


When a client says they do not wish to be called;

Do not use the “Do Not Contact” resolve button, instead, select “Refused Appointment” and when the PR Option dialog box comes up, select “Poor Experience” and enter the description of the call in the notes so that they can be added to the list manually

Resolve

Bad Number/Bad Address:
Client cannot be contacted by any means.

Different Language:
Client speaks another language.

 **Refused Appointment:**
The presentation was refused either on the phone or during a drop by visit to the home.

Miscellaneous:
Please explain why the lead is being resolved.

Duplicate:
The lead has been contacted or seen within the past 3 months. The ID# of the duplicate lead needs

Uninsurable:
The client has identified themselves as over-age or medically uninsurable.

~~**Do Not Contact – Adds Number to DNC List:**
To be used only if the member is extremely upset being contacted and is adamant that they should~~

PR Option ✕

Flag for PR?

No

Great Experience

Poor Experience

Comment:
Description of call

to your lead representative.