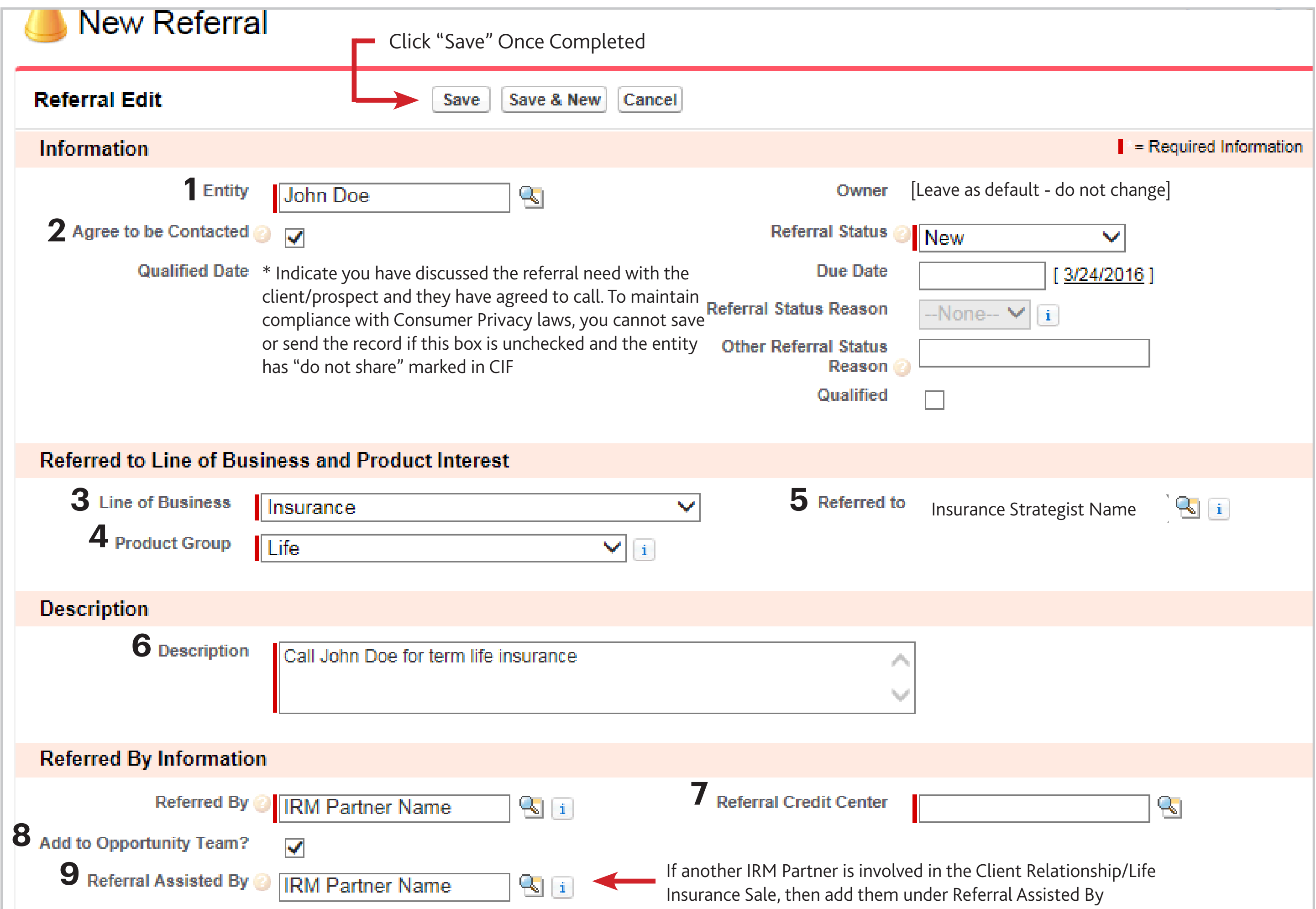
Create a referral for a person or business entity

- Log into Heritage BB&T InSite
- Click **PCE / IRM** at the top middle of the homepage, select **Salesforce Login**
- Select Referrals from the home screen toolbar, Click New
- Select Personal Entity Referral (unless it is a business then select "Business" Entity), Click Continue



New Referral

Click "Save" Once Completed

Referral Edit Save | Save & New | Cancel

Information = Required Information

1 Entity: John Doe

Owner: [Leave as default - do not change]

2 Agree to be Contacted: ☑

Referral Status: New

Qualified Date: * Indicate you have discussed the referral need with the client/prospect and they have agreed to call. To maintain compliance with Consumer Privacy laws, you cannot save or send the record if this box is unchecked and the entity has "do not share" marked in CIF

Due Date: [3/24/2016]

Referral Status Reason: --None--

Other Referral Status Reason:

Qualified: ☐

Referred to Line of Business and Product Interest

3 Line of Business: Insurance

4 Product Group: Life

5 Referred to: Insurance Strategist Name

Description

6 Description: Call John Doe for term life insurance

Referred By Information

Referred By: IRM Partner Name

7 Referral Credit Center:

8 Add to Opportunity Team? ☑

9 Referral Assisted By: IRM Partner Name

If another IRM Partner is involved in the Client Relationship/Life Insurance Sale, then add them under Referral Assisted By

<u>Information</u>

1. Enter the "Entity" (person or business)
2. Check "Agreed to be Contacted" box

<u>Line of Business and Product Interest</u>

3. Select Insurance for "Line of Business"
4. Select Life for "Product Group"
5. Enter the Truist LIS Insurance Strategist you would like to refer the Client to in the "Referred to" field (if known) otherwise, leave blank

<u>Description</u>

6. Fill in any details of the insurance you may know (i.e., purpose, death benefit amount, type of insurance, etc.)

<u>Referred By Information</u>

7. Add "Referral Credit Center"
   (There may be discrepancy between where the referred by is sitting and
   where the credit should go. If you cover more than one center, you may need to adjust the numbers)
8. Check the "Add to Opportunity Team" box to add yourself to the team to receive updates and have access to the information if the referral is converted to an opportunity.
9. Add Additional IRM partner name to "Referral Assisted By" field if there is another IRM partner materially involved in the referral to Truist LIS (If involved, Private and Wealth will need to be in the "Referred By" field so that the revenue feeds to Wealth View accurately). **Click "SAVE"**

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