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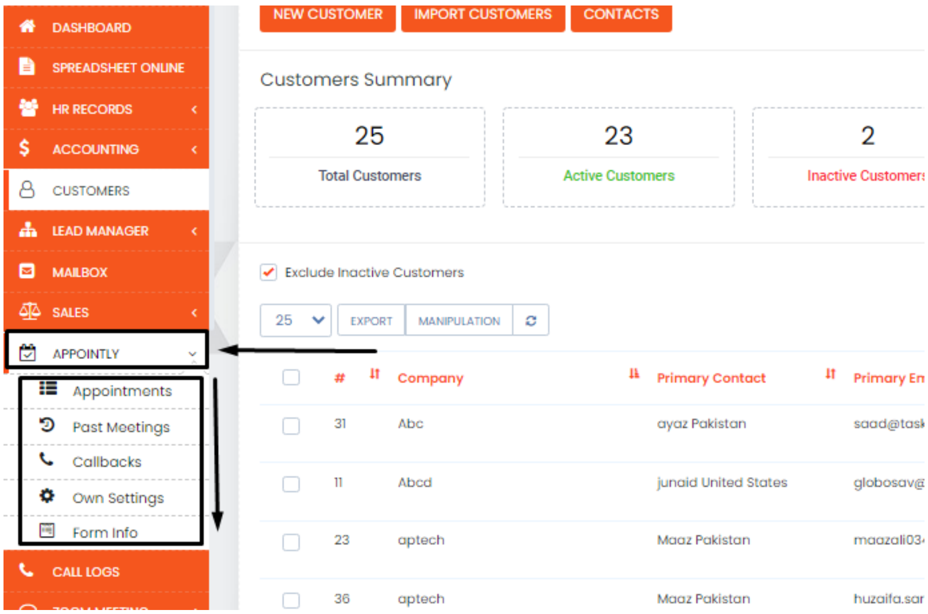
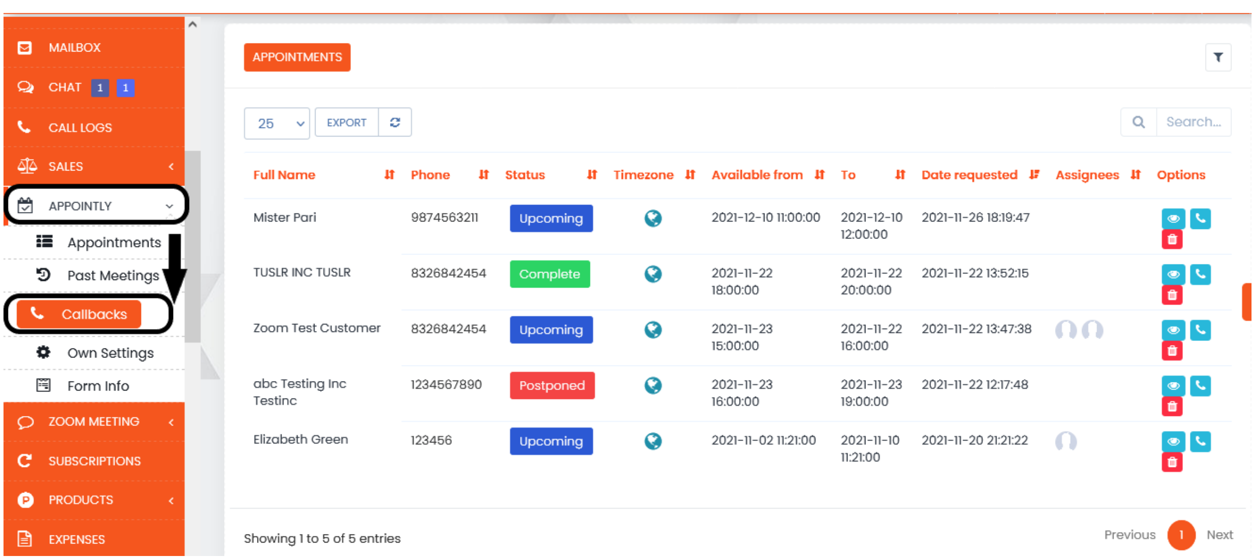
TASKTAK USER GUIDE – APPOINTLY

