

In the printed form this is an uncontrolled document. The official version can be found online.

Subject: Completed Courtesy Call	Product: Customer Loyalty Group	Approved on:
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Purpose:

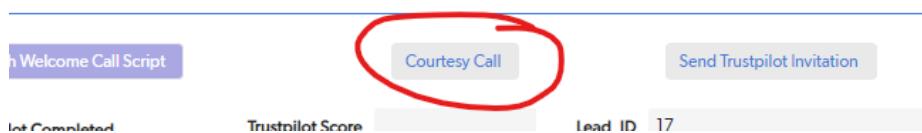
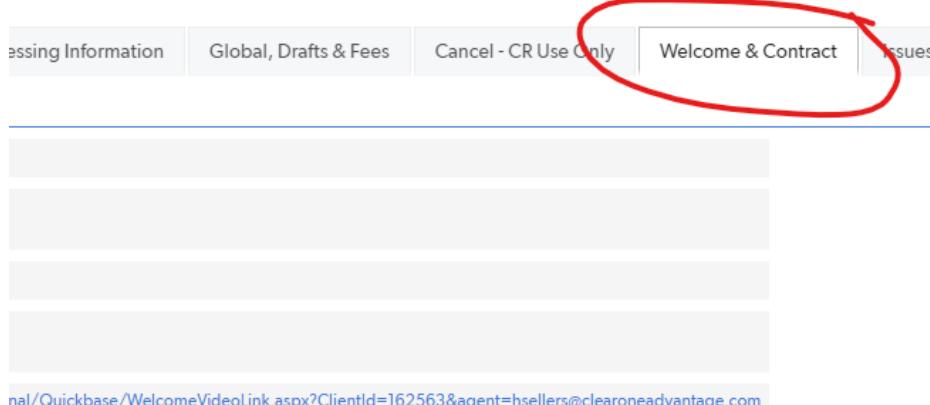
Marking a client's courtesy call complete in QuickBase.

Policy:

Courtesy calls should be marked complete after the call has been finished with the client.

Procedure:

1. Click on Welcome & Contract tab
2. Click on Courtesy Call button
3. Click 30 Day, 45 Day, 60 Day, 90 Day, 6mo, 9mo, and 12mo to select the appropriate script
4. From the *Courtesy Agent* dropdown, select your name
5. From the *Courtesy Completed Date*, select date that call was completed



Exceptions:

If courtesy call was not completed, keep section blank so client can be reloaded into the dialer for another call.

Latest Revision Date: 8/13/2024	Page 1 of 1	Author of Latest Revision: Samantha Shumaker
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