



# Leveraging the Call Log in SA5

# SA5 Call Log



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# Agenda

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- Customer Testimonial
- Call Log Setup
- Creating Calls
- Editing and Closing Calls
- Call Log Reporting
- Call Log Management Utility

# Customer Testimonial

# Customer Testimonial

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- Green Lawn + RealGreen Partnership
- The Importance of the Call Log

# SA5 Call Log: Set up

# SA5 Call Log: Call Log Setup

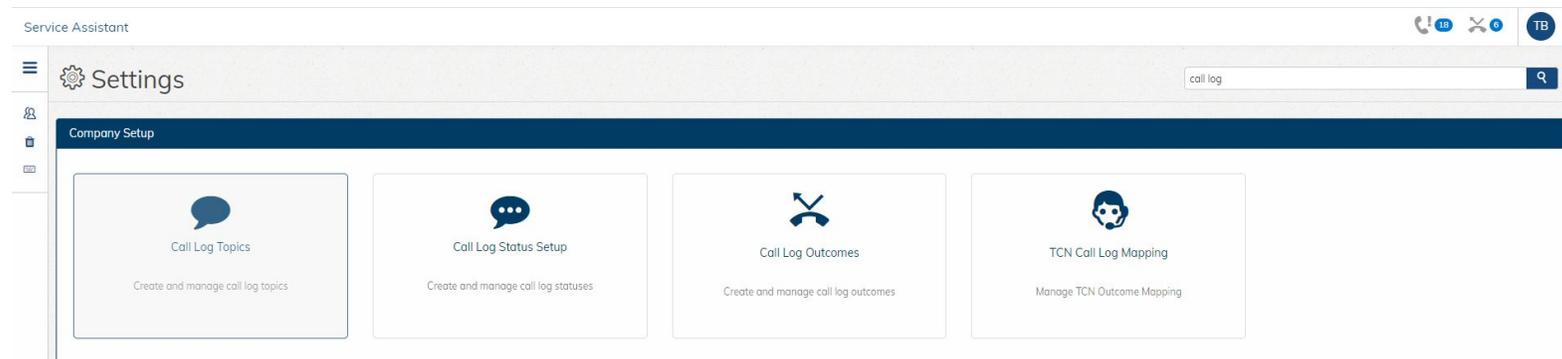
Why start with using the call log in SA5?

- Schedule calls and set reminders to return calls
- Interoffice communication
- Integrates customer information and contact history
- Initiate contact for collections, follow-ups, and upsells

# SA5 Call Log: Call Log Setup

There are three main items and an optional fourth item for call log setup found under Settings > Company Setup:

- Call Log Topics (Subjects)
- Call Log Status Setup
- Call Log Outcomes
- TCN Call Log Mapping (optional)



# SA5 Call Log: Call Log Setup

## Call Log Topics:

Found under Settings > Company Setup > Call Log Topics. Topics (also called Subjects) are essentially flag codes for call logs. They can be used as a filter on the call log report and are options to group calls without creating an excess of statuses or outcomes.

Topic	French Topic	Spanish Topic	
<input type="text" value="Enter Topic"/>	<input type="text" value="Enter French Topic"/>	<input type="text" value="Enter Spanish Topic"/>	+
Aeration	<input type="text"/>	<input type="text"/>	
Billing Question	<input type="text"/>	<input type="text"/>	
Snow Plow	<input type="text"/>	<input type="text"/>	🗑️
Watering	<input type="text"/>	<input type="text"/>	

# SA5 Call Log: Call Log Setup

## Call Log Status Setup:

Found under Settings > Company Setup > Call Log Status Setup. Call Log Statuses are the current state of the call, where it is currently in the communication life cycle: left message, resolved, call back, etc.

### Call Log Status Setup

Code *	Status Description *	Resolved	Default	Mobile Device
<input type="text" value="Code"/>	<input type="text" value="Status"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Text Color	Background Color	French Description	Spanish Description	
<input type="text" value="☒"/>	<input type="text" value="☒"/>	<input type="text" value="Status"/>	<input type="text" value="Status"/>	

# SA5 Call Log: Call Log Setup

## Call Log Status Setup:

- Code: a single character code linked to the description
- Status Description: a short word or phrase to represent the call log status
- Resolved: if this box is checked, the call will be treated as complete (Resolved calls may include notes, answered questions, any call that does not require a follow up action)
- Default: only one default status is selectable, typically it will be New Call
- Mobile Device: is the status available in Mobile Live
- Text Color: color of text tied to the status (For quick representation)
- Background Color: background color tied to the status (for quick representation—Urgent calls in RED)

\*If using background and text colors, make sure they are readable together

# SA5 Call Log: Call Log Setup

## Call Log Outcomes:

Found under Settings > Company Setup > Call Log Outcomes. Call Log Outcomes are the result achieved for each attempt to contact the customer. These may or may not impact or change the overall status of the call. An outcome of Voicemail may change the status of the call to Left Message, while an outcome of No Answer would leave the status as New Call.

