

AUTOMATE **Beginner** 10 MIN · UPDATED 2026-10-01

Log a customer interaction automatically with Copilot.

Have Copilot draft the interaction log entry from the actual conversation instead of writing it up manually after every call or email.

MICROSOFT 365

Outlook

WORKS WITH

Copilot

Business Outcome

Consistent, complete interaction logs without the manual write-up tax on every customer conversation.

Workflow Steps

Step 1: Have the conversation or email thread ready

Outlook

The log is only as good as what it's drawn from — make sure the full interaction, not a partial excerpt, is available.

Step 2: Ask Copilot to draft the log entry

Copilot

Name the exact fields your system expects — issue, resolution, follow-up required, and any category your CRM uses — directly in the prompt, so Copilot returns something you can paste straight into the log rather than a loose narrative summary you'd have to manually break apart into fields anyway.

Step 3: Correct anything the draft got wrong before saving

Outlook

Automated summaries can occasionally mischaracterize whether something was actually resolved — fix this before it becomes the official record.

Step 4: File it in the system where the next rep will actually see it

Outlook

A log entry only helps if the next person handling this customer can find it — confirm it's saved where it belongs.

✓ Check the work

- The log accurately reflects whether the issue was actually resolved or still open.
- Follow-up items are specific enough for the next person to act on without re-reading the whole thread.
- The entry is filed where it will actually surface for the next interaction with this customer.

Expected Outcome

A structured log entry capturing what the customer needed, what was resolved, and what's still open.

Want help rolling this out across your team? **Go to Liminals.Tech** 📄