Leveraging the Call Log in SA5

BEYOND SERVICE
CUSTOMER CONFERENCE '26

CONFIDENTIAL | workwave.com

SA5 Call Log

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Agenda

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

Customer Testimonial

Customer Testimonial

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

SA5 Call Log: Set up

SA5 Call Log: Call Log Setup

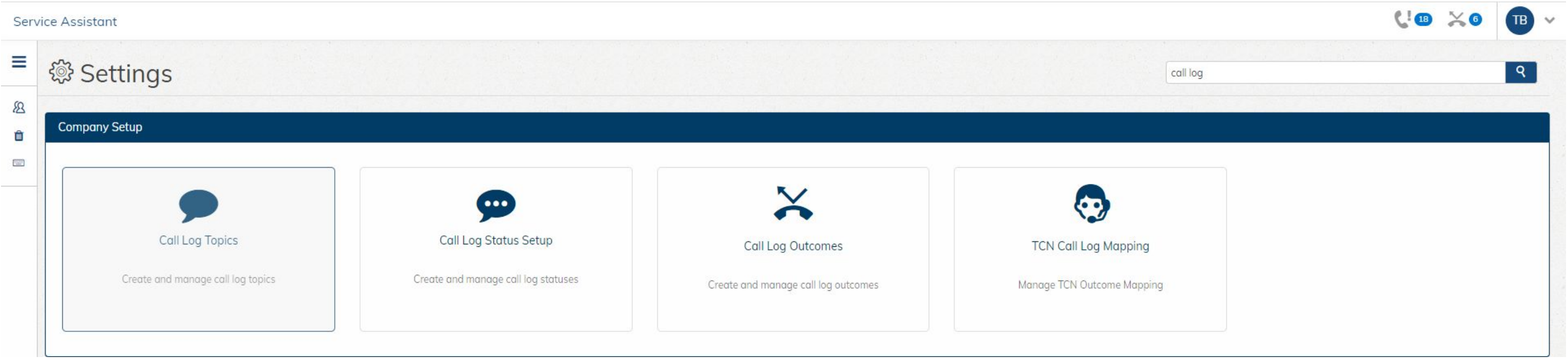
Why start with using the call log in SA5?

- 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:

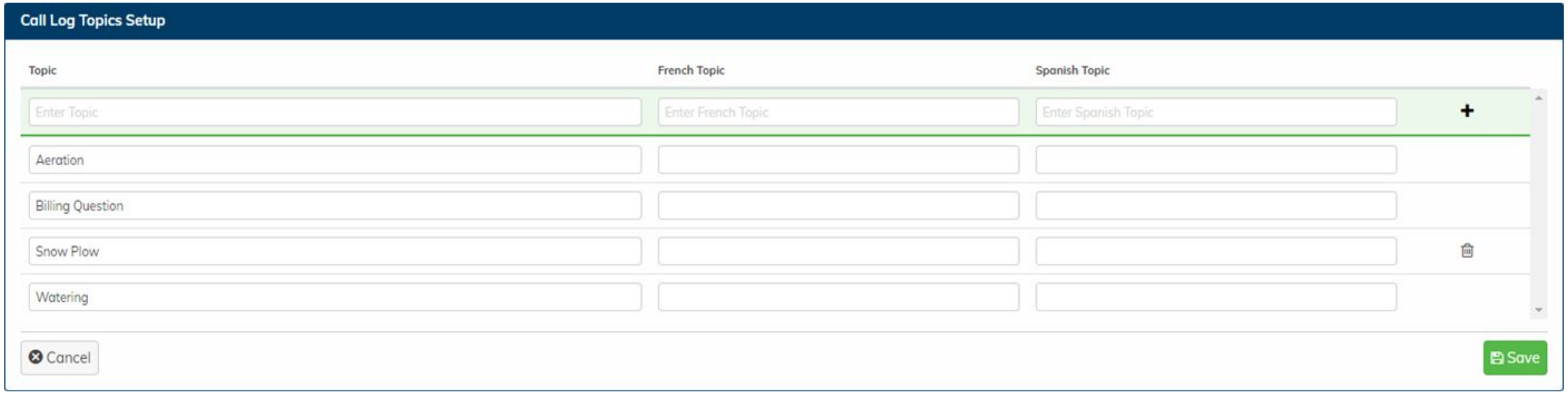
- Call Log Topics (Subjects)
- Call Log Status Setup
- Call Log Outcomes
- TCN Call Log Mapping (optional)



SA5 Call Log: Call Log Setup

Call Log Topics:

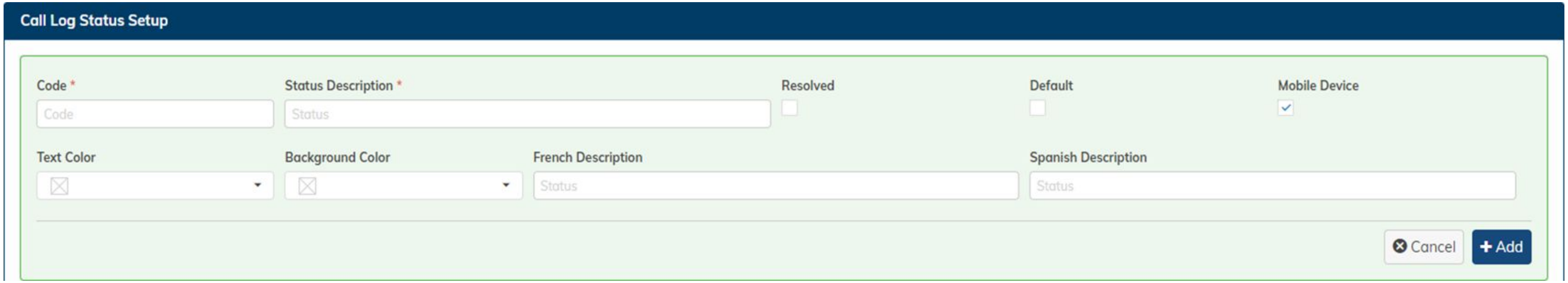
Found under Settings > Company Setup > Call Log Topics. Topics (also called Subjects) are essentially flag codes for call logs. They can be used as a filter on the call log report and are options to group calls without creating an excess of statuses or outcomes.



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.



SA5 Call Log: Call Log Setup

Call Log Status Setup:

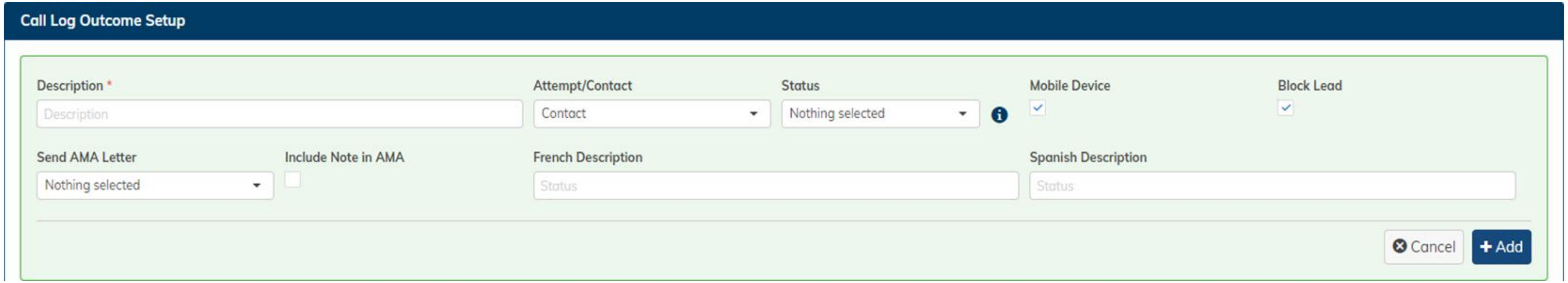
- Code: a single character code linked to the description
- Status Description: a short word or phrase to represent the call log status
- Resolved: if this box is checked, the call will be treated as complete (Resolved calls may include notes, answered questions, any call that does not require a follow 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.



