



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


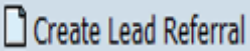
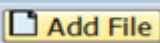
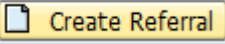
<b>Business Process:</b>	<b>Business Technology Office - SUNTAX</b>
<b>Tax Type:</b>	<b>All</b>
<b>Activity:</b>	<b>Creating Leads for ECO Team using ZICM_WORKLIST</b>
<b>Sub-Activity:</b>	<b>New Registration</b>

### 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.

<b>Name of Screen/Tab/Pop-up Window</b>	<b>STEPS</b>
<i>SAP Easy Access</i>	1. Enter ZICM_WORKLIST in the command field.
	2. Click  .
<i>ICM Work List – Audit / Campaigns</i>	3. Click  .
<i>Lead Details Section</i>	4. Project - select ECO.
	5. Source - select Registration.
<i>Taxpayer Info Section</i>	6. Partner Type - select Search For / Create New Taxpayer.
	7. Select radio button for Person or Organization
	8. Enter BP #.
	9. Press Enter
<i>Referral Details Section</i>	10. Tax Type – select tax type.
	11. Recommendation – select ECO.
	12. Priority – select priority (normal, high, critical).
<i>Reason for Referral Section</i>	13. Enter New Registration.
<i>Attachments Section</i>	14. If needed, click  to add an attachment.
<i>ICM Work List – Audit / Campaigns</i>	15. Click  .