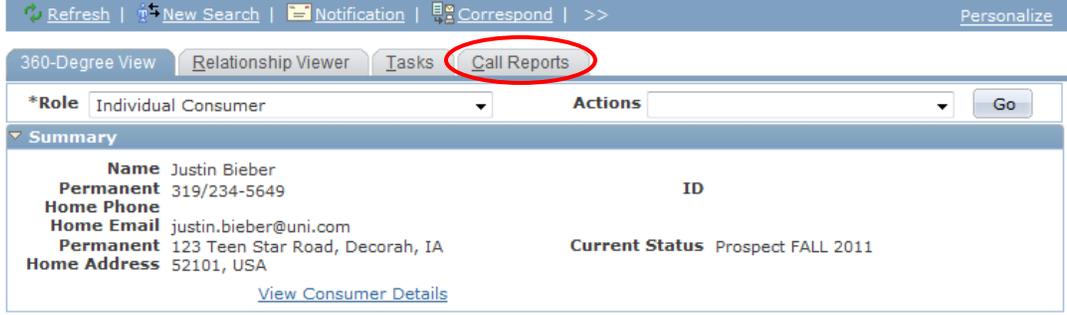
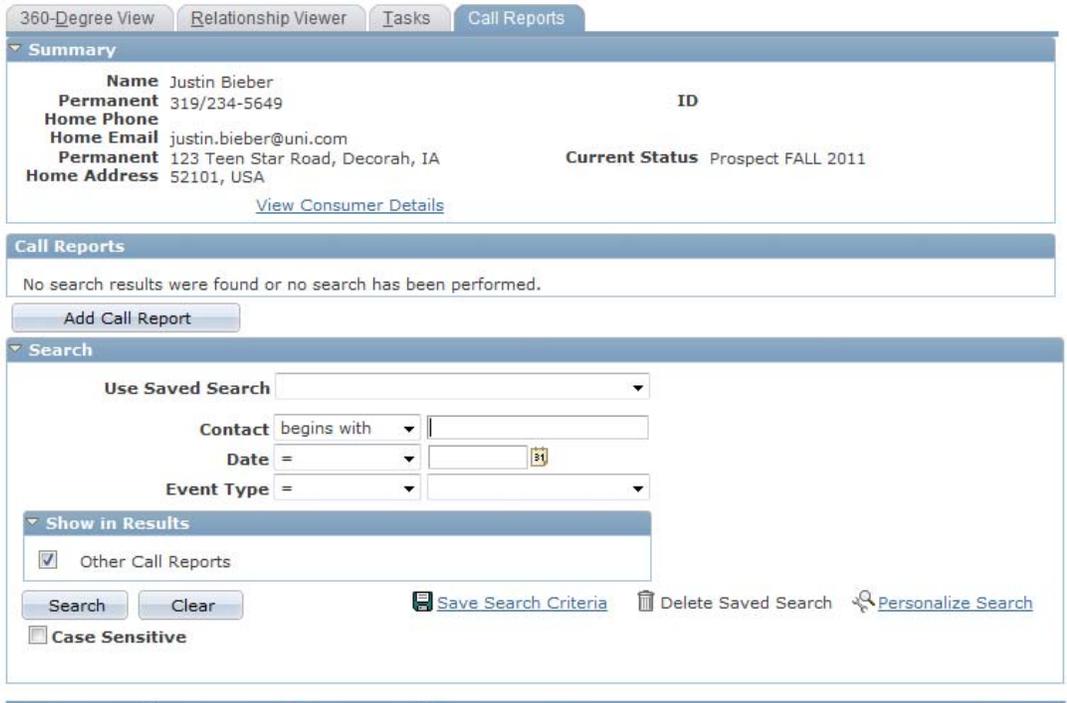