SA5 Call Log: Call Log Setup

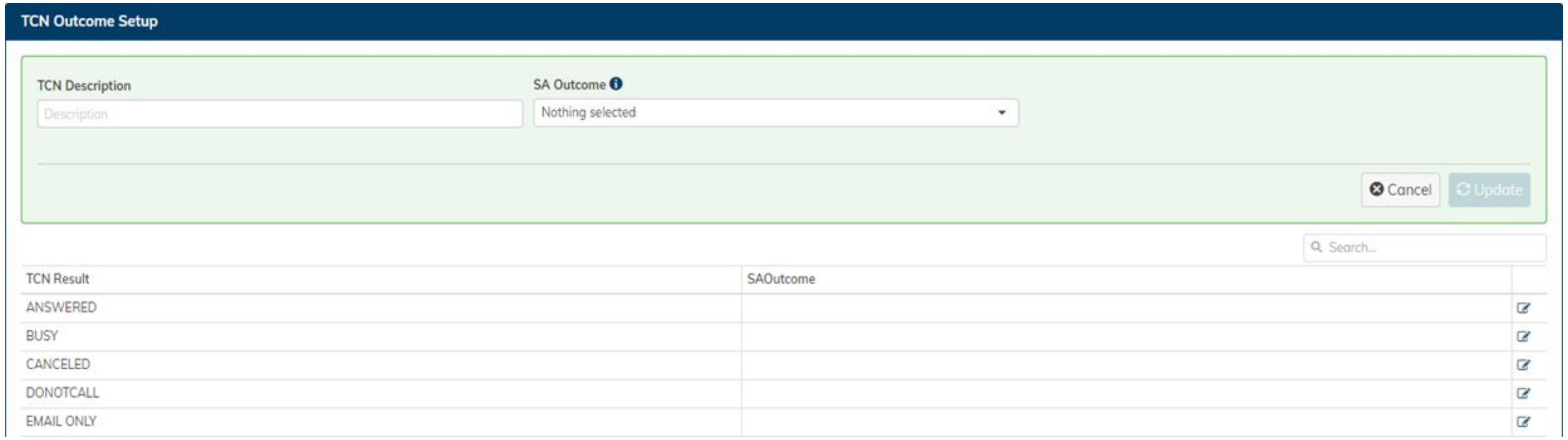
Call Log Outcomes:

- 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

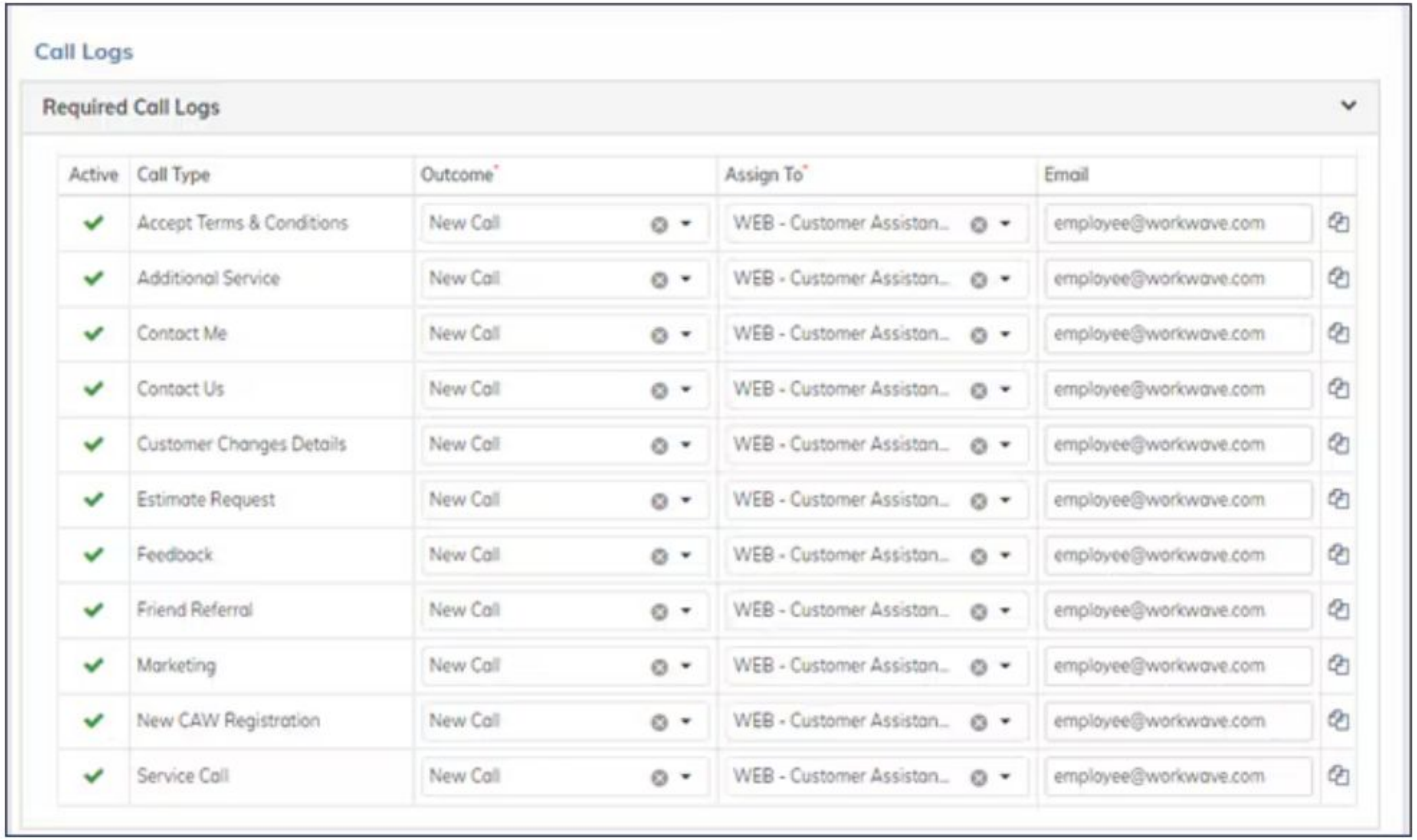
TCN Call Log Mapping:

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.



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.



Call Logs

Required Call Logs

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

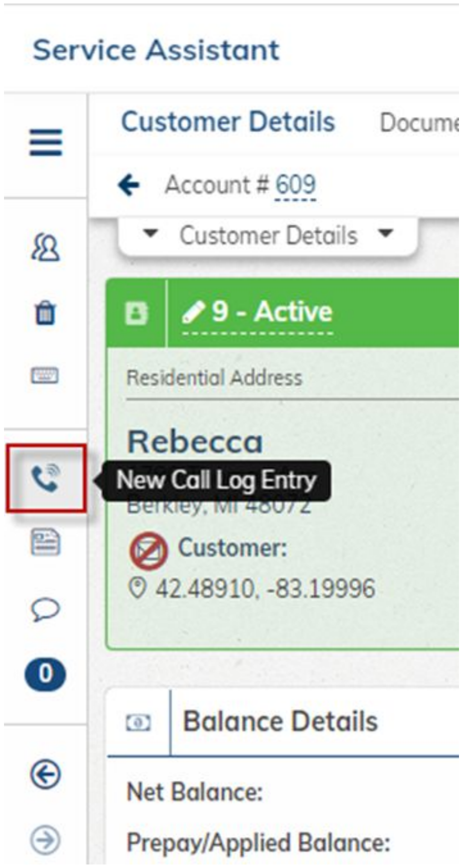
CAW Optional Call Logs

Optional Call Logs

Active	Call Type	Outcome	Assign To	Email	Autopay	
✓	Autopay Enrollment	New Call	WEB - Customer Assistan...	employee@workwave.com		
✓	Cancel Autopay	New Call	WEB - Customer Assistan...	employee@workwave.com		
✓	Email Bounced	New Call	WEB - Customer Assistan...	employee@workwave.com		
✓	NPS Detractor Score	New Call	WEB - Customer Assistan...	employee@workwave.com		
✓	NPS Neutral Score	New Call	WEB - Customer Assistan...	employee@workwave.com		
✓	NPS Promoter Score	New Call	WEB - Customer Assistan...	employee@workwave.com		
✓	Payment Rejected	New Call	WEB - Customer Assistan...	employee@workwave.com	☐	
✓	PaymentBasedCall	New Call	WEB - Customer Assistan...	employee@workwave.com	☐	

