullest extent.

To use, load Map with all desired layers then scroll to the bottom of the screen and locate the Map List header (light gray area).



Scroll bar may be hidden however it will be located on the far right side of the screen, becoming visible when tapped or if screen is scaled down to 75% size.

In the example below, one layer is loaded on the Map:

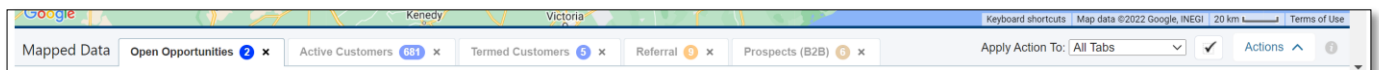


To expand the list, touch in the middle of the list header (light gray area) and gently glide upward (iPad screen gesture) on the screen:

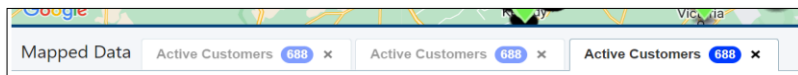


Note that it may take practice to pull the Map List up from the bottom of the screen using the Header's gestures. It helps to think of the gesture similar to swiping an eyelash gently away from the screen. To put the Map List away, simply reverse the motion by touching the middle of the list header and gliding downward.

If many Map Layers are loaded on Map, there will be several tabs open on the Map List (one per layer tapped):

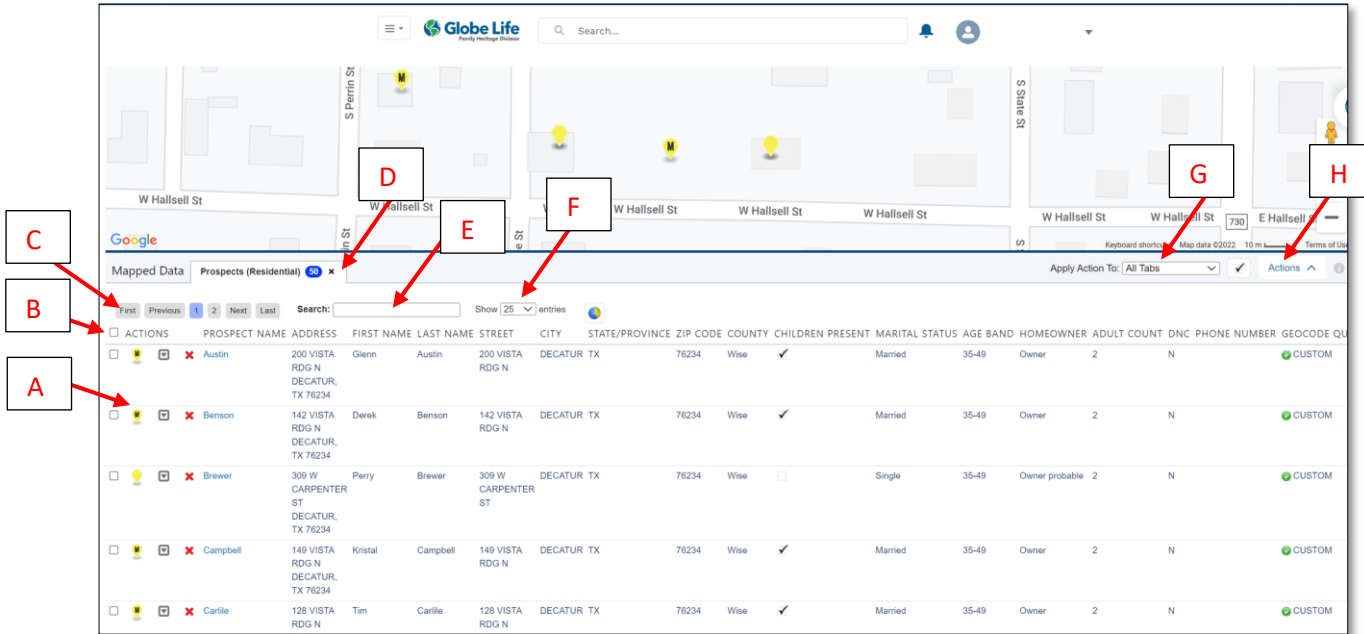


If user taps on the same layers multiple times, the layer will open multiple times on Map List:



As a best practice, only tap on a Map Layer to load once to avoid the duplication of tabs on the Map List. Remember that in order to remove Layers from the Map, use the “Mapped Layers” (i.e. Stacked Layers) tab.

The expanded Map List at the bottom of the tablet screen (turn tablet horizontally in Landscape mode for viewing ease) will show a table sortable by columns of the Pins (Leads) on the Map:



- A- **Pin:** Tap icon to update the area on the Map to where the Pin is physically located.
- B- **Actions check box:** Tap to select all records (Pins) on the current Map list Tab page.
- C- **Map List Page area:** Options for moving through the current Map List Tab’s page.
- D- **Map List Tab:** Displays number of records (Leads) on Tab which coordinates with the number of Pins on that specific loaded Map Layer. There may be several Tabs open if multiple Map Layers are loaded. Note: if user has loaded same Map Layer multiple times, there will be multiple Tabs open of the same Map Layer (not recommended).
- E- **Map List Search Field:** To filter the list type a keyword in this field, such as the Street, County, Name, etc. List will filter based the searched criteria.
- F- **Show X Entries dropdown:** Tap to change the amount of records (Pins) displayed on a single page of the Map List Tab. For example if there are 50 records in the tab, in the dropdown select 50 or more. Recommendation to only Push to Mobile 50 Pins at a time.
- G- **Apply Action To:** This dropdown will update automatically to “Selected Records” when the blank checkboxes next to the Pin icon has been tapped to select those records (Pins).
- H- **Actions Button:** Tap to reveal “Push to Mobile” button and send selected records to MSA.

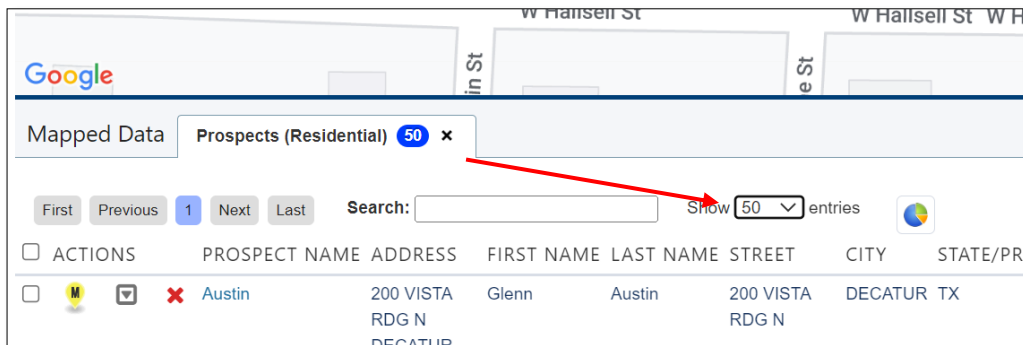
Push Multiple Leads to Mobile Simultaneously

Salesforce functionality includes the ability to Push to Mobile several Leads simultaneously, however the recommendation is to send up to 50 Leads at a time to avoid any delays or issues. To send several pins in a batch do the following steps outlined below.

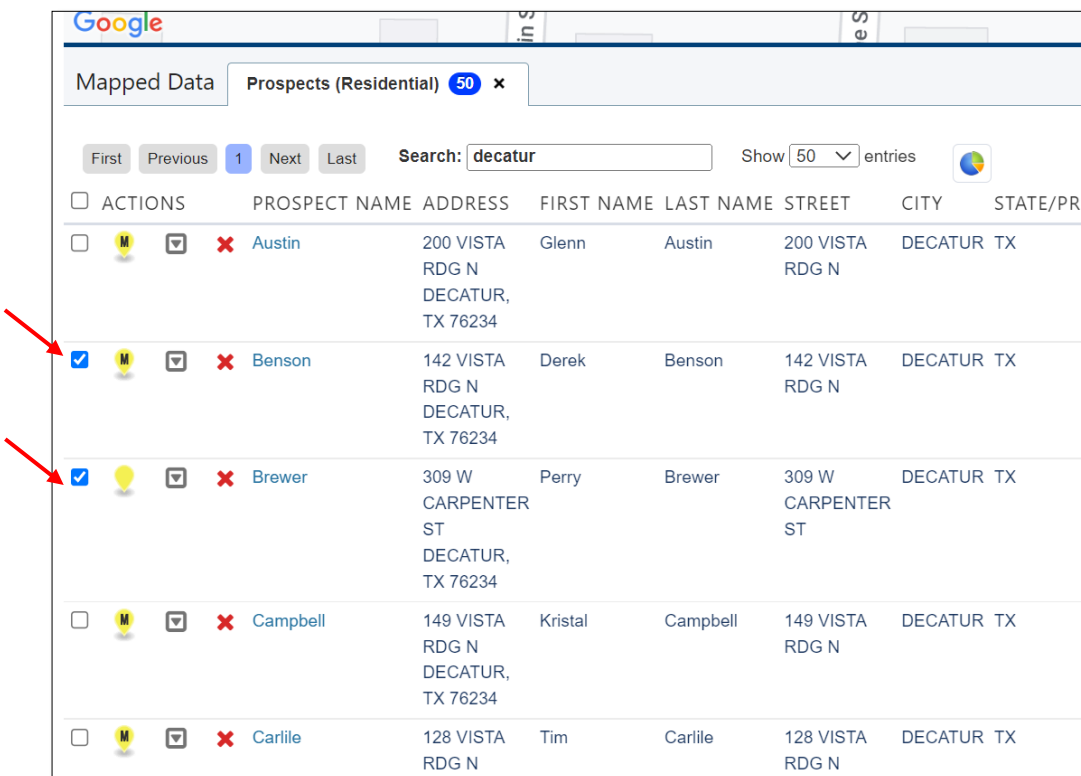
How to Batch Multiple Leads Push to Mobile

Send multiple leads at the same time to Mobile Sales App by utilizing the Map list feature at the bottom of the Salesforce Map. The first step to view this feature on the screen, load at least one Map Layer on the Map. Then lightly touch and glide upward from the center of the Map list header (light gray space at bottom of Map screen) to reveal the list as outlined above.

