



## Create Leads in CRM for ECO Team ZICM\_WORKLIST

<b>Business Process:</b>	<b>Business Technology Office - SUNTAX</b>
<b>Tax Type:</b>	<b>All</b>
<b>Activity:</b>	<b>Creating Leads for ECO Team using ZICM_WORKLIST</b>
<b>Sub-Activity:</b>	<b>New Registration</b>

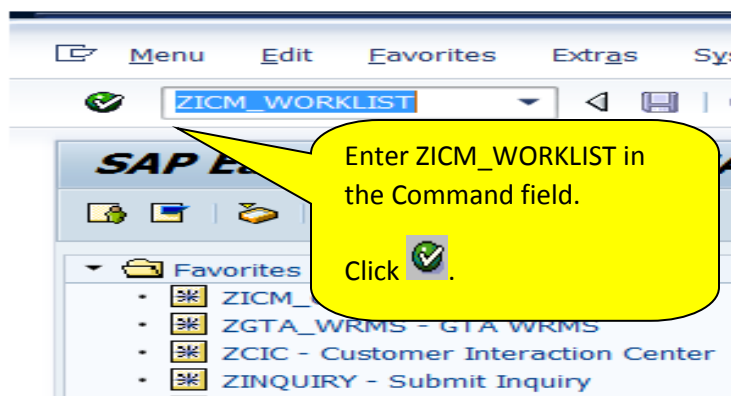
### Purpose/Objective

GTA's new Education and Compliance Outreach (ECO) program will be managed and reported from Integrated Compliance Management (ICM). ECO leads will be created and managed using ZICM\_WORKLIST.

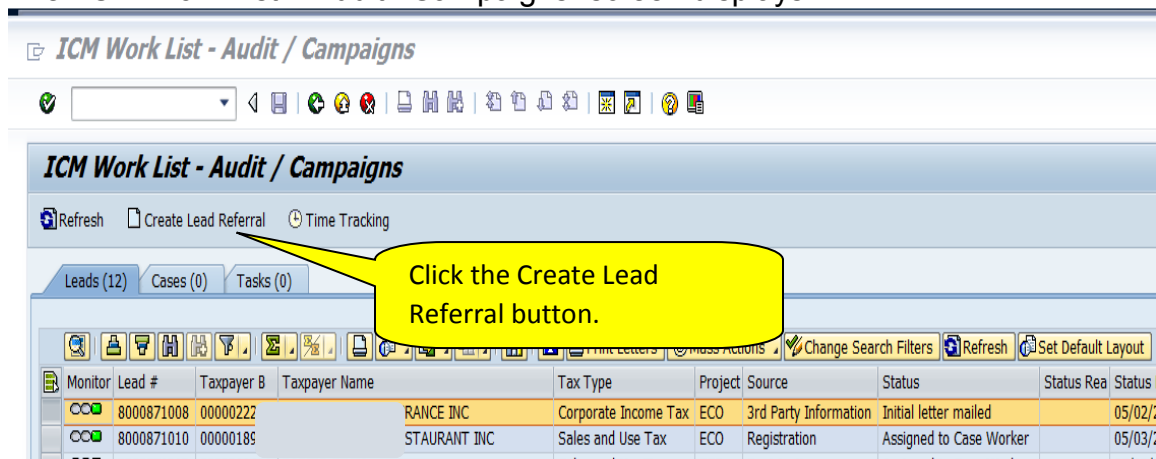
### Steps

Before creating a lead referral, use transaction ZCIC to verify each business partner number is a new registration. Do not create a lead if the account shows collection or audit activities, has a START letter previously mailed, or has a Voluntary Disclosure case.

### ZICM\_WORKLIST



The "ICM Work List – Audit / Campaigns" screen displays.



The Create Lead Referral window displays.