### Call Log Outcome Setup

Description *	Attempt/Contact	Status	Mobile Device	Block Lead
<input type="text" value="Description"/>	<input type="text" value="Contact"/>	<input type="text" value="Nothing selected"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send AMA Letter	Include Note in AMA	French Description	Spanish Description	
<input type="text" value="Nothing selected"/>	<input type="checkbox"/>	<input type="text" value="Status"/>	<input type="text" value="Status"/>	

# SA5 Call Log: Call Log Setup

## Call Log Outcomes:

- Description: word or phrase to describe the contact made
- Attempt/Contact: no contact made (attempt), reached the customer or left a message (contact)
- Status: if the outcome needs to change the overall status of the call
- Send AMA Letter: if the outcome should trigger AMA notification
- Include Note in AMA: if the call log notes need to be included in the AMA notification

# SA5 Call Log: Call Log Setup

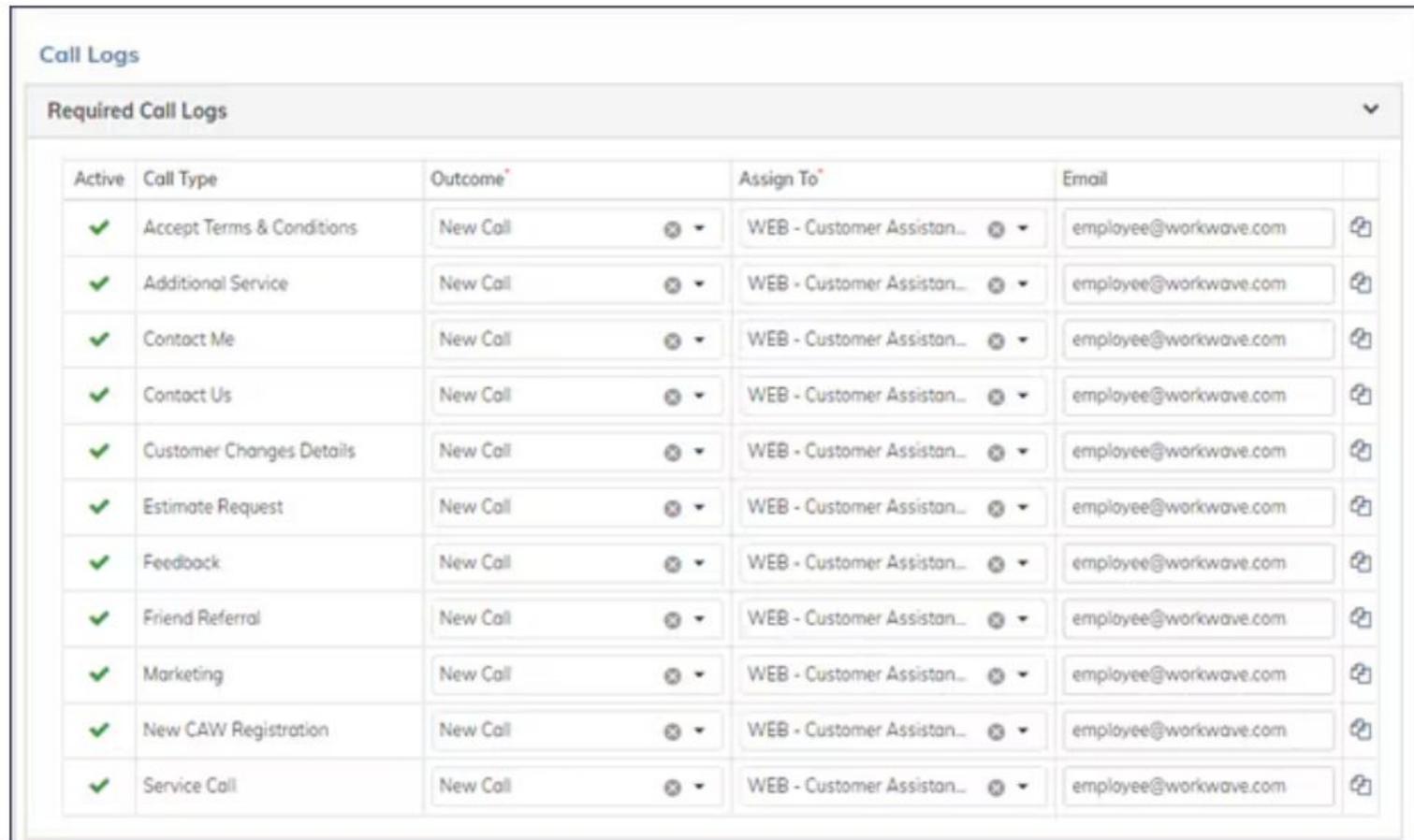
## TCN Call Log Mapping:

Found under Settings > Company Setup > TCN Call Log Mapping. TCN Call Log Mapping is only required for users integrating with TCN. Call Log Statuses need to be mapped to the specific TCN call codes so the outbound calls sent to TCN can be updated accordingly in Service Assistant when the campaign finishes.

TCN Result	SAOutcome	
ANSWERED		
BUSY		
CANCELED		
DONOTCALL		
EMAIL ONLY		

# CAW Call Required Call Logs

To access Call Log Setup, locate the Company Settings and Utilities Settings section on the Customer Assistant Settings page and select Call Log Setup.



The screenshot displays a 'Call Logs' interface with a section for 'Required Call Logs'. It contains a table with the following data:

Active	Call Type	Outcome*	Assign To*	Email
✓	Accept Terms & Conditions	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	Additional Service	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	Contact Me	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	Contact Us	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	Customer Changes Details	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	Estimate Request	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	Feedback	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	Friend Referral	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	Marketing	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	New CAW Registration	New Call	WEB - Customer Assistan...	employee@workwave.com
✓	Service Call	New Call	WEB - Customer Assistan...	employee@workwave.com