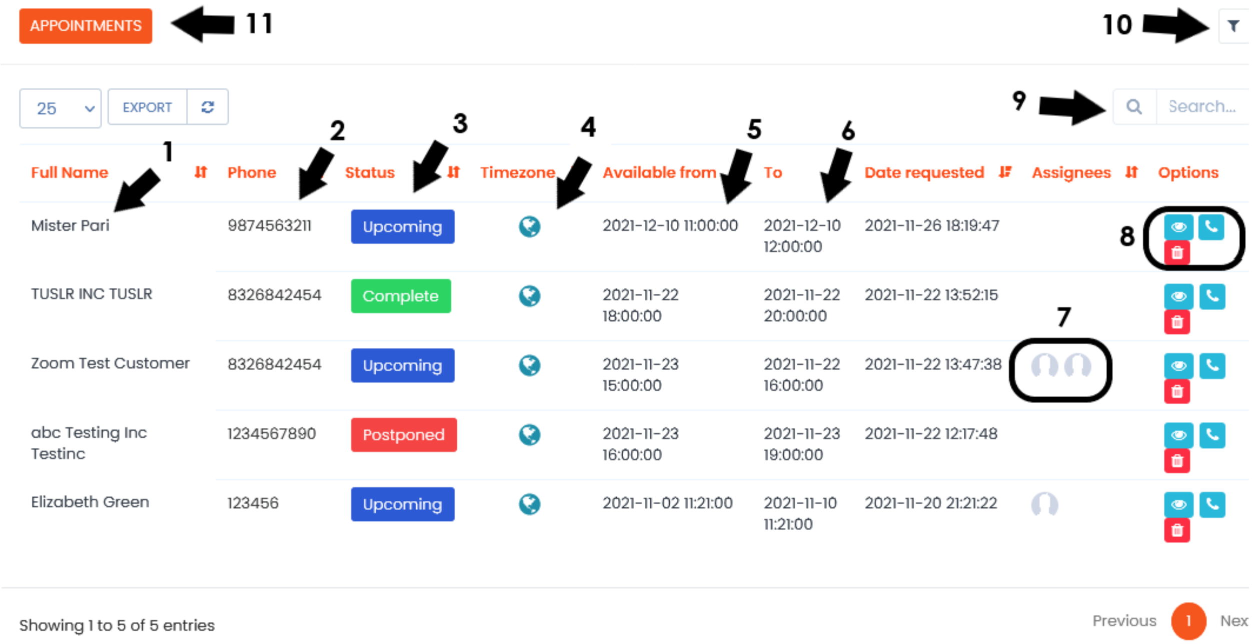


If you click Appointly, you will get a drop-down list.

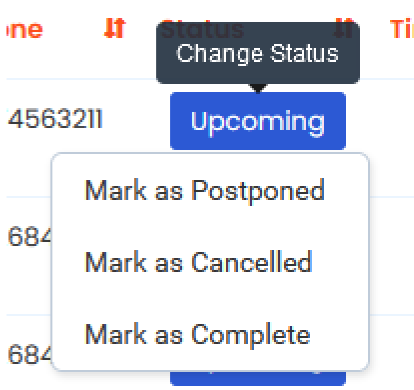
CALLBACKS



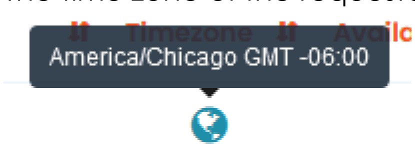
Once you click the "Callbacks" option, the above UI page is loaded.



1. Here you can find the names of the customers contacts who have requested call backs.
2. The phone numbers that the contacts have chosen to be called back with are displayed here.
3. The status of the call will show here. To adjust the call back status, click on the status. A drop-down menu will appear and you can select the status you would like to adjust it to.



