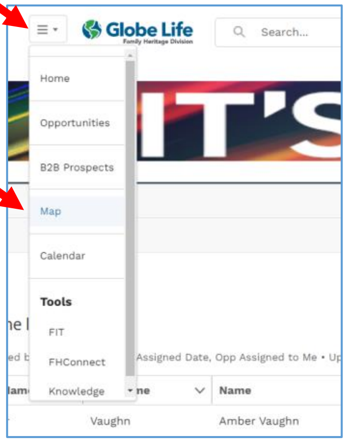
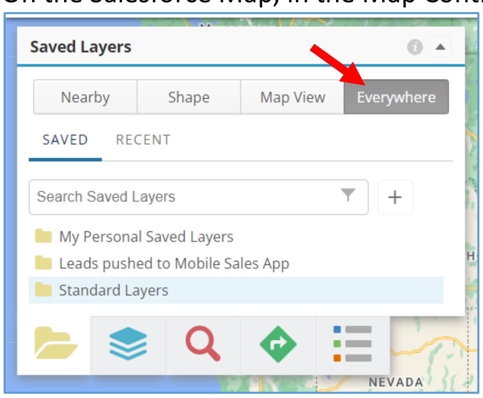
Find your Active Customers in Salesforce Using Map

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/ .

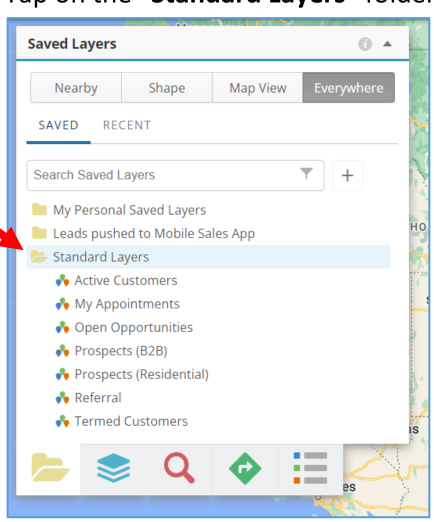
1. From the Salesforce Homepage, tap on the Navigation Menu to expand, then tap on "**Map**":



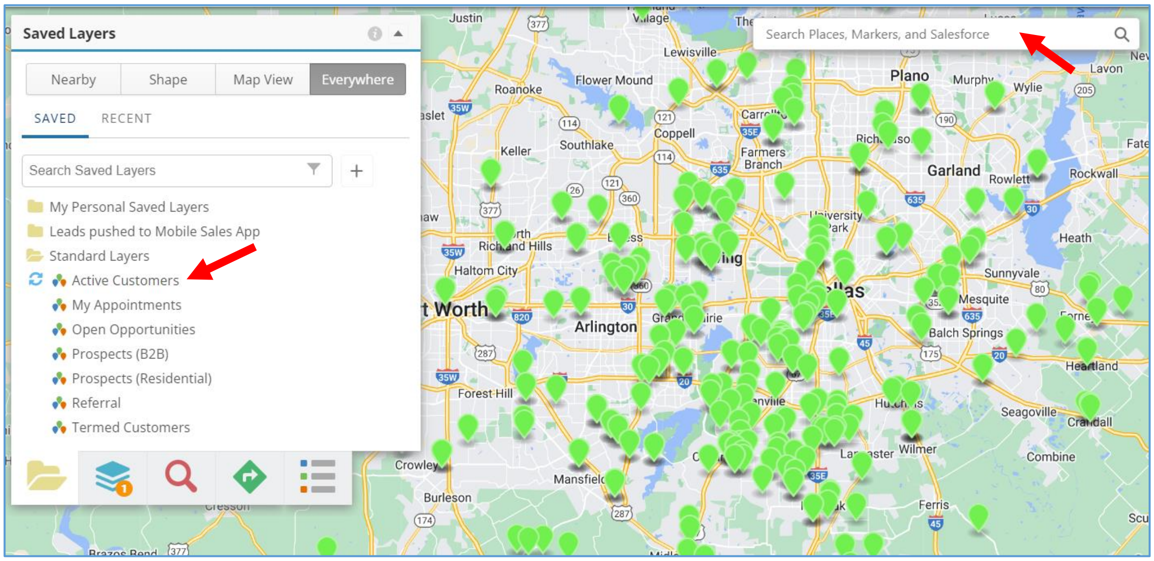
2. On the Salesforce Map, in the Map Control Panel "Saved Layers" Tab, tap on "**Everywhere**":



