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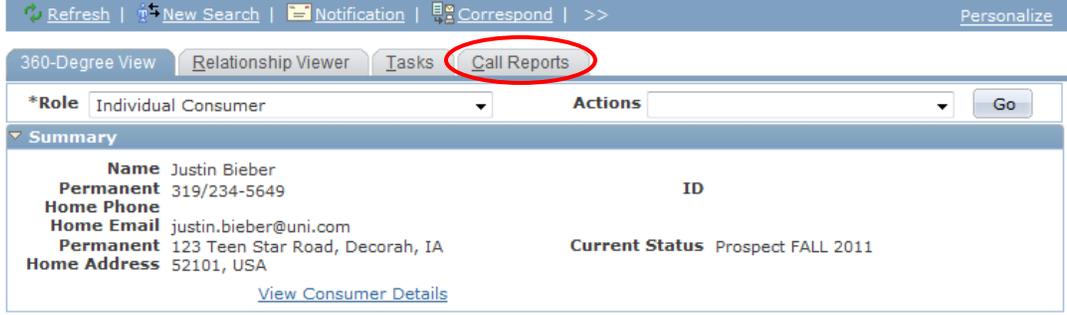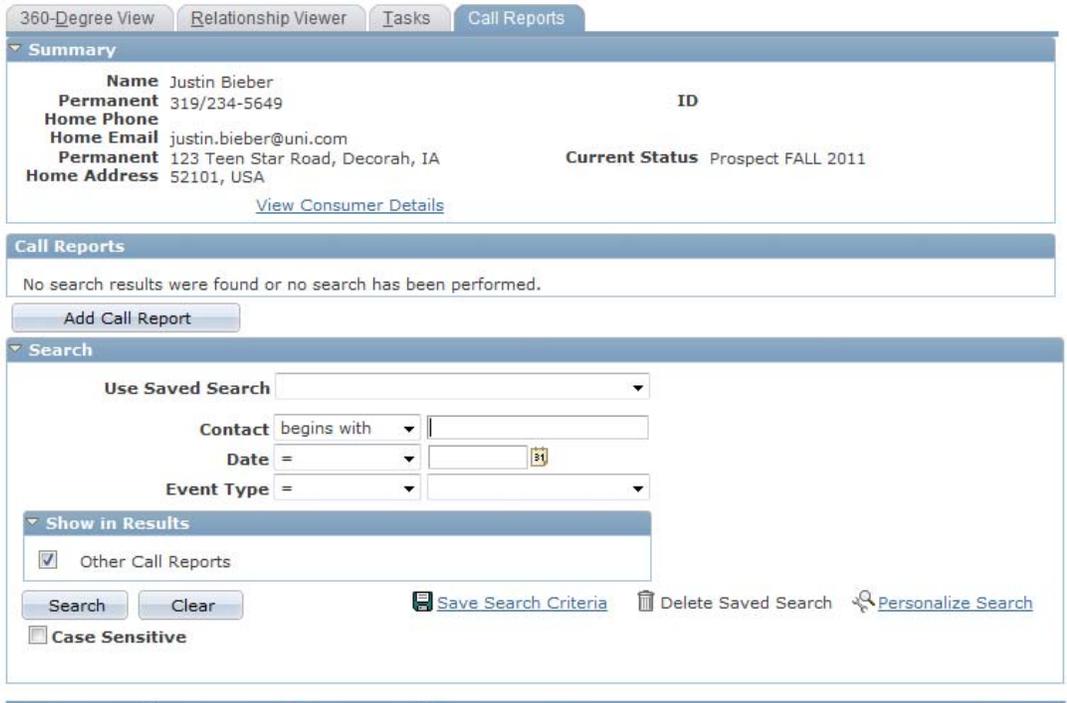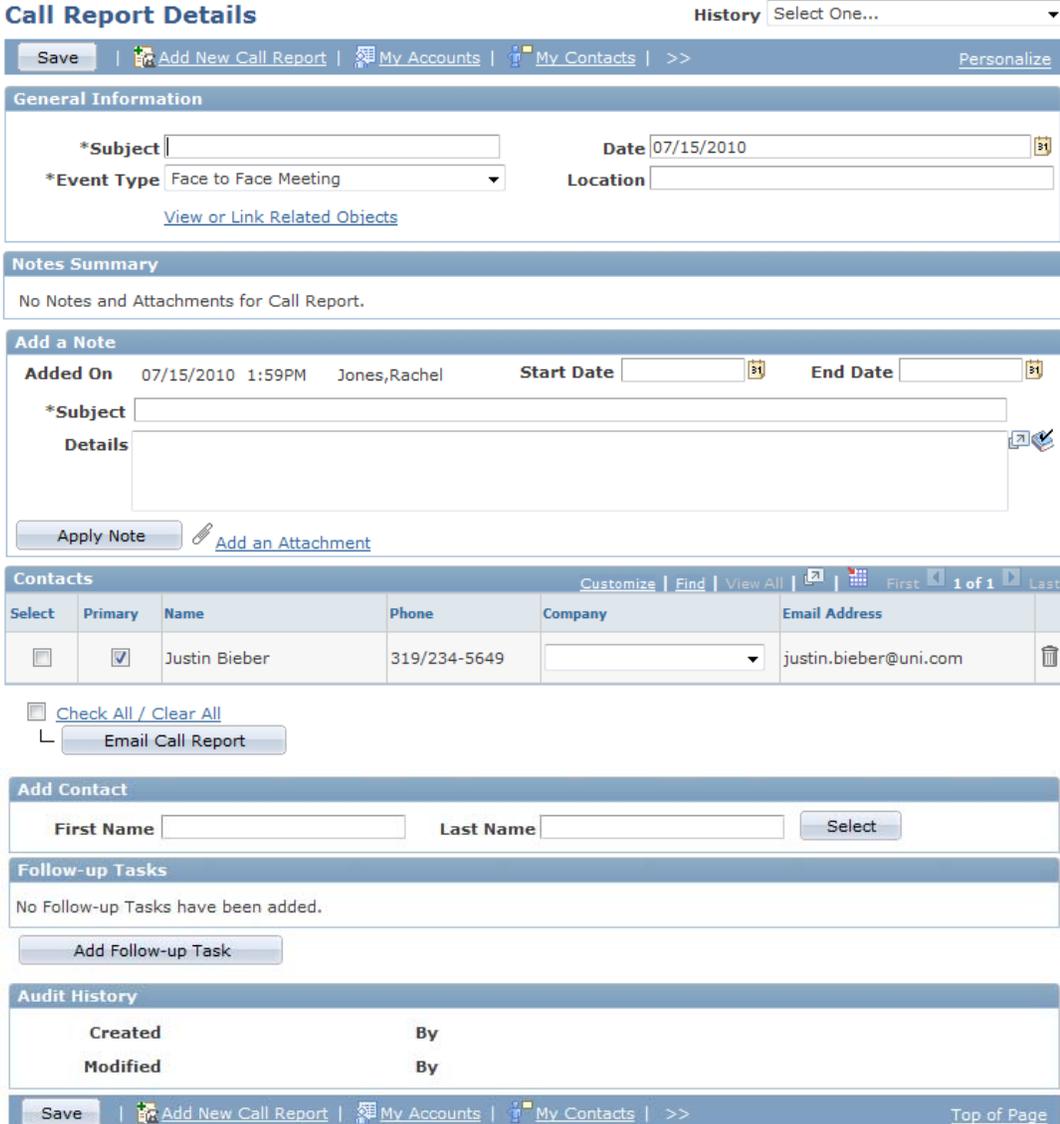# CRM - Call Report

**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. | Select the **Call Reports** tab.  *Result:* The Call Reports page displays.  |

| Step | Action |
|------|--------|
| 3. | Click the **Add Call Report** button.<br><br>*Result:* The Call Report Details display.<br><br> |
| 4. | In the General Information section, complete the following:<br><br>• **Subject** – Enter the call type (e.g. Qual, Congrats on Admit, High School Visit, etc.)<br>• **Date** – Defaults to today's date<br>• **Event Type** – Select *Telephone*<br>• **Location** – DO NOT USE |
| 5. | 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. |

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| Step | Action |
|------|--------|
| 6. | Click the **Save** button. |
| | |
| | ***Result:*** The Call Report now displays on the Call Reports tab. |
| |  |