Medicare CENTER

MedicareCENTER Contact Management

A step-by-step guide to managing your individual contacts and book of business efficiently.

Welcome to our enhanced MedicareCENTER Contact Management.

You will be able to easily search contacts, import your full book of business, create a new lead contact and update existing contacts as well as a host of new features that will make your daily workflow much smoother when managing bulk clients over a period of time.

Our new contact features will allow you to take detailed notes, set appointment reminders, update activities for follow up and notate the stage lifecycle of your contacts' individual needs.

All the above will allow every agent to manage daily priorities and keep every lead organized for optimal productivity. Let's go step by step on how to make the most out of the MedicareCENTER CRM.

After signing into MedicareCENTER, navigate to the CRM button on the main dashboard to dive into our latest features.

ADD CONTACTS

1. IMPORT YOUR BOOK OF BUSINESS

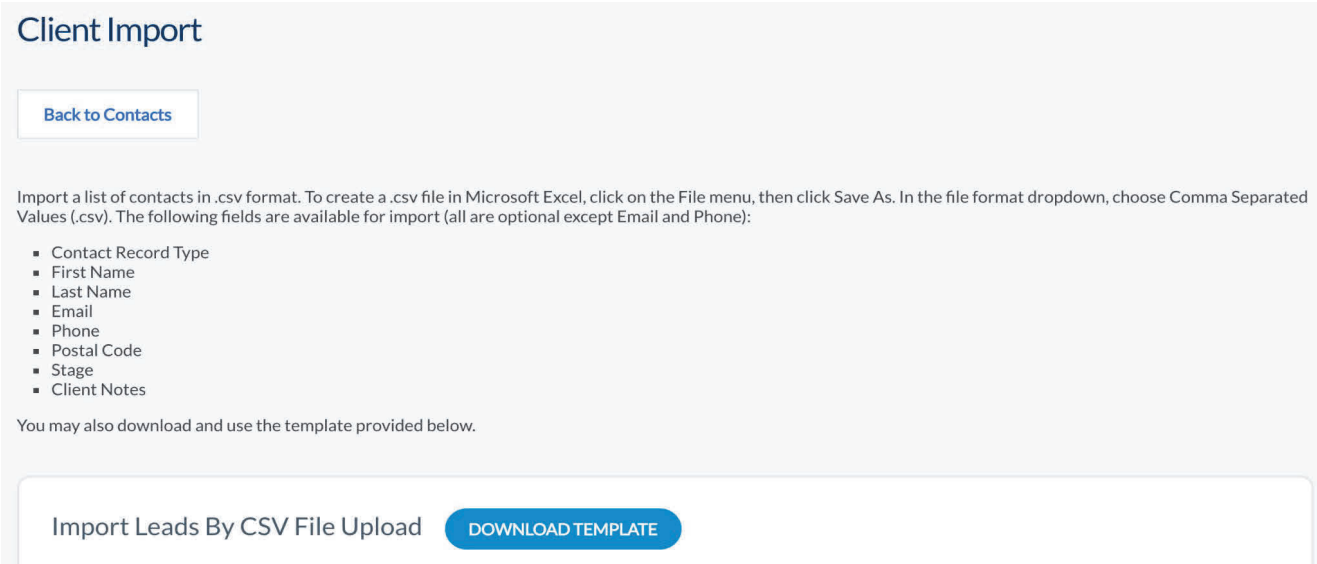
Import a list of contacts in .csv format.

**To create a .csv file in Microsoft Excel, click on the File menu, then click Save As. In the file format dropdown, choose Comma Separated Values (.csv).*