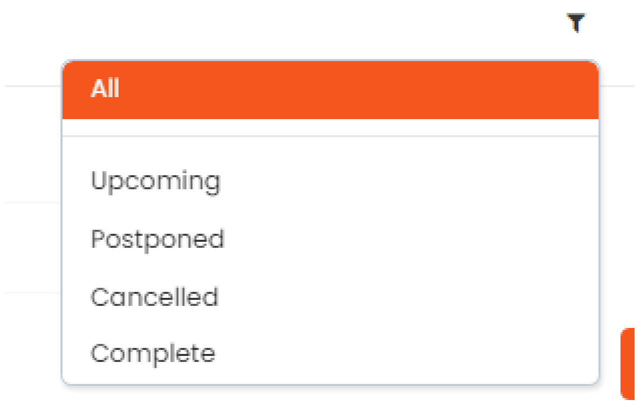
4. The time zone of the requestor will show when you hover over the



5. This shows the start time the requestor is available.
6. This shows the end time the requestor is available.

7. Hover over the person icon to view who has been assigned to the call. The name will appear above the icon.

8. Here you can view the call back request details.
   Delete the call back request.
   Call the requestor from here.
9. Enter a contact name here to quickly filter.
10. This filter option allows you to view the callbacks based on the fields you choose.

