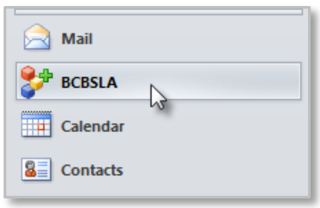
Using CRM in Outlook
Reference Guide

Accessing CRM

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

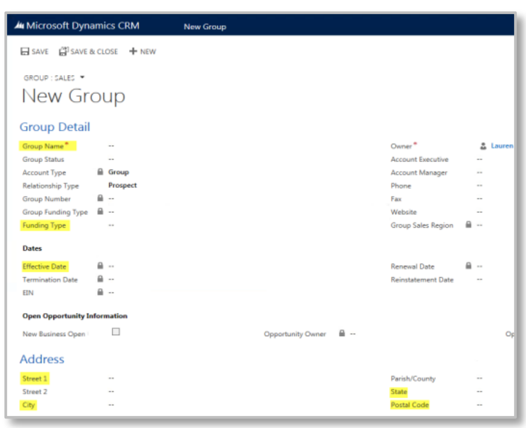


    - Click Workplace, My Work, then Dashboards
2. Access CRM online using the URL below:

https://crm-prd-web.lahsic.com/BCBSLA/main.aspx#

Creating New Groups

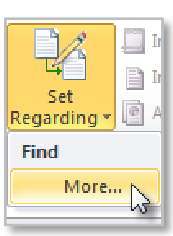
1. Click the Customers tab.
2. Select Groups.
3. Click the "New" icon on the ribbon menu.
4. Fill-in the highlighted fields in the image below:



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.

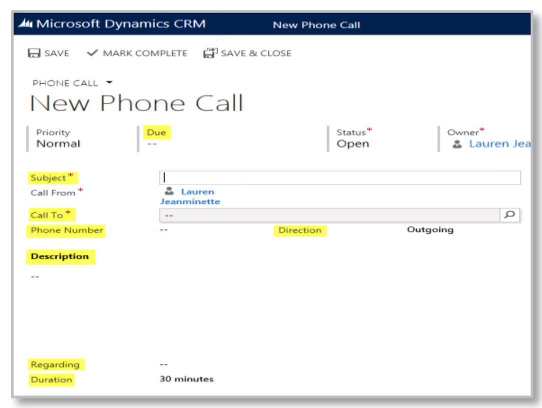
Note: A "Regarding" notice will appear near the bottom of the email.

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:

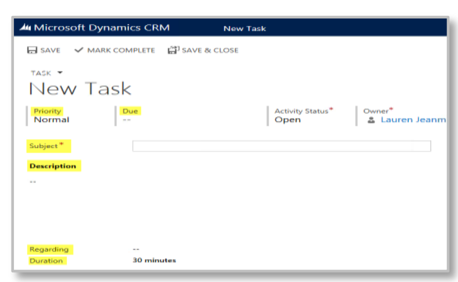


4. Click "Save & Close."

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:



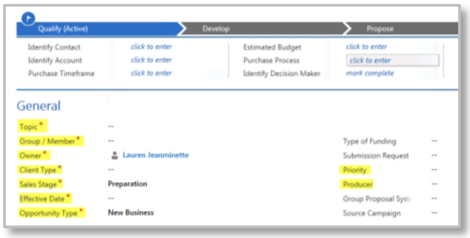
4. Click "Save & Close."

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

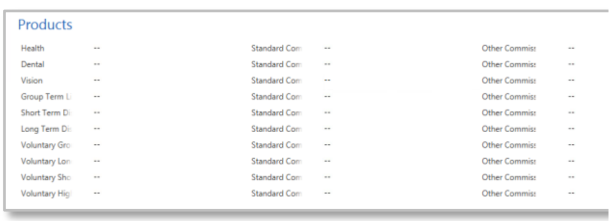
1. Click the Opportunities tab.
2. Click the “New” icon on the ribbon menu.
3. Fill-in the highlighted fields in the image below:



4. Click “Save” then “Save & Close.”

Sending Opportunities to Underwriting

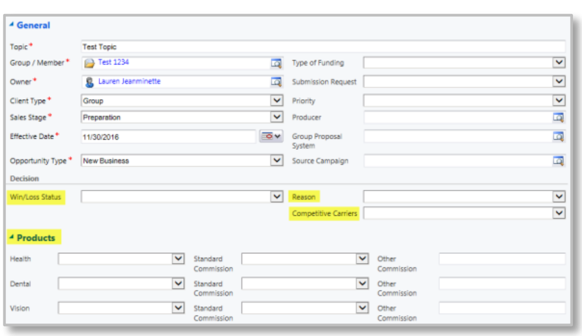
1. Click the Opportunities tab.
    - Choose an open opportunity.
2. Fill-in the Product fields below accordingly:



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:



- 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.