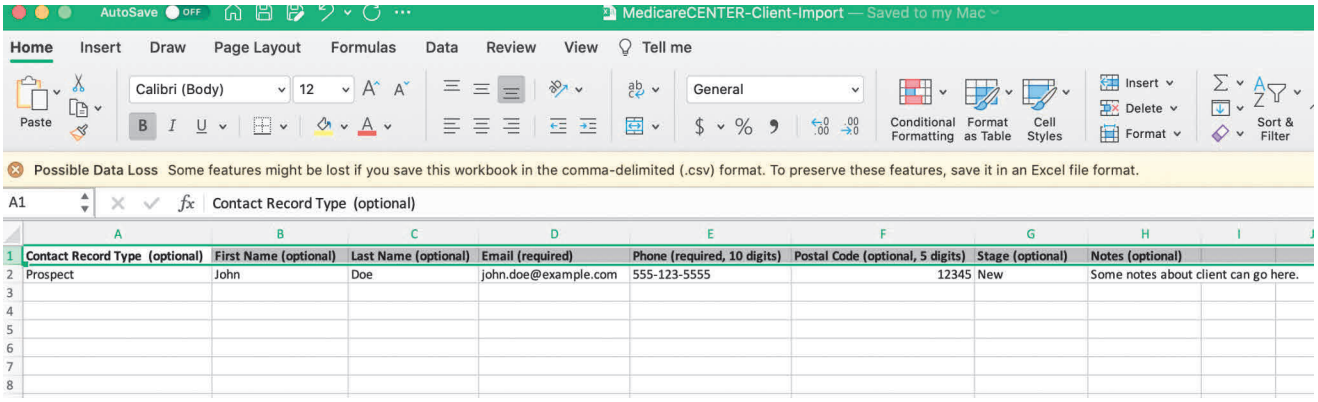
The following fields are available for import (all are optional except Email and Phone):

- Contact Record Type
- First Name
- Last Name
- Email (required)
- Phone (required)
- Postal Code
- Stage
- Client Notes (optional)

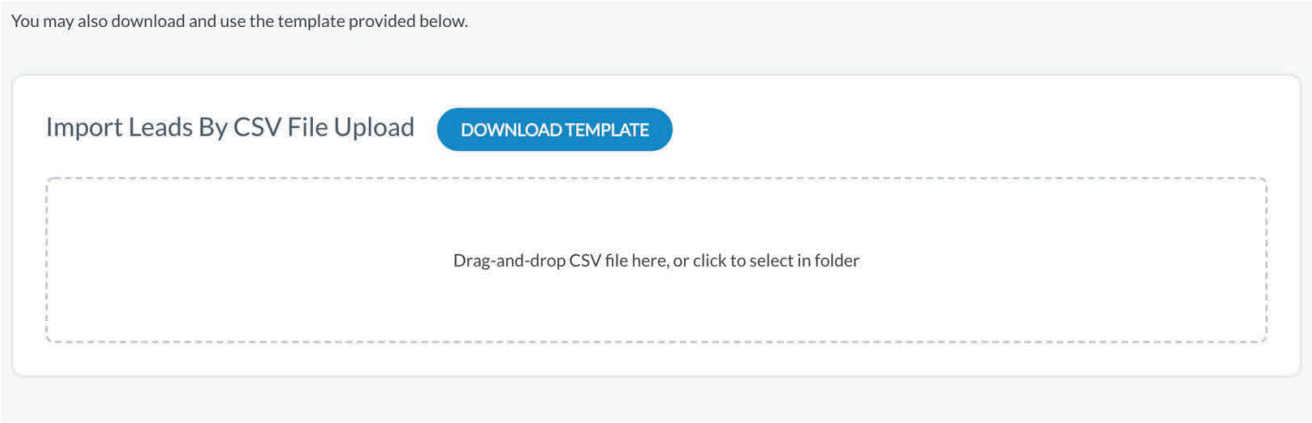
You may also download and use the template provided in the link here:
https://learningcenter.tawebhost.com/MedicareCENTER-Client-Import.csv



The Excel sheet is easy to populate with copy and pasting.



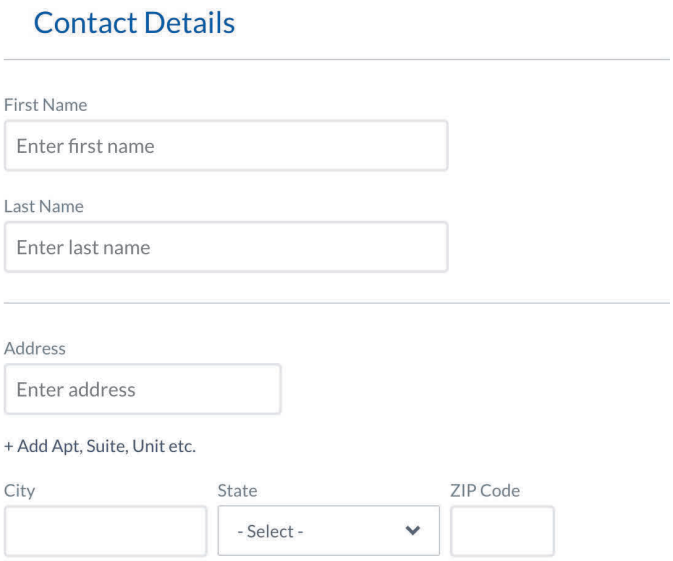
Once you have completed your .cvs file simply upload it within the drag and drop box and follow the steps provided.



