JOB AID

# Create Leads in CRM for ECO Team ZICM_WORKLIST

| | |
|---|---|
| **Business Process:** | **Business Technology Office - SUNTAX** |
| **Tax Type:** | **All** |
| **Activity:** | **Creating Leads for ECO Team using ZICM_WORKLIST** |
| **Sub-Activity:** | **New Registration** |

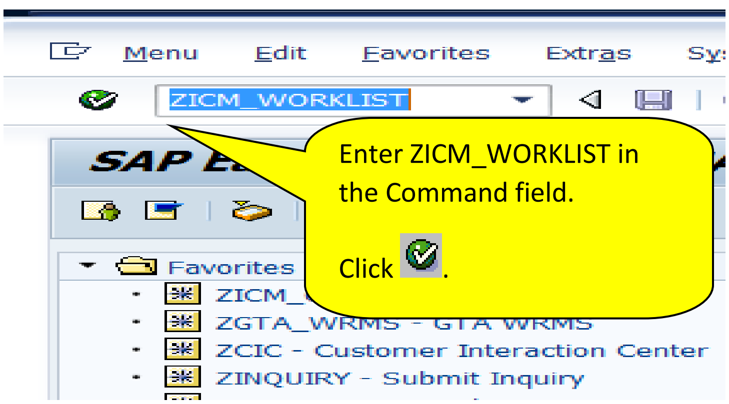
## Purpose/Objective

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.

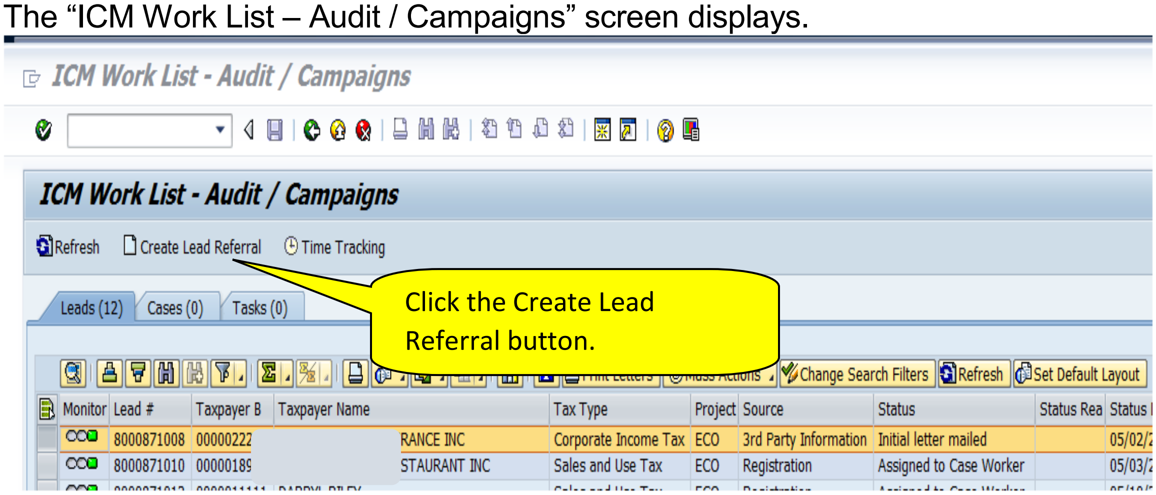
## Steps

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.

