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## TASKTAK USER GUIDE – APPOINTLY

**NEW CUSTOMER** **IMPORT CUSTOMERS** **CONTACTS**

### Customers Summary

25 Total Customers	23 Active Customers	2 Inactive Customers
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☒ Exclude Inactive Customers

25 **EXPORT** **MANIPULATION**

<input type="checkbox"/>	#	Company	Primary Contact	Primary En
<input type="checkbox"/>	31	Abc	ayaz Pakistan	saad@task
<input type="checkbox"/>	11	Abcd	Junaid United States	globosav@
<input type="checkbox"/>	23	aptech	Maaz Pakistan	maazali03@
<input type="checkbox"/>	36	aptech	Maaz Pakistan	huzailfa.sar

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

## CALLBACKS

**APPOINTMENTS**

25 **EXPORT**

Search...

Full Name	Phone	Status	Timezone	Available from	To	Date requested	Assignees	Options
Mister Pari	9874563211	Upcoming		2021-12-10 11:00:00	2021-12-10 12:00:00	2021-11-26 18:19:47		
TUSLR INC TUSLR	8326842454	Complete		2021-11-22 18:00:00	2021-11-22 20:00:00	2021-11-22 13:52:15		
Zoom Test Customer	8326842454	Upcoming		2021-11-23 15:00:00	2021-11-22 16:00:00	2021-11-22 13:47:38		
abc Testing Inc Testinc	1234567890	Postponed		2021-11-23 16:00:00	2021-11-23 19:00:00	2021-11-22 12:17:48		
Elizabeth Green	123456	Upcoming		2021-11-02 11:21:00	2021-11-10 11:21:00	2021-11-20 21:21:22		

Showing 1 to 5 of 5 entries

Previous **1** Next

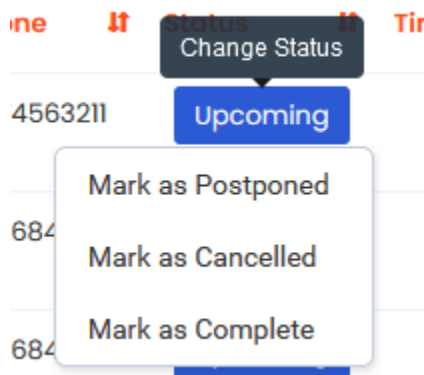
Once you click the “Callbacks” option, the above UI page is loaded.

Full Name	Phone	Status	Timezone	Available from	To	Date requested	Assignees	Options
Mister Pari	9874563211	Upcoming		2021-12-10 11:00:00	2021-12-10 12:00:00	2021-11-26 18:19:47		
TUSLR INC TUSLR	8326842454	Complete		2021-11-22 18:00:00	2021-11-22 20:00:00	2021-11-22 13:52:15		
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Elizabeth Green	123456	Upcoming		2021-11-02 11:21:00	2021-11-10 11:21:00	2021-11-20 21:21:22		

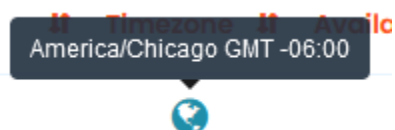
Showing 1 to 5 of 5 entries

Previous 1 Next

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

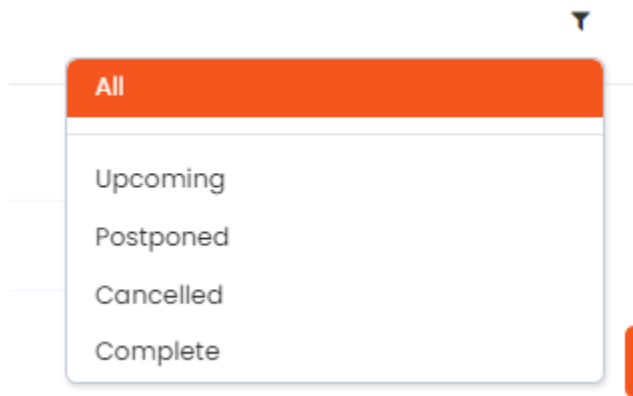


5. This shows the start time the requestor is available.
6. This shows the end time the requestor is available.

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.

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## 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.


General Information


Notes


 Name: Mister Pari





 Phone number: 9874563211


 Email: 123mrpari@123mrparis.com


 Time Zone: America/Chicago GMT-06:00

 Status:Upcoming

 Client Message:

 Client has preffered to be contacted via:   

 Best time to call between: 2021-12-10 11:00:00 AND 2021-12-10 12:00:00

 Assignees

Select assignees

No assignees for this callback

CLOSE

## 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