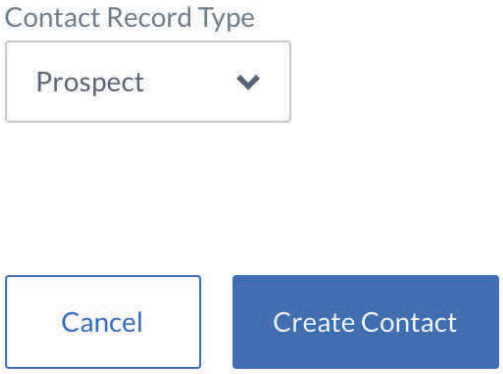
2. ADD AN INDIVIDUAL CONTACT

You can also update and create new contacts individually with the Add New button on the main Contacts page.

Simply type in your client's name, address, full contact information and Record Type to start your management process.

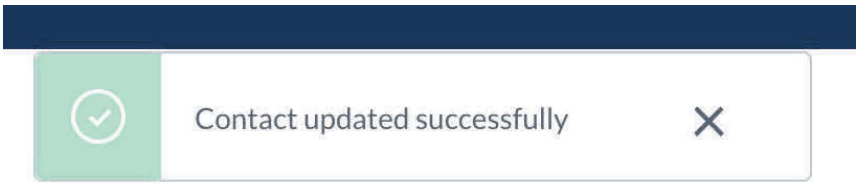


After choosing the Contact Record Type, simply save your contact at the lower corner by clicking the blue Create Contact button.



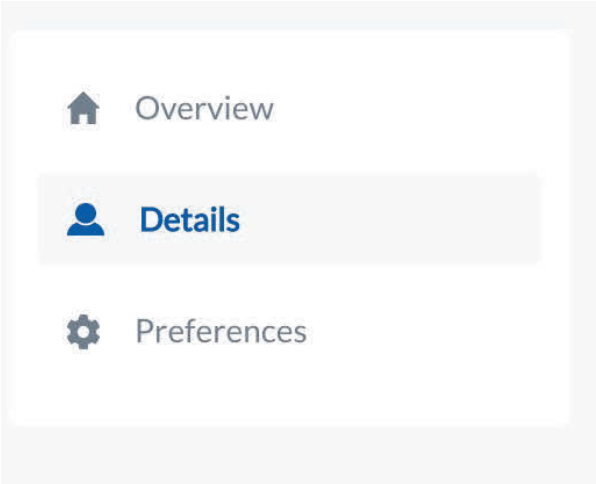
UPDATE, EDIT AND DELETE CONTACTS

You will see a green check notification pop up box once you have created and saved your new contacts' information. When updating any information within a Contact Profile you will receive the same confirmation green check when you are complete.

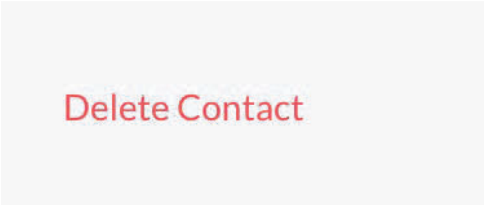


While keeping track of your imported contacts, please note that the system will notify you of potential duplicates.

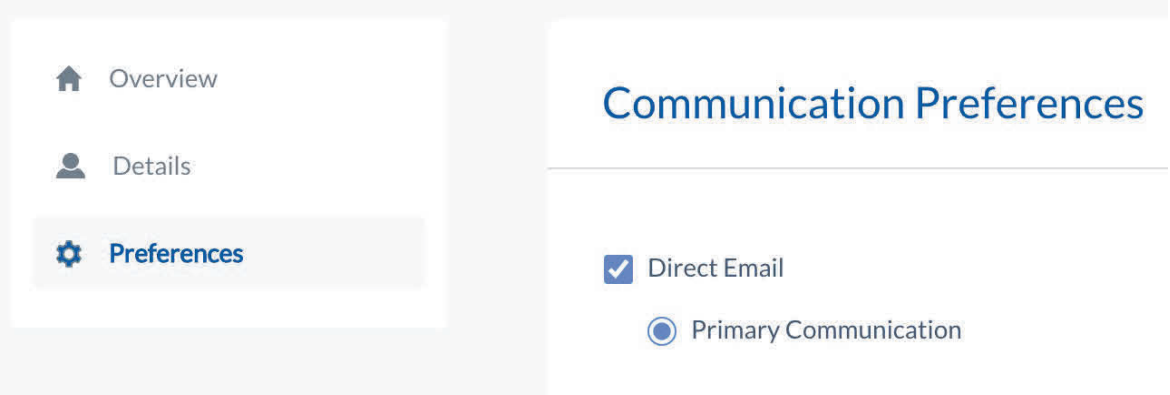
From there, you can easily delete a contact using the Details tab within the Contact Profile.