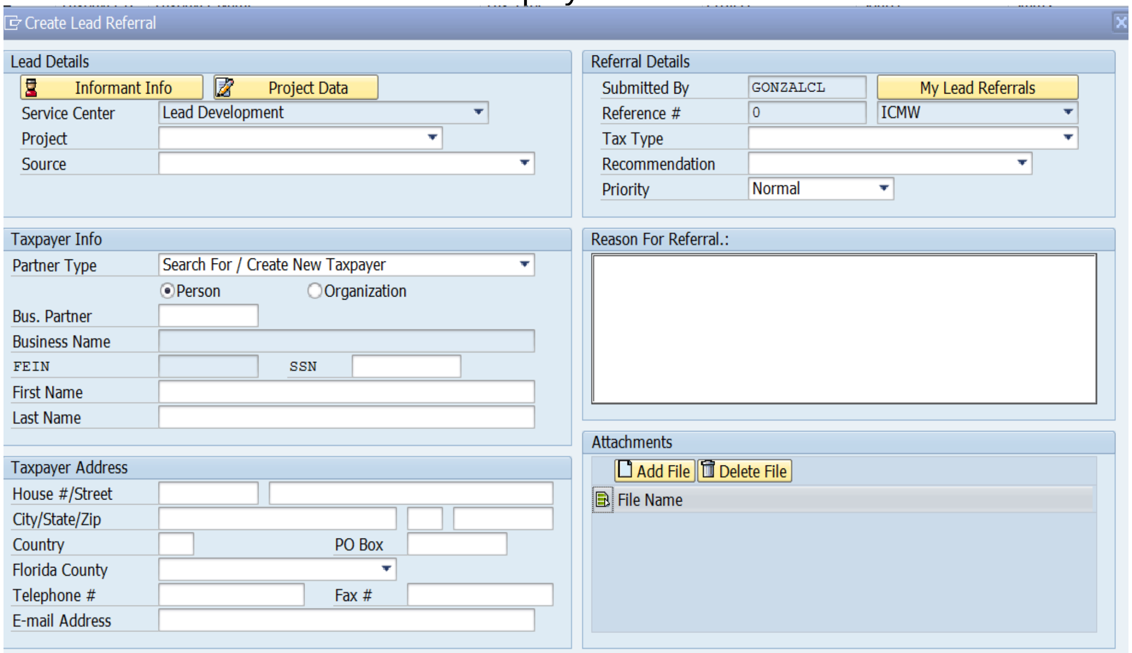
### ZICM_WORKLIST




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

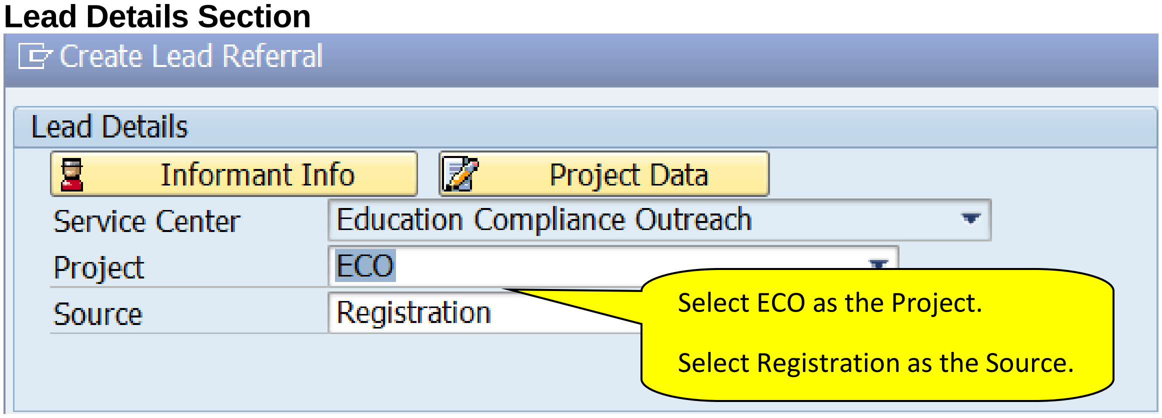


The Create Lead Referral window displays.