# CAW Optional Call Logs

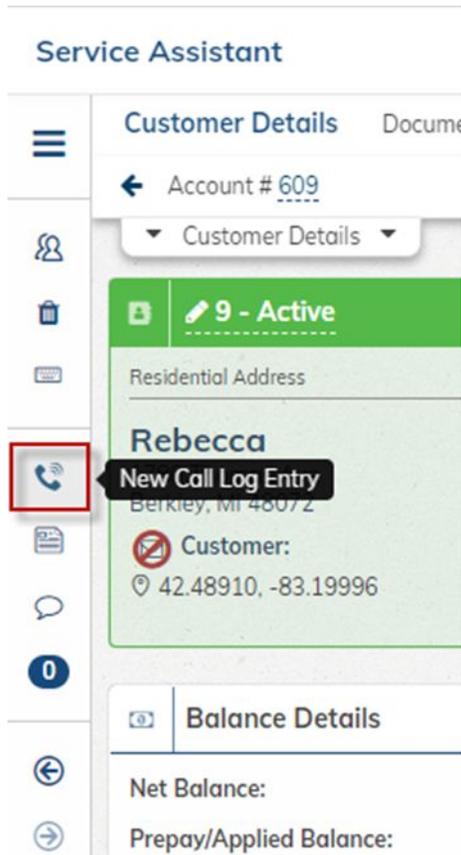
Optional Call Logs						
Active	Call Type	Outcome	Assign To	Email	Autopay	
<input checked="" type="checkbox"/>	Autopay Enrollment	New Call  ▾	WEB - Customer Assistan...  ▾	<input type="text" value="employee@workwave.com"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Cancel Autopay	New Call  ▾	WEB - Customer Assistan...  ▾	<input type="text" value="employee@workwave.com"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Email Bounced	New Call  ▾	WEB - Customer Assistan...  ▾	<input type="text" value="employee@workwave.com"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	NPS Detractor Score	New Call  ▾	WEB - Customer Assistan...  ▾	<input type="text" value="employee@workwave.com"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	NPS Neutral Score	New Call  ▾	WEB - Customer Assistan...  ▾	<input type="text" value="employee@workwave.com"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	NPS Promoter Score	New Call  ▾	WEB - Customer Assistan...  ▾	<input type="text" value="employee@workwave.com"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Payment Rejected	New Call  ▾	WEB - Customer Assistan...  ▾	<input type="text" value="employee@workwave.com"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	PaymentBasedCall	New Call  ▾	WEB - Customer Assistan...  ▾	<input type="text" value="employee@workwave.com"/>	<input type="checkbox"/>	

# SA5 Call Log: Creating Calls

# SA5 Call Log: Creating Calls

Once all the backend information has been set up, calls can be added to customer accounts, created en masse by exporting from a report, or created from the call log itself without having it tied to a customer record.

Call Logs can be created any time you see the phone icon on the left-hand toolbar.



# SA5 Call Log: Creating Calls

The screenshot shows a 'New Call Log Entry' form with the following fields and values:

- Name: Rebecca
- Company: [Empty]
- Phone #: 5551234567
- Assigned To: ASB - Andy Bathgate
- Call is Public:
- Additional Assignees: Nothing selected
- Call Status: New Call
- Due: [Empty]
- Alarm is Off:
- Outcome: New Call
- Notes: Please reach out to Rebecca regarding her lawn needing aeration this spring.
- Subjects: Aeration

Buttons: Reset, Save

The most common place you will create calls is directly from the customer account, but any time a customer account is being used, production, payments, etc., a call can be created for that account.

- **Name:** will use the customer name on file, but can be changed
- **Company:** will use the company name on file, but can be changed
- **Phone:** will default to the customer's preferred phone #, but can be changed
- **Assigned to:** the employee responsible for contacting the customer
- **Call is Public:** viewable by all, or just the employee(s) assigned
- **Additional Assignees:** add additional employees to watch the call as needed
- **Call Status:** uses the default status from parameters, but can be changed
- **Due:** if/when the call needs to be handled by
- **Alarm:** force a pop-up if the due date/time is missed (works in Mobile Live as well)
- **Outcome:** current outcome of the call (generally New Call or Task)
- **Notes:** the details specific to this specific contact path
- **Subject:** add one or multiple subject lines as needed

# SA5 Call Log: Creating Calls

Calls created from the Call Log itself will never be linked to a customer account; they are primarily for interoffice communication only.

If a call is created this way, you can still enter customer information like name, company, and phone number, but once saved, it cannot be merged to the specific customer contact history.

These calls can be created as generic tasks or reminders for employees.

Service Assistant

New Call Log Entry

Name

Company

Phone #

Assigned To

Call is Public

Additional Assignees

Call Status

Due

Alarm is Off

Outcome

Printing

- Print an Invoice
- Print an Estimate
- Print a Statement
- Print a Letter
- Print Coupons

Alarm

Due: 2/2/2025 1:13:00 PM

Name: Austin Schmidt

Subject:

30 Snooze

View Help Pages

# SA5 Call Log: Creating Calls

Send To

Targets:  
Send to Call Log

Call Status:  
A - Sales Call

Assigned To:  
ASB - Andy Bathgate

Outcome:  
Sales Call

Assigned Date:

Subject:  
Nothing selected

Notes:  
Please contact customers regarding fall clean-up specials]

Exclude Customers with a Call Status of:  
A - Sales Call 25 Days

Cancel Send

In some instances, it may be necessary to create multiple calls at once: collections, sales, call aheads, etc. To create calls en masse, we can use the 'Send to Call Log' from any customer specific report.

- Utilize the Send To option on the left toolbar of the report
- Choose the Send to Call Log option
- Only customers with a phone number will be included when exporting from a report to the call log
- There are similar options available when exporting calls to the call log, as there are when creating individual calls
- Options are available to ignore or not create calls for those customers that already have a call in a status or statuses within X number of days

# SA5 Call Log: Creating Calls

The same 'Send to Call Log' option can be used to upload calls to TCN broadcasting if you are currently signed up to use them.

