

CALL LOG definitions



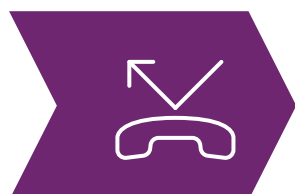
Not Scheduled

The goal is to have every Call Log lead scheduled. Any Call Log Leads that aren't scheduled with a Reminder/Follow Up date will be assigned to the To Be Scheduled sub tab of your Call Log. Only scheduled Call Log leads will be reassigned to the date assigned in your call Log Schedule and display in your software calendar accordingly.



Scheduled

All Call Log leads with a Reminder/Follow Up date assigned to them will be moved into your Call Log Schedule and scheduled in your software calendar for reference. All scheduled but not due Call Logs are labeled with a Scheduled status.



Missed Call Log

Any scheduled Call Log that passes the date it was scheduled for Reminder/Follow Up automatically changes status to Missed Call Log. All Missed Call Log leads turn yellow and the Call Log is automatically moved to the To Be Scheduled sub tab of your Call Log for rescheduling.



Past Due Call Log

Any Call Log lead that goes 2 days without being touched turns red in the To Be Scheduled sub tab waiting to then be rescheduled for Next Action.



Available

Available leads are found in the Lead Bank sub tab of the Call Log tile. All leads with the status of Available are visible to the entire company and anyone can access these leads by reassigning them to themselves. The Lead Bank holds all Available and Abandoned leads and can be a great source for finding warm and new leads. Leads from this section can be moved to any individual Call Log by clicking into them and reassigning/scheduling them for action.



Abandoned

Any Call Log lead that goes 3 days without being touched by anyone moves to an Abandoned status. The software views Abandoned leads as unscheduled and requiring prioritization. Call Log leads will only remain yours for 5 days. If any lead is left with an Abandoned status for longer than 5 days the lead is then moved to the Available Lead sub tab which can be viewed by the entire company. Abandoned leads and leads that have been posted as Available are first come first serve.



Lost/Archive

Call Logs that should no longer be pursued by the company or where the contact has explicitly requested to no longer be contacted should be removed from the Call Log by applying a Lost/Archive status to them. No Call Logs are ever lost, Archives can be searched and leads can be reactivated by security approved staff.