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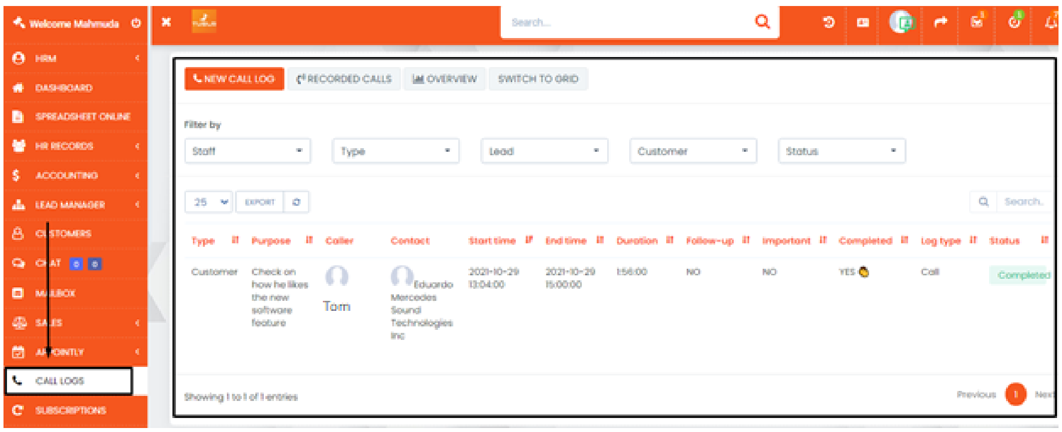
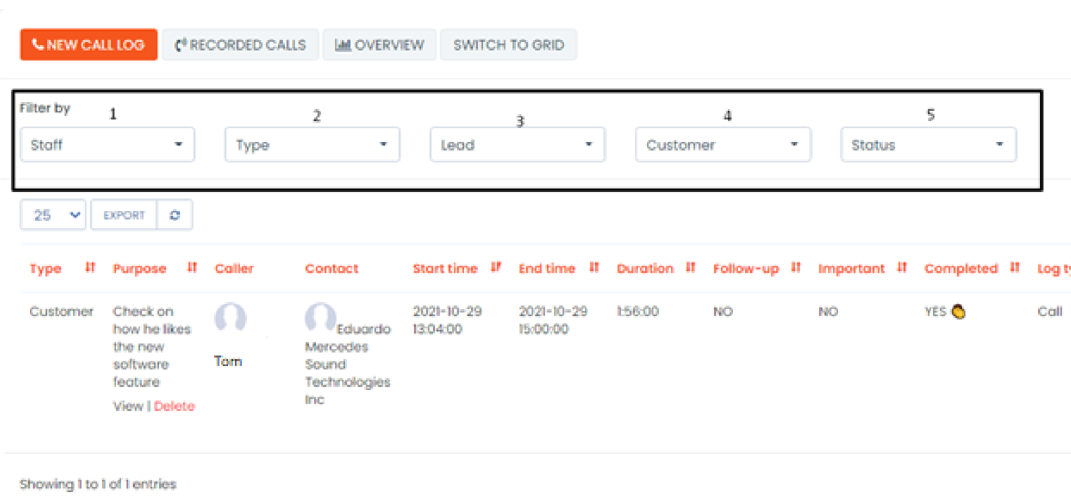
Call log is the database of calls that has been conducted between the employees of Tasktak with the customer and lead for any project or task.

- CALL LOG MAIN PAGE



Once you click the Call Logs Option, the Call logs main page will open.

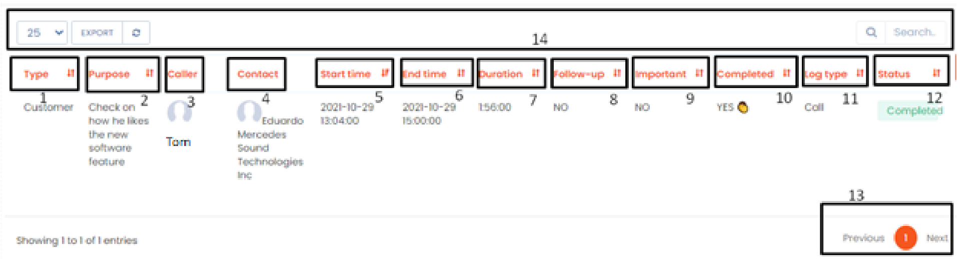
- "FILTER BY" PORTION



1. To see all the calls made by a specific staff member you can filter by staff. Select the name of the staff member you would like to see in the filter the call log details by clicking their name.
2. You can filter by selecting a specific type of calls that took place.

3. You can also filter by selecting a specific Lead.
4. Here, you can filter by selecting a specific customer from the list
5. You can also filter the call logs by the status of the call.