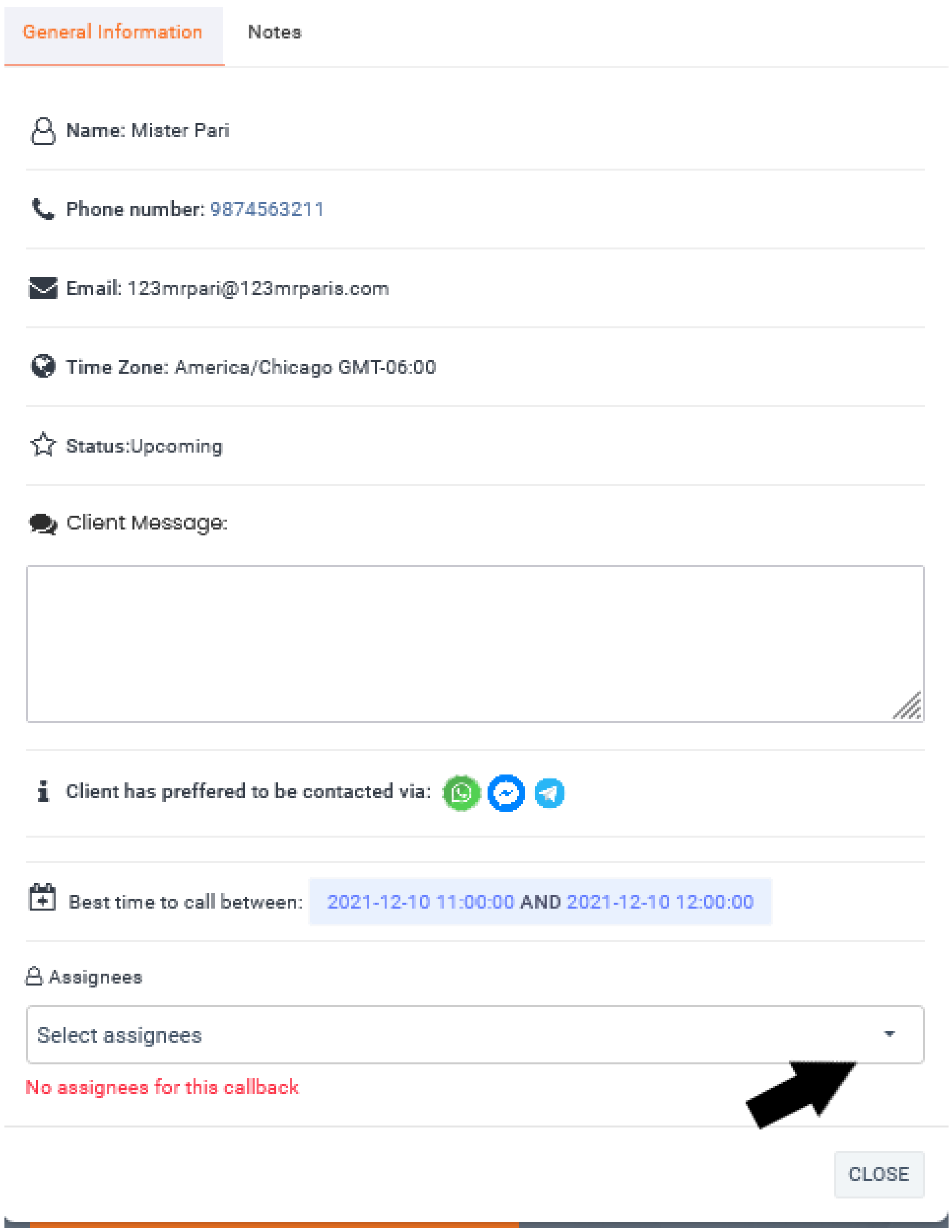


11. Click this button, redirects you to the appointments page.

ASSIGNING A CALLBACK

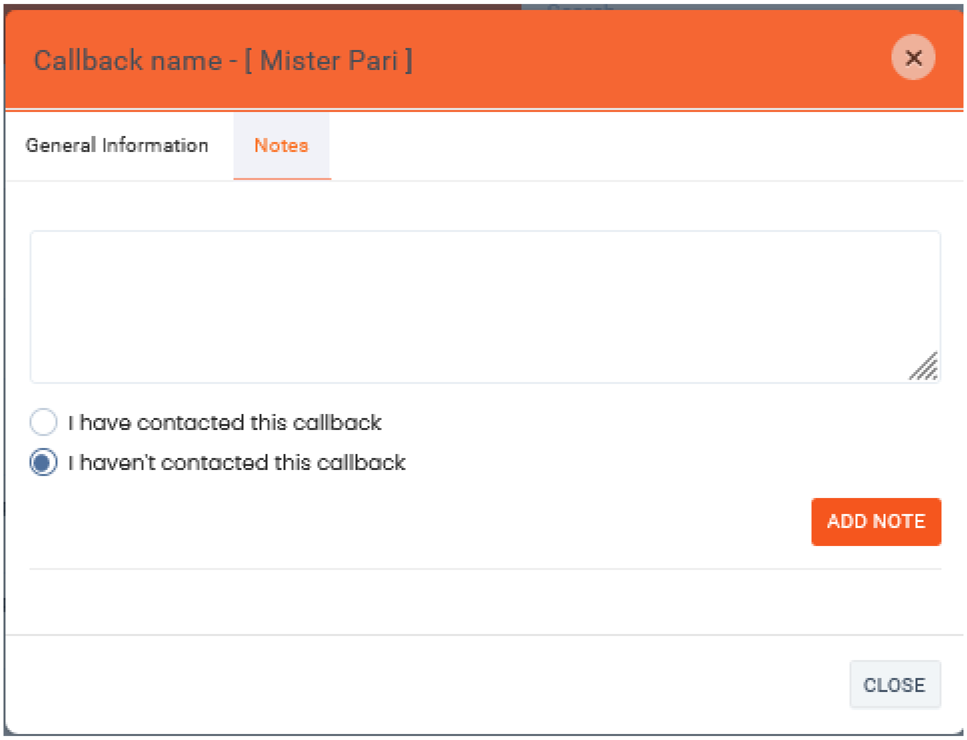
By clicking the icon the details of the callback will pop up.

You can assign a staff member to call back the requestor at the bottom of the form. Multiple assignees can be chosen if desired.



ENTERING NOTES FOR THE CALLBACK

By clicking the notes tab when viewing the call back details you will see the below Form. Enter any notes as needed. Select if the callback has been contacted.


Callback name - [Mister Pari]
General Information
Notes
I have contacted this callback
I haven't contacted this callback
ADD NOTE
CLOSE