The screenshot shows the 'Create Lead Referral' window with the following sections:

- Lead Details:** Includes tabs for 'Informant Info' and 'Project Data'. Fields include Service Center (Lead Development), Project, and Source.
- Referral Details:** Includes Submitted By (GONZALEZ), Reference # (0), Tax Type, Recommendation, and Priority (Normal). A 'My Lead Referrals' button is also present.
- Taxpayer Info:** Includes Partner Type (Search For / Create New Taxpayer), Bus. Partner, Business Name, FEIN, SSN, First Name, and Last Name.
- Taxpayer Address:** Includes House #/Street, City/State/Zip, Country, PO Box, Florida County, Telephone #, Fax #, and E-mail Address.
- Attachments:** Includes 'Add File' and 'Delete File' buttons, and a list of file names.

The following screen shots isolate each section of the Create Lead Referral window and provide information the ECO team will use to create the lead.

### Lead Details Section

The screenshot shows the 'Lead Details' section of the 'Create Lead Referral' window. It includes tabs for 'Informant Info' and 'Project Data'. The 'Service Center' is set to 'Education Compliance Outreach', the 'Project' is set to 'ECO', and the 'Source' is set to 'Registration'. A yellow callout box points to the 'Project' and 'Source' fields with the text: 'Select ECO as the Project. Select Registration as the Source.'

**Note: Service Center defaults to Education Compliance Outreach when the ECO Caseworkers updates the Project drop down to ECO.**

The following Source options are available for ECO leads:

3 <sup>rd</sup> Party Information	Registration
Commercial Rental	Special Events
Estimated Tax Filers	Subjectivity
Frequency Change	Transient Rental
Lexus Nexis	Various
Manual Request	

## Taxpayer Info Section

Taxpayer Info	
Partner Type	Search For / Create New Taxpayer
	<input checked="" type="radio"/> Person <input type="radio"/> Organization
Bus. Partner	
Business Name	
FEIN	SSN
First Name	
Last Name	

Select Search For / Create New Taxpayer.

Select Person or Organization.

Enter BP # in Bus. Partner field and press the Enter key.

**Note: The taxpayer's social information will auto-populate after you enter the BP number and press Enter.**

If you select Person, the following information will auto-populate:

**First Name Field** - First Name of Taxpayer

**Last Name Field** - Last Name of Taxpayer

**SSN Field** – Taxpayer's Social Security Number

If you select Organization, the following information will auto-populate:

**Business Name Field** - Business Name

**FEIN Field** – Business' Federal Employer Identification Number

## Taxpayer Address Section

Taxpayer Address	
House #/Street	
City/State/Zip	
Country	PO Box
Florida County	
Telephone #	Fax #
E-mail Address	

Fields are auto-populated with BP standard address information.

**Note: These fields auto-populate with the taxpayer's standard address information after you enter the BP number in the Taxpayer Info section and press Enter. You can change this to the mailing address, if necessary.**

## Referral Details Section

Referral Details		
Submitted By	GONZALCL	My Lead Referrals
Reference #	0	ICMW
Tax Type		
Recommendation		
Priority	Normal	

Select the tax type.

Select ECO as the Recommendation.

Select priority (defaults to Normal).

**Note:** The Reference # field is not used for ECO leads.

**Submitted by Field** – defaults with User's ID

**Reference # Field** - Not in use for ECO

**Tax Type Field** - Tax Type drop down

**Recommendation Field** - For this type of Lead, choose ECO

**Priority Field** - Priority of the Lead (leave as Normal unless otherwise instructed)




## Reason for Referral Section

Reason For Referral.:

Enter New Registration as the reason for referral.

**Note:** This is a required field. For this type of lead, enter "New Registration".

## Attachments Section

Attachments	
	Add File
	Delete File
	File Name

Use the Add File button to attach a file to the lead, if needed. For example, the Power of Attorney form may be attached.

**Note:** Users who create an attachment may remove it using the Delete File button.

## Create and Cancel Buttons



When you have completed entering all required information for the lead, click the Create Referral button. Use the Cancel button to cancel the action; the lead will not be created.

After you click Create Referral, the Lead Created window displays with the case number and a successful creation message. The lead is now assigned to you and displays in your worklist.