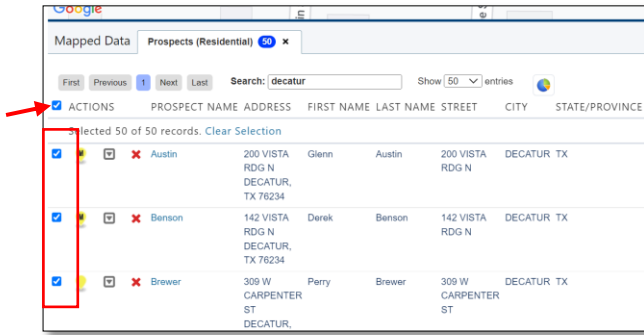
Next, update the “Show X Entries” dropdown according to your needs:



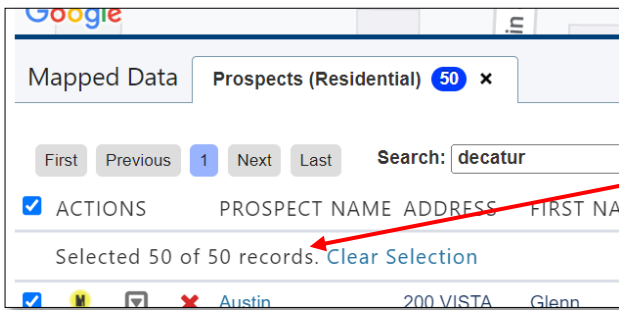
The Map List will update to display the number of entries selected. Continue by either searching for Leads fitting a specific criteria (ie City) or just select each record by tapping on the blank checkbox beside the Pin icon. Checkbox will turn blue with white checkmark displayed:



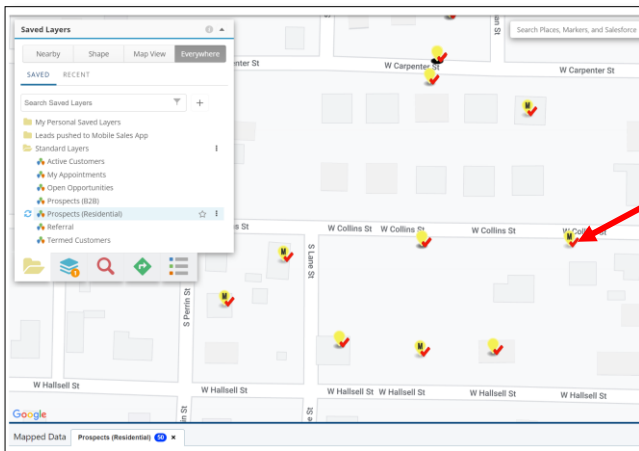
Alternatively, if all records on list page are to be selected, tap on the blank Actions checkbox to select all entries on the page (bulk select):



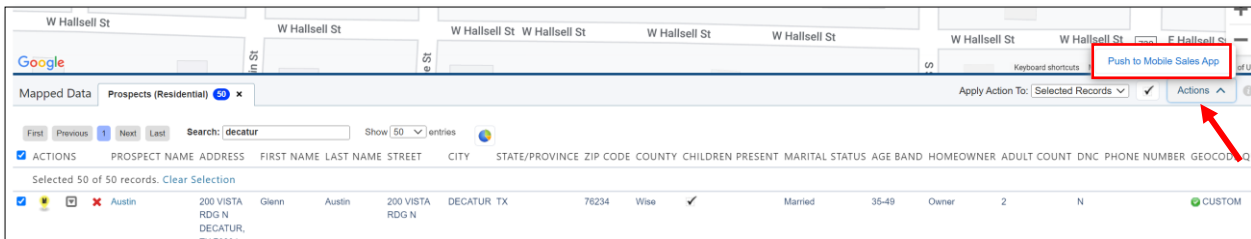
Once all are selected, a row will populate just below the Actions checkbox stating the number of selected records to be Pushed to Mobile:



As records are selected, the Map will display red checkmarks on each Pin (note that red checkmarks do not mean a lead was Pushed to Mobile yet, only that they have been selected):

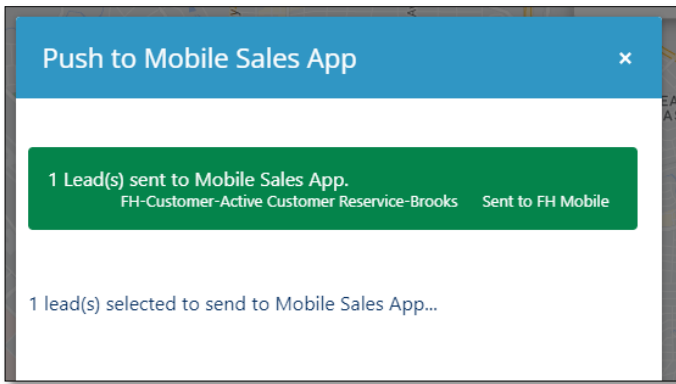


Once all desired leads are selected, tap on the Actions button on the far right side of the Map List header to reveal the Push to Mobile Sales App button. Then tap however many buttons are displayed in that area:

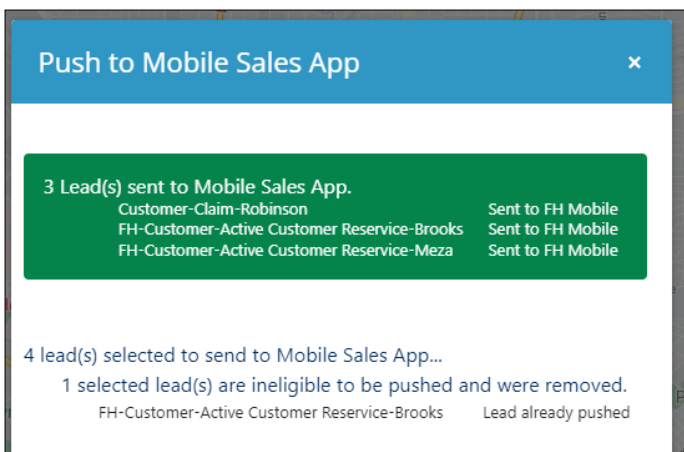


A confirmation will display allowing the user to view if the Push was successful, which Leads were unable to be pushed, as well as the reason why they were not sent.

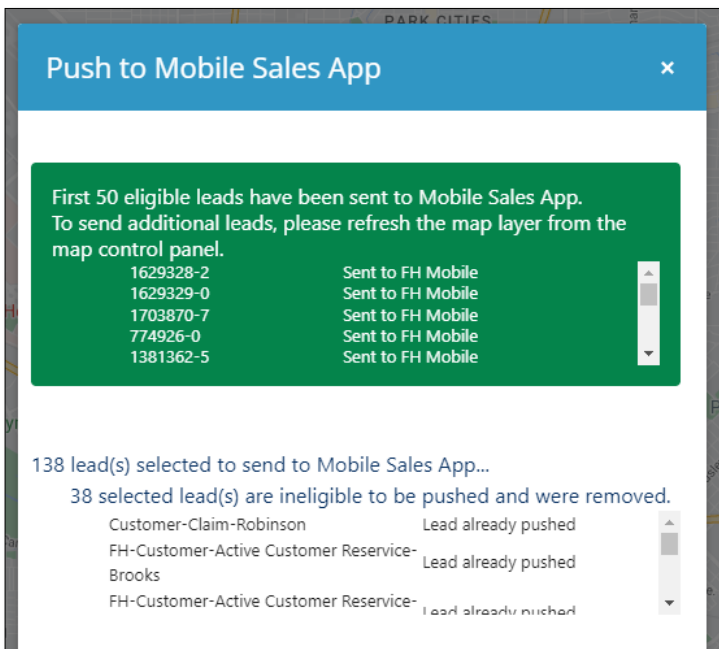
Below is an example of a Success Message with no errors:



Example where not all the Leads were successfully sent (reason: one lead already pushed to mobile):



Up to 50 leads can be Pushed to Mobile at one time. If more than 50 leads are selected (up to 1,000 record selection at one time), the system will send the first 50 eligible leads:

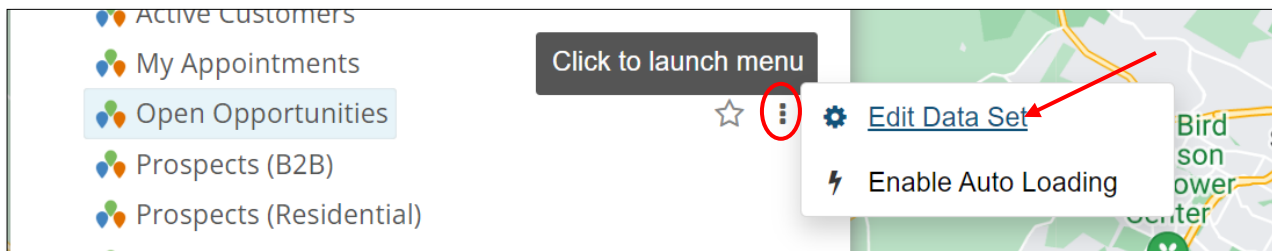


To send more of the selected leads, re-tap from the Actions menu to “Push to Mobile” again until all selected leads are sent. After a successful Push, user can now complete the process by returning to Mobile Sales App’s Lead Page to manually Sync Leads, downloading the newly pushed leads from Salesforce. Refer to the Mobile Start-up Guide for more information on how Leads Management works in MSA.