SA5 Call Log: Creating Calls

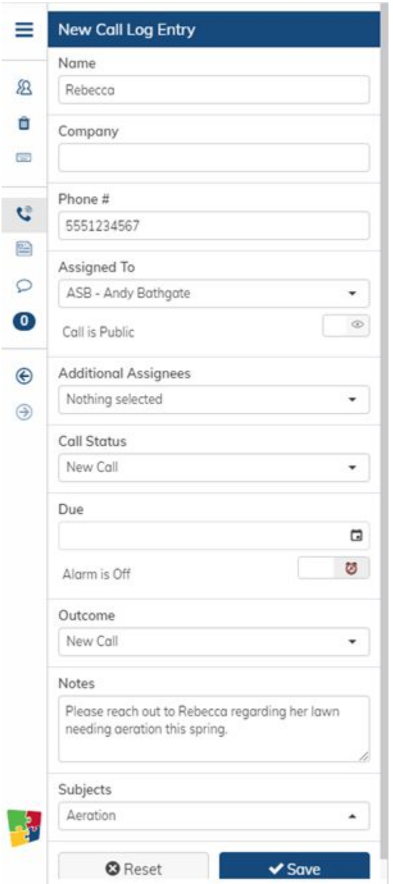
SA5 Call Log: Creating Calls



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.

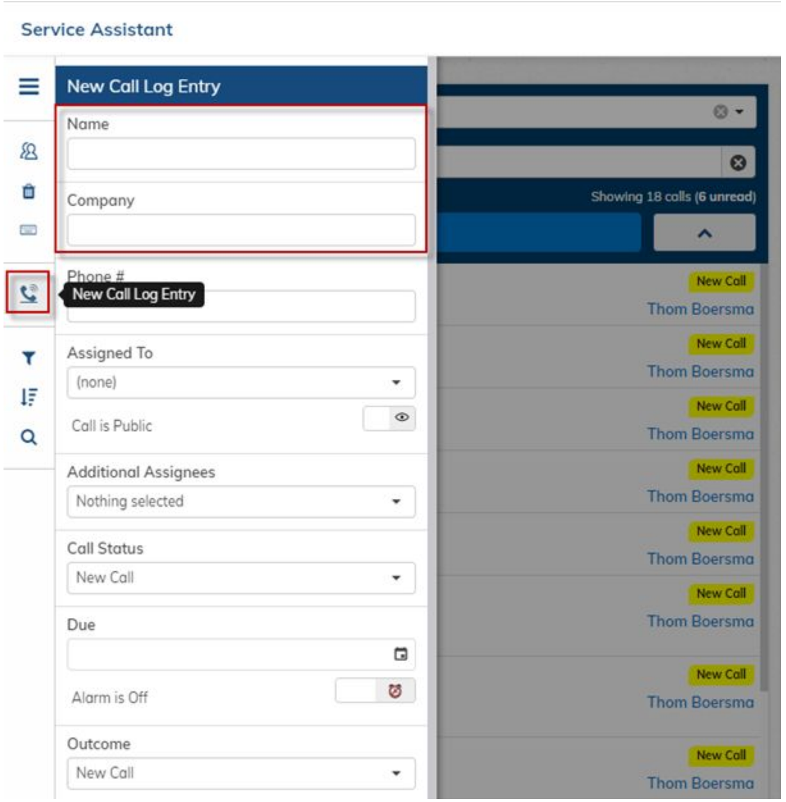
SA5 Call Log: Creating Calls



The 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

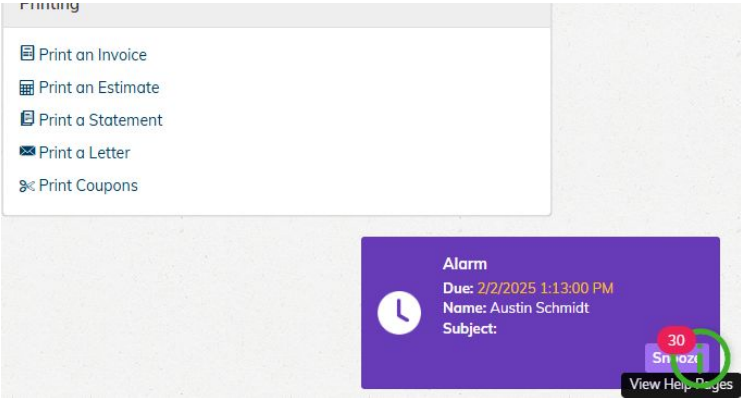
SA5 Call Log: Creating Calls



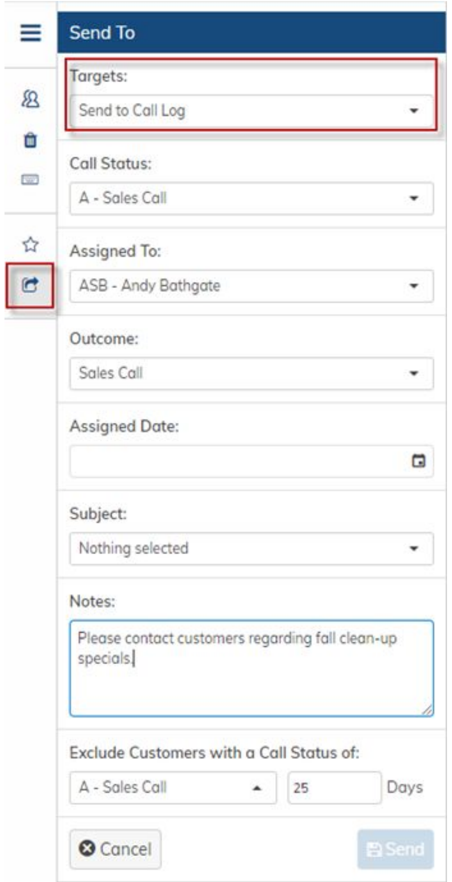
Calls created from the Call Log itself will never be linked to a customer account; they are primarily for interoffice communication only.

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.



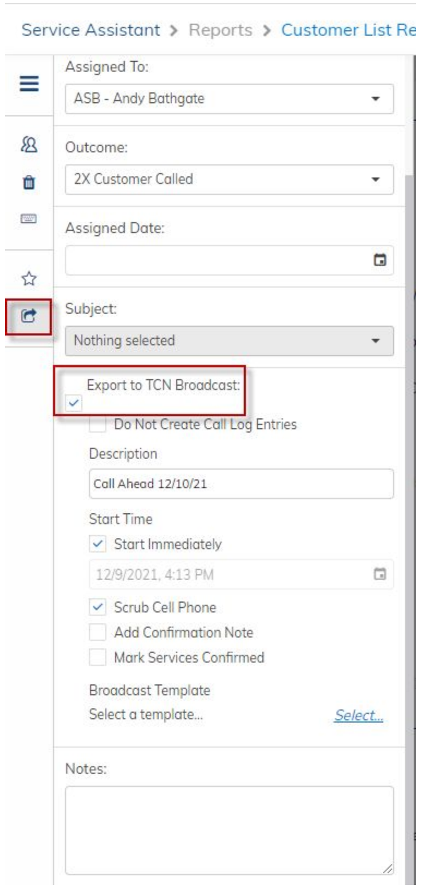
SA5 Call Log: Creating Calls



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.

