

## Sales Hub Quick Start User Guide

Hello and welcome to the Excellus BlueCross BlueShield (BCBS) Sales Hub. This guide will get you started quickly on several areas and capabilities of the Excellus BCBS Sales Hub.

### A. How to Request a New Sales Hub Account

- In your browser's address bar, paste and go to:
  - <https://excellusforbusiness.com/saleshub/register/>
- Fill out the form with your details; all fields are required
- Click “Register” when all fields are filled
- All new user registration requests will be reviewed within two business days
- You’ll receive a confirmation email once your account has been approved

### B. How to Log in to the Sales Hub

- In your browser's address bar, paste and go to:
  - <https://excellusforbusiness.com/saleshub>
- Enter your Sales Hub email/username and password
- Click “Log In” to log in
- If you have forgotten your password, your password can be reset by:
  - Clicking the “Forgot Your Password?” link or pasting the following link into your browser’s address bar:
    - <https://excellusforbusiness.com/saleshub/password-reset/>
  - On the “Password Reset” page, enter your username or email address and click the “Reset My Password” button
  - You should receive an email with a link to reset your password

### C. Updating Your Account Information

- When logged in to the Sales Hub (Section A), click the “Account” menu link in the main menu
- On the Account page, you will find your account information. To make any changes to this information:
  - Adjust the values in the First Name, Last Name, Email Address or Company fields
  - *Click “Update Account” to save any changes*

- To change your password, click the “Change Password” menu item from the left-hand menu
  - Enter your current and new passwords
  - Click “Update Password” to save any changes
- To upload or change your Sales Hub account logo:
  - Click “Edit Account Logo” underneath your name on the left side of the Account page
  - If there is no logo uploaded yet, click “Choose File” and upload a supported image file (jpg, png) and click “Open/Save”
  - If updating your logo, mouse over the current image and click the “X” button to remove the current image
  - Click the “Save Changes” button to save any changes

## D. Finding, Filtering and Viewing Resources

- All resources are available from the Sales Hub homepage. On the homepage you will see that the Resources section initially displays the latest resources that have been added to the Sales Hub
- To quickly find a particular resource(s), you can use the “Content Filters” section to search and filter resources based on Type, Topic and Group Size
- You can also use the “Content Filters” search bar to narrow down your search
- When you find the resource you are looking for, you can view that resource by clicking its image or title. This will take you to the Resources page with more information about it, including Related Resources. On this page you can also:
  - Click “View” to view the resource in your browser
  - Click “Download” to directly download that resource (more information in Section E)
  - Click “Share” to get a link to share that resource with others (more information in Section E)

## E. Downloading and Sharing Resources

- On the Sales Hub homepage, the Resources section allows you to quickly build packages to download or share
- To add a resource to your download/share package, select that resource by mousing over and clicking the checkbox in the top right corner of the resource’s image
  - **Additional Tips:**
    - Only the resources that are available to download/share will have this checkbox. (Note: videos cannot be downloaded or shared)

- You can “Select All” available resources that are being displayed by clicking the “Select All” button that is just below the “Content Filters” section
- When you are done building your package, click “Download Selected” or “Share Selected”
  - **If downloading resources**, you will be taken to the “Download Resource Package” page, where you can review the contents of your package before clicking “Download Package” to start downloading
  - **If sharing resources**, you will be taken to the “Share Resources” page, where you can review the contents of your package and view the “Share” link you have created
    - These “Share” links are publicly accessible and can be accessed without a Sales Hub account
    - These “Share” links are also tied to your Sales Hub account and will display your First Name, Last Name and Sales Hub Account Logo to those who view it
      - To make any changes to your First Name, Last Name or Sales Hub Account Logo, see the [Updating Your Account Information](#) instructions (Section C)

## F. Tools and Links

- There are also a few Tools and Additional Links that are available to Sales Hub users
- Those links are accessible from two areas on the Sales Hub
  - Tools are accessible from the navigation menu at the top of every page
  - Additional Links can be found toward the bottom of the Sales Hub homepage, beneath the Resources section

## G. Looking for Help?

- Let us know if you have questions about the Sales Hub by clicking “Contact” in the main menu and filling out the Contact Form with your questions