

# Customer Service

Omnichannel og Workspace

# Guro Faller

Dynamics 365 & Power Platform Lead

### Cases Dashboard

This Quarter 1/1/2021 To 3/31/2021

My Active Cases		Filtered
104	Modified On	
Normal Problem Phone Camille Cartier	No display on coffee maker LED panel The wiring connecting the LED panel and ...	In Progress
High Question Phone Camille Cartier	Cafe S-200 Semiautomatic has debris cl...	In Progress
High Question Phone Camille Cartier	Cafe PG-1 Pro says add water but reserv...	In Progress
High Question Phone Camille Cartier	Cafe S-200 Semiautomatic has debris cl...	In Progress
High Question Phone Camille Cartier	Cafe PG-1 Pro says add water but reserv...	In Progress
High Question Phone Camille Cartier	Cafe S-200 Semiautomatic has debris cl...	In Progress
High Question Phone Camille Cartier	Cafe S-200 Semiautomatic has debris cl...	In Progress

My Resolved Cases		Filtered
100	Modified On	
High Question Phone Camille Cartier	Cafe S-200 Semiautomatic has debris cl...	Problem Solved
High Question Phone Camille Cartier	Cafe PG-1 Pro says add water but reserv...	Problem Solved
High Question Phone Camille Cartier	Cafe S-200 Semiautomatic has debris cl...	Problem Solved
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Active Cases		Filtered
517	Modified On	
Normal Problem Phone Camille Cartier	No display on coffee maker LED panel The wiring connecting the LED panel and ci...	In Progress
Low Problem Phone Lorenzo Russo	Cooling techniques for thermostats	In Progress
High Question Web Malik Barden	Calcium is clogging the tubes	In Progress
Low Request Phone Sara Perez	Coffee machines claeing techniques	In Progress
High Question Phone Camille Cartier	Cafe S-200 Semiautomatic has debris clog...	In Progress
High Problem Phone Lorenzo Russo	Cafe S-200 Semiautomatic has air bubbles...	In Progress
High Request Phone Sara Perez		

### Cafe S-200 Semiautomatic has debris clogging the line

Case

High Priority | 3/22/2021 10:00 AM Created On | In Progress Status | Camille Cartier Owner

Summary | Knowledge Articles | Enhanced SLA Details | Related

CASE DETAILS	
Case Title	* Cafe S-200 Semiautomatic has debris cl...
ID	CAS-48429-W8Y2H0
Customer	*  Graphic Design Institute
Contact	Doug Corwin
Origin	Phone
Category	---
Product	Smart Brew 300
Type	Question
Incident Type	---

APPLICABLE SLA	
Priority	High

**Timeline** + Filter List Menu

Search timeline

Enter a note...

**Get started**

Capture and manage all records in your timeline.

IoT DETAILS	
Customer Asset	---
IoT Alert	---
Device ID	---
Device	---

**CUSTOMER DETAILS**

CUSTOMER DETAILS

Company ---

**Graphic Design Institute**

Account Number 2010

Service Territory US - West Coast

Email **doug@contoso.com**

Phone 725-555-0179

**RECENT CASES**

- Cooling techniques for thermostats  
CAS-48432-N0P3X4  
Low
- Calcium is clogging the tubes  
CAS-48430-T5B0M6  
High
- Coffee machines claeing techniques  
CAS-48431-M9M3C2  
Low
- Cafe S-200 Semiautomatic has debris clogging the line  
CAS-48429-W8Y2H0  
High

Page 1

**Chat request from Claudia 8**

Comment Escalated from bot

Wait Time 80 sec

**Accept** **Reject**

### Customer Service Agent Dashboard

#### My Active Cases

New Case Refresh See all records

Search this view

Case Title Case Number Priority Origin Customer Status Reason Created On



No data available.

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

0 - 0 of 0 (0 selected)

#### Cases Available to Work On

Refresh See all records

Search this view

Title Entered Queue Queue Worked By

No display on coffee maker LED panel	1/14/2021 2:28 AM	Q1	---
--------------------------------------	-------------------	----	-----

Home

CM Claudia Mazzanti

Customer Summary

Knowledge article ... +

Claudia Mazzanti  
00:00:14 | Neutral

End

PH Hello Claudia! Thanks for opting into our remote monitoring program

PH We have detected an issue with your Smart Brew 300.

