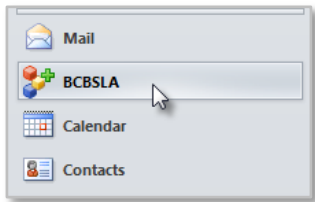


# Using CRM in Outlook

## Reference Guide

### Accessing CRM

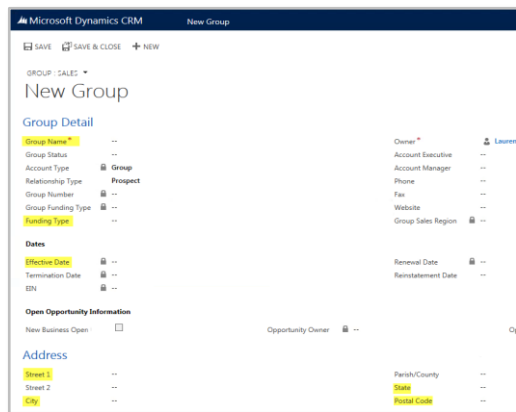
1. To access CRM in Outlook:
  - Click BCBSLA on the bottom left:



- Click Workplace, My Work, then Dashboards
2. Access CRM online using the URL below:  
**<https://crm-prd-web.lahsic.com/BCBSLA/main.aspx#>**

### Creating New Groups

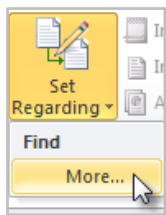
1. Click the Customers tab.
2. Select Groups.
3. Click the “New” icon on the ribbon menu.
4. Fill-in the highlighted fields in the image below:



5. Click “Save” then “Save & Close.”

### Tracking Emails

1. Create a new email in Outlook.
2. Select the “Set Regarding” icon and click more.



3. Search for the group you’d like to track.
  - Click the appropriate group.
  - Click Add.
4. Continue your email.

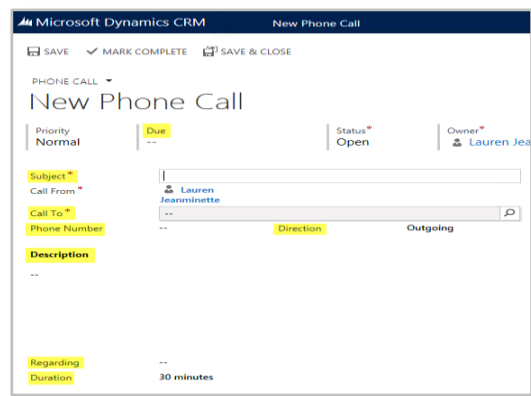
Note: A “Regarding” notice will appear near the bottom of the email.

### Appointments

1. Click the Activities tab.
2. Select the “Appointment” icon.
3. Fill-in the following fields: Subject, Location, Start Time, and End Time.
  - Enter notes as needed.
  - Set regarding the appropriate group.
4. Click “Save & Close.”

### Phone Calls

1. Click the Activities tab.
2. Select the “Phone Call” icon.
3. Fill-in the following fields:

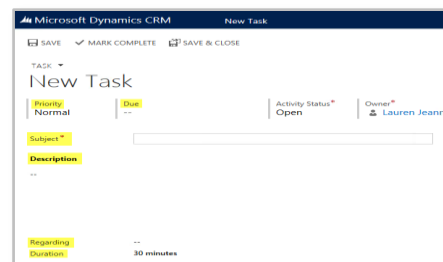


4. Click “Save & Close.”

Note: Add notes as needed and mark as complete after the phone call.

### Tasks

1. Click the Activities tab.
2. Select the “Task” icon.
3. Fill-in the following fields:



4. Click “Save & Close.”

Note: Add notes as needed and mark as complete when finished. This moves the task to closed activities.

# Using CRM in Outlook

## Reference Guide

### Creating New Opportunities

1. Click the Opportunities tab.
2. Click the “New” icon on the ribbon menu.
3. Fill-in the highlighted fields in the image below:

Qualify (Active) | Development | Proposal

Identify Contact | click to enter | Estimated Budget | click to enter  
Identify Account | click to enter | Purchase Process | click to enter  
Purchase Timeline | click to enter | Identify Decision Maker | mark complete

**General**

Topic \* -- Type of Funding --  
Group / Member \* -- Submission Request --  
Owner \* -- Lauren Jeannette -- Priority --  
Client Type \* -- Preparation --  
Sales Stage \* -- Preparation --  
Effective Date \* -- -- Group Proposal Sys: --  
Opportunity Type \* -- New Business -- Source Campaign --

4. Click “Save” then “Save & Close.”

### Sending Opportunities to Underwriting

1. Click the Opportunities tab.
  - Choose an open opportunity.
2. Fill-in the Product fields below accordingly:

**Products**

Health	--	Standard Com	--	Other Commis	--
Dental	--	Standard Com	--	Other Commis	--
Vision	--	Standard Com	--	Other Commis	--
Group Term L	--	Standard Com	--	Other Commis	--
Short Term D	--	Standard Com	--	Other Commis	--
Long Term D	--	Standard Com	--	Other Commis	--
Voluntary Gro	--	Standard Com	--	Other Commis	--
Voluntary Lon	--	Standard Com	--	Other Commis	--
Voluntary Sho	--	Standard Com	--	Other Commis	--
Voluntary Hg	--	Standard Com	--	Other Commis	--

3. Update the Sales Stage and Win/Loss Status fields under the General section.
4. Click “Save & Close.”

### Opportunities Lost to Competition

1. Click the Opportunities tab.
  - Choose an open opportunity.
2. Fill-in the following fields in the image below:

**General**

Topic \* Test Topic  
Group / Member \* Test 1234  
Owner \* Lauren Jeannette  
Client Type \* Group  
Sales Stage \* Preparation  
Effective Date \* 11/30/2016  
Opportunity Type \* New Business  
Decision --  
Win/Loss Status \* --  
Competitive Commis --

**Products**

Health	--	Standard Commission	--	Other Commission	--
Dental	--	Standard Commission	--	Other Commission	--
Vision	--	Standard Commission	--	Other Commission	--

- Select all products lost to competition.
3. Click “Save & Close.”

### Viewing Closed Activities

1. Ensure the dashboard view is set to the correct dashboard based on your security role.
  - AM- My Dashboard
  - Group- My Dashboard
  - Individual- My Dashboard
  - Other
2. Click “My Activities” on the Activities ribbon.
3. Select “Closed Activities” to view ALL current closed activities or “My Closed Activities” to view ONLY your closed activities.

Dashboard: Individual - My Dashboard

**Activities** | My Activities | Search for record

**System Views**

- All Activities
- Closed Activities**
- Closed Activity Associated View
- CSA - Activities
- Customer Service Member Form

**My Activities**

- My Closed Activities**
- My Team Members' Activities
- Open Activities
- Open Activity Associated View
- Scheduled Activities
- Create Personal View

**Opportunities** | My Open Opportunities

Effective D...	Topic
11/30/2016	Test Topic
10/29/2016	New Topic 3
10/28/2016	New