The screenshot shows the 'Service Assistant > Reports > Customer List Re' interface. On the left toolbar, the 'Send to Call Log' icon is highlighted with a red box. The main form contains the following fields and options:

- Assigned To: ASB - Andy Bathgate
- Outcome: 2X Customer Called
- Assigned Date: [Empty]
- Subject: Nothing selected
- Export to TCN Broadcast:
- Do Not Create Call Log Entries:
- Description: Call Ahead 12/10/21
- Start Time:  Start Immediately, 12/9/2021, 4:13 PM
- Scrub Cell Phone:
- Add Confirmation Note:
- Mark Services Confirmed:
- Broadcast Template: Select a template... [Select...](#)
- Notes: [Empty text area]

- Utilize the Send To option on the left toolbar of the report
- Choose the Send to Call Log option
- Select the Export to TCN Broadcast option
- Do Not Create Call Log Entries: if you do not need records of the results
- Description: short description of the broadcast
- Start Time: either start immediately, or schedule a send time
- Scrub Cell Phone: eliminates any cell phones from the broadcast
- Add Confirmation Note: adds a confirmation note to the service note field
- Mark Services Confirmed: marks the service as confirmed
- Broadcast Template: The template to use **\*created on TCN's website**

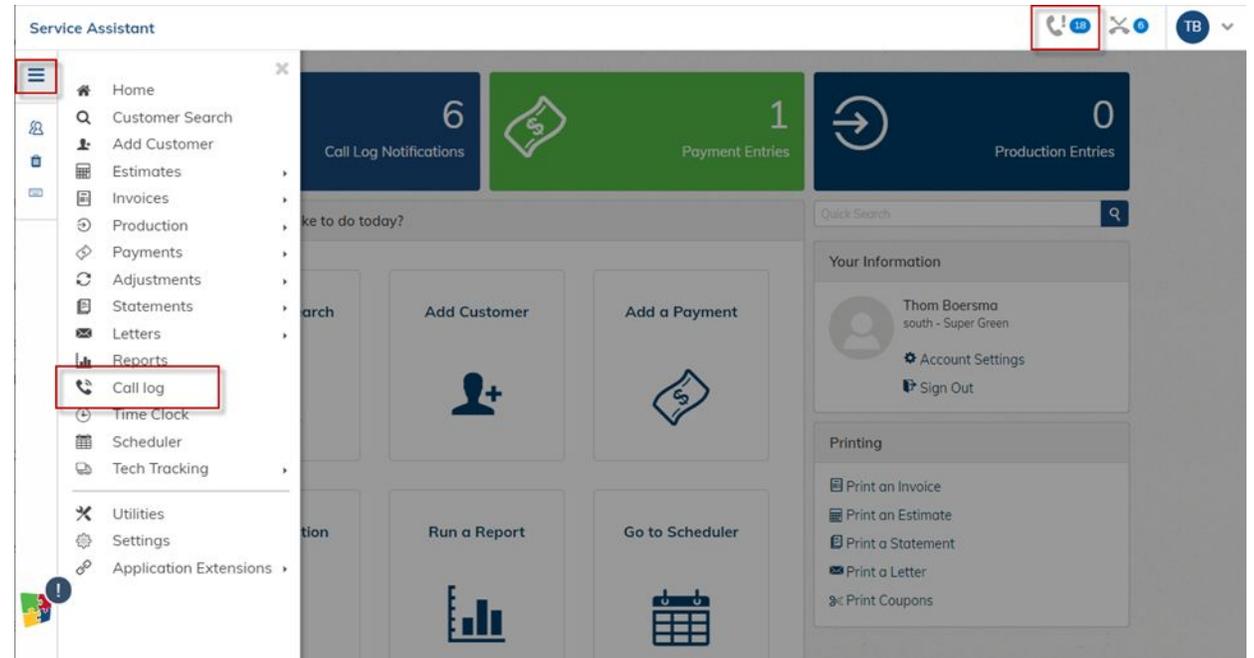
# SA5 Call Log: Editing and Closing Calls

# SA5 Call Log: Editing and Closing Calls

Once calls are created, they will be in the assigned user's call log.

The call log can be accessed via the phone icon at the top, the menu on the left-hand side, or by clicking the Call Log Notifications on the home screen.

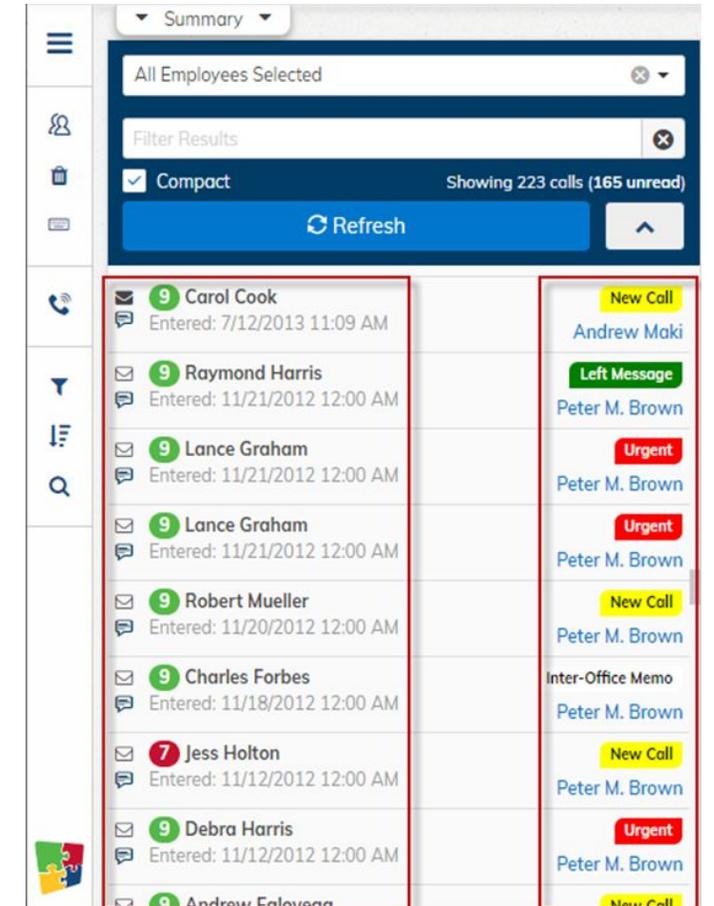
Unresolved and unread (not viewed) call totals for the logged in user will always display in the upper right corner of the top toolbar.