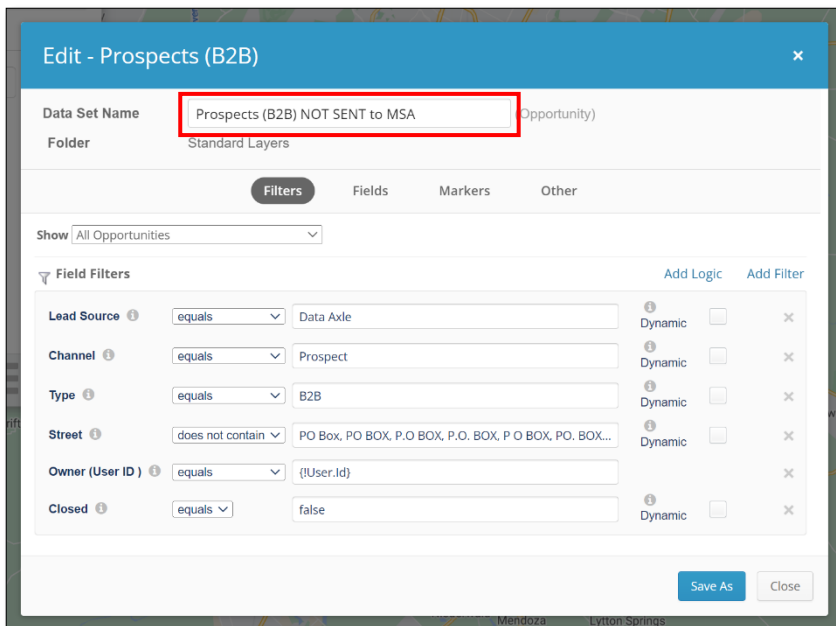
Advanced Map Feature: Creating a Personal Saved Layer

After learning how the Map features work together to help a Sales Professional plan and work their week, explore this advanced functionality of creating a customized Map Layer. These layers will save under the “My Personal Saved Layers” folder. Personal Map Layers can be customized by Name, Filters, Fields, and Markers (pins).

The first step is identify which Map Layer is the most useful to base a new Map Layer on (ie what you want to see). Select one then tap on a Map Layer’s “Edit Data Set” option while Map Layer is loading onto Map:



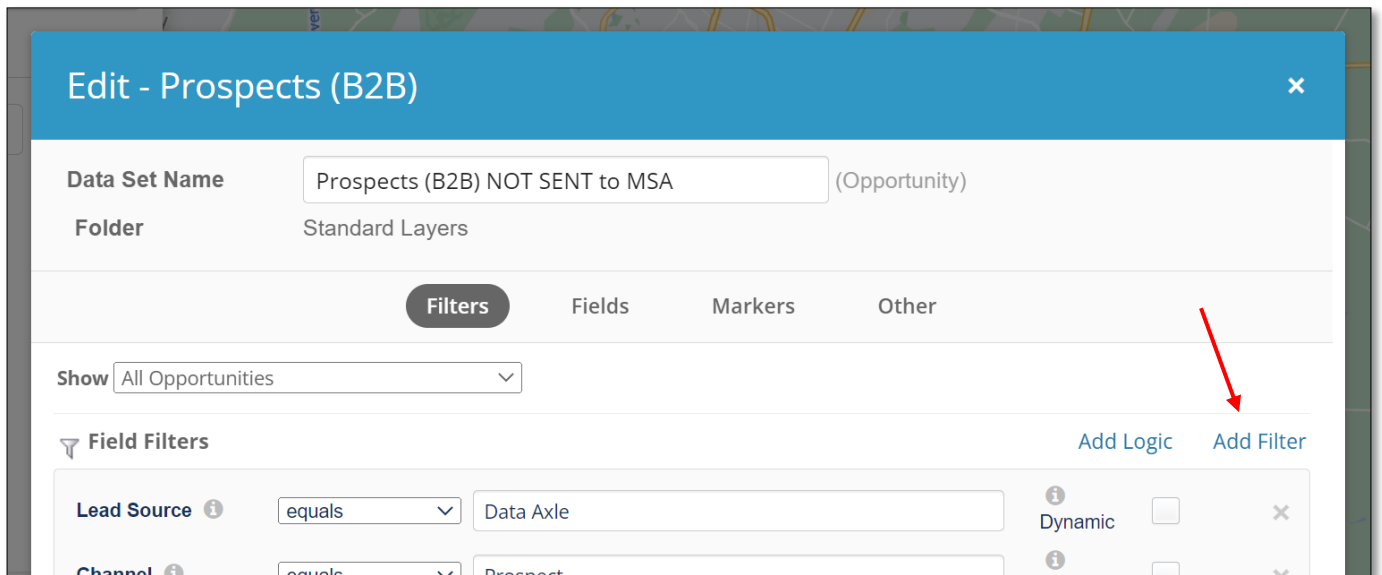
The Edit Data Set box will appear. Edit the Name according what the New Map Layer will display. For example, if a user wants to have a Map Layer that shows all the B2B leads that have not been Pushed to Mobile they would have used the “Standard Layers- Prospects (B2B)” as the based, and name the Layer “Prospects (B2B) NOT SENT to MSA”:



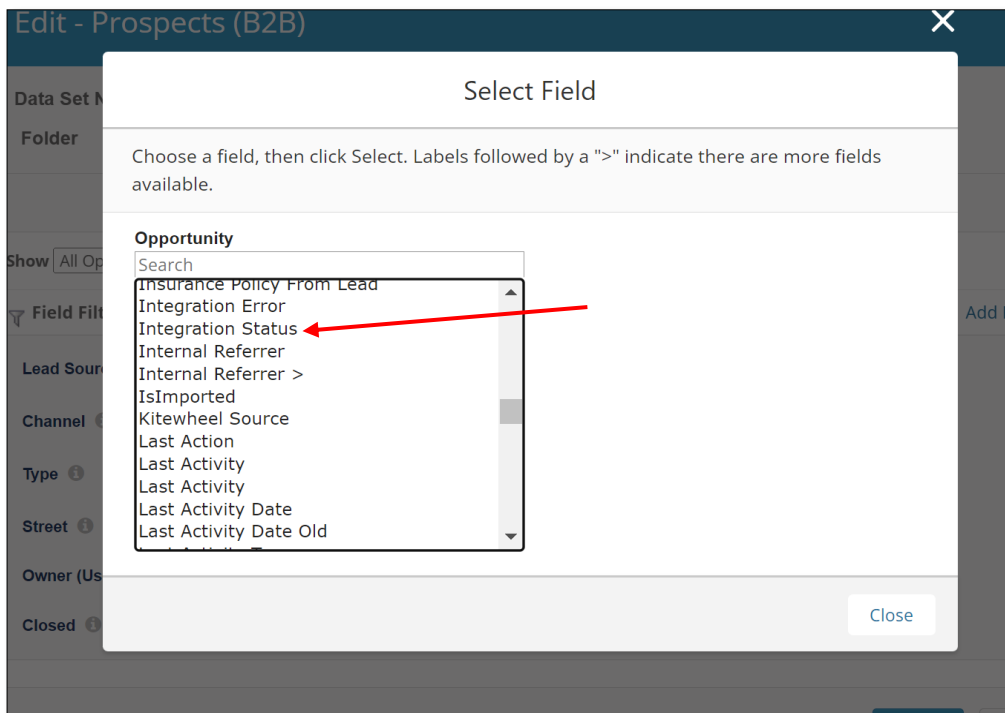
Note that Prospects Residential leads are only present in the Map for 24 hours so creating a Personal Saved Layer based on that Map layer is not recommended.

Next, review the Field Filters to decide what needs to be changed. Note it is not recommend to remove the Lead Source, Street, Owner (User ID) field, Status = Withdrawn, or Closed field as that will impact the layer format and the desired Pins will not populate correctly.