- 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

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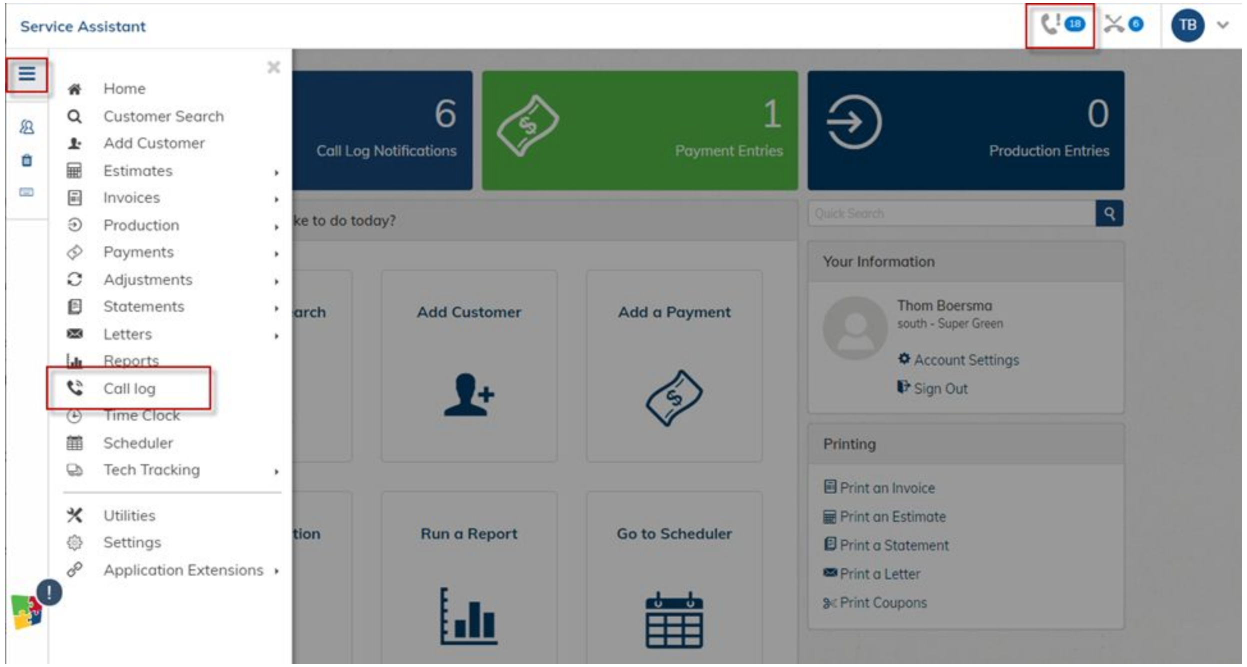
SA5 Call Log: Editing and Closing Calls

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.

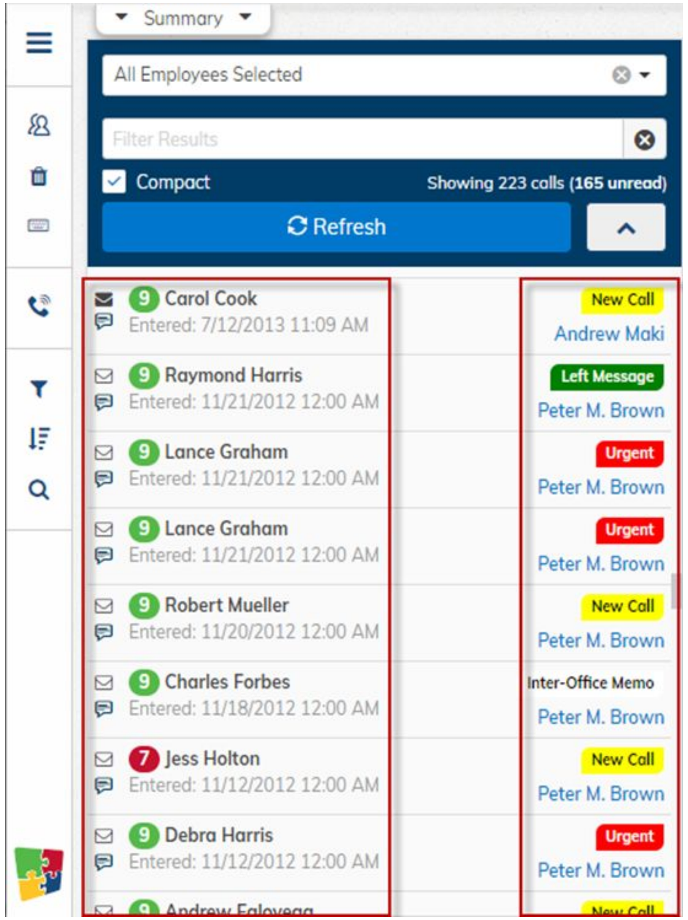
Unresolved and unread (not viewed) call totals for the logged in user will always display in the upper right corner of the top toolbar.