It should be a quick fix!

PH Please let me know when you're in front of your machines.

PHI - 10:52 AM

CU Yes i am

Customer - 10:53 AM

PH All you need to do is tighten the brew valve. Please look at this knowledge article for detailed instructions: <https://contosocoffeeccs.powerappsportals.com/knowledge-base-articles/article/KA-01018/en-us>

PHI - 10:53 AM

CU I don't understand the article. I want to talk to an agent.

Customer - 10:53 AM

PH I apologize you did not find the article helpful. Let me route you to the proper live agent immediately to support you.

PHI - 10:53 AM

PH Customer having Faulty Brew

PHI - 10:53 AM

Type your public message ...

Public Internal

### New Conversation

Conversation · Customer summary

#### Details

Search customer

Contact  
**Claudia Mazzanti**

B2C Customer

claudiam365@outlook.com

206-678-1234

#### Conversation summary

Pre-chat survey Visitor details

No pre-chat survey found

Conversation details

Engagement channel **Live Chat**

Waiting time **5 mins 7 secs**

Queue **Premium Customers**

Start time **8/27/2020 10:23 PM**

Search issue **Pressure Issues with Smart...**

Case

PI **Pressure Issues with Smart ...**

Pressure

Smart Brew 300

Pressure too low of machine - need to tighten valve

Recent Cases

PI Pressure Issues with Smart Brew 300  
CAS-35786-C8V8Y3  
High

Linked records **Case**

#### Timeline

Search timeline

- VA Conversation from Virtual Agent (Phill)  
Claudia Mazzanti: Phill WS  
Closed 10:23 PM
- Conversation from Enrico Cattaneo  
Claudia Mazzanti: Phill WS  
Active 8/15/2020 2:05 AM
- Conversation from Enrico Cattaneo  
Claudia Mazzanti: Phill WS  
Active 7/2/2020 11:40 AM
- Auto-post on Pressure Issues with Smart Bre...  
Pressure Issues with Smart Brew 300 was assign...  
7/2/2020 4:31 PM
- Auto-post on Pressure Issues with Smart Bre...  
Case: Created by Spencer Low for Account Clau...  
7/2/2020 4:31 PM

**Dynamics 365** | Customer Service workspace

Customer Summary

End

Voice call

Video call

Screenmee...

Customer having Faulty Brew

Internal message - Phill - 1:30 PM

Hello Claudia, my name is in Enrico. Please give me a moment to review the issue with your coffee maker.

Looks like we need to tighten the brew valve. Would you like me to assist you in finding the valve on your Smart Brew 300?

Sent - 1:35 PM

I guess so, but the first representative tried that already. I am more of a visual learner.

Customer - 1:36 PM

No worries, Claudia. I am also a visual learner. We can engage in a video call, would that help?

Sent - 1:37 PM

Absolutely! I did not know we could do that.

Customer - 1:37 PM

Type your public message ...

Public Internal

New Conversation

Conversation · Customer summary

Details

Search customer **Claudia 8**

Contact **Claudia 8**

Contoso Coffee

claudia8@pmgdemo.onmicrosoft.com

725-555-0179

Search issue **Pressure Issues with Smart...**

Case **Pressure Issues with Smart...**

Pressure

Smart Brew 300

Pressure too low of machine - need to tighten valve

Conversation summary

Pre-chat survey Visitor details

No pre-chat survey found

Conversation details

Recent Cases

Pressure Issues with Smart Brew 300 CAS-46349-S9N2H9 High

Open Save





Save Save & Close + New Refresh

# 20 Café A-100 Automatic

Opportunity · Sales Insights

1/15/2021  
Est. Close Date

\$167,000.00  
Est. Revenue

In Progress  
Status

David Mallory  
Owner

Opportunity Sales Process  
Active for 3 months



Summary Stake Holders Relationship Analytics Product line items Quotes LinkedIn Sales Navigator Related

