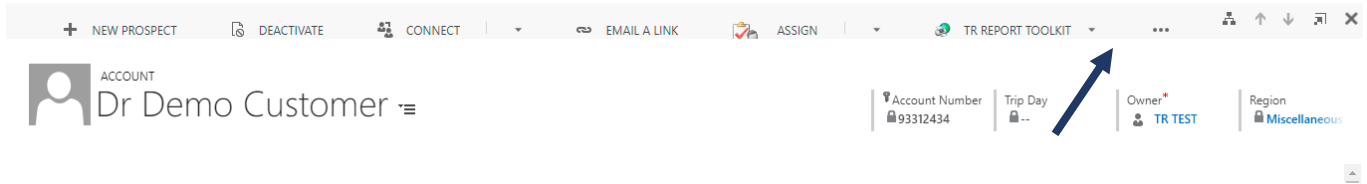
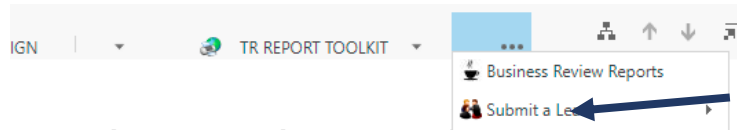


Entering a Dental Enhancements Lead from CRM Web

To submit a lead for your customer for our partner services, you'll need to go to the 3 dots at the top right-hand corner of the screen.

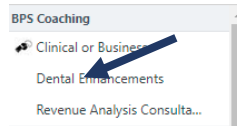


In this drop-down menu, you're going to select "Submit a Lead"



"Submit a Lead" opens all of the options for the leads that you can enter: Practice Coaching, Practice Transitions, Software, and our vendor partners.

*** The Dental Enhancements lead center is under Practice Coaching ***



Once you click on **Dental Enhancements**, you should get a pop-up screen that asks what Dental Enhancements services that your customers are interested in. Select the service and fill out the fields that come up next.

Please do not select the COVID Complete package, this is no longer being offered and we are waiting for IT to remove it from the lead form.

How can Dental Enhancements help you?

What services are you interested in?

OSHA/HIPAA

COVID Complete Pkg – Includes COVID Training Video and PPP Template - Order for client

Contact Information

Office Name

(Main) Doctor Name

Key Contact Person

Main Email Address

This email address has been approved by this dental office to send OSHA & HIPAA information from Dental Enhancements. In checking this box, I, the Benco Representative, confirm that this client has qualified & approved the e-mail address provided. Dental Enhancements and Benco Dental Supply work only within the United States CANN-SPAM laws and will never send emails to non-approved email addresses which can be punishable by law.

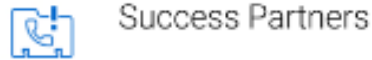
Alternate Email Address

Office Phone Number

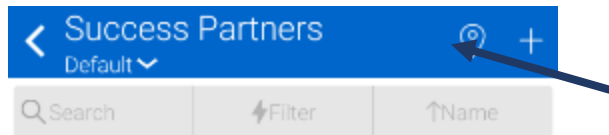
When you're finished entering information on your customers, click Submit!

Entering a Dental Enhancements Lead from CRM Mobile App

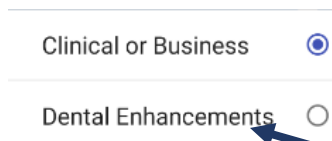
In the Mobile CRM app, scroll down, until you see the file folder for Success Partners.



When you click on the Success Partners icon, it will take you to a new screen. Click the + symbol in the right-hand corner to enter a lead.



In this screen, you'll have to search for your account and select the Dental Enhancements Service from the drop-down menu.



When you're done selecting your customer and selecting **Dental Enhancements** as your Success Partner, click **continue**.

Now, you have to select what the service your customer needs to talk to Dental Enhancements about:
OSHA/HIPAA.

Please do not select the COVID Complete package, this is no longer being offered and we are waiting for IT to remove it from the lead form.

When you select what your customers' needs are, CRM will populate the form to fill out with your customers contact information.

Please fill out every field to the best of your ability.

The last bit of information that would be helpful to the Dental Enhancements team is any additional notes you want to provide. Ex.) If you know this office hasn't had an OSHA/HIPAA update in a few years, or if they're going to be closed on vacation from July 1 – July 14, please let them know. Then, click **submit**!