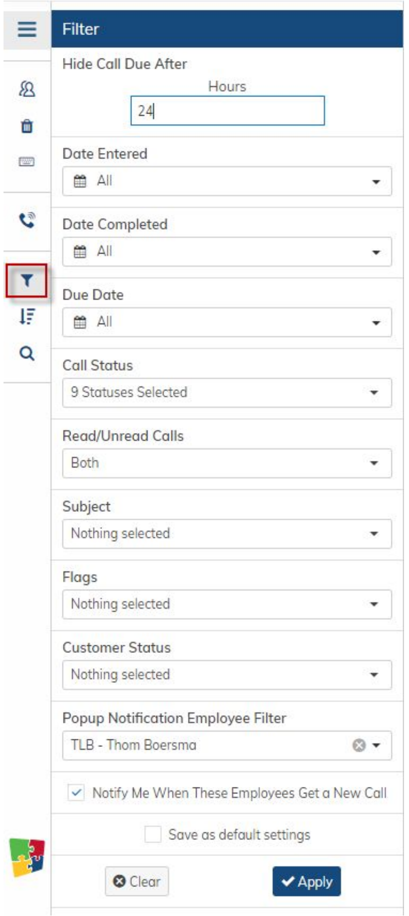
SA5 Call Log: Editing and Closing Calls

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



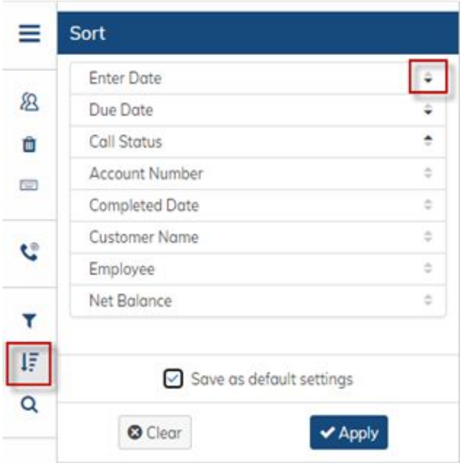
SA5 Call Log: Editing and Closing Calls



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

- 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

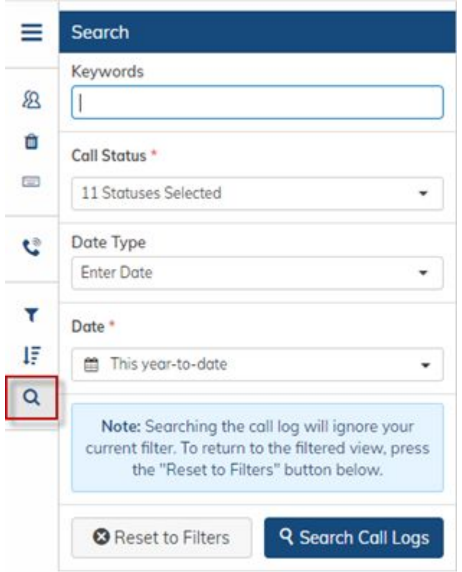
SA5 Call Log: Editing and Closing Calls



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



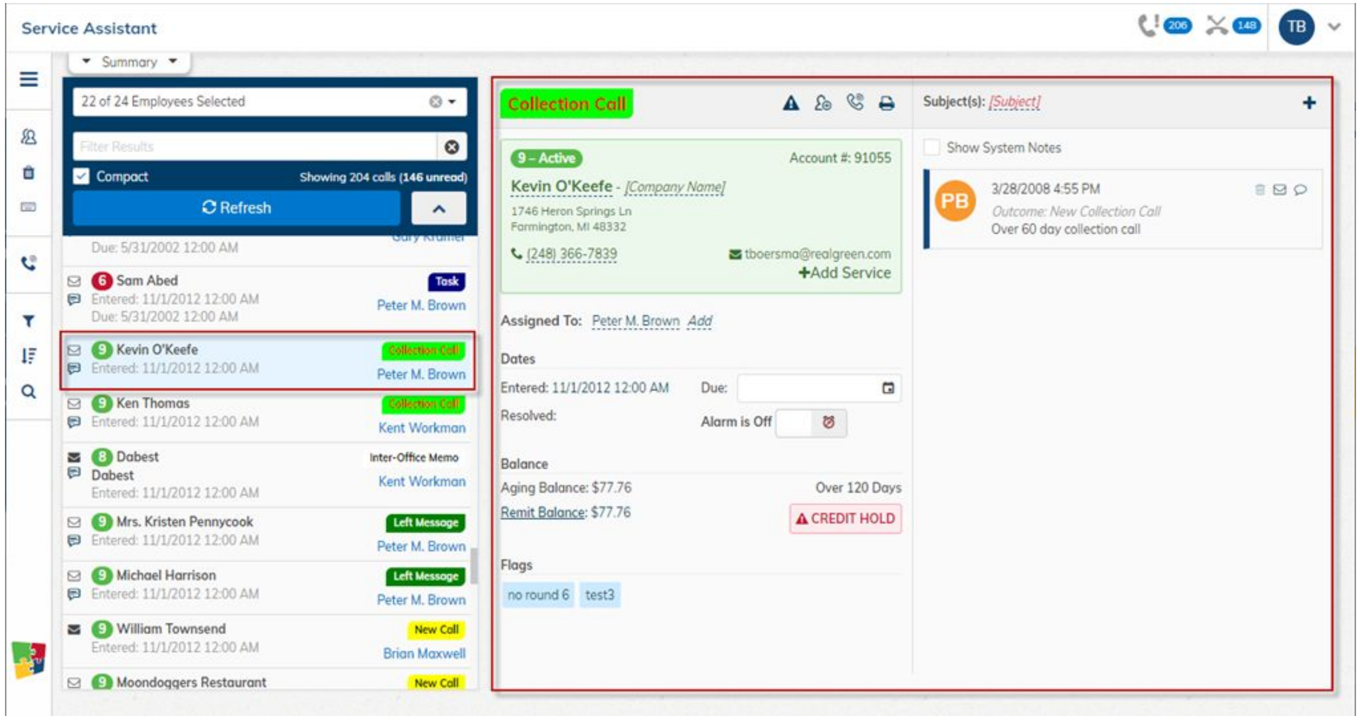
The call log can be searched using the keyword option under the Employee drop-down or using the Search on the left toolbar.

- 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.

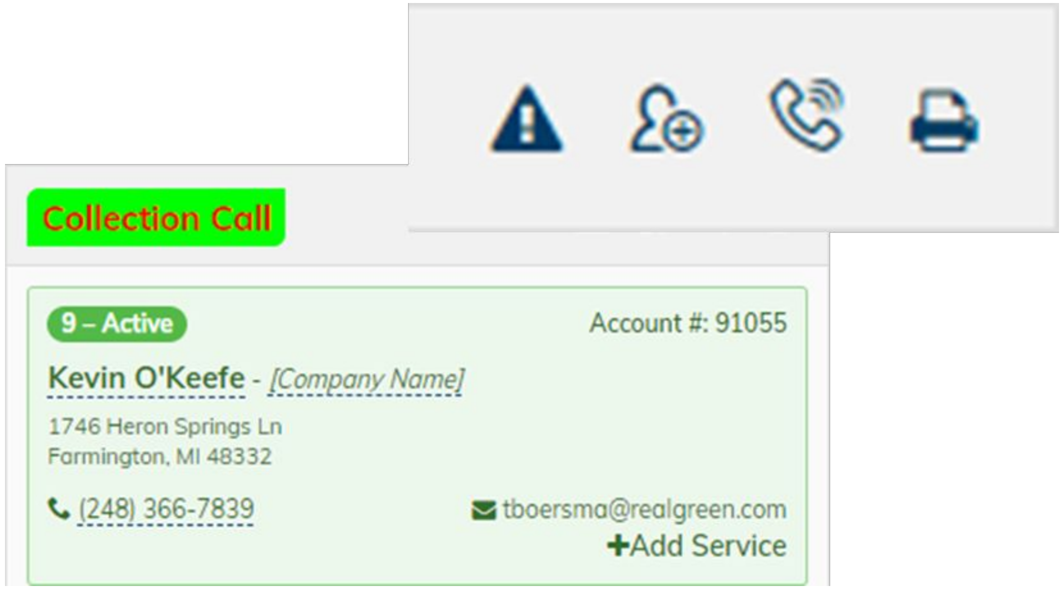
- Any dash underlined field may be clicked and edited
- Various hyperlinks are available to open the customer account, add services, email the customer, or enter payments



SA5 Call Log: Editing and Closing Calls

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

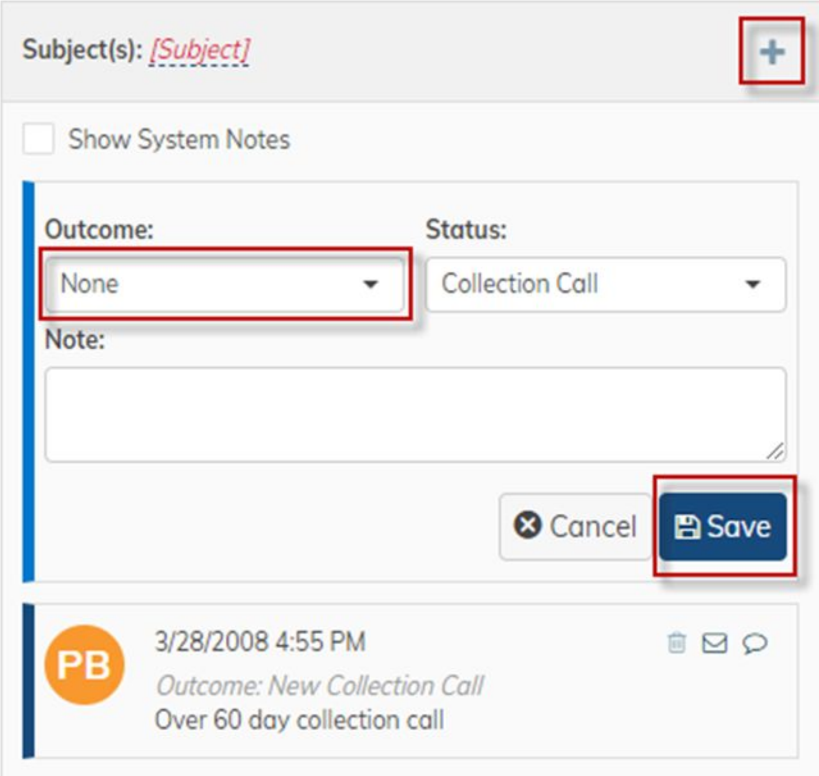
- Place in use: marks the call in use under the Busy status
- Assign to me: places call under your login if viewing calls assigned to other employees
- New Call Log Entry: adds a separate call log entry for the same customer
- Call Log Detail Report: prints the details of this call, or multiple calls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