Topic\*  
20 Café A-100 Automatic

Contact  
**Alex Baker**

Account  
**Trey Research**

Purchase Timeframe

This Quarter

Currency\*  
**US Dollar**

Budget Amount  
**\$200,000.00**

Purchase Process

Committee

Description

## Timeline

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Scheduling sales kickoff meeting with team  
Can we hold a sales kickoff before end of month?  
**Active** 2/18/2021 2:55 PM

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*We need to go over the account plan before the QBR ne...*  
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**Active** 2/18/2021 1:00 AM

**NW**  Note modified by Nancy Warner  
Demo agenda  
*I just got off a call with their VP of Sales Mark Truman an...*  
2/11/2021 11:17 AM

**DM**  Task modified by David Mallory

## Opportunity score

**86** **Grade A**  
Improving

- ▲ Purchase timeframe is This quarter
- ▲ Estimated value is \$167,000.00
- ▲ Budget amount is \$170,000.00
- ▼ Forecast category is committee

Details

## Assistant

## Insights

4 suggested follow-ups

## Teams (Preview)

Chat Channel

### Chats linked to this Opportunity

- Markus Long** hey David 2/18
- David So** You: absolutely, let's do it 2/18
- Inga Wolff** need help? happy to assist 2/18
- Trey Research Demo T...** You: would be great to have reviewed by tom... 1:56 PM

### Suggested chats & contacts

- Nancy Warner** Recently interacted with TimeLine wall 2/18
- Jeremy Johnson** Member of connected Sales team 2/18

### Recent

Save Save & Close + New Refresh

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Develop (34 D)

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Close

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- Trey Account Sales T... You: great idea David ...
- June Li You: way to go June 2/18
- Nancy Warner thanks so much David 2/18
- QBR Prep Team You: Thanks Markus! 2/18
- Sanjay Shah You: hey Sanjay, great job 2/18
- Jeremy Johnson well then let's pull them in 2/18
- Alan Steiner 2/18

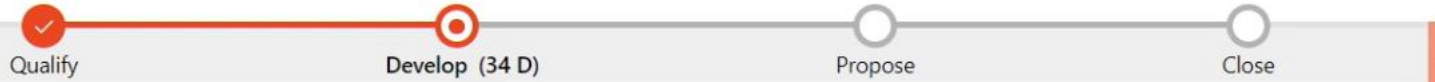
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Trey Research Dem... 6

1:55 PM hey team

could you please review this doc

2021 XLT Product ...

would be great to have reviewed by tomorrow

Type a new message

Save

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Trey Research Dem... [edit] [share] [close]

6 [more]

would be great to have reviewed by tomorrow

I heard the pitch didn't fully land, how about I pull in a product specialist?

👍 ❤️ 😊 😐 😞 😡 ...

Nancy Warner 1:59 PM  
that would be great

Type a new message

📎 ! 📎 😊 📎 📎

Save

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1 filter	4
Leads—Grade A	4
<b>Regina Brady</b> Follow up with customer 1:56 PM • Lead	90
<b>David Baker</b> New business account - follow... 2/16/2021 3:30 PM • Lead	89
<b>Ivan Cashin</b> Follow up meeting with custo... 2/16/2021 11:58 AM • Lead	88
<b>Wyatt Wetmore</b> Send business account paper... 2/16/2021 12:05 PM • Lead	82
Leads—Grade B	4
<b>Reuben Kidd</b> Introduction mail 2/16/2021 1:59 PM • Lead	75
<b>Rachel Michael</b> Introduction mail 2/16/2021 12:10 PM • Lead	72
<b>Harold Alexander</b> Introduction mail 2/16/2021 12:05 PM • Lead	68
<b>Lavona Field</b> Request new credit limit 2/16/2021 12:02 PM • Lead	65
Leads—Grade C	5
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Qualify Disqualify Follow Assign

**Regina Brady** Lead · Accelerator

Seminar Lead Source Warm Rating New Status **Jacob Smith** Owner

Lead to Opportunity Sal... Active for 51 hours

Qualify (51 Hrs) Develop Propose Close

Summary Relationship Analytics Details Related

Up next Tip: Catch up on last analyzed calls

Sequence: Call

Follow up with customer  
Step 1 of 4 • Due by 1:56 PM

Call Mark complete

Send call summary  
Step 2 of 4

Follow up on tasks  
Step 3 of 4

Follow up with customer  
Step 4 of 4

Previous steps

Lead score Grade A

**90** → Steady

- Purchase timeframe is next quarter
- Purchase process is individual
- Lead is relatively new
- Estimated budget is \$50,000.00