The 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

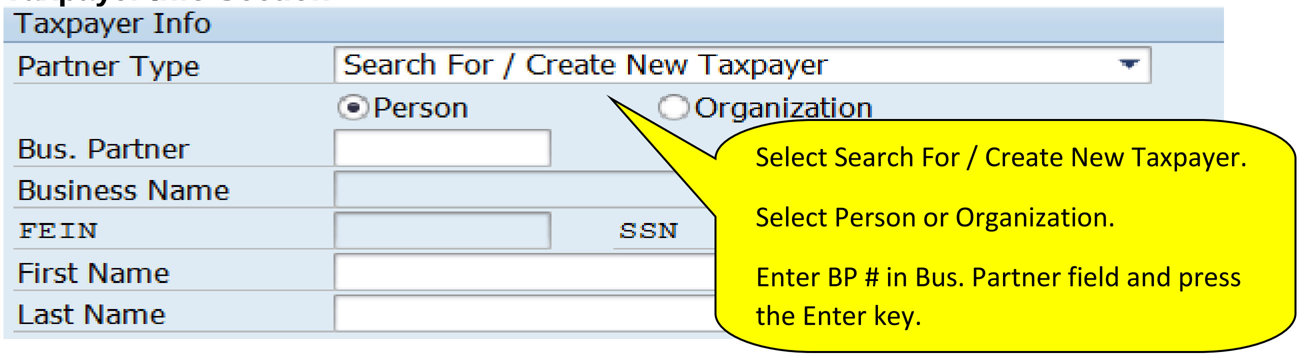



***Note: Service Center defaults to Education Compliance Outreach when the ECO Caseworkers updates the Project drop down to ECO.***

The following Source options are available for ECO leads:

| | |
|---|---|
| 3rd Party Information | Registration |
| Commercial Rental | Special Events |
| Estimated Tax Filers | Subjectivity |
| Frequency Change | Transient Rental |
| Lexus Nexis | Various |
| Manual Request | |

**Taxpayer Info Section**




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

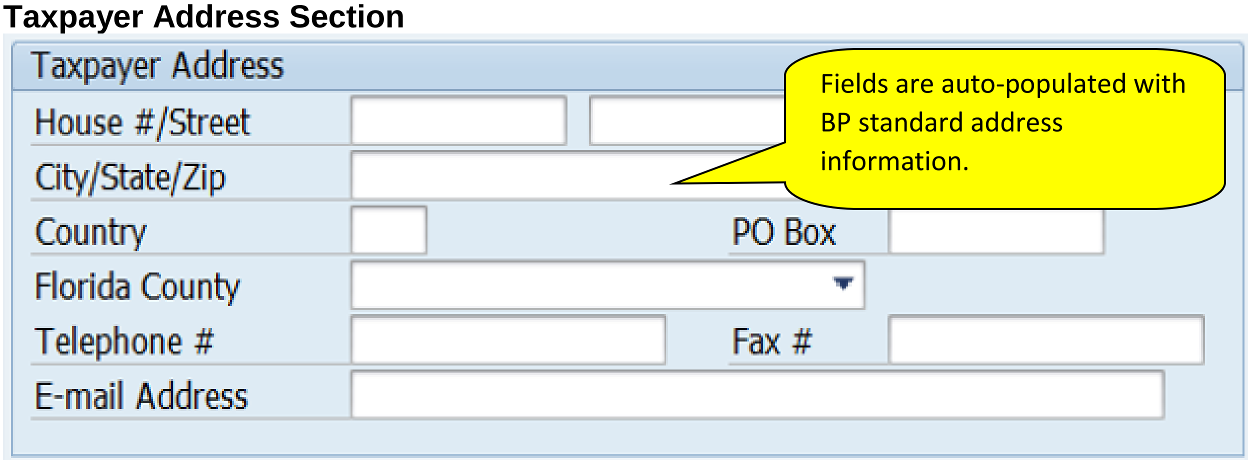
If you select Person, the following information will auto-populate:

- **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:

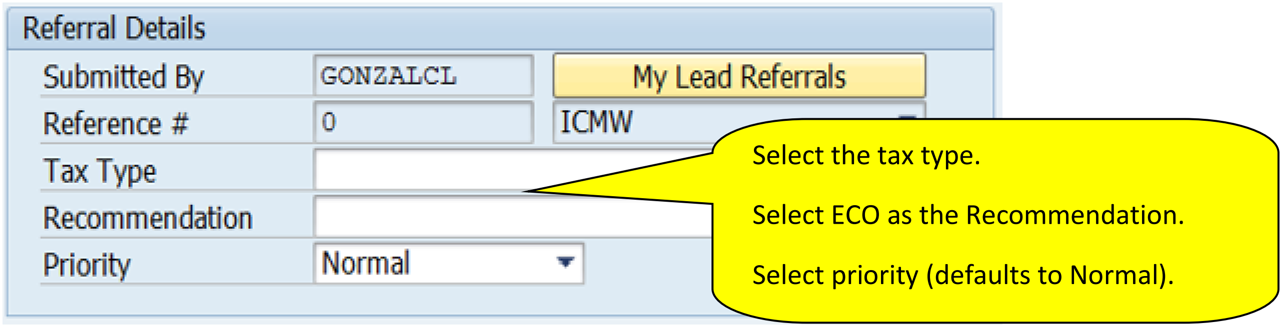
- **Business Name Field** - Business Name
- **FEIN Field** – Business' Federal Employer Identification Number