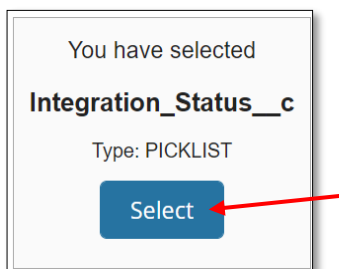
In the example below, all the fields are required but it is missing a Filter showing Integration Status. Tap “Add Filter” to search what other fields can be added:



Search the list by scrolling down to find a field. In this example, “Integration Status” will be selected:



Then tap “Select” button:



The next step is to set the picklist values for this field. Note that not all fields will require this step. In this example, “Sent to FH Mobile” means a lead that has already been Pushed to Mobile. Tap “Add Filter” button to proceed:

Select Field

Select the field name to return to the list of fields.

Field	Operator	Value
Integration Status	equals	

You have selected a Picklist field
 Separate values with a comma to filter for multiple values. (eg: USA, Canada, Germany).
 If you use greater/less than as the operator, the commas will be ignored.

The following are the current Picklist values for this field. Use the Add To and Replace buttons to copy those values to the text box above:

- New
- Ready for FH Mobile
- Sent to FH Mobile
- Error Sending to FH Mobile

The window will return to the previous one where user can edit the logic “i.e. not equal to” and enter in the filter field “Sent to FH Mobile”. Then Tap “Save As” button:

Edit - Prospects (B2B)

Show

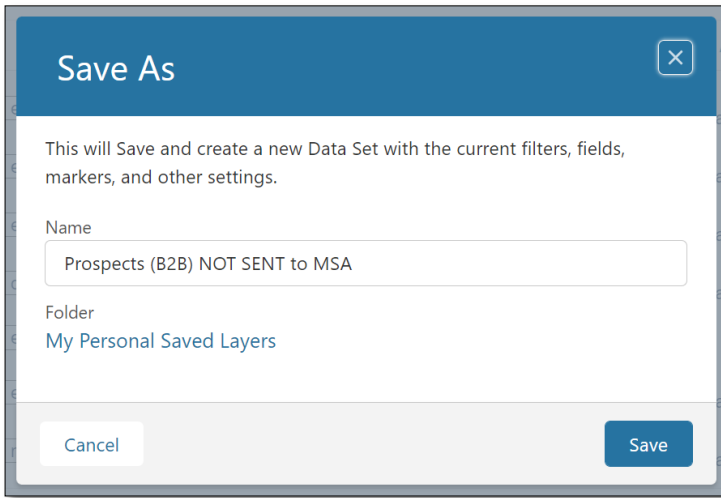
Field Filters Add Logic Add Filter

Lead Source	equals	Data Axle	Dynamic	<input type="checkbox"/>	<input type="button" value="x"/>
Channel	equals	Prospect	Dynamic	<input type="checkbox"/>	<input type="button" value="x"/>
Type	equals	B2B	Dynamic	<input type="checkbox"/>	<input type="button" value="x"/>
Street	does not contain	PO Box, PO BOX, P.O BOX, P.O. BOX, P O BOX, PO. BOX...	Dynamic	<input type="checkbox"/>	<input type="button" value="x"/>
Owner (User ID)	equals	{!User.Id}	Dynamic	<input type="checkbox"/>	<input type="button" value="x"/>
Closed	equals	false	Dynamic	<input type="checkbox"/>	<input type="button" value="x"/>
Integration Status	not equal to	Sent to FH Mobile,	Dynamic	<input type="checkbox"/>	<input type="button" value="x"/>

Cross Object Filters Add Cross Object Filter

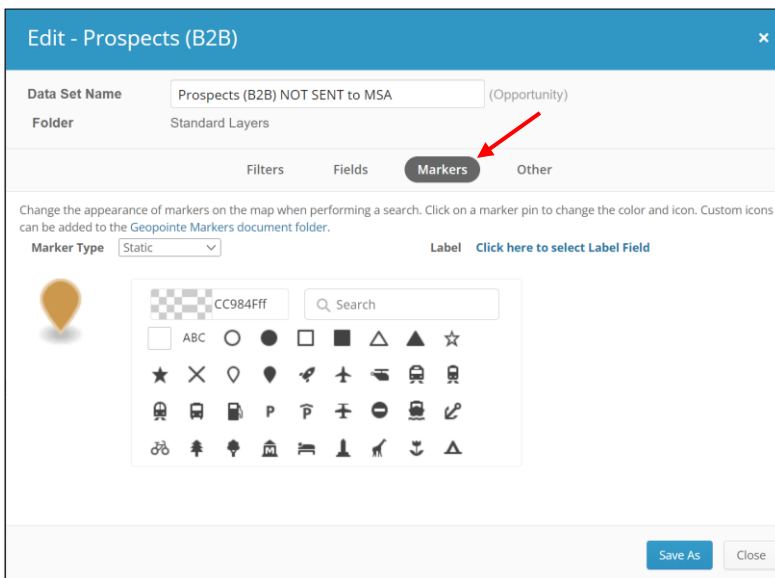
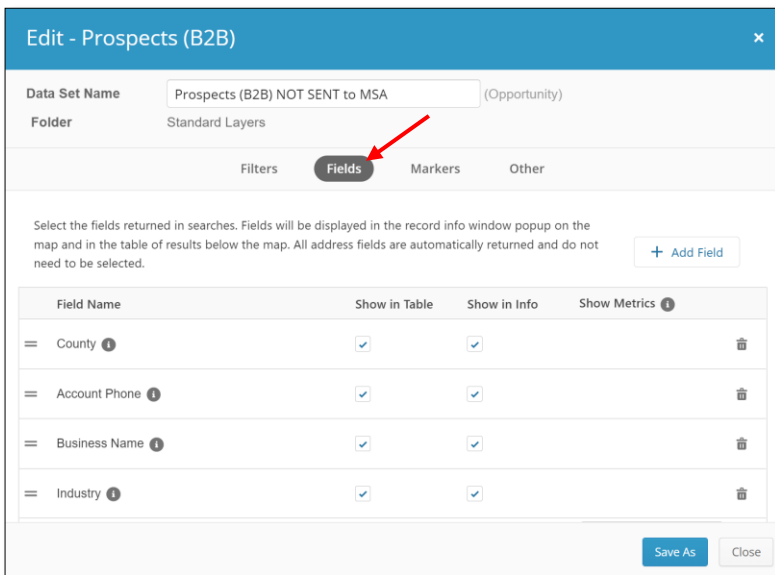
There are no Cross Object Filters.

The Save As box will appear, confirm the new name and tap “Save”:

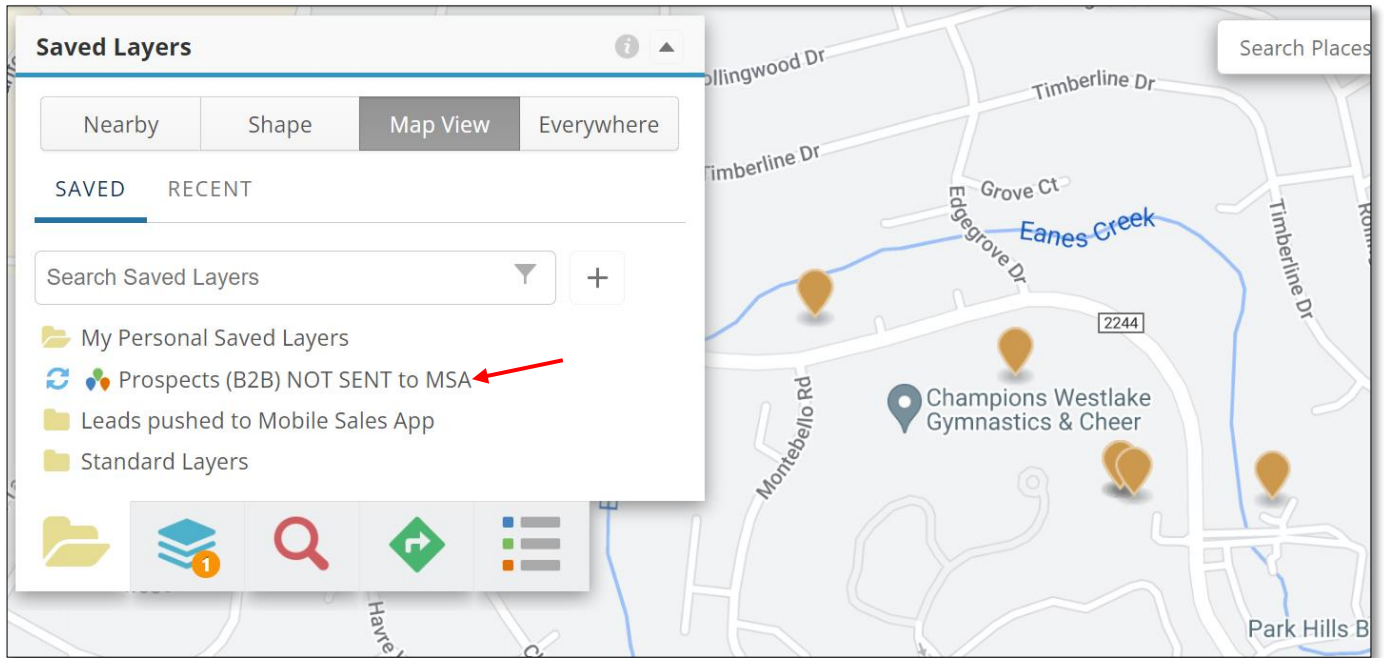


Close the edit box to return to the main Salesforce Map.