Details

Who Knows Whom

- Alan Steiner**  
alans@contoso.com  
Get Introduced
- Alicia Thomber**  
aliciac@contoso.com  
Get Introduced
- Allie Bellew**  
allieb@contoso.com  
Get Introduced
- David So**  
davids@contoso.com  
Get Introduced

Timeline

Search timeline

Enter a note...

**Phone Call from Jacob Smith**  
Follow up with customer  
Active 2/16/2021 10:32 PM

**Phone Call from Jeremy Johnson**

1 filter

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Timeline

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Active  
2/16/2021 10:32 PM
- Phone Call from Jeremy Johnson

Teams calls (preview)

00:08

**Regina Brady**

Record and analyze  On

Notes Transcription eng

1 filter

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Teams calls (preview)

00:51

**Regina Brady**

Record and analyze  On

Notes **Transcription**

- Jacob Smith  
00:04 hi **regina** is **jacob** from **contoso** bank hope you are well
- Regina Brady  
00:11 hey **jacob** i am good thanks
- Jacob Smith  
00:14 great i'm just calling about your **mortgage** request i wanted to update you that i got an approval for the **interest rate** we previously discussed
- Regina Brady  
00:28 So happy to hear that.
- Regina Brady  
00:30 Could you remind me on the **monthly payment** amount?
- Jacob Smith  
00:34 Yes, the **monthly payment** will be



1 filter	4
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<b>Regina Brady</b> Follow up with customer 1:56 PM • Lead	90
<b>David Baker</b> New business account - follow... 2/16/2021 3:30 PM • Lead	89
<b>Ivan Cashin</b> Follow up meeting with custo... 2/16/2021 11:58 AM • Lead	88
<b>Wyatt Wetmore</b> Send business account paper... 2/16/2021 12:05 PM • Lead	82
Leads—Grade B	4
<b>Reuben Kidd</b> Introduction mail 2/16/2021 1:59 PM • Lead	75
<b>Rachel Michael</b> Introduction mail 2/16/2021 12:10 PM • Lead	72
<b>Harold Alexander</b> Introduction mail 2/16/2021 12:05 PM • Lead	68
<b>Lavona Field</b> Request new credit limit 2/16/2021 12:02 PM • Lead	65
Leads—Grade C	5
<b>Jaclyn Moses</b> Follow up with customer 2/16/2021 11:59 AM • Lead	63
<b>Halle Griffiths</b> Send call summary 2/16/2021 12:00 PM • Lead	58
<b>Gerald Stephens</b>	

Qualify Disqualify Follow Assign

**Regina Brady** Lead · Accelerator

Seminar Lead Source Warm Rating New Status **Jacob Smith** Owner

Lead to Opportunity Sal... Active for 51 hours

Qualify (51 Hrs) Develop Propose Close

Summary Relationship Analytics Details Related

**Up next** Tip: Catch up on last analyzed calls

Sequence: Call

**Follow up with customer**  
Step 1 of 4 • Due by 1:56 PM

Call Mark complete

**Send call summary**  
Step 2 of 4

**Follow up on tasks**  
Step 3 of 4

**Follow up with customer**  
Step 4 of 4

Previous steps

**Lead score** Grade A → Steady

90

- Purchase timeframe is next quarter
- Purchase process is individual
- Lead is relatively new
- Estimated budget is \$50,000.00

Details

**Who Knows Whom**

- Alan Steiner** alans@contoso.com Get Introduced
- Alicia Thomber** aliciac@contoso.com Get Introduced
- Allie Bellew** allieb@contoso.com Get Introduced
- David So** davids@contoso.com Get Introduced

Teams calls (preview)

**Regina Brady**  
+972545726959  
February 17 2021 • 7:51 PM • 1m 13s

Notes Transcription

Action items:  
1. Regina Brady said "Could you please send me the agreement for review?"