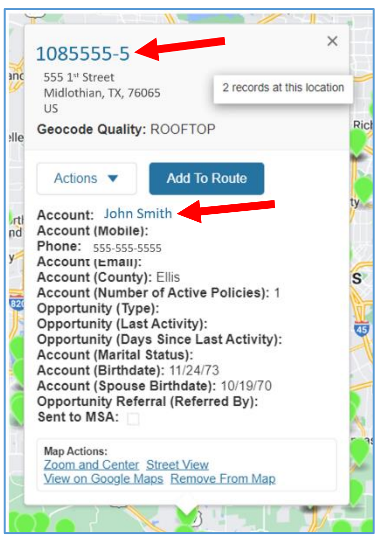
3. Tap on the "**Standard Layers**" folder to expand:



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:



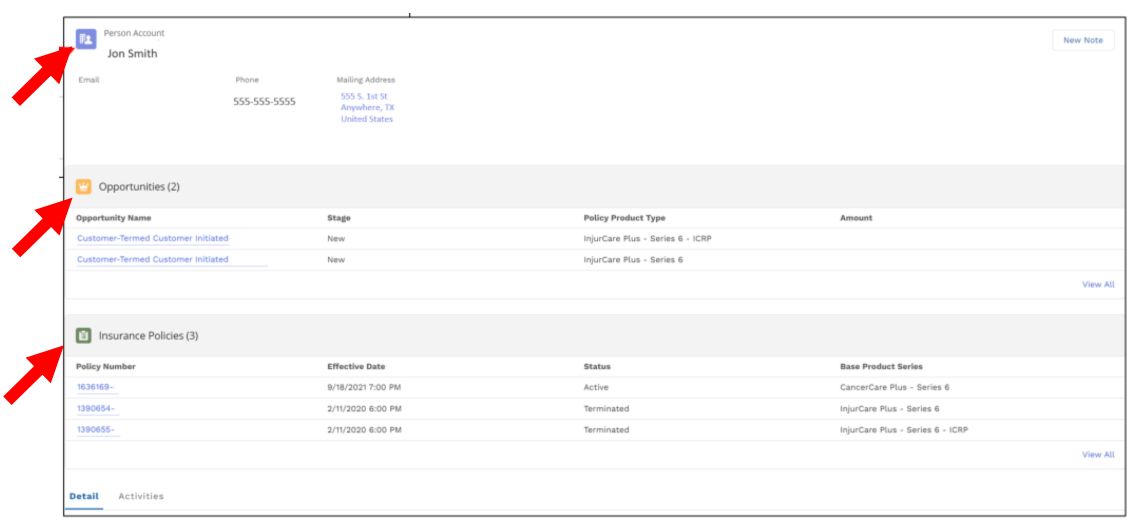
5. When tapping on any Active Customer pin, a Tooltip with information on the Policy, such as Policyholder (Account), address, phone number, number of active policies, etc.



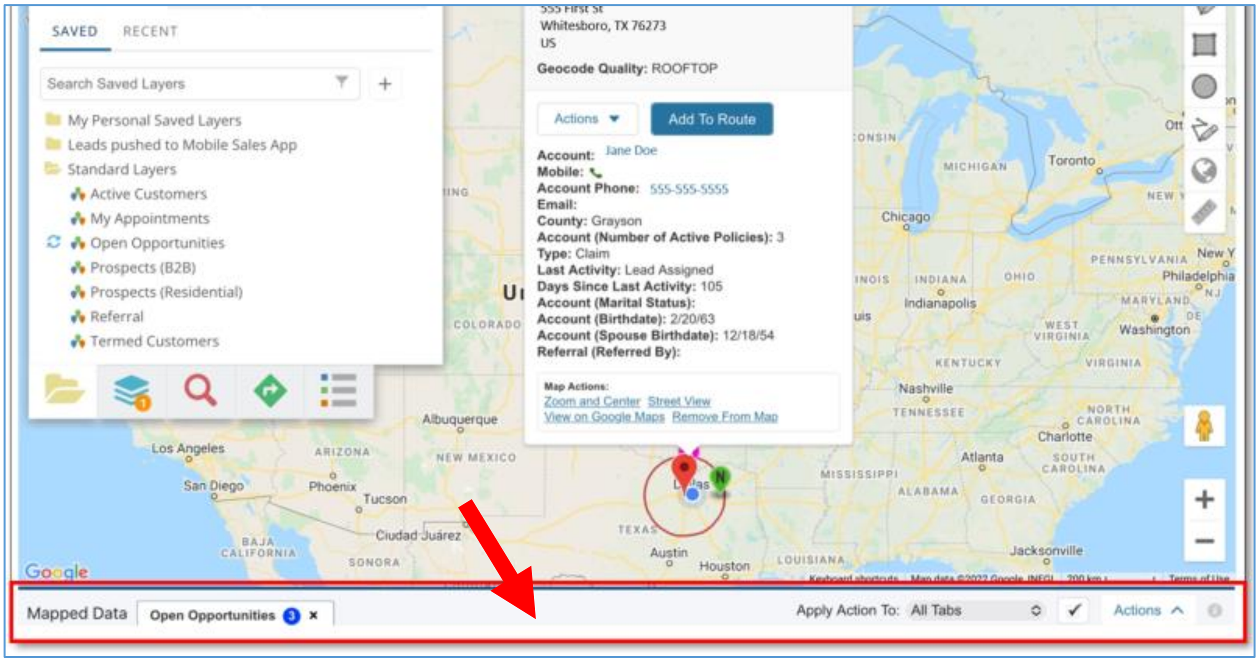
The numbers in blue at the top of the Tooltip are hyperlinked to the **Insurance Policy Page** where the agent can find additional details on the Policyholder such as policy type, AC draft day, premium amount, effective date, and more.