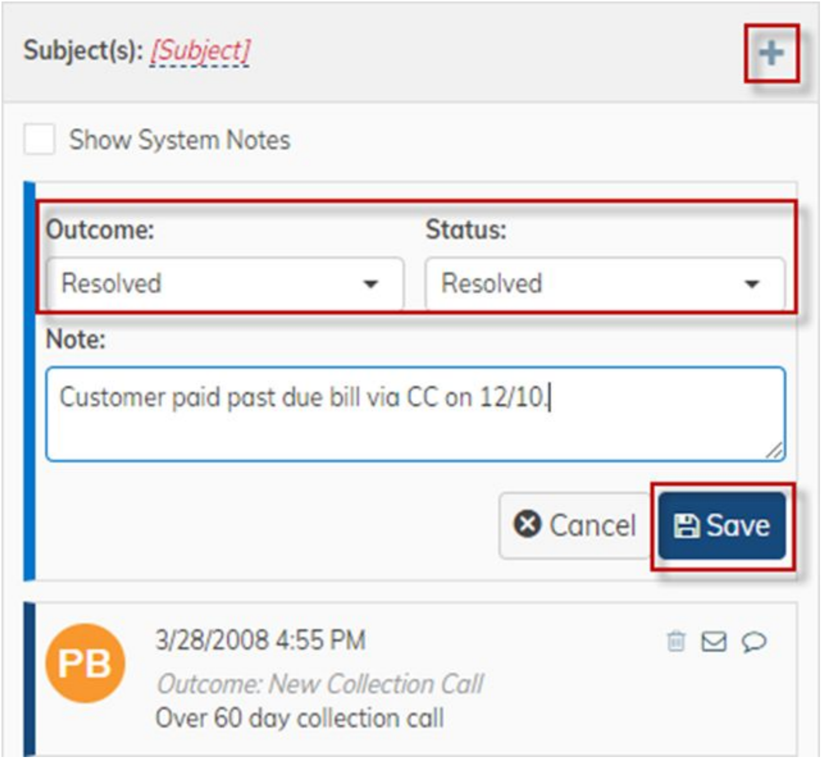
- Notes relevant to the call/contact should be filled in, the lower right corner can be dragged to expand the note field out
- It is recommended to always select the outcome of the call whether contact was made or not, this will update the status as needed automatically
- Click Save to record the new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