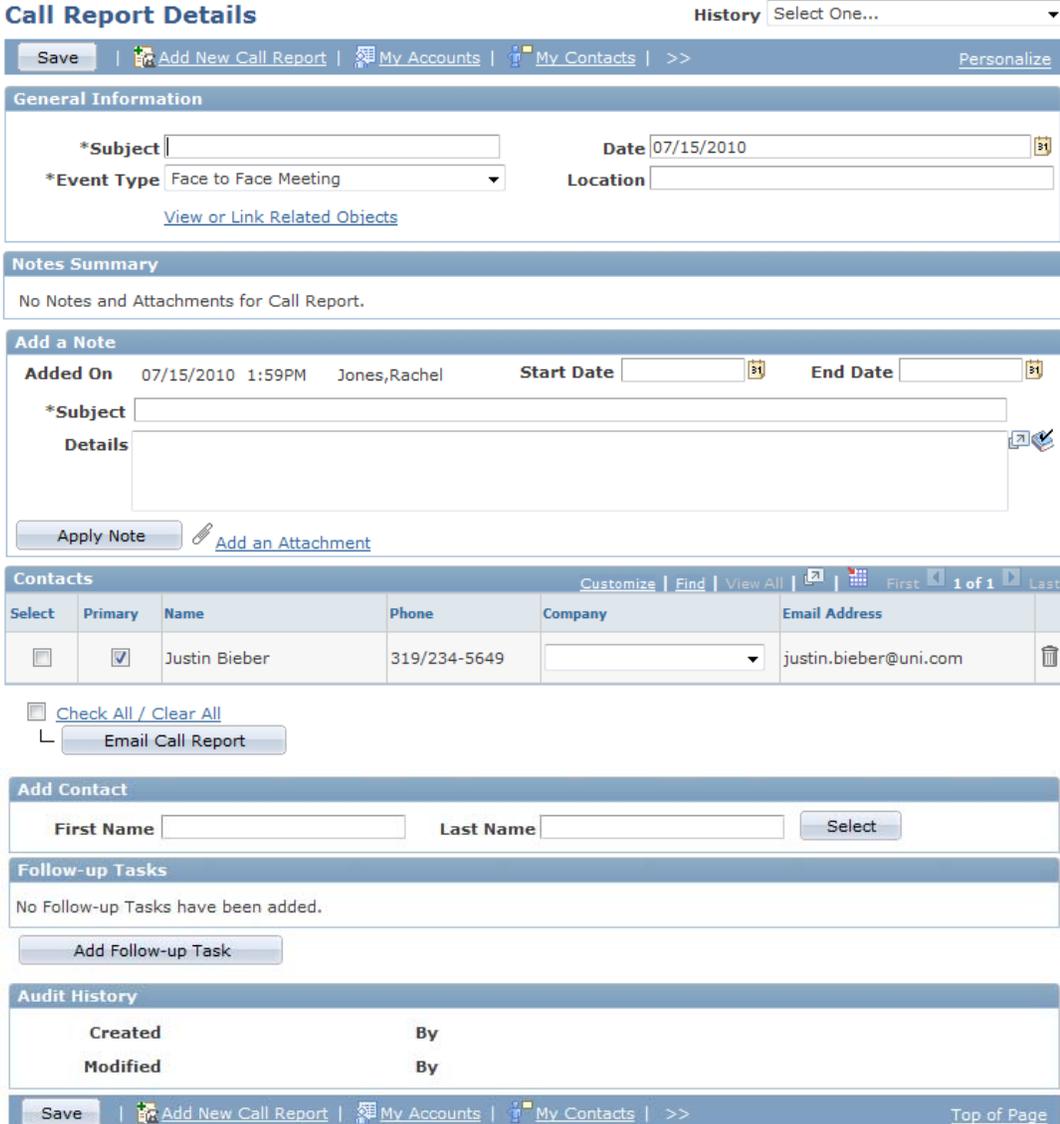


