

Caller without a Contact in SF	Caller with a Contact <u>AND</u> Account Owner	Caller with a Contact <u>AND</u> Account Owner
Create a Lead.	Does the Contact have active coverage?	Does the Contact have active coverage?
Convert Lead.	If No: Navigate to the Account Page	If Yes: Navigate to the Member360 Page.
Create Quote from the Opportunity.	Create New Opportunity through the Related Tab.	Under Broker Actions click “Create Quote”
	Making sure to input the following information:	Generate Quote and create Opportunity from here.
Caller with a Contact but <u>NOT</u> the Account Owner	<u>Opportunity Name:</u> Last Name First Name – DOB Opp	This information does show under the contact record once created as well.
Create a Lead.	<u>Primary Applicant DOB:</u> Using this format: 00/00/0000	
Choose existing contact however create a new Account and Opportunity.	<u>Agent:</u> Enter Your Name Here.	
Create Quote from the Opportunity.	<u>Stage:</u> Must be set as Qualification to create a quote.	
	<u>Close Date:</u> Set the date for 60 days from the date you are creating the opportunity.	
	<u>Lead Source:</u> Enter appropriate answer here.	
	Save the Opportunity.	
	Create Quote from the Opportunity just created.	