# SA5 Call Log: Editing and Closing Calls

The Call Log will default to display the calls assigned to the current logged in user. Additional employees can be selected from the drop-down as needed.

- The left side displays customer status, customer name, and entry date
- The right side displays call status and assigned employee



# SA5 Call Log: Editing and Closing Calls

**Call log filters are an employee-by-employee setting.**

Filter

Hide Call Due After Hours  
24

Date Entered  
All

Date Completed  
All

Due Date  
All

Call Status  
9 Statuses Selected

Read/Unread Calls  
Both

Subject  
Nothing selected

Flags  
Nothing selected

Customer Status  
Nothing selected

Popup Notification Employee Filter  
TLB - Thom Boersma

Notify Me When These Employees Get a New Call

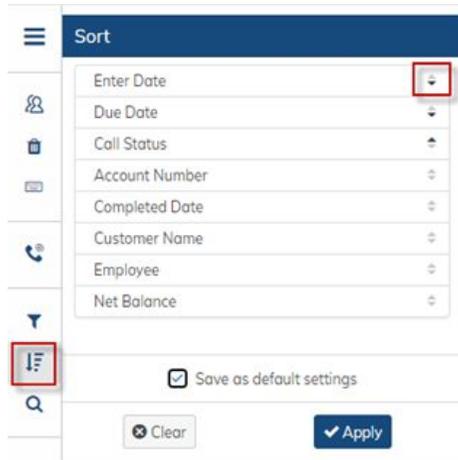
Save as default settings

Clear Apply

- Hide Call Due After: option to hide calls with due dates/times in the future X hours
- Date Entered: filter by calls entered during a specific time frame
- Date Completed: filter by calls with a specific range of completed dates (only if you are viewing resolved calls)
- Due Date: filter by calls with a specific range of due dates
- Call Status: choose the status(es) to view in the call log, quick select options for just Unresolved and Resolved statuses
- Read/Unread Calls: view read/unread/or both
- Subject: filter specifically by call log topic
- Flags: filter by customer flag code
- Customer Status: filter by customer status
- Popup Notification Employee Filter: select which employee(s) to get call log notifications for
- Notify Me When These Employees Get a New Call
- Save as default settings: saves current settings as the sticky settings for the user

# SA5 Call Log: Editing and Closing Calls

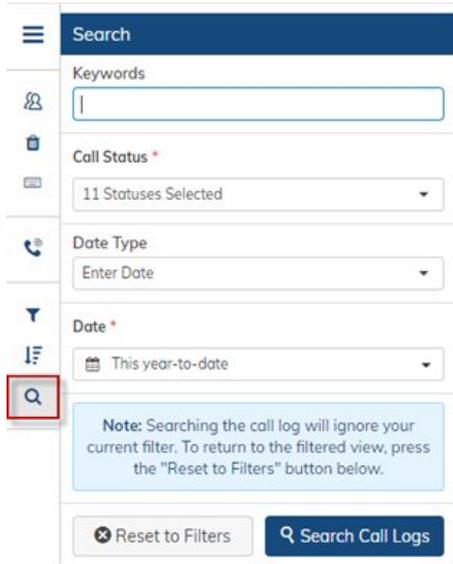
Call log sort options are an employee-by-employee setting. Sort options can be dragged and dropped within the list to set the sort priority. The arrows on the right of the sort will change between ascending or descending order.



- Enter Date
- Due Date
- Call Status
- Account Number
- Completed Date
- Customer Name
- Employee
- Net Balance

# SA5 Call Log: Editing and Closing Calls

The call log can be searched using the keyword option under the Employee drop-down or using the Search on the left toolbar.



Search

Keywords

Call Status \*

11 Statuses Selected

Date Type

Enter Date

Date \*

This year-to-date

Note: Searching the call log will ignore your current filter. To return to the filtered view, press the "Reset to Filters" button below.

Reset to Filters Search Call Logs

- Keywords: search calls for a specific keyword or keywords
- Call Status: search for specific call status(es)
- Date Type: choose a date type to search for (Enter, Due, Completed)
- Date: corresponds to the date type selected

# SA5 Call Log: Editing and Closing Calls

Selecting a call from the call log will display the details of that specific call.

