Find your Active Customers in Salesforce Using Map

Follow these steps below to find your active book of business on the Salesforce Map, then select to Push to Mobile Sales App (MSA) for Leads Management. Salesforce CRM can be accessed via MSA's home page using the Salesforce cloud icon. Sign on with the five-digit agent number and personal password. To access the CRM via any web browser, use this link: https://globelife.my.site.com/familyheritage/.

1. From the Salesforce Homepage, tap on the Navigation Menu to expand, then tap on "Map":



2. On the Salesforce Map, in the Map Control Panel "Saved Layers" Tab, tap on "Everywhere":



3. Tap on the "Standard Layers" folder to expand:



4. Tap on the "Active Customers" Map layer and allow it to fully load, showing lime green pins on the map. After the layer loads, if needed you can move the map to zoom in to the specific area *or* type the name of the location (*i.e. Travis County, Dallas, 78504*) in the Map Search box:



5. When tapping on any Active Customer pin, a Tooltip with information on the Policy, such as Policyholder (Account), address, phone number, number of active policies, etc.



The numbers in blue at the top of the Tooltip are hyperlinked to the **Insurance Policy Page** where the agent can find additional details on the Policyholder such as policy type, AC draft day, premium amount, effective date, and more.

The Account name in blue is hyperlinked to the **Person Account Page** where the agent can view Opportunities linked to the Policyholder. Note that since March 2024, new Opportunities from your *own* customer database will automatically populate in Mobile Sales App (MSA) for Leads Management during the overnight process.

(Below is the example of a Person Account Page:)

Email	Phone	Mailing Address			
-	555-555-5555	555 S. 1st St Anywhere, TX United States			
Opportunities (2)					
Opportunity Name		Stage	Policy Product Type	Amount	
Customer-Termed Customer I	nitiated	New	InjurCare Plus - Series 6 - ICRP		
Customer-Termed Customer I	nitiated	New	InjurCare Plus - Series 6		
Insurance Policies (3)					
Policy Number		Effective Date	Status	Base Product Series	
1636169-		9/18/2021 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	

6. To view in a Map List, scroll to the bottom of the tablet screen until the Map List Header is displayed:



7. Touch the middle of the header's bar and slowly glide in an upwards motion to expand the list:



8. A Map List of all the Active Customer Pins will display with the same information displayed on the Tooltip. Each row is a separate policy.

List will default to 25 rows per page and can be **searched** (filters the list based on the text in the search box). Scroll to the far-right on the table list to see additional information on the policy. Each column is **sortable**. Just tap on the column header (example: Total Claims Paid, Effective Date, Account Number of Active Policies) to sort DSC to ASC (tapping a second time will sort ASC to DSC):

Brazos Bend (27) Granbury Acton Godley Nar (10) Pecan Plantation Bon	Joshua 70 Keene (2) Ak 1 Clyre Flats 0 (1) (1) (2) (2) (2) (2) (2) (2) (2) (2) (2) (2	Mildo Ventos Waywearl Five Points	Reugor Springs and A	stol Grays Prairie Ker sp ta Styx Alma Keyboard shortcuts Map date 62	Mabank Big + Gran Barrel City Eustace 2020 Google 10 km Luns Journey Terms of Use
Mapped Data Active Customers 522 ×				Apply Action To: All Tabs	✓ ✓ Actions ∧ ①
First Previous 1 2 3 4 5 Next Last	Search:	Show 25 🗸 entries			
ACTIONS POLICY NUMBER ADDRESS	ACCOUNT ACCOUNT (MOBILE) PHON	IE ACCOUNT (EMAIL) ACCOU	INT (COUNTY) ACCOUNT (NUME	BER OF ACTIVE POLICIES) OPPORTUNIT	Y (TYPE) OPPORTUNITY (LAST ACTIVIT)
S55555-3 S55555-3 S55555-3 S55555-3 Crest Place Waxahachie TX 75165 US	John Smith 555- 555- 5555- 5555	Ellis	3		
Crest Place Waxahachie, TX 75165 US	John Smile 555- 555- 5555	Ellis	3		
C V V V V V V V V V V V V V V V V V V V	Jane Doe Jr 555- 555- 5555	Dallas	2		
S555 Blue S552255-3 Trinity Mills Rd #117 Carrollton	Jen James 555- 555- 5555	Dailas	2		

9. After reviewing the information, contacting the customer, or narrowing down what customers will be visited during the work week, tap on the empty boxes on the far left of the list to select the records (pins) to be Pushed to Mobile Sales App (or use the left "ACTIONS" blank check box to batch Push by bulk selecting all of the leads on the first page- orange arrow below):



