Subject: Recorded calls	Product: Customer Loyalty Group	Approved on:

11Purpose: Recording calls through inContact.

Policy: Recordings are needed for:

- Draft changes, skips, and redrafts
- Settlement authorizations
- Refunds/withdrawals
- Saves
- Voiding settlement(s) per client request
- Program Changes – including removing BLP

Procedure:

1. Advise the client that they will be on a brief hold while connecting to the recorded line
2. From InContact, click the Hold button
3. Click the Transfer/Conf button
4. Type in Record Authorization Service
5. Click the Call button
6. When prompted, select the recording type using your phone's keypad

    - 1 for Draft Changes
      (Including Redrafts, Special Drafts, & Draft Skips)
    - 2 for Authorizations
    - 3 for Welcome Calls
    - 4 for Cancels
    - 5 for Saves
    - 6 for Refunds & Withdrawals
    - 7 for Voiding a Settlement
    - 8 for Program Change
    - 9 for Other
    - 0 to Repeat All Options

7. Click the Conference button
8. Once the necessary portion of the call is finished recording, click the End Conference button

9. The recording will be sent to your Microsoft Outlook inbox

10. If speaking to the client on the same phone number they have on file, the recording should automatically upload to their Client File

After the call is finished, from the Client Page, check the Client File to verify that the automatic upload is successful

For Global Authorization, even if it auto-uploads, it must be manually entered into the client file with the client's last name, "GA", the creditor's name, and today's date. Please refer to the Authorization SOP for further details.
Example: SamayaSmith_GA_Chase_08052022

Exceptions:

1. If the recording isn't automatically uploaded to their Client File

- Obtain sent recording from Outlook, right click, then save as, add file name
- From the Client page, go to the Client File
- Click the Choose File button
- Select the related recording from your desktop
- From the Select File Title dropdown, select the applicable recording title
- Click the Upload button