

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

The screenshot shows a web interface with a top navigation bar containing tabs: 'Assessing Information', 'Global, Drafts & Fees', 'Cancel - CR Use Only', 'Welcome & Contract', and 'Issues'. The 'Welcome & Contract' tab is highlighted and circled in red. Below the tabs is a large text area with several horizontal lines. A URL is visible: na1/Quickbase/WelcomeVideoLink.aspx?ClientId=162563&agent=hsellers@clearoneadvantage.com. At the bottom, there are three buttons: 'Welcome Call Script', 'Courtesy Call' (circled in red), and 'Send Trustpilot Invitation'. Below these buttons, there are labels for 'Not Completed', 'Trustpilot Score', and 'Lead ID 17'.

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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