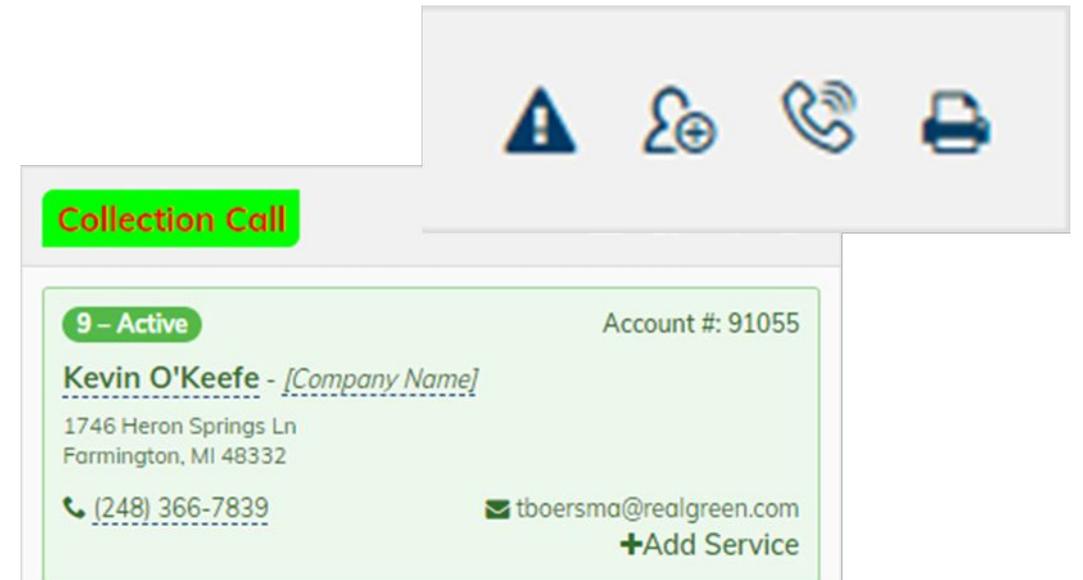
- Any dash underlined field may be clicked and edited
- Various hyperlinks are available to open the customer account, add services, email the customer, or enter payments

The screenshot displays the Service Assistant interface. On the left, a call log lists several calls, with 'Kevin O'Keefe' highlighted in a red box. The main panel shows the details for this 'Collection Call'. The call is assigned to Peter M. Brown and is for account # 91055. The customer's name is Kevin O'Keefe, with address 1746 Heron Springs Ln, Farmington, MI 48332, and phone number (248) 366-7839. The call was entered on 11/1/2012 at 12:00 AM. The balance is \$77.76, and there is a 'CREDIT HOLD' warning. The interface includes various navigation icons and a search bar.

# SA5 Call Log: Editing and Closing Calls

Each call log entry can be acted on with a variety of options:

- Place in use: marks the call in use under the Busy status
- Assign to me: places call under your login if viewing calls assigned to other employees
- New Call Log Entry: adds a separate call log entry for the same customer
- Call Log Detail Report: prints the details of this call, or multiple calls for this customer



# SA5 Call Log: Editing and Closing Calls

To edit a call, click the + button in the upper right (if the call is not currently assigned to you, it will prompt to assign to yourself):

- Notes relevant to the call/contact should be filled in, the lower right corner can be dragged to expand the note field out
- It is recommended to always select the outcome of the call whether contact was made or not, this will update the status as needed automatically
- Click Save to record the new entry for this call

Subject(s): *[Subject]* +

Show System Notes

Outcome: None Status: Collection Call

Note:

Cancel Save

PB 3/28/2008 4:55 PM 🗑️ 📧 💬

*Outcome: New Collection Call  
Over 60 day collection call*

# SA5 Call Log: Editing and Closing Calls

To resolve or close a call, click the + button in the upper right (if the call is not currently assigned to you, it will prompt to assign to yourself):

- Notes relevant to the call/contact should be filled in, the lower right corner can be dragged to expand the note field out
- It is recommended to select the outcome of the call to change the status to a Resolved status
- Click Save to record this call as completed

The screenshot displays a call log entry for a subject named [Subject]. The interface includes a '+ button' in the top right corner. Below the subject name, there is a checkbox for 'Show System Notes'. The main form area contains two dropdown menus: 'Outcome:' and 'Status:', both currently set to 'Resolved'. Below these is a 'Note:' field containing the text 'Customer paid past due bill via CC on 12/10|'. At the bottom right of the form are 'Cancel' and 'Save' buttons. Below the form, a call log entry is visible with a 'PB' icon, the date and time '3/28/2008 4:55 PM', and the text 'Outcome: New Collection Call Over 60 day collection call'.

# SA5 Call Log: Editing and Closing Calls

## Call Log Recommendations:

- Any time contact is made, or conversations occur with customers, it is recommended to record that information in the call log
  - Open tasks for the customer, prior conversations, all contact history is valuable information to CSRs and other employees currently speaking with the customer
- It is recommended to define the outcomes in the settings to impact the status of the call, and it is recommended to always use the outcomes when editing
  - Every attempt to reach the customer is a valuable record, whether the line was busy, nobody answered, or a message was left
- Each new topic should be created as a new call log entry to prevent conversations from being closed if only half of a topic is resolved
  - Billing dispute should be a separate call log than if the customer had a question about an upcoming aeration service

# SA5 Call Log - Navigating the Call Log

The screenshot displays the SA5 Call Log interface. On the left, a list of calls is shown with columns for employee name, customer name, call date, and due date. The main area shows a detailed view of a '1 Call Back' for John at Home Depot - Fenton. The call was entered on 7/7/2020 at 1:15 PM and is due on 1/11/2024 at 2:06 PM. The assigned employee is Matthew Parise. The account information includes John's address (4725 Pineview Dr, Walled Lake, MI 48390) and phone number (586) 111-1111. The balance section shows an aging balance of \$6,023.65 and a remittance balance of \$6,509.90 with a 'CREDIT HOLD' warning. The call log on the right shows two entries: one from AS on 1/11/2024 at 1:17 PM with an outcome of 'Call Back' and a note 'Customer would like to be called back', and another from MP on 7/7/2020 at 1:15 PM with an outcome of 'Note'.