**Taxpayer Address Section**




***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.***

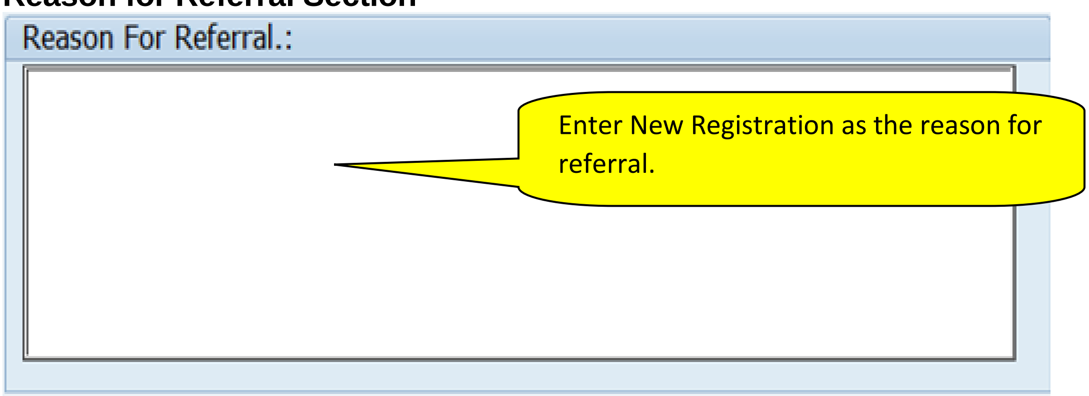
### Referral Details Section




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

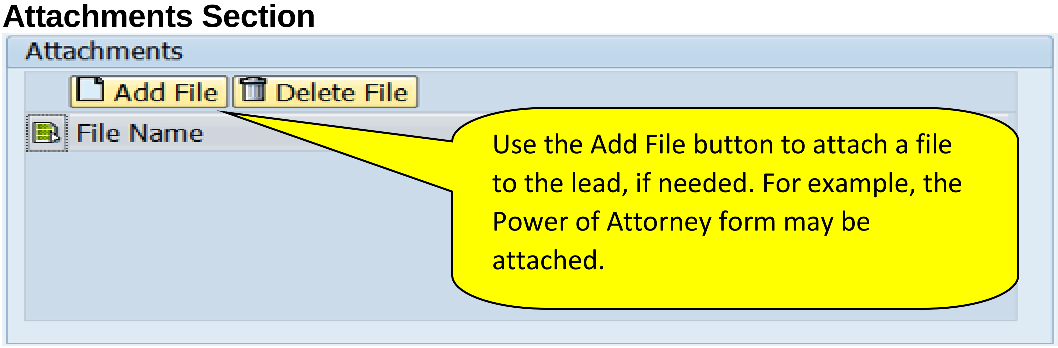
**Submitted by Field** – defaults with User's ID
**Reference # Field** - Not in use for ECO
**Tax Type Field** - Tax Type drop down
**Recommendation Field** -  For this type of Lead, choose ECO
**Priority Field** - Priority of the Lead (leave as Normal unless otherwise instructed)

### Reason for Referral Section



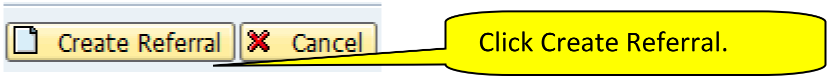

***Note: This is a required field. For this type of lead, enter "New Registration".***

### Attachments Section




***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.