Remember that the Fields and Markers (pins) can also be customized if needed:



The newly created Map Layer will display now under the “My Personal Saved Layers” folder:



Note that data set layers under the My Personal Saved Layers are not supported by Helpdesk. If an issue is being experienced with a customized Map Layer, attempt to edit the other filters or logic by trial and error.

Here are few helpful Map Layer customization ideas:

- **Referrals with Activity Status = Stale**

Data Set Name	Referrals with Activity Status = Stale	(Opportunity)
Folder	My Personal Saved Layers	
	Filters	Fields Markers Other
Show	My Opportunities	
Field Filters		
Type	equals	Referral
Closed	equals	false
Activity Status	equals	Stale

- **Open Opportunities of Termed Agent's Policies:**

Data Set Name	Open Opportunities Termed Agent Policies	(Opportunity)
Folder	My Personal Saved Layers	
	Filters	Fields Markers Other
Show	My Opportunities	
Field Filters		
Closed	equals	false
Type	equals	Termed Agent Policy

- **Open Opportunities Assigned in Last 7 Days**

Data Set Name: Open Opportunities Assigned in Last 7 Day: (Opportunity)

Folder: Standard Layers

Filters Fields Markers Other

Show: My Opportunities

Field Filters

Closed: equals false

Type: equals Active, Claim, Orphaned, Termed Exclusive, New Policy...

Assigned Date: greater or equal Last_N_Days:7

- Prospects (B2B) Pushed to Mobile Sales App Last 7 Days (Or 30 Days)

Data Set Name: Prospects (B2B) - Pushed to MSA in Last 7 Days (Opportunity)

Folder: Leads pushed to Mobile Sales App

Filters Fields Markers Other

Show: My Opportunities

Field Filters

Integration Status: equals Sent to FH Mobile

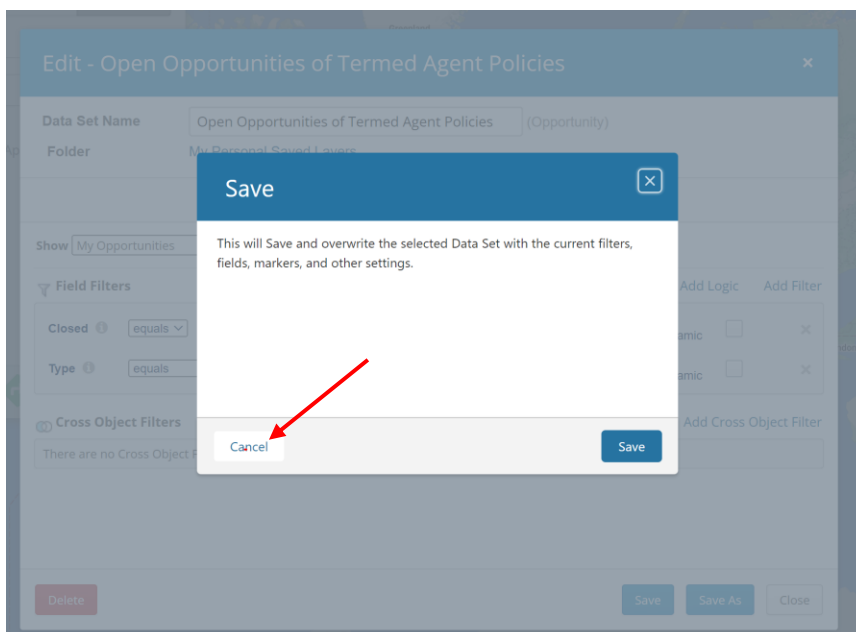
Type: equals B2B

Opp Sent to FH Mobile Date: greater or equal LAST_N_DAYS:7

Type: not equal to Withdrawn

Note that Prospects (Residential) in the Pushed to Mobile Sales App Map Layer can only ever display in a layer for a max of 24 hours.

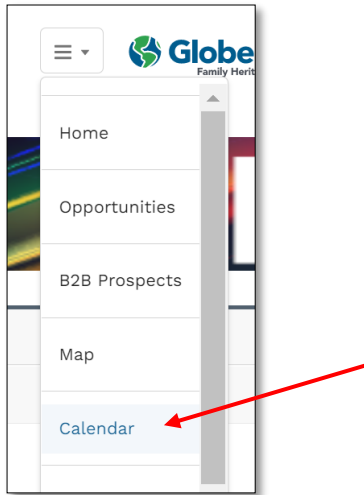
IMPORTANT: The Standard Data Set Layers should not be edited, therefore do not overwrite the default Map Layers. Do not “Save”, only “Save As” when creating Personal Saved Layers:



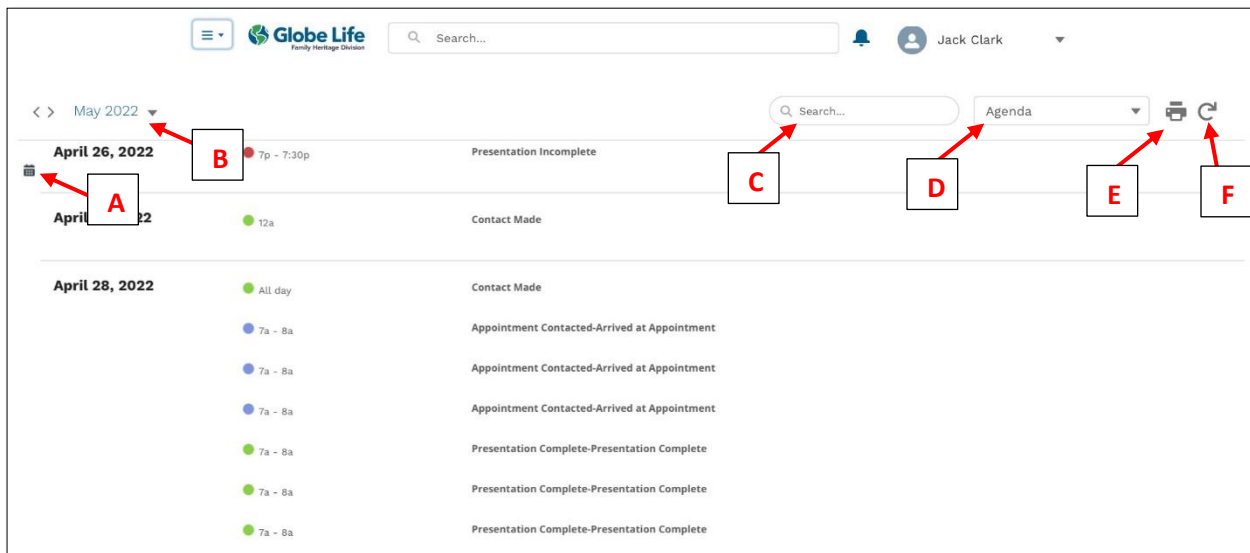
MENU: CALENDAR

The Salesforce Calendar is useful to keep track of appointments and events created within Salesforce. Create miscellaneous events, print the calendar, and search the events (i.e. Appointments from Salesforce).

Tap on “Calendar” from the Navigation Menu:



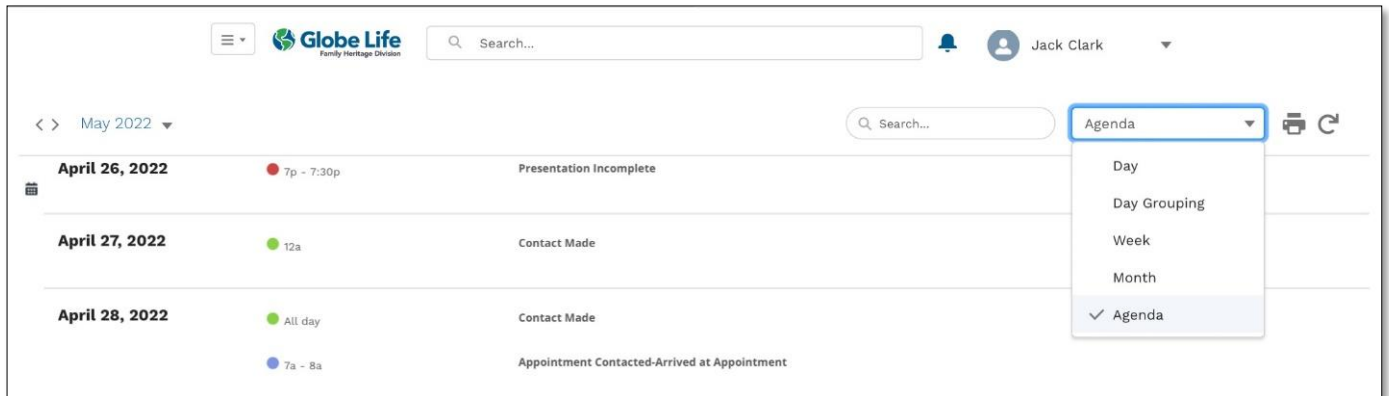
Once the Calendar has loaded, it can be customized by preference. The diagram below will demonstrate how the Calendar is organized in Salesforce:



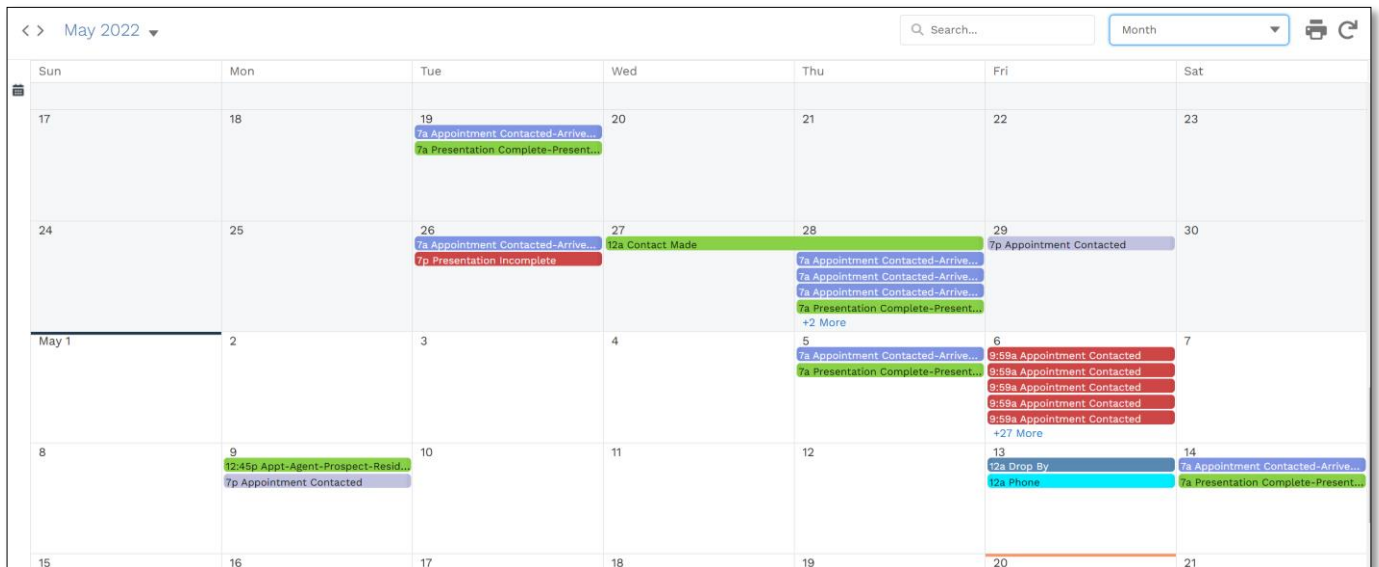
- A- **Display Calendar icon** will allow user to display either tasks and/or events. .Agency Builders (AB) will have the option to view their team’s calendar events and tasks if selected.
- B- **Change Date buttons** will update the date, moving it forwards or backwards.
- C- **Search Calendar field** will allow user to search events or tasks of the Salesforce Calendar.
- D- **Calendar View dropdown** will display options for viewing the Calendar format.
- E- **Print icon** will allow user to see screen in a print view then print.
- F- **Refresh icon** will update the Calendar page.
- G- **Add a Miscellaneous Event** icon will allow user to add any event such as: a team meeting, personal events, recruiting events, or a new recruit training week.

Update the Calendar View

The default calendar view is set to “Agenda” however various views are available according to preference. To change the view or see what views are available, tap on the Calendar View dropdown menu and tap on a different view:

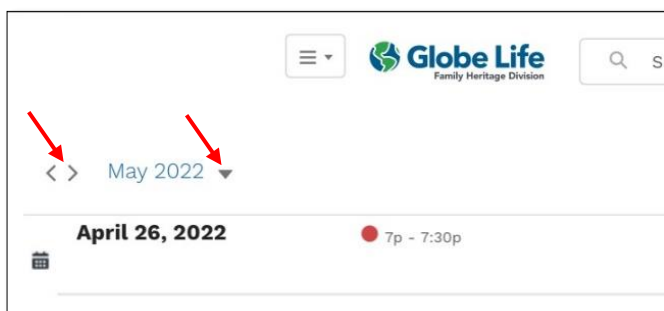


If changed to Month, this is how the Calendar would appear then:



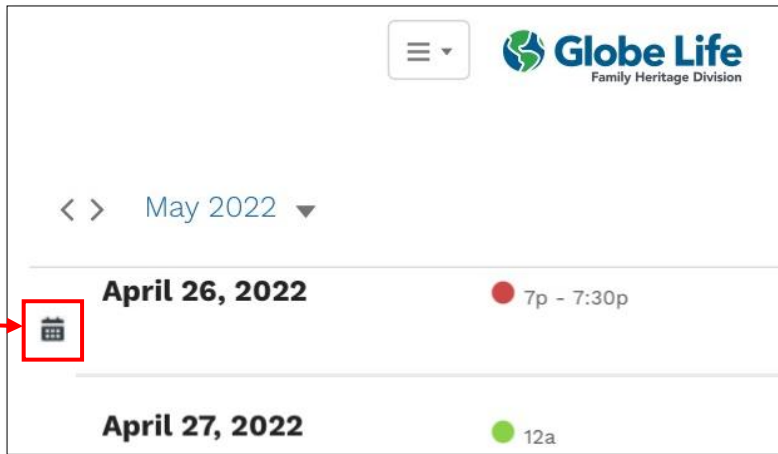
Change Date for Viewing

At top left-hand corner of the Salesforce Calendar, tap on the date to change the options for date range or tap on the “<>” icon:

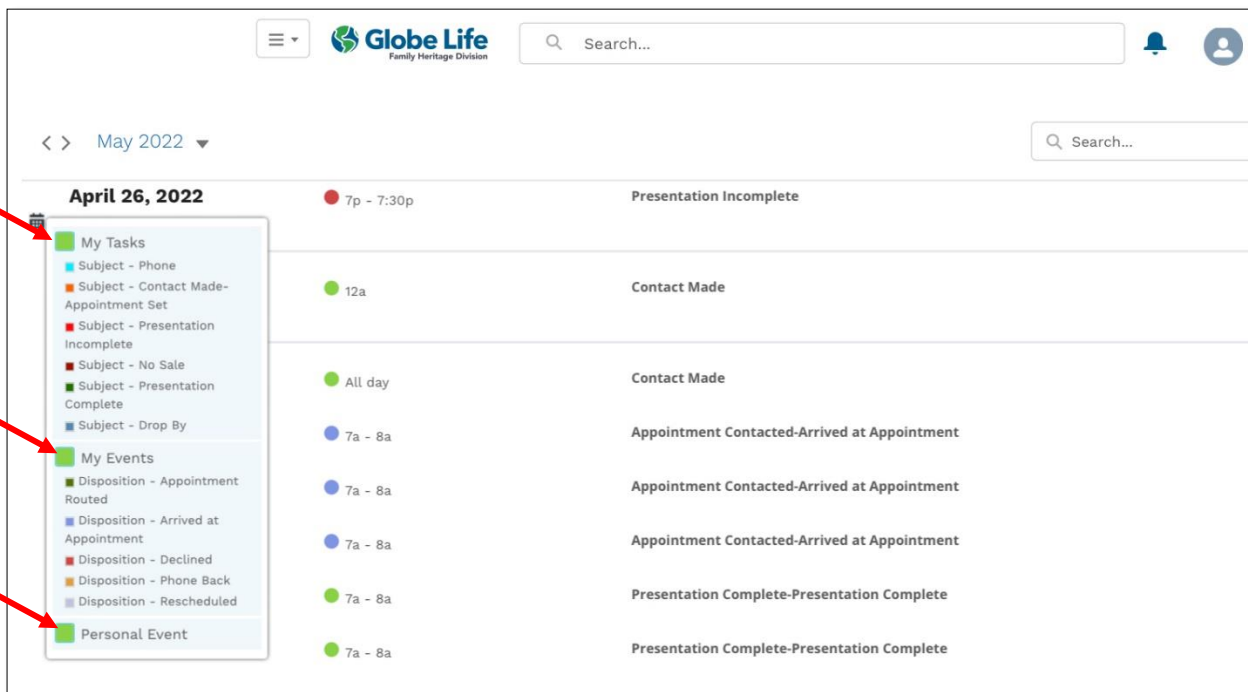


Display Events or Tasks (AB ONLY: Self and/or My Team)

As an Agent, there is an option to decide what type of event or task displays on the Calendar. As an Agency Builder both self-events/tasks as well as Team's events/tasks can be displayed. To view the options available, tap on the Display Calendar icon:



Then Select and unselect what events/tasks would like to see displayed by tapping on the options (the options are color coded on the Calendar):



This is the Agency Builder's view will appear similar but with the options to select or unselect Team.

