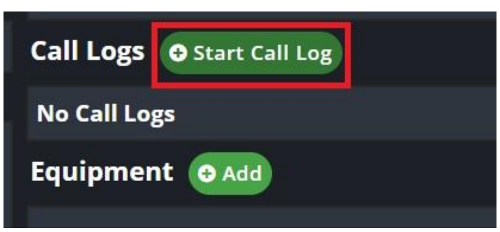
300 INDUSTRIAL DR
RANDOM LAKE, WI 53075
920-994-2388

Creating/Using Call Logs

Author: Brad Wilkinson & Chris Bratcher **Date: April 10th, 2025**

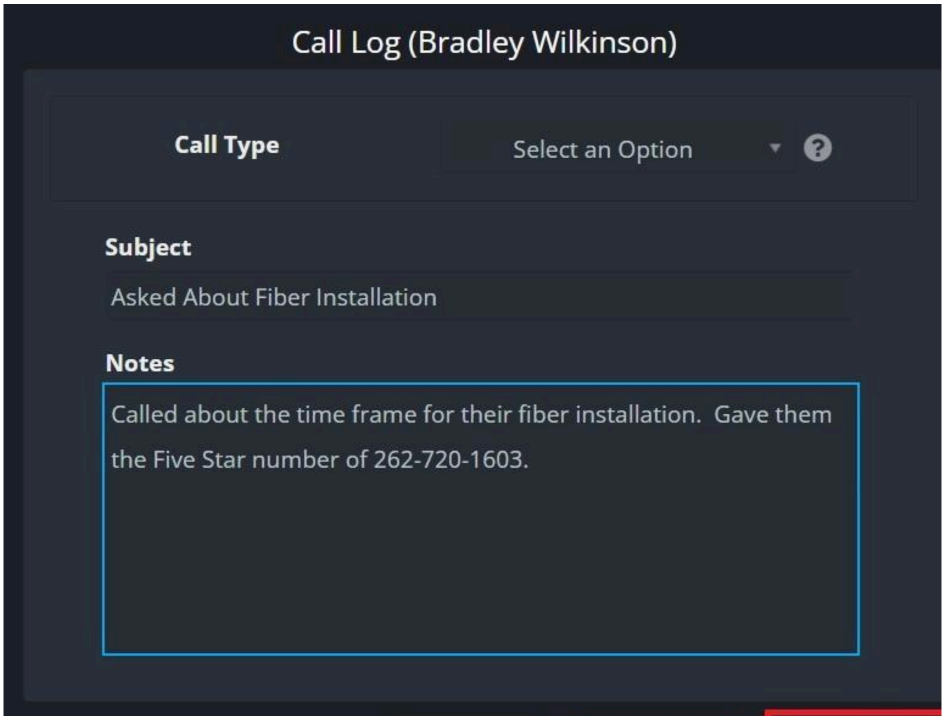
Purpose: The purpose of call logs is to summarize customer interactions. Each log should include a summary of the conversation, the agreed-upon next steps, and any issues that may need escalation. If follow-up is required, a ticket should be created to track that follow-up.

1. When interacting with a customer you can search by name or phone number to pull up their account. While it will default to searching by name or phone number you can also use the drop down to search by other fields such as address.
   a. 

2. After accessing their account, click on "Start Call Log" from the Overview page, which is located just above the equipment section.
   a. 

3. A screen will appear asking for the name of the person you are talking to. It will automatically default to the main contact on the account. There is no need to Add a New Contact if a different family member is calling in.
   a. 

4. You will first be prompted to enter a subject line, which can be a brief phrase like "Fiber Installation Questions". In the "Notes" section of the call log, you can provide more detailed information about what was discussed. After that, you can click the "Call Complete" button.

    a. 

5. This will create a Call Log on their account that we can hover over with the mouse to see the discussion details.

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