Note that all deletions are final. When deleting, you will see a notification of your update and will be given a few seconds to undo any deleted edit.

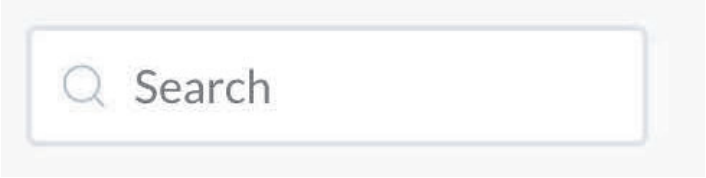


You can edit all their contact information, address, activities, notes, reminders and even their contacting preferences within their individual Contact Profile.



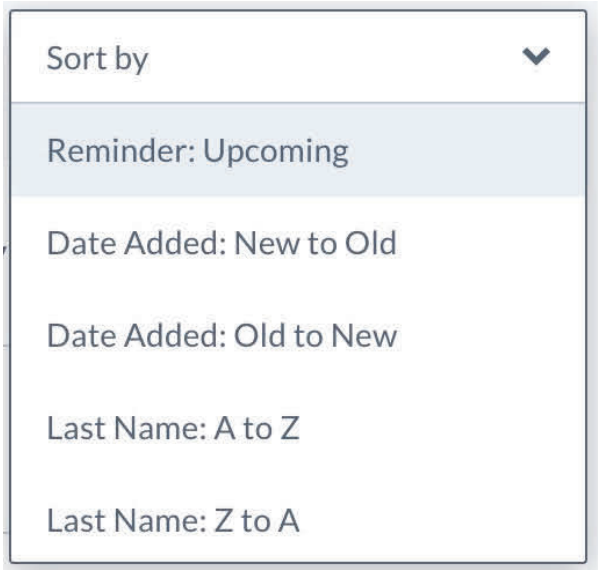
SEARCH, SORT AND MANAGE YOUR BOOK OF BUSINESS

As you grow your list of contacts within the CRM, you can easily navigate, sort and search all contacts on the Main CRM page.



Search by first name or last name.

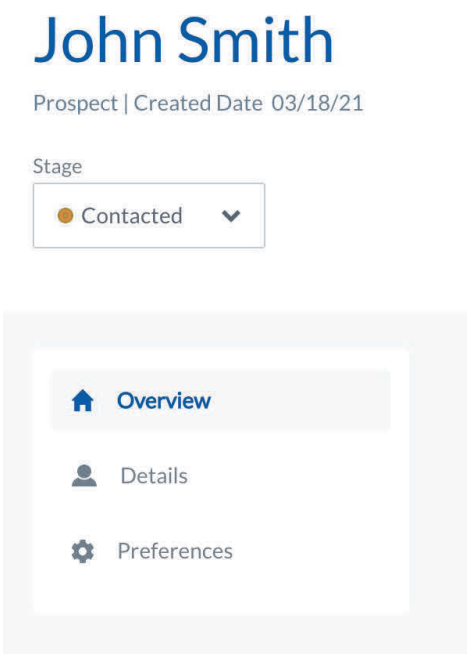
Sort by reminder appointments, date added (new to old) and alphabetical order.



Once you have added all your contacts, we can then manage them optimally.

HOW TO MANAGE YOUR LEADS

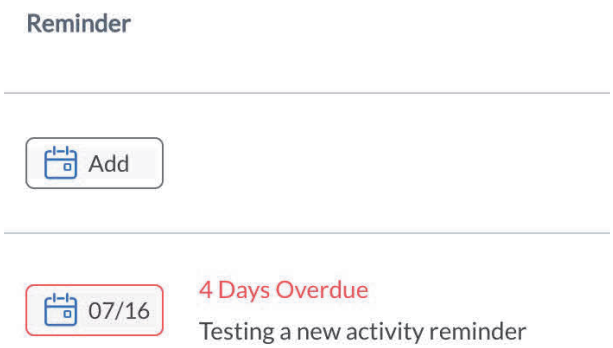
Our new enhanced CRM features allow you to manage your contacts in every detail. Set up different stages for each client, take detailed notes and set date reminders for follow-up calls or in-person appointments.