Saved at 07:52 PM

**Suggested action items (2)**

- Jacob Smith said at 00:44 **i will send it out** Add to note
- Jacob Smith said at 00:55 **I will send it over.** Add to note

1 filter

Leads—Grade A

**Regina Brady**  
Follow up with  
1:56 PM • Lead

**David Baker**  
New business  
2/16/2021 3:30 PM

**Ivan Cashin**  
Follow up with  
2/16/2021 11:58 AM

**Wyatt Wetmore**  
Send business card  
2/16/2021 12:05 PM

Leads—Grade B

**Reuben Kidd**  
Introduction  
2/16/2021 1:59 PM

**Rachel Michael**  
Introduction  
2/16/2021 12:10 PM

**Harold Alexander**  
Introduction  
2/16/2021 12:05 PM

**Lavona Field**  
Request new information  
2/16/2021 12:02 PM

Leads—Grade C

**Jaclyn Moses**  
Follow up with  
2/16/2021 11:59 AM

**Halle Griffiths**  
Send call summary  
2/16/2021 12:00 PM

**Gerald Stephens**

Still processing...

Overview **Action items** Highlights Transcript

Feb 17, 2021 07:51 PM | 1m 4s

**Participants**

Jacob Smith  
Regina Brady

**KPIs**

67/33 **147 wpm**  
Talk to listen ratio Average talking speed

9 **1 s**  
Switches per conversation Average pause

3 s  
Longest customer monologue

**Transcript**

00:04 **Jacob Smith**  
hi **regina** is **jacob** from **contoso bank** hope you are well

00:11 **Regina Brady**  
hey **jacob** i am good thanks

00:14 **Jacob Smith**  
great i'm just calling about your **mortgage request** i wanted to update you that i got an approval for the **interest** rate we previously discussed

00:28 **Regina Brady**  
So happy to hear that.

---

00:30 **Regina Brady**  
Could you remind me on the **monthly payment** amount?

00:34 **Jacob Smith**  
Yes, the **monthly payment** will be \$2000.

---

00:40 **Regina Brady**  
Sounds good.

00:41 **Regina Brady**  
Could you please send me the **agreement** for review?

00:44 **Jacob Smith**  
sure i will send it out

00:47 **Jacob Smith**  
Can you use your existing email address?

00:00

Greetings and introduction + Identification Price Closing

Jacob Smith  
Regina Bra...

Sentiment Negative Neutral Positive

00:00 / 01:04

- Regina Brady  
Follow up with  
1:56 PM • Lead
- David Baker  
New business  
2/16/2021 3:30 PM
- Ivan Cashin  
Follow up with  
2/16/2021 11:58 AM
- Wyatt Wetmore  
Send business  
2/16/2021 12:05 PM
- Leads—Grade B
- Reuben Kidd  
Introduction  
2/16/2021 1:59 PM
- Rachel Michael  
Introduction  
2/16/2021 12:10 PM
- Harold Alexander  
Introduction  
2/16/2021 12:05 PM
- Lavona Field  
Request new  
2/16/2021 12:02 PM
- Leads—Grade C
- Jaclyn Moses  
Follow up with  
2/16/2021 11:59 AM
- Halle Griffiths  
Send call sur  
2/16/2021 12:00 PM
- Gerald Stephens

Overview **Action items** Highlights

- New task suggestion  
**Jacob Smith to follow up on task: ...I will send it over.**
- New task suggestion  
**Action item for Jacob Smith: Could you please send me the agreement for review?.**
- Email suggestion  
**Jacob Smith to send email about "the agreement for review".**

Transcript

00:04 Jacob Smith  
hi **regina** is **jacob** from **contoso bank** hope you are well

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hey **jacob** i am good thanks

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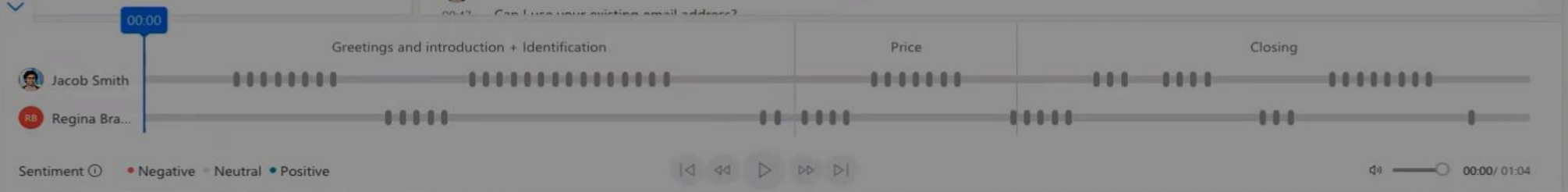
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00:44 Jacob Smith  
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00:47 Jacob Smith  
Can I use your existing email address?



