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

Subject: Setting Follow Ups	Product: Customer Loyalty Group	Approved On:

Purpose:
Setting a reminder to follow back up with clients about their accounts at a later time/date.

Policy:
When clients request a call back, a *FollowUp* should be submitted in QuickBase.

Procedure:

1. Navigate to the *Request Section* of the client's page
2. Click the *Add FollowUp* button
3. From the *Related Agent* dropdown, select your name
4. In the *Follow Up Date* field, select date of follow up call
5. From the *Follow Up Type* dropdown, select the reason (or closest to it)
6. Leave the *Status* as *Active*
7. Click the *Save & close* button
8. The *FollowUp* can be found in your *Processor Queue*
9. Complete your follow up with the client
10. Once completed with client
    a. Go back to the *FollowUp* in the *Request Section*
11. From the *Status* dropdown, select *Completed*
12. Click the *Save & close* button

Exceptions:
None