This screenshot shows a search filter overlay in the SA5 interface. The filter is set to 'Select All' and lists several employees with checkboxes: MI Production (1 item), MIMARKET - Michigan Market, ACOLE - April Cole, DONNA - Kylie Jones, EC - Erik Chris, ESALES - East Sales, JT - Jaqueline Thai, KLESLIE - Kimm Leslie, and LDELL - Lindsay Dellasega. Below the list, account information is displayed for Acct #: 122, located at 5502 N 27th Ave S, Phoenix, AZ 85017, with a phone number (248) 555-1114. The subject is identified as Austin Schmidt, with call dates of 7/13/2020 at 2:42 PM and 2/5/2021 at 12:00 AM. A 'Call Back - Appointment' button is visible at the bottom right of the filter overlay.

## View Multiple Employees at Once

- You can select both yourself and your team or any other person including those used by the CAW

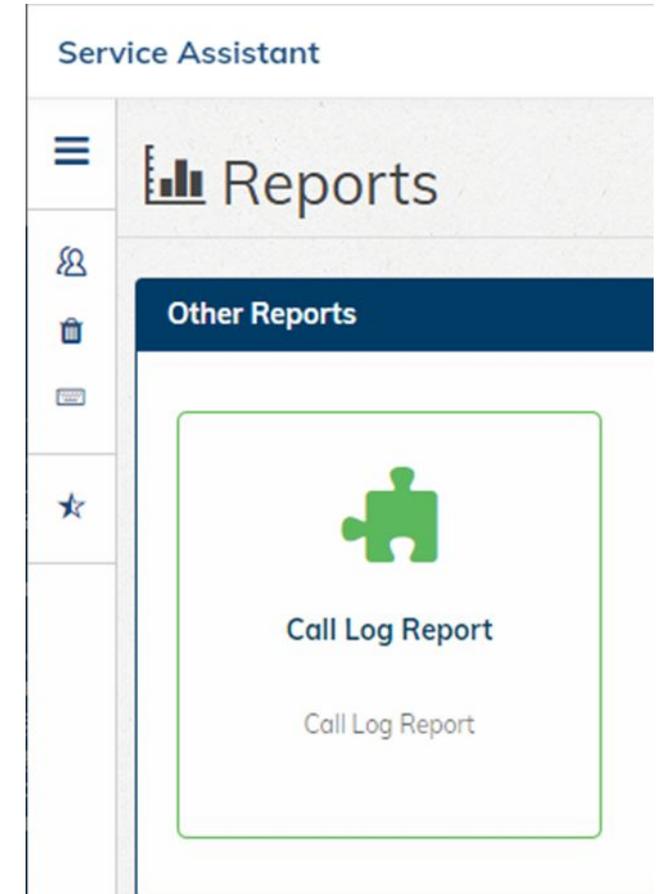
# SA5 Call Log: Call Log Reporting

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There is a single Call Log Report under Reports > Other Reports > Call Log Report

The Call Log Report looks primarily at current status of the call, the employee(s) the call is assigned to, and the date type and range desired.

Call Topics can be used as an additional sort as needed.



# SA5 Call Log: Call Log Reporting

Service Assistant > Reports > Call Log Report

206 148 TB

### Call Log Report

Branch: All Branches Selected

#### Call Log related filters

Select Calls with Status: All Statuses

- I - D2D - Knock, No Answer

Selected Statuses

- B - Busy
- C - Call returned, no answer
- \$ - Collection Call
- D - Duplicate Call
- I - Inter-Office Memo
- L - Left Message

Employees: 29 of 29 Employees Selected

Subject: 4 of 4 Subjects Selected

Include Additional Assignees

Enter Date: This year-to-date

#### Output and related filters

Output Type: Summary by Topic

Customer Type: Both

Viewed Calls Only

Include Calls Unassigned To Customer

#### More filters

+ Flag Codes

+ Advanced Options

- Send To Mapping Filter
- Simple Customer List

Cancel Preview Generate

# SA5 Call Log: Call Log Reporting

The Call Log Report has a variety of outputs depending on the information or details required:

- List: a list of the customers, when calls were entered/resolved, current status, if it is resolved, if it has been viewed, current assigned employee
- Detail: provides similar information to the List view, but will include all contact notes for each call record
- Evaluation: summary by employee of average time to resolution, % of resolved calls, and total # of resolved calls
- Contact Evaluation: how many days it took to contact per call, # of contact points and attempts per call, and how old the call is
- Contact List: similar to the Contact Evaluation, but with less details and more dates
- Aging: displays calls by employee by how old they are in aging categories
- Summary by Topic: only works if Topics are used, summarizes call count by specific topic assigned

# SA5 Call Log: Call Log Reporting

The Call Log also has some basic reporting available using the Summary dropdown:

- In-Use Summary – View current calls 'in-use' by employee(s)
- Status Summary – View all unresolved calls by employee(s) and status
- Date Summary – View unresolved and resolved calls by branch and date

The screenshot displays the 'Service Assistant' interface with the 'Status Summary' tab selected. The 'Employee' dropdown is set to 'All Employees Selected'. A table lists employees and their number of unresolved calls. A call log at the bottom shows a 'New Call' by Thom Boersma.