Print the Calendar

If the user prefers to print the calendar/agenda displayed in the current view (including print to PDF) then tap on the Print icon at the top right side of the Calendar view:

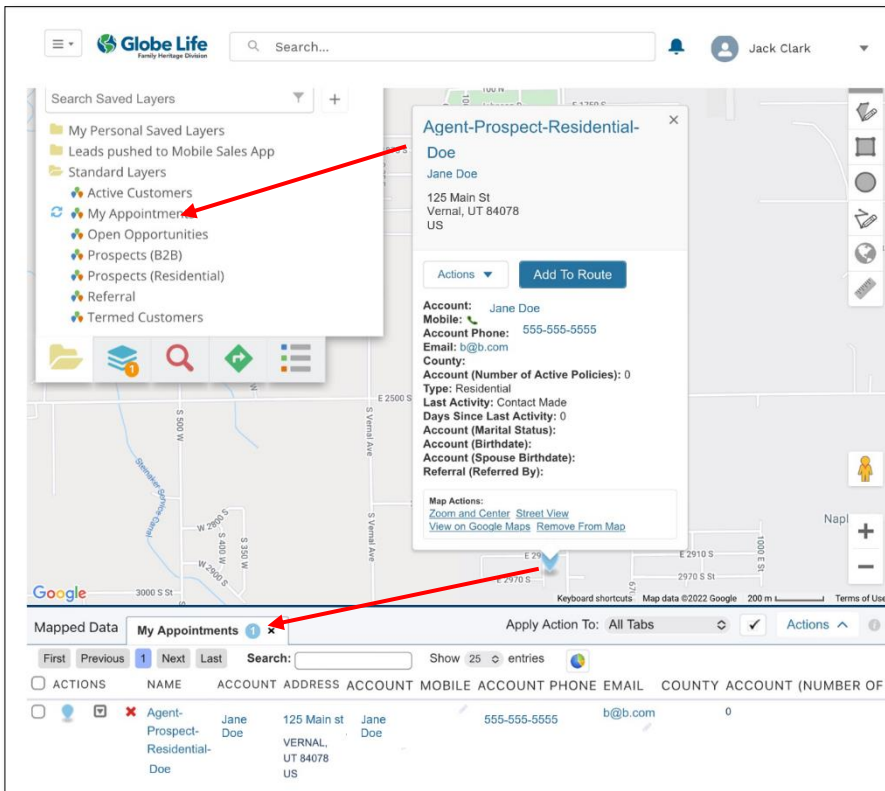


Once on the Print view page, tap on the Settings button to change configuration or tap on the Print button to continue onward to print the calendar:



Viewing Appointments from Calendar on Salesforce Map

A set appointment with a Lead Opportunity will populate a baby blue Pin when Standard Layer- My Appointments is loaded on the Salesforce Map:



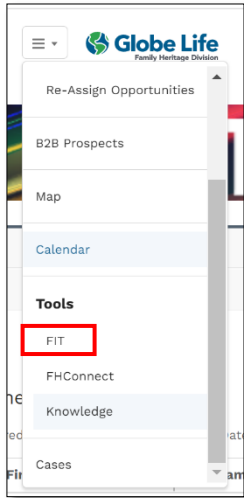
When the Leads on Salesforce Map have set appointments that were scheduled within the Salesforce Opportunities Pages, upon Pushing to Mobile and once manually synced on the MSA Leads Page, Lead will display the Salesforce set appointment date and time:

Name	Address	Type	Appt/Follow	DOL	More Info
Jesse Barrera	184 CR 3011 Edna, TX 77957	Customer	05/10/2022	26	More Info
Mel Anderson	2953 S 450 E VERNAL, UT 84078	Prospect Residential	05/09/2022 12:45 PM	294	More Info
Terry Webb	9407 CARACAS DR AUSTIN, TX 78733	Prospect Residential	05/05/2022	4	More Info
Ester	1514 Windsor	Customer		26	More Info

To learn more about how MSA works with Salesforce CRM, check out the Mobile Start-Up Guide.

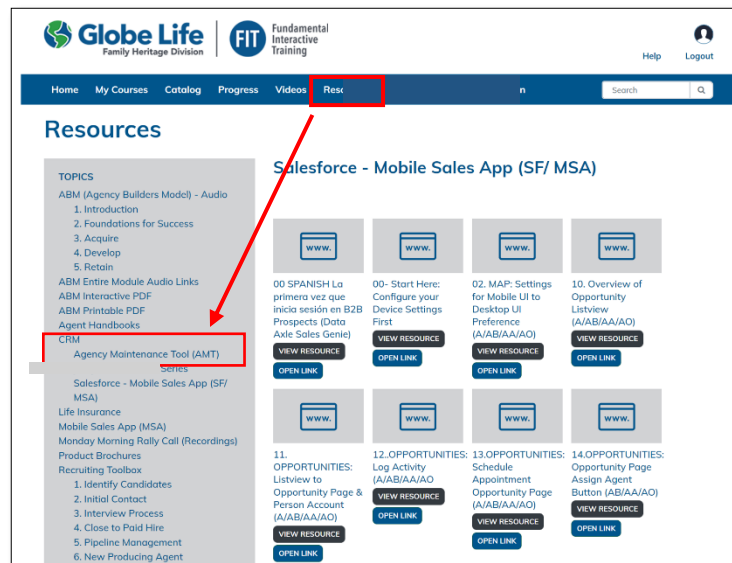
MENU: TOOLS

This menu section contains links to the various learning and FHD resources available such as FIT, FHConnect (FHLConnect.com), Knowledge Articles (Salesforce User Guide), and Cases (currently under construction as of May 2022).

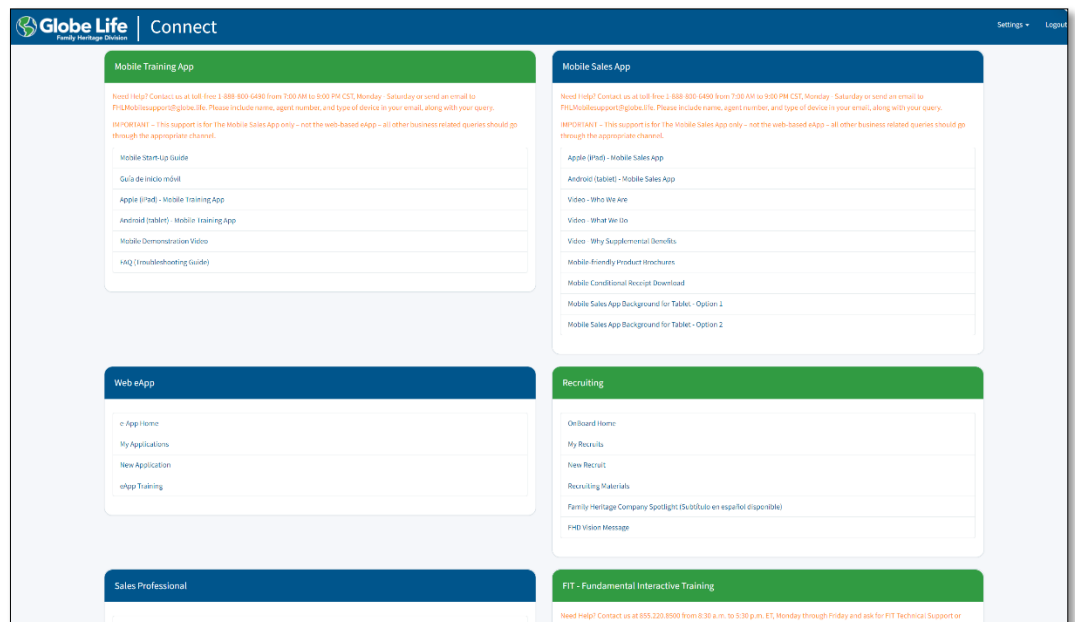
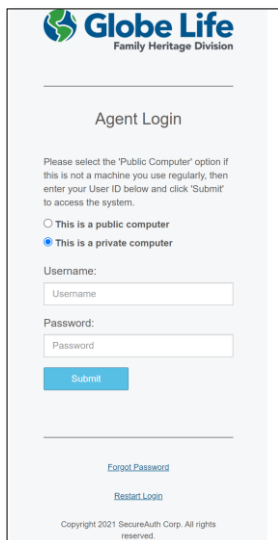


Fundamental Interactive Training FIT: Tapping on “FIT” will open up the Fundamental Interactive Training portal where an agent can log in or register for a FIT user account if they do not have one yet.

FIT is where all the CRM resources are housed under the “Resources” tab, in the “CRM” section. Select the resources and videos for learning more by tapping on one of the links in the section (i.e. “Salesforce- Mobile Sales App”), then tap on any of the resource’s “Open Link” button to directly navigate to the resource.



FHConnect: Tapping on “FHConnect” will open the FHLConnect website portal. Sign in with the username (agent number) and password.



Knowledge: Tapping on “Knowledge” will open the FHD Knowledge Articles database where there are numerous resources for troubleshooting common issues, frequently asked questions, and other “how to” information. This tool is currently under construction as of November 2022.

Cases: Tapping on “Cases” will allow a user to report issues with Salesforce CRM. Review the next section to learn how to submit and follow a technical support case.

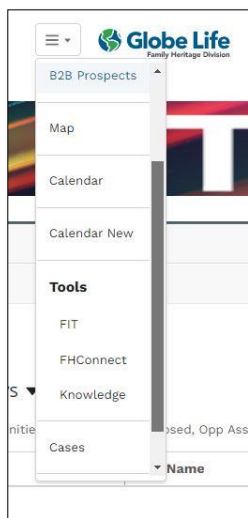
NEED HELP? CONTACT SUPPORT

Tier 1- Fundamental Interactive Training (FIT)

The first level of support is reserved for the various training videos, guides and other resources that are available under the “Resources” tab of FIT as outlined in the section before. New resources will be made available according to mobile technology updates. As best practice, refer to the Mobile Start Up Guide for MSA, the Salesforce User Guide for CRM, and the Frequently Asked Questions resource to assist in troubleshooting common issues.