10. Once all the boxes are checked for the records about to be sent to MSA, tap on the "Actions" button on the far right-hand side of the Map List header:

niGoogle 377	Huboh./5 Seed, alle Crimedial Crimedial Public Sales App Structure Villing Revised shorture Mag data 22222 Push to Mobile Sales App Structure
Mapped Data Active Customers 522 ×	Apply Action To: Selected Records V 🖌 Actions 🔨 🕐
First Previous 1 2 3 4 5 Next Last	Search: Show 5 v entries
ACTIONS POLICY NUMBER ADDRESS	ACCOUNT ACCOUNT (MOBILE) PHONE ACCOUNT (EMAIL) ACCOUNT (COUNTY) ACCOUNT (NUMBER OF ACTIVE POLICIES) OPPORTUNITY (TYPE) OPPORTUNITY (LAST ACTIVITY)

11. Now tap on the "**Push to Mobile Sales App**" button to send record to MSA Leads Management:



12. Return to the Mobile Sales App (MSA) go to the Leads Page by tapping on the Leads Management icon at bottom of bar:



13. Once in the Leads Page, tap on "List" (top-left). Then tap the "Sync Leads" icon (top-right) to manually sync the records from Salesforce to MSA to complete the process:

			Leads		(s	Lee (5	Sarver 4180)	0
Мар	List	Overview			Sync Leads	Residential Prospects	Add Business	Add Leads
Q Search							Remove	Filter
Name		Address	Туре	Status	Appt/Follow	DSLA		



At the bottom of the list will display the last date and time MSA synced leads. To the bottom-right of the page, the count of leads displayed in the list.

After tapping on "Sync Leads" the date/time will **update** and the count of leads will **increase**.

14. Once your newly "Pushed to Mobile" Leads have synced, to find those newly synced leads, use the Search **Filter** (on right side of screen) to filter:

			Leads			Le (!	e Sarver 54180)	0
Мар	List	Overview			Sync Leads	Residential Prospects	e Add Business	Add Leads
Q Search							Remove	Filter
Name		Address	Туре	Status	Appt/Follow	DSLA		
Aqua Tots Swi	m Schools	15922 Eldorado Pkwy # 400		Ê		13		

15. Filter by "Lead Types" as "Active" so the Leads List filters to only display those lead types:

							(5418	0)	
Мар	List	Overview		Clear	L	eads Filte.	r	×	Is
Q Search				Q Search					1
Type: Active	8			Show Removed	d Only				
Name		Address	Туре	-					
Jana Daa		555 First Street	G	Show Favorites	s Only				
Jane Doe		Dallas TX 75555	¥	Date					te
				Туре		• Rang	e	•	
				Lead Types (1	selected)				
			•	?	AH		\$		
				Active	Ad Hoc	828	Claim	Kelerral	
				Lead Statuses					
				¢		Ŷ	\$	۲	
L				Application	Appointment	Awaiting Email	Call Back	Demo Complete	

Note that **customer lead types can vary based on what Opportunities the CRM system has created** and sent through during the overnight "leads sync and policy load" process. Other customer lead types can include: New Policy Follow Up, Claim, 1st Year anniversary, and more.

When user **manually** pushes from the Salesforce CRM Map's **Standard Folder- Active Customer** layer, it will "reset" the lead pin/type in MSA so that it resets the ability to set a follow up appointment with the customer Lead record. Otherwise, once a Lead is marked as "Sold," the ability to create a Follow Up Appointment is disabled until a new Opportunity record is sent from Salesforce CRM.

≺ ocarch						Remove	Filter
Name	Address	Туре	Status	Appt/Follow	DSLA		
Aqua Tots Swim Schools	15922 Eldorado Pkwy # 400 Frisco, TX 75035				13	0	
Robert Madden Industries	2124 E Saint Elmo Rd # D Austin, TX 78744		•	10/6/2024 10:45 PM	189	0	
Dollar General	5002 Nuckols Crossing Rd Austin, TX 78744	•	*	8/1/2025 12:00 AM	26	0	
Communitycare Health Ctr	2901 Montopolis Dr Austin, TX 78741		•	1/12/2025 12:00 AM	100	0	
Fred Linares	2124 Ponciana Loop Austin, TX 78744		+		19	0	Activate
Devera Colingsworthington	5000 Pepper Ln Austin, TX 78744	\$	Ŷ		20	>0	Activate
	E403.0					-	0

16. In MSA Leads, to view more Lead detail information, tap on the "i" information icon:

17. To view policy details, select "**Coverages**" on the Lead Details page (notice the "Follow Up" icon has returned since it has been reset by the push):



Review the Learning Pathways for MSA PDF to watch short videos on features and functions in MSA. For more information on Salesforce CRM, download the Salesforce User Guide. Both resources can be downloaded from the Homepage of CRM:

5	UNSTOPPABLE	
FH Links		
SF User Guide	e CRM Learning Pathway MSA Learning Pathway	

Additional resources can be found in FIT, under the "Resources" Tab, in the Mobile Technology topic section:



For questions or to report an issue please create a new support ticket within Salesforce utilizing "Cases" under the "Tools" section of the Salesforce Navigation menu. Here's a video on how to create a Case in Salesforce: <u>https://familyheritagelife-</u> <u>1.wistia.com/medias/p78pzs5vxt</u>

For support for the Mobile Sales App, contact the helpdesk at 1-888-800-6490 (M-Sat).