Employee	Unresolved Calls
ASB	5
BAM	9
BOB	20
EAA	71
GLF	0
GML	0
GTK	10
JTN	7
KAP	6
KLI	0
KLW	3
KMM	3
KMW	3

Click on an employee to see their call breakdown

Summary | na | Busy | Thom Boersma  
Entered: 6/25/2021 3:09 PM  
Joy | New Call | Thom Boersma  
Entered: 6/25/2021 3:23 PM  
Due: 11/29/2022 4:40 PM

Service Assistant version: 5.3.302.3704 | © 2023 RealGreen by WorkWave. | Request Technical Support

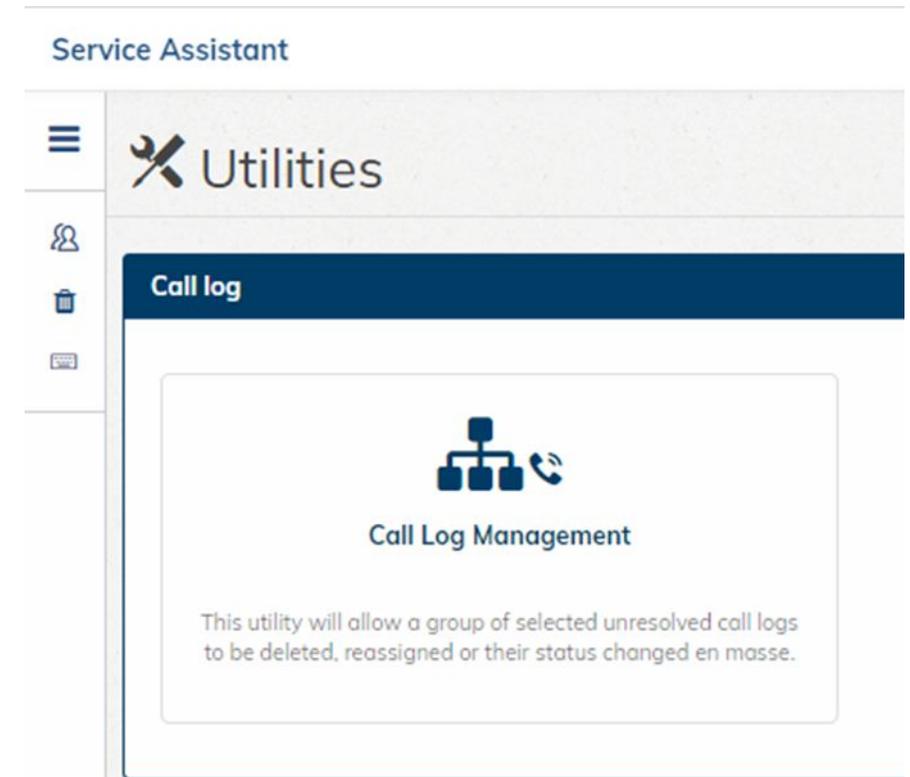
# SA5 Call Log: Call Log Management Utility

# SA5 Call Log: Call Log Management Utility

The Call Log Management Utility can be found under Utilities > Call Log > Call Log Management Utility.

This utility can be used to:

- Change the status of calls en masse
- Resolve calls en masse
- Delete calls en masse
  - It cannot delete already resolved calls
- Reassign calls to a new employee en masse



# SA5 Call Log: Call Log Management Utility

The utility allows you to search by:

- Date Entered
- Entered By
- Call Status

Easily select calls by employee, and filter by status as needed.

Inactive employees will be displayed if they currently have calls assigned to them

The screenshot displays the 'Call Log Management' utility interface. At the top, the breadcrumb navigation shows 'Service Assistant > Utilities > Call Log Management'. The search filter section includes:

- Search for Calls:**
- Calls Entered:** Earliest to date
- Entered By:** All Employees Selected
- Call Status:** N - New Call

Below the search filters, there are options for 'More filters' and '+ Flag Codes'. A 'Cancel' button and a 'Search' button are also present.

The 'Call Log Results' section features a table of employees and call counts:

Employee	Call Count
ASB — Andy Bathgate	2
BAM — Brian Maxwell	9
CDG — Charles de Gaulle	1
CLC — Calvin Coffel	6
EAA — Elaine Anderson	70
GTK — Gary Kramer	10
JTN — James Nichols	5
KLW — Ken Williams	2
KMW — Kent Workman	1
MNN — Andrew Maki	19
MSD — Mark Daugherty	1

To the right of the table, there is a search bar and a list of call details:

- Select All
- Acct. #30422 Paul Ewing  
26705 Irving Rd, Franklin, MI 48025  
(248) 932-0840 **New Call** Andy Bathgate (ASB)  
Entered: 11/01/2012 12:00 AM
- Acct. #1142653 Wilneita Smith  
15148 James St, Oak Park, MI 48237 **New Call** Andy Bathgate (ASB)  
Entered: 03/11/2021 9:34 AM

# SA5 Call Log: Call Log Management Utility

Once calls are selected, use the options to:

- Change Status
- Delete
- Reassign

**These changes are permanent.**

Deleted calls cannot be recovered, and mass resolved calls cannot be re-opened through this utility.

The screenshot shows the 'Call Log Actions' utility interface. At the top, a yellow banner contains a warning icon and the text: 'This utility allows you to permanently change the selected calls in the call log'. Below this, the 'Action:' dropdown menu is open, showing three options: 'Change Status', 'Delete', and 'Reassign'. The 'New Outcome:' field is empty. The 'New Status:' dropdown menu is set to 'V - Resolved'. A 'Process' button is located at the bottom right of the form.

# Questions?

# Session Feedback

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**We appreciate your feedback and attendance**

- Login to the event mobile app
- Add this session to your schedule
- Click “Survey”
- Select a rating 1-5 stars