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:)



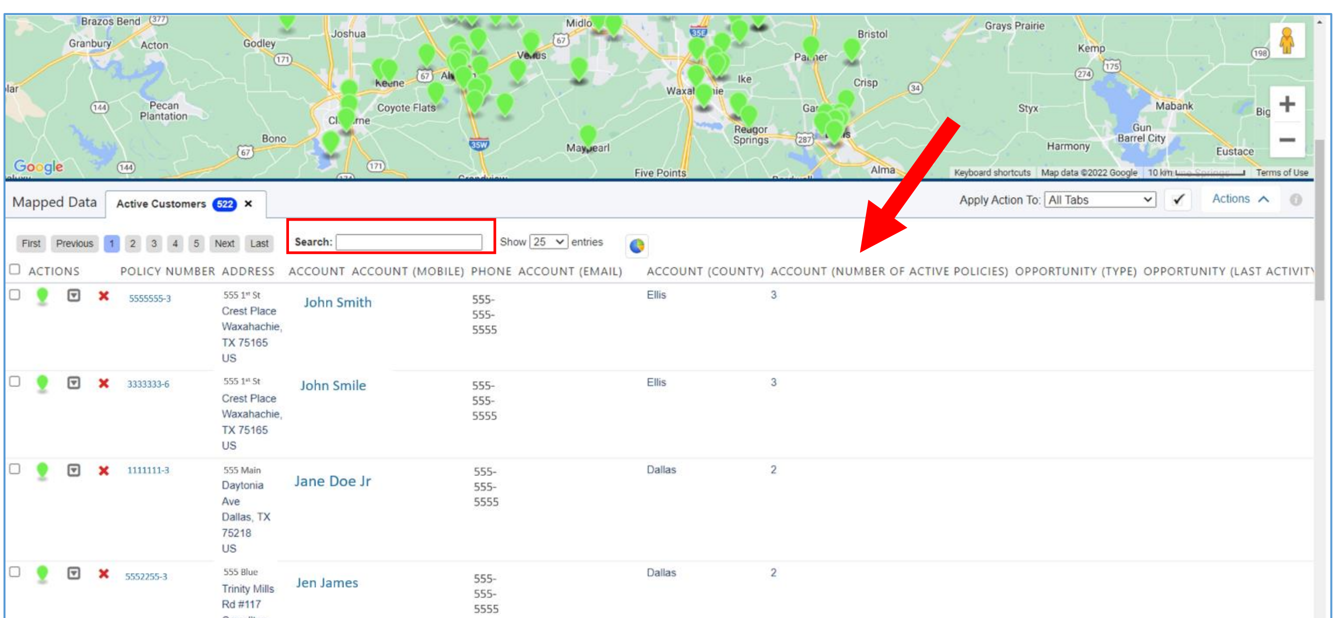
6. To view in a Map List, scroll to the bottom of the tablet screen until the Map List **Header** is displayed:



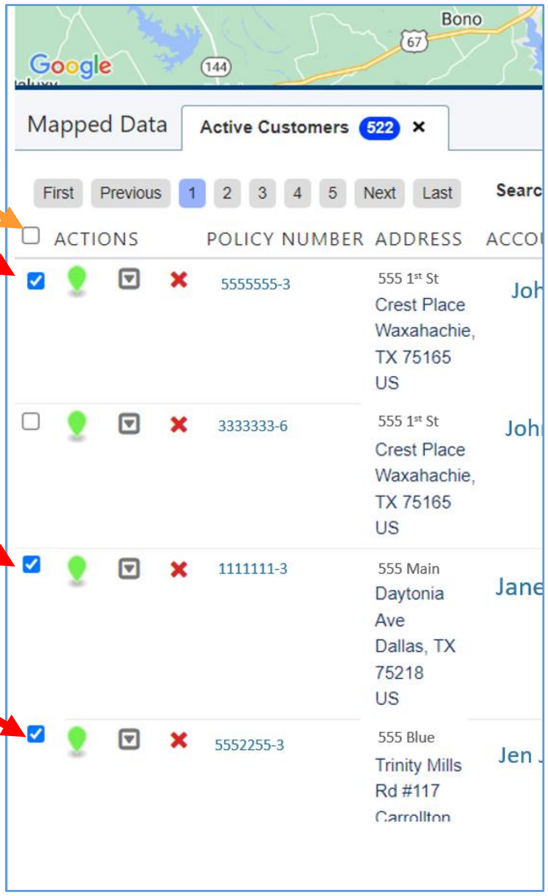
7. Touch the middle of the header's bar and slowly **glide** in an upwards motion to expand the list:

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.

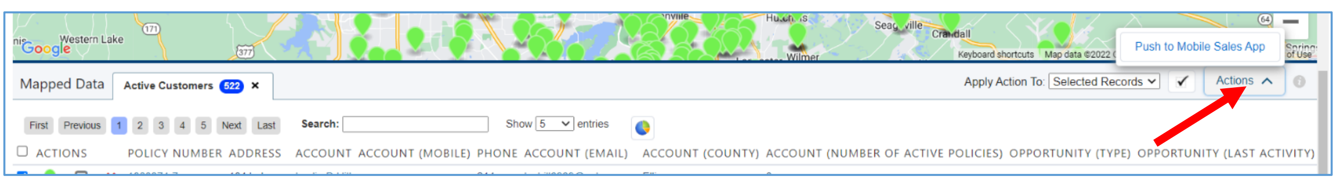
   List will default to 25 rows per page and can be **searched** (filters the list based on the text in the search box). Scroll to the far-right on the table list to see additional information on the policy. Each column is **sortable**. Just tap on the column header (example: Total Claims Paid, Effective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



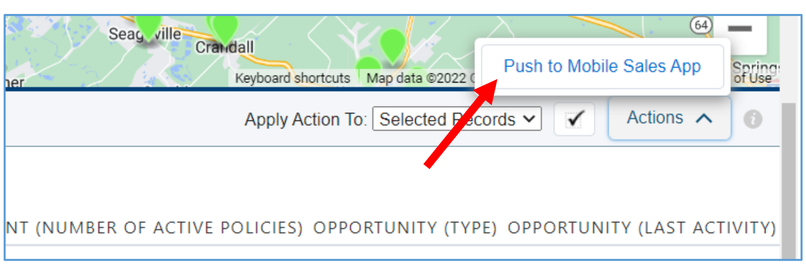
9. After reviewing the information, contacting the customer, or narrowing down what customers will be visited during the work week, tap on the empty boxes on the far left of the list to **select** the records (pins) to be Pushed to Mobile Sales App **(or use the left "ACTIONS" blank check box to batch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



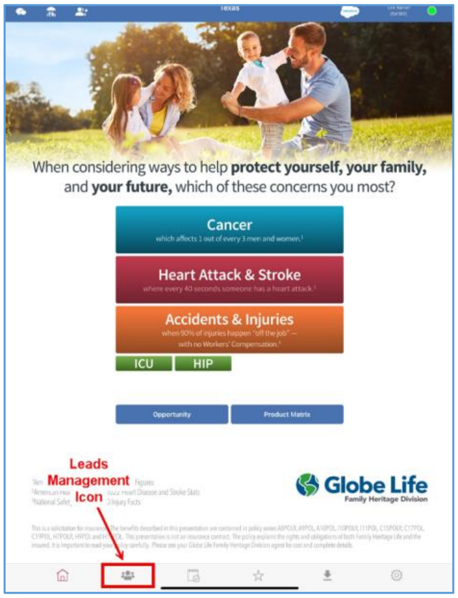
10. Once all the boxes are checked for the records about to be sent to MSA, tap on the "**Actions**" button on the far right-hand side of the Map List header:



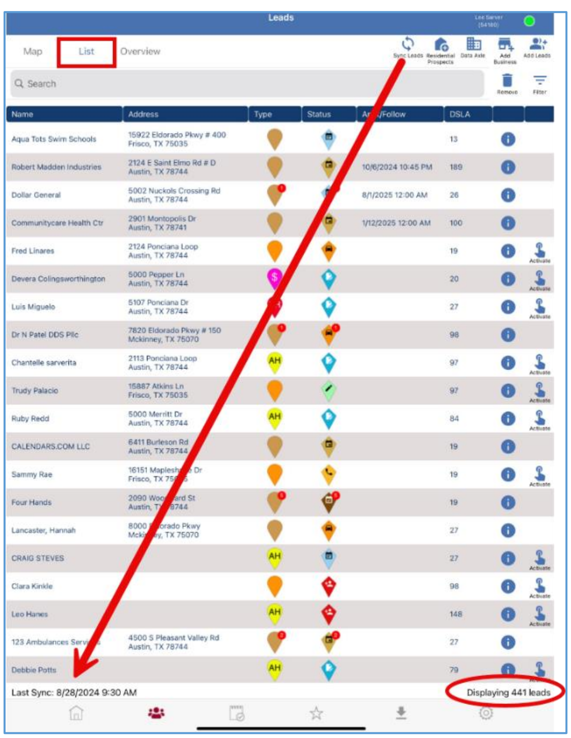
11. Now tap on the "**Push to Mobile Sales App**" button to send record to MSA Leads Management:



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



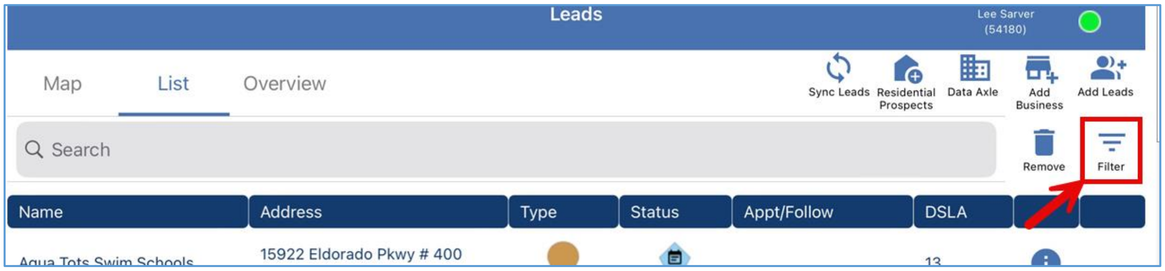
13. Once in the Leads Page, tap on "**List**" (top-left). Then tap the "**Sync Leads**" icon (top-right) to manually sync the records from Salesforce to MSA to complete the process:



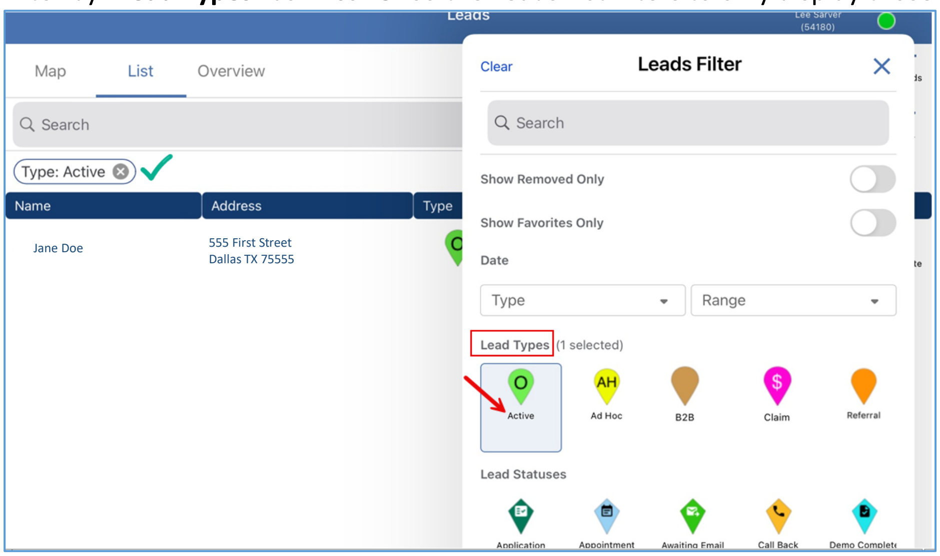
At the bottom of the list will display the last date and time MSA synced leads. To the bottom-right of the page, the count of leads displayed in the list.