Dynamics 365 Sales

Search

Still processing...

1 filter

Leads—Grade A

Regina Brady  
Follow up w...  
1:56 PM • Lead

David Baker  
New busines...  
2/16/2021 3:30 PM

Ivan Cashin  
Follow up m...  
2/16/2021 11:58 AM

Wyatt Wetmore  
Send busine...  
2/16/2021 12:05 PM

Leads—Grade B

Reuben Kidd  
Introduction  
2/16/2021 1:59 PM

Rachel Michael  
Introduction  
2/16/2021 12:10 PM

Harold Alexand...  
Introduction  
2/16/2021 12:05 PM

Lavona Field  
Request new...  
2/16/2021 12:02 PM

Leads—Grade C

Jaclyn Moses  
Follow up w...  
2/16/2021 11:59 AM

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Send call sur...  
2/16/2021 12:00 PM

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Overview Action items Highlights Transcript

Feb 17, 2021 07:51 PM | 1m 4s

Participants  
Jacob Smith  
Regina Brady

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147 wpm Average talking speed  
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1 s Average pause  
3 s Longest customer monologue

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Greetings and introduction + Identification Price Closing

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00:00 / 01:04

avanade

- 1 filter
- Leads—Grade A
  - Regina Brady (RB) Follow up w... 1:56 PM • Lead
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  - Halle Griffiths (HG) Send call sur... 2/16/2021 12:00 PM
  - Gerald Stephens (GS)

**Overview** | Action items | Highlights

**FOLLOW UP WITH CUSTOMER**  
Feb 17, 2021 07:51 PM | 1m 4s

**Participants**

- Jacob Smith
- Regina Brady

**Tags**

Add call tags +

**KPIs**

<b>67/33</b> Talk to listen ratio	<b>147 wpm</b> Average talking speed
<b>9</b> Switches per conversation	<b>1 s</b> Average pause
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**Transcript** Search

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Closing

00:00

Jacob Smith

Regina Bra...

Sentiment Negative Neutral Positive

00:00 / 01:04

Dynamics 365 Sales

Search

1 filter

Leads—Grade A

- Regina Brady (RB) Follow up with Regina Brady 2/16/2021 1:56 PM • Lead
- David Baker (DB) New business with David Baker 2/16/2021 3:30 PM
- Ivan Cashin (IC) Follow up with Ivan Cashin 2/16/2021 11:58 AM
- Wyatt Wetmore (WW) Send business card to Wyatt Wetmore 2/16/2021 12:05 PM
- Leads—Grade B
- Reuben Kidd (RK) Introduction with Reuben Kidd 2/16/2021 1:59 PM
- Rachel Michael (RM) Introduction with Rachel Michael 2/16/2021 12:10 PM
- Harold Alexander (HA) Introduction with Harold Alexander 2/16/2021 12:05 PM
- Lavona Field (LF) Request new contact information from Lavona Field 2/16/2021 12:02 PM
- Leads—Grade C
- Jaclyn Moses (JM) Follow up with Jaclyn Moses 2/16/2021 11:59 AM
- Halle Griffiths (HG) Send call script to Halle Griffiths 2/16/2021 12:00 PM
- Gerald Stephens (GS)

Overview Action items **Highlights**

Tracked keywords mentioned ⓘ

regina (2) jacob (6) contoso (1) mortgage (1)

interest (1) payment (2) agreement (1)

Keywords mentioned ⓘ

monthly payment (1) contoso bank (1)

mortgage request (1) regina (1) jacob (1)

People ⓘ

Jacob (1)

Times ⓘ

monthly (2)

Transcript

Search

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