Tier 2- CRM Support via Cases

A second level of support is available by utilizing Cases within Salesforce. This feature enables a user to report an issue that has not been successfully resolved after utilizing “Resources” in FIT. This allows the Tier 2 Technical Support team to assist in troubleshooting the reported issue and respond to the submitted inquiry.



Tapping on “Cases” at the bottom of the Navigation Menu will open the Cases page where a user can generate a support ticket or review a previously submitted Case.

Creating a New Case

To open a Case, on the Cases page, tap on the button labeled “New” located on the right-hand side of the page:



A pop up window will appear where information can be added regarding the issue or inquiry:

The screenshot shows the 'New Case: FH Support' form. The title is 'New Case: FH Support'. The form has several fields: 'Case Number' (empty), 'Case Owner' (Stephen Iden), '* Subject' (empty text box), '* Description' (empty text area), '* Status' (dropdown menu set to 'New'), 'Additional Information' section with 'Type' (Salesforce), 'Category' (dropdown menu set to '--None--'), 'Case Close Reason' (dropdown menu set to '--None--'), and 'Sub-Category' (dropdown menu set to '--None--'). At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

New Case: FH Support

Complete the required fields, denoted with a red asterisk. The “Subject” field should summarize the issue being experienced. For example: “Salesforce Sign On Error when accessing B2B Prospects.”

The “Description” is the area that will describe the issue being experienced in greater detail (what happened, what was expected, where or when the issue occurred, etc.) as well as details regarding the mobile device being used (Settings, default browser, iOS Version, and device model).

New Case: FH Support

Case Number Case Owner
Stephen Iden

* Subject
Salesforce Sign On Error when accessing B2B Prospects

* Description
iPad 9th Gen, iOS 15
Using Safari browser

My mobile device is set according to the required Settings outlined on the Salesforce User Guide and when I go to B2B Prospects to sign on to Data Axle for the first time I get a screen that says "Salesforce Login Error" and I can't reset the login or enter in my email/password either.

* Status
New

[View all dependencies](#)

The "Status" will remain "New" in the dropdown as Tech Support will use this field to best track the resolution of the issue or response to the query.

Additionally a "Category" may be selected by tapping on the dropdown. This field is optional.

New Case: FH Support

and I can't reset the login or enter in my email/password either.

* Status
New

[View all dependencies](#)

Additional Information

Type
Salesforce

Case Close Reason
--None--

[View all dependencies](#)

Category
--None--

[View all dependencies](#)

Sub-Category
--None--

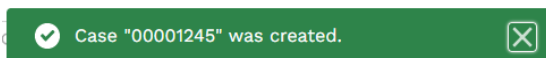
[View all dependencies](#)

After selecting the “Category,” the “Sub-category” field will populate additional options to further specific information on the reported issue or inquiry. This field is also optional.

Tap “Save” to generate your New Case:

Tap “Cancel” to not proceed further or “Save & New” to create the Case then open a new one.

Once saved, a confirmation box will appear briefly displaying a green box at the top center of the screen that a Case was created, successfully.



Edit a Case

Edit immediately after opening a New Case or by selecting the Case Number from the “Recently Viewed” Case list:

Case Number	Subject	Status	Category	Case Owner Alias	Created By Name	Date/Time Opened
00001246	Salesforce Sign On Error when accessing B2B Prospects	New	B2B	FH Support	Stephen Iden	7/1/2022, 4:52 PM

The Case page will display. Tap “Edit” at the top right-hand corner of the Case’s page:

Case
Salesforce Sign On Error when accessing B2B Prospects

Status: New Case Number: 00001246

Case Number: 00001246 Case Owner: FH Support

Subject: Salesforce Sign On Error when accessing B2B Prospects

Description: iPad 9th Gen, iOS 15 Using Safari browser

My mobile device is set according to the required Settings outlined on the Salesforce User Guide and when I go to B2B Prospects to sign on to Data Axle for the first time I get a screen that says "Salesforce Login Error" and I can't reset the login or enter in my email/password either.

Status: New

Case Comments (0) [New]

Attachments (0) [Upload Files]

[Upload Files] Or drop files

The Case box will appear displaying the Case number. Information can now be edited:

Globe Life Family Healthcare Division

Search... Stephen Iden

Edit 00001246

Case Number: 00001246 Case Owner: FH Support

* Subject: Salesforce Sign On Error when accessing B2B Prospects

* Description:

Tap “Save” when done:

Cancel Save & New Save

Add Case Comments

With a specific Case open, in the “Case Comments” box, tap the “New” button:

Case
Salesforce Sign On Error when accessing B2B Prospects

Status: New Case Number: 00001246

Case Number: 00001246 Case Owner: FH Support

Subject: Salesforce Sign On Error when accessing B2B Prospects

Description: iPad 9th Gen, iOS 15 Using Safari browser

My mobile device is set according to the required Settings outlined on the Salesforce User Guide and when I go to B2B Prospects to sign on to Data Axle for the first time I get a screen that says "Salesforce Login Error" and I can't reset the login or enter in my email/password either.

Status:

Case Comments (0) [New]

Attachments (0) [Upload Files]

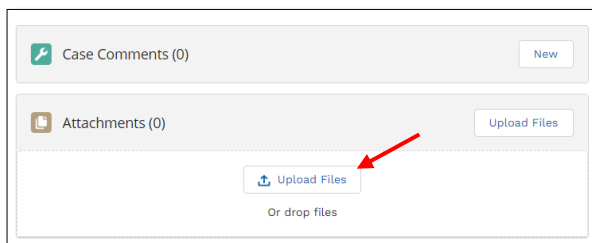
[Upload Files] Or drop files

The New Case Comment box will appear where the user can add additional information to the case. Tap “Save” when done.

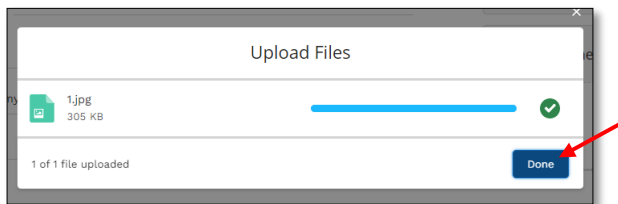


Add Attachments

To add attachments to a Case, such as a screenshot image, tap the second “Upload” Files button with the “upload” icon on an opened Case page:



On the next prompt, select the file to be uploaded from your device and allow it to load. Tap “Done” when upload is complete:



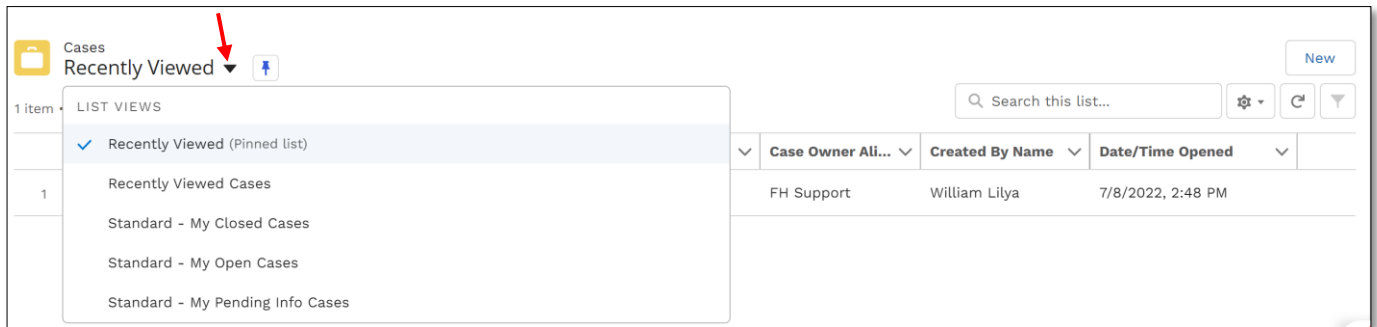
The uploaded file (i.e. image) will now display below the “Attachments” area:



As a best practice when reporting errors or issues, attach screenshots of what is being experienced so that the CRM Tech Support team can better assist in resolving the issue. Providing as much information as possible is helpful for a speedier resolution. Expect an initial response to an inquiry within 24 hours.

Follow the Case Response with Cases List Views

After creating a new case a user can follow along to view responses and requests from the CRM Tech Support team. Tap on “Cases” from the Navigation Menu. Once on the Cases page, tap on the dropdown to view available lists:



- **Recently Viewed** (same as Recently Viewed Cases) displays cases the user was reviewing last.
- **Standard-My Closed Cases** displays cases that have already been resolved (historical).
- **Standard-My Open Cases** displays cases that are unresolved and are actively being reviewed.
- **Standard-My Pending Info Cases** displays cases where the CRM Tech Support team has requested additional information from the user.

Just as with the Opportunity List views, a frequently used or preferred Case List view can be pinned as a favorite by tapping on the “thumbtack” icon.

Be sure to review “My Open Cases” and “My Pending Info Cases” to follow along with progress as well as respond to a CRM Tech Support member’s questions or request for additional information (i.e. all cases remain within the CRM system).

The Salesforce Notification Bell icon will display a red dot to denote a response is available in Cases.

Tier 3- Globe Life Development Team

In the event that issue cannot be resolved at the Tier 2 level, issue will be escalated to Tier 3 so that Globe Life Development team member, who is experienced in the specific area of concern, can investigate the issue and propose a resolution.

[FHD0522A-AB-3](#)