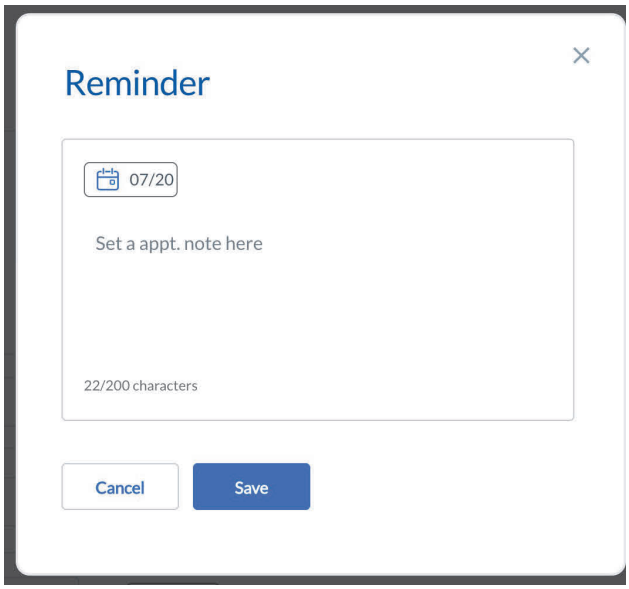
Each Contact Profile allows you to manage the **Overview** dashboard, contact **Details** and your contacts' **Preferences**.

The Client Profile Overview tab allows you to see all your contacts' preferences, Reminders, Activities and Notes in one place.

Setting up an appointment reminder is (1) simple and easy within the Contact Profile and (2) also directly on the CRM dashboard.

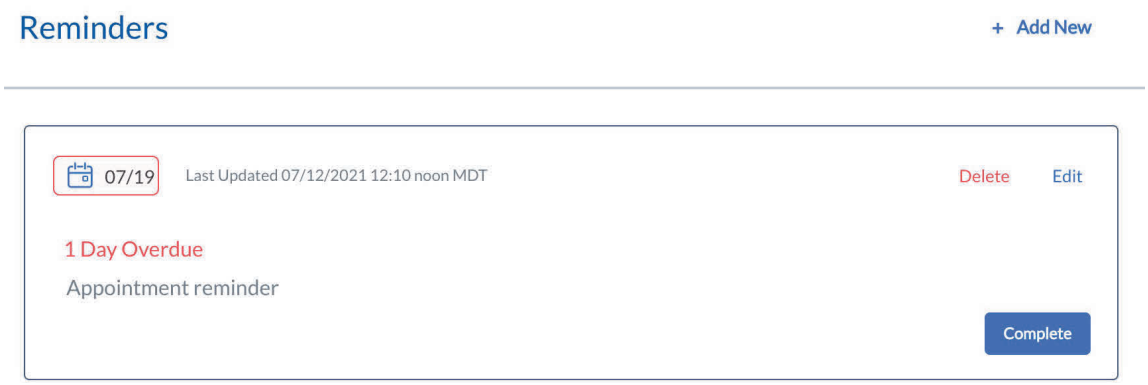


1. **Click Add New within the Reminder column on the main Contacts page. Set a date on the pop-up calendar and leave a notation regarding the appointment.**