CRM - Call Report

Purpose: STARS will use the Call Report tab in the 360-Degree View to record outbound calls.

Step	Action
1.	In CRM, navigate to the 360-Degree View for the appropriate person.
2.	<p>Select the Call Reports tab.</p>  <p>360-Degree View</p> <p>Refresh New Search Notification Correspond >> Personalize</p> <p>360-Degree View Relationship Viewer Tasks Call Reports</p> <p>*Role Individual Consumer Actions Go</p> <p>Summary</p> <p>Name Justin Bieber ID Permanent Home Phone 319/234-5649 Home Email justin.bieber@uni.com Permanent Home Address 123 Teen Star Road, Decorah, IA 52101, USA Current Status Prospect FALL 2011</p> <p>View Consumer Details</p> <p>Result: The Call Reports page displays.</p>  <p>360-Degree View Relationship Viewer Tasks Call Reports</p> <p>Summary</p> <p>Name Justin Bieber ID Permanent Home Phone 319/234-5649 Home Email justin.bieber@uni.com Permanent Home Address 123 Teen Star Road, Decorah, IA 52101, USA Current Status Prospect FALL 2011</p> <p>View Consumer Details</p> <p>Call Reports</p> <p>No search results were found or no search has been performed.</p> <p>Add Call Report</p> <p>Search</p> <p>Use Saved Search</p> <p>Contact begins with Date = Event Type = </p> <p>Show in Results</p> <p><input checked="" type="checkbox"/> Other Call Reports</p> <p>Search Clear Save Search Criteria Delete Saved Search Personalize Search</p> <p><input type="checkbox"/> Case Sensitive</p> <p>Refresh New Search Notification Correspond >> Top of Page</p>

Step	Action
3.	<p>Click the Add Call Report button.</p> <p>Result: The Call Report Details display.</p>  <p>The screenshot shows the 'Call Report Details' page. At the top, there are navigation links: Save, Add New Call Report, My Accounts, My Contacts, and a 'Personalize' link. The 'General Information' section contains fields for *Subject, Date (07/15/2010), *Event Type (Face to Face Meeting), and Location. Below this is a 'Notes Summary' section with the message 'No Notes and Attachments for Call Report.' and an 'Add a Note' section with fields for Added On (07/15/2010 1:59PM), Start Date, End Date, *Subject, and Details. The 'Contacts' section shows a table with one contact: Justin Bieber (319/234-5649, justin.bieber@uni.com). Below the table are buttons for 'Check All / Clear All' and 'Email Call Report'. The 'Add Contact' section has fields for First Name, Last Name, and a 'Select' button. The 'Follow-up Tasks' section shows 'No Follow-up Tasks have been added.' and an 'Add Follow-up Task' button. The 'Audit History' section has columns for Created, Modified, and By. At the bottom, there are navigation links: Save, Add New Call Report, My Accounts, My Contacts, and a 'Top of Page' link.</p>
4.	<p>In the General Information section, complete the following:</p> <ul style="list-style-type: none"> • Subject – Enter the call type (e.g. Qual, Congrats on Admit, High School Visit, etc.) • Date – Defaults to today’s date • Event Type – Select <i>Telephone</i> • Location – DO NOT USE
5.	<p>Use the Add a Note section to enter a note if applicable. Click the Apply Note button once you have entered a subject (e.g. Success, Call Back, etc.) and details.</p>

Step	Action										
6.	<p>Click the Save button.</p> <p>Result: The Call Report now displays on the Call Reports tab.</p> <p>360-Degree View</p>  <p>The screenshot shows the CRM interface with the following details:</p> <ul style="list-style-type: none"> Navigation: Refresh, New Search, Notification, Correspond, Personalize Tabs: 360-Degree View, Relationship Viewer, Tasks, Call Reports Summary Section: <ul style="list-style-type: none"> Name: Justin Bieber Permanent Home Phone: 319/234-5649 Home Email: justin.bieber@uni.com Permanent Home Address: 123 Teen Star Road, Decorah, IA 52101, USA ID: [blank] Current Status: Prospect FALL 2011 Link: View Consumer Details Call Report Table: <table border="1" data-bbox="365 751 1409 829"> <thead> <tr> <th>Subject</th> <th>Event Type</th> <th>Location</th> <th>Date</th> <th>Primary Contact</th> </tr> </thead> <tbody> <tr> <td>Qual Call</td> <td>Telephone</td> <td></td> <td>07/15/2010</td> <td>Justin Bieber</td> </tr> </tbody> </table> Buttons: Add Call Report 	Subject	Event Type	Location	Date	Primary Contact	Qual Call	Telephone		07/15/2010	Justin Bieber
Subject	Event Type	Location	Date	Primary Contact							
Qual Call	Telephone		07/15/2010	Justin Bieber							