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

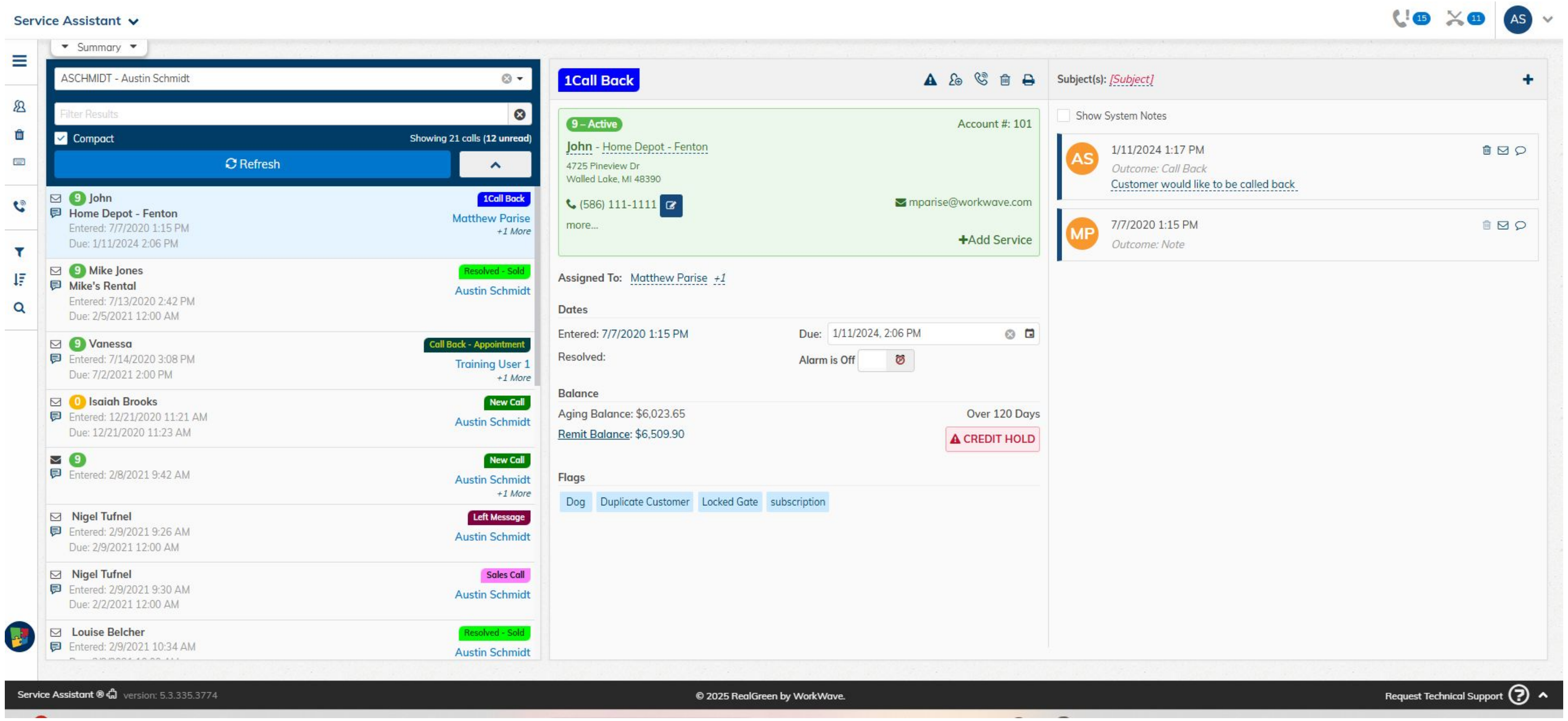


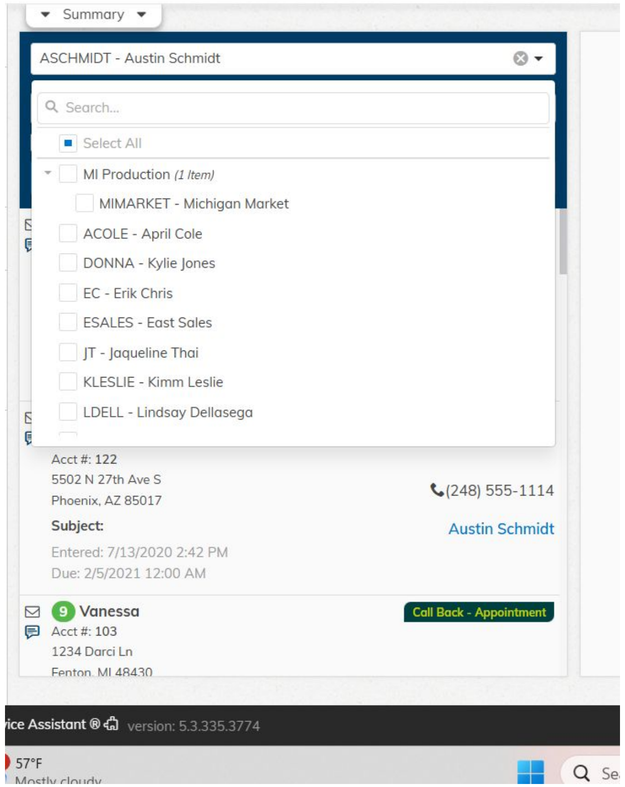
SA5 Call Log: Editing and Closing Calls

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





View Multiple Employees at Once

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

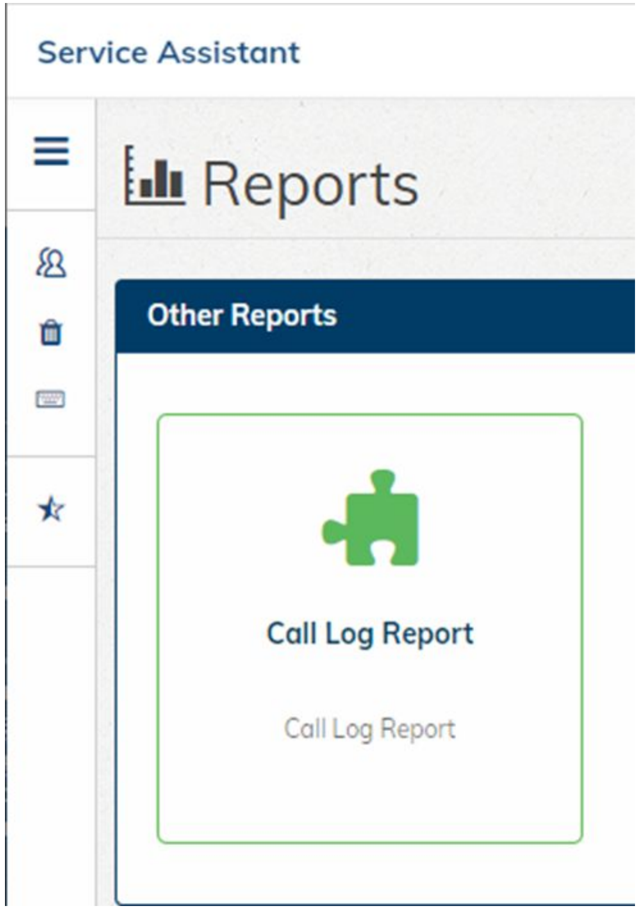
SA5 Call Log: Call Log Reporting

SA5 Call Log: Call Log Reporting

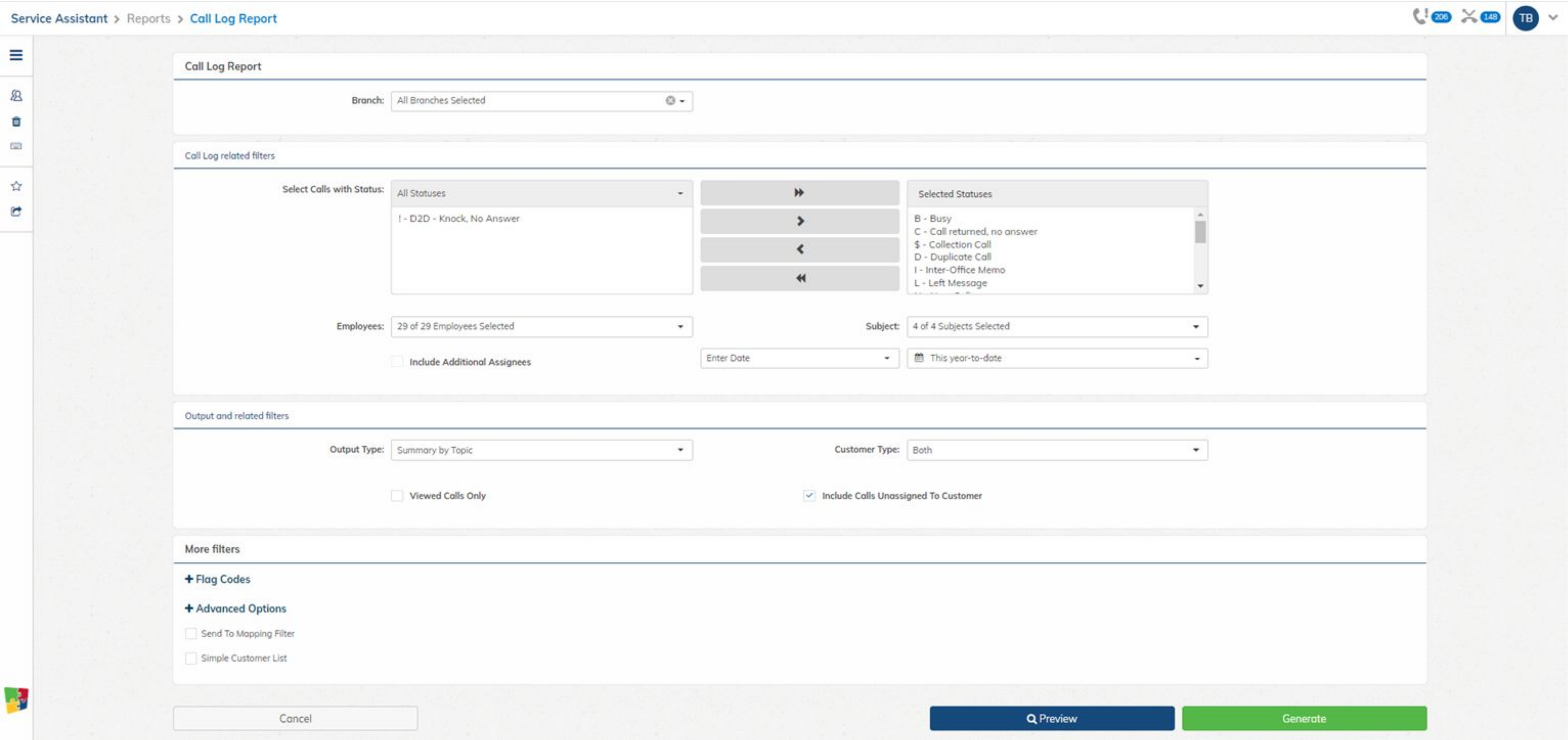
There is a single Call Log Report under Reports > Other Reports > Call Log Report

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



SA5 Call Log: Call Log Reporting

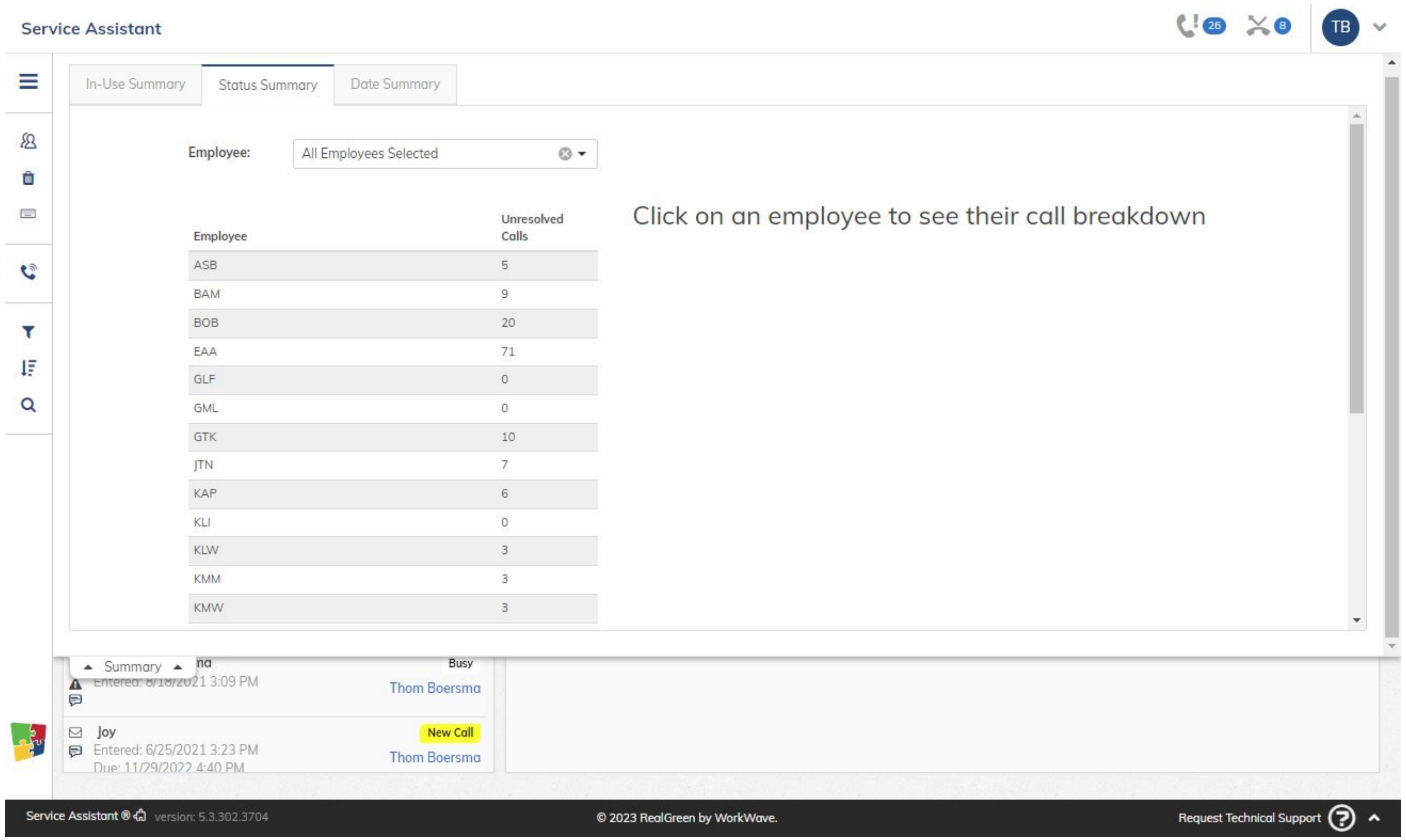
The Call Log Report has a variety of outputs depending on the information or details required:

- 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



SA5 Call Log: Call Log Management Utility

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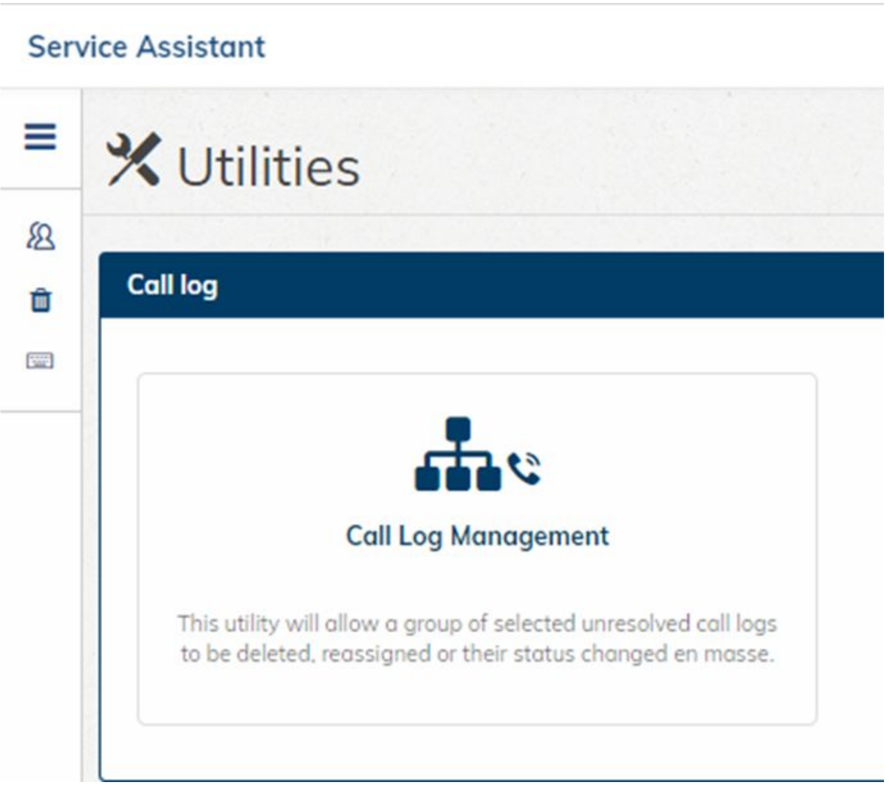
The Call Log Management Utility can be found under Utilities > Call Log > Call Log Management Utility.



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

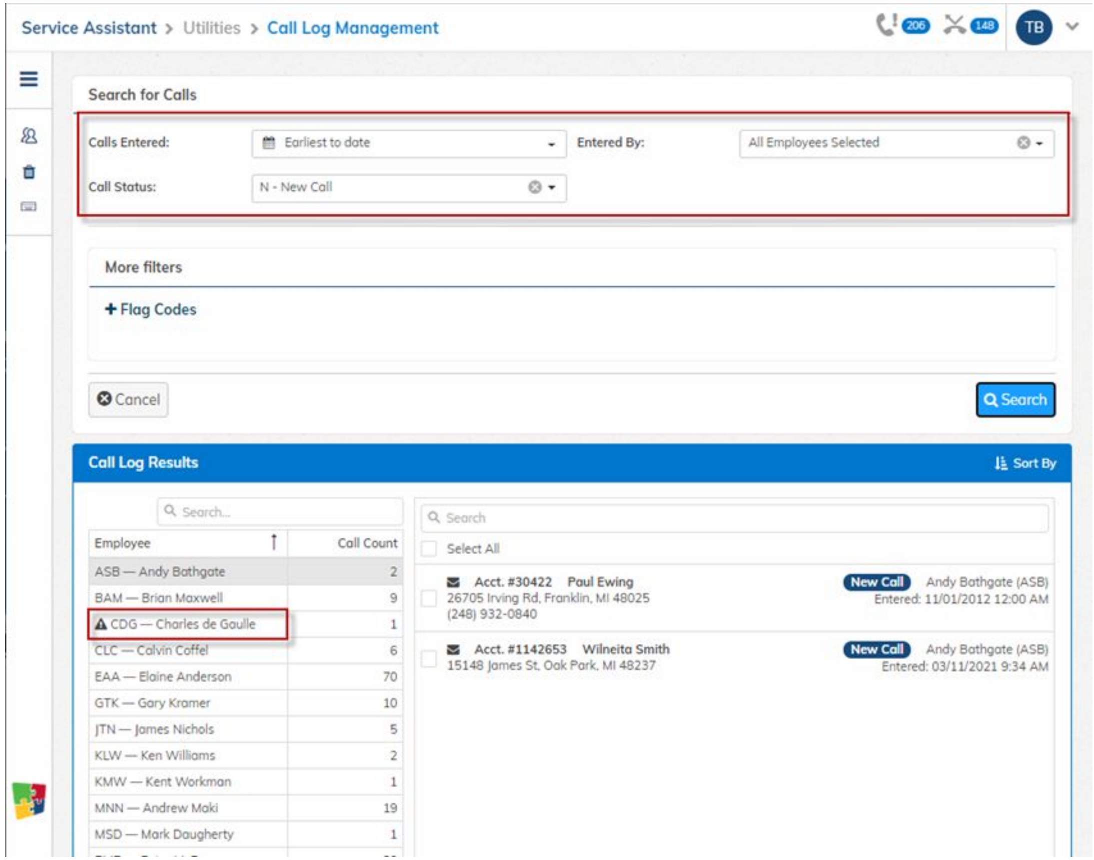
SA5 Call Log: Call Log Management Utility

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

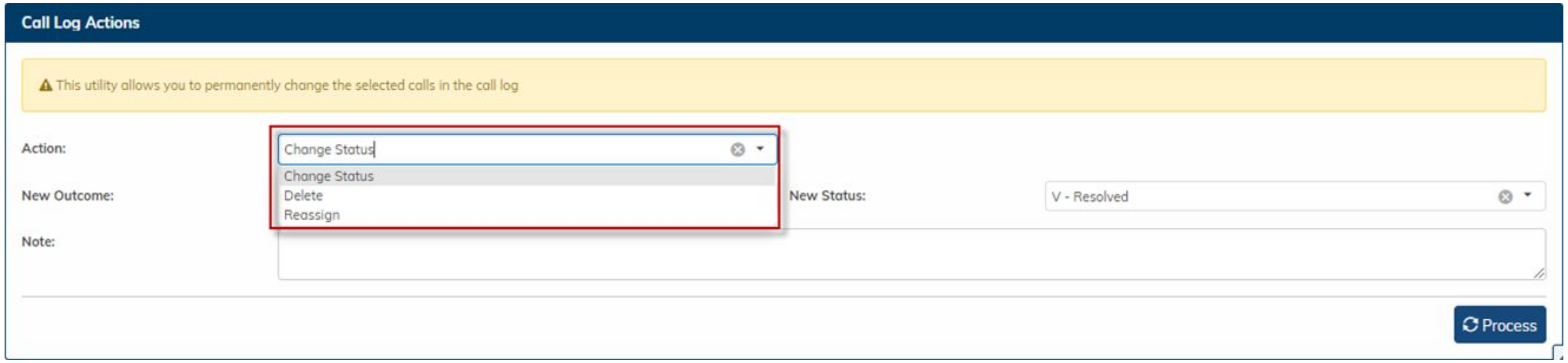


SA5 Call Log: Call Log Management Utility

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.



Questions?

Session Feedback

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