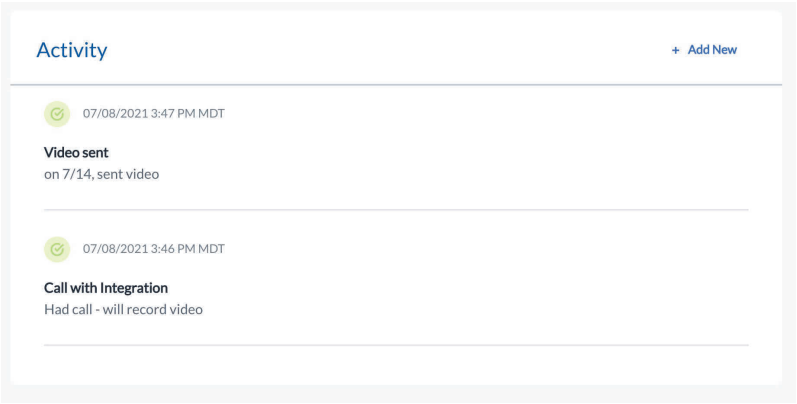


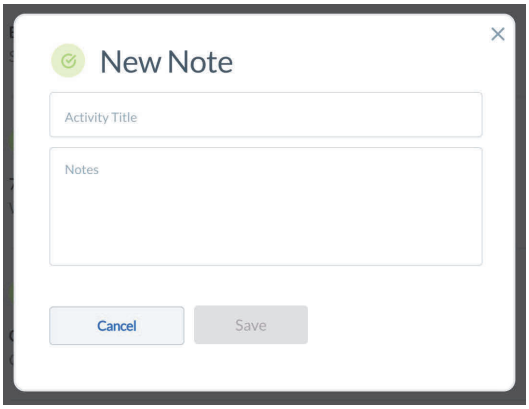
2. **You can also add multiple date reminders within the Contact Profile itself. Simply go to the Contact Profile you want to edit and +Add New reminder within the Overview dashboard column.**

Your list of contact reminders and confirmation of your completion of each appointment reminder is within the Overview tab of the contact. When you complete an appointment click the blue Complete button to remove notifications.



Never miss an opportunity to follow up with your leads in detail using the Activities and Client Notes sections within each Contact Profile.

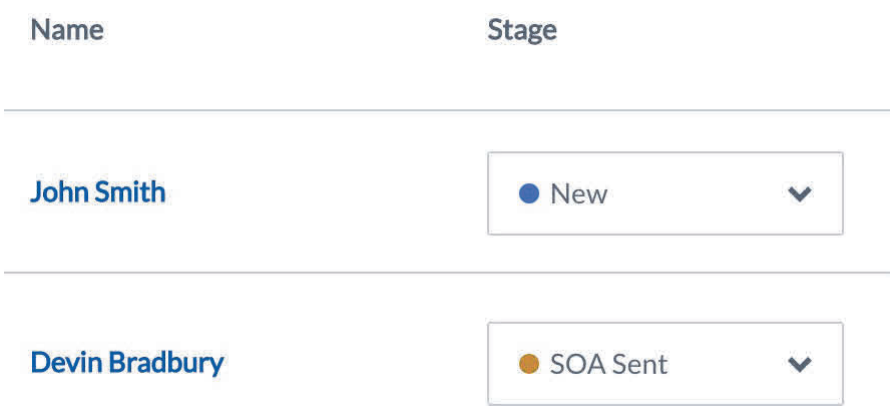




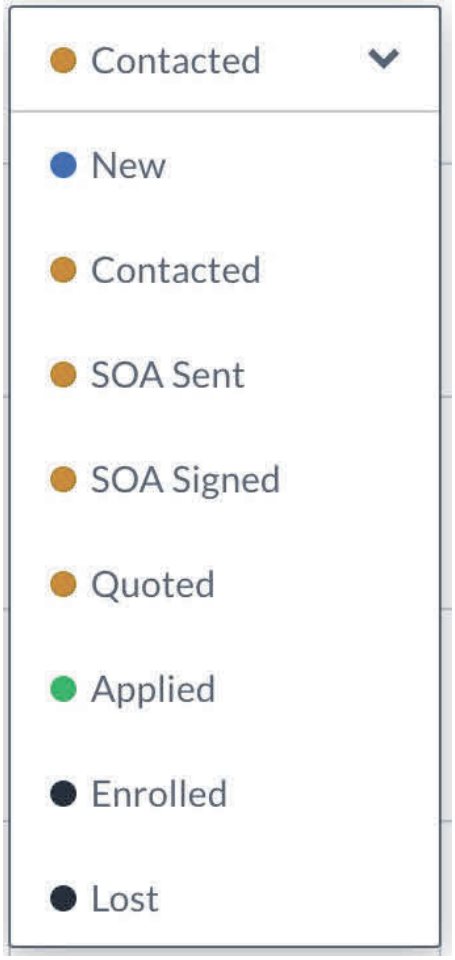
Add new activities for follow-up with the Add New button and also keep detailed notes of your client needs and sales opportunities by clicking the Edit button within the profile.

TRACKING CONTACT STAGE

Make sure you keep track of your Contact Stage in the client lifecycle. This will help you follow up with all appointments and completions of your sales.



No matter where you are in developing your leads and contacts, you can keep track of their Stage within our CRM. Set the Stage as Contacted, New, SOA Sent, SOA Signed, Quoted, Applied, Enrolled or Lost.



Finally, a CRM that fits your workflow!

It's as simple as uploading your book of business! From start to finish you will want to ensure that your book of business is fully updated, each leads stage is noted and your new contacts are imported within MedicareCENTER Contact Management.