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:



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

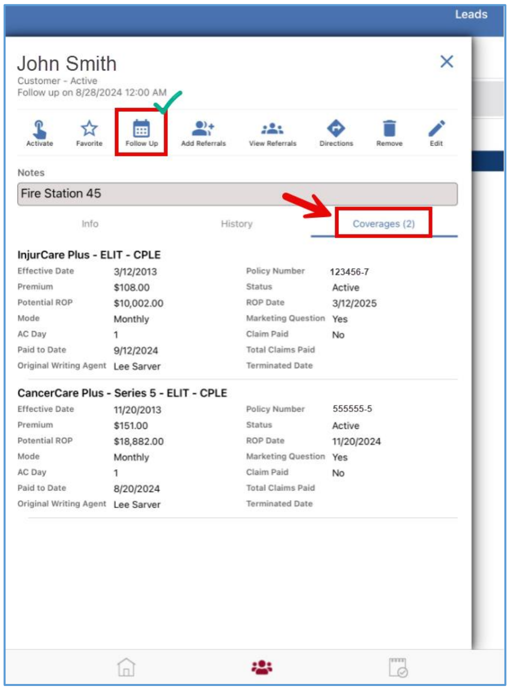


Note that **customer lead types can vary based on what Opportunities the CRM system has created** and sent through during the overnight “leads sync and policy load” process. Other customer lead types can include: New Policy Follow Up, Claim, 1st Year anniversary, and more.

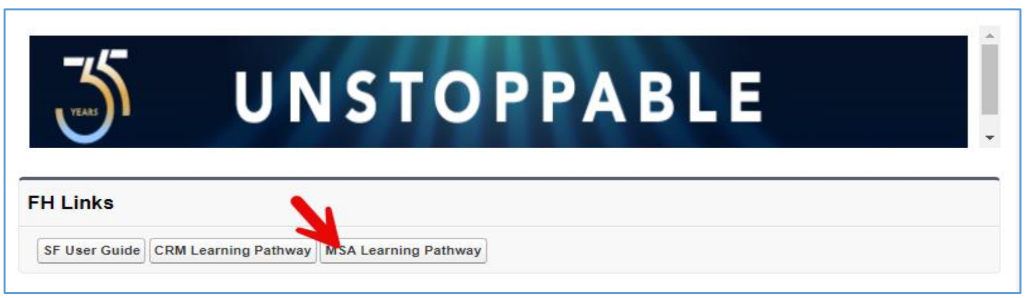
When user **manually** pushes from the Salesforce CRM Map’s **Standard Folder- Active Customer** layer, it will “reset” the lead pin/type in MSA so that it resets the ability to set a follow up appointment with the customer Lead record. Otherwise, once a Lead is marked as “Sold,” the ability to create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

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

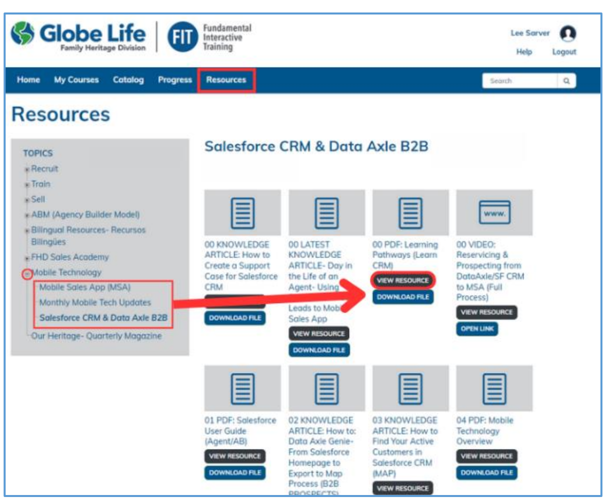
17. To view policy details, select “**Coverages**” on the Lead Details page (notice the “Follow Up” icon has returned since it has been reset by the push):



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:



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: https://familyheritagelife-1.wistia.com/medias/p78pzs5vxt

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