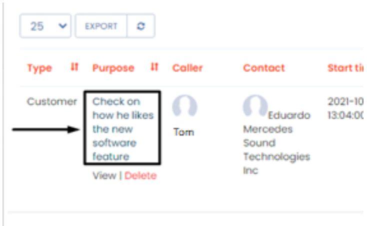
- CALL LOG TABLE TOOLS AND CALL DETAILES GUIDE



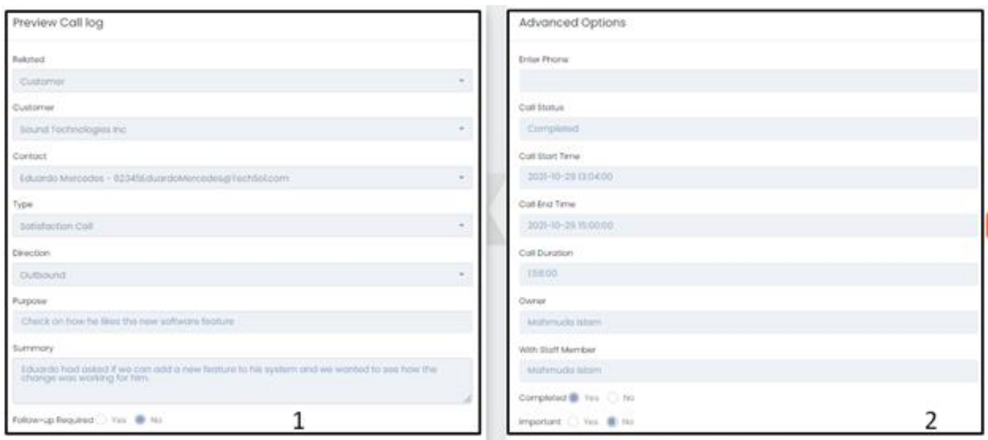
From 1-14 contains the Call Log tools and the call details.

1. This shows the type of client being contacted.
2. This shows the purpose or objective to call the client.
3. This shows the Caller’s name.
4. This shows the Clients name and the company they are currently employed.
5. This is the start time of the Call
6. This is when the call ended.
7. This is the duration of the call.
8. This tells whether there is a need for a follow up or not.
9. This gives an idea whether the call was important or not.
10. This shows whether the purpose of the call was achieved or not.
11. This shows the type of call.
12. This is shows whether the status of the call was completed or not.
13. This allows you to move to the previous page or the next page, when the number of call lists exceed the current size given.
14. This portion allows you to set the size of call lists on the front page, “Export” the selected call logs and even search for a specific call log. You can also reload the page using icon.

- CLICKING A SPECIFIC PURPOSE



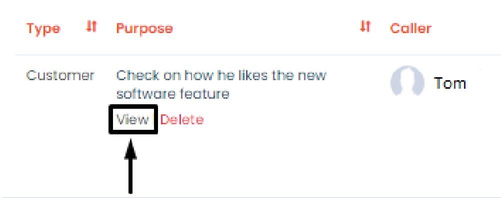
To check the details of the purpose, click this portion.



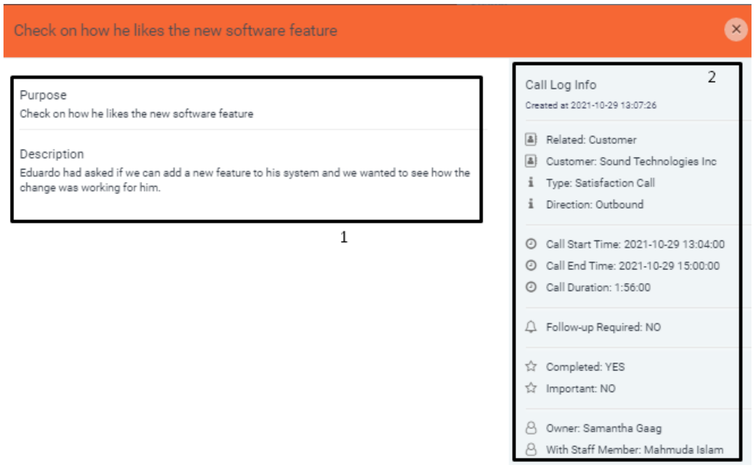
Once you click the Purpose details, it will redirect you to the preview of the call log page. This page is not editable as it protects you from changing details by accident.

1. This portion shows the customer details, call type, and most importantly shows the summary of the call.
2. This portion shows you the details of the call.

- CLICKING THE VIEW ICON



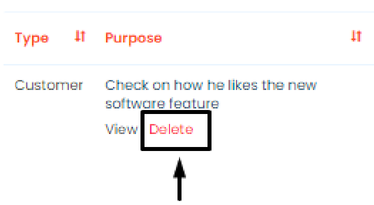
Right beneath the purpose, you can also click the "View" icon to preview the call details.



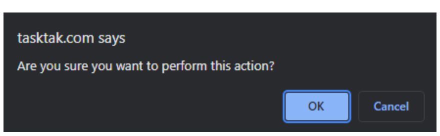
Once you click the "View" Icon, you will be able to see the detailed information of the call log.

1. This portion explains the purpose and gives a brief description of how the call lasted.
2. This portion tells you the call log in details.

- CLICKING THE DELETE ICON

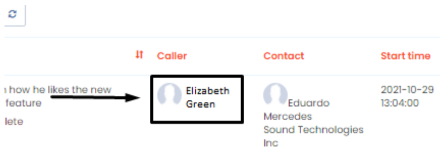


To delete the call log, you can click the "delete" icon.



Once you click the Delete option, a pop up will appear. You will be asked to confirm whether you want to delete the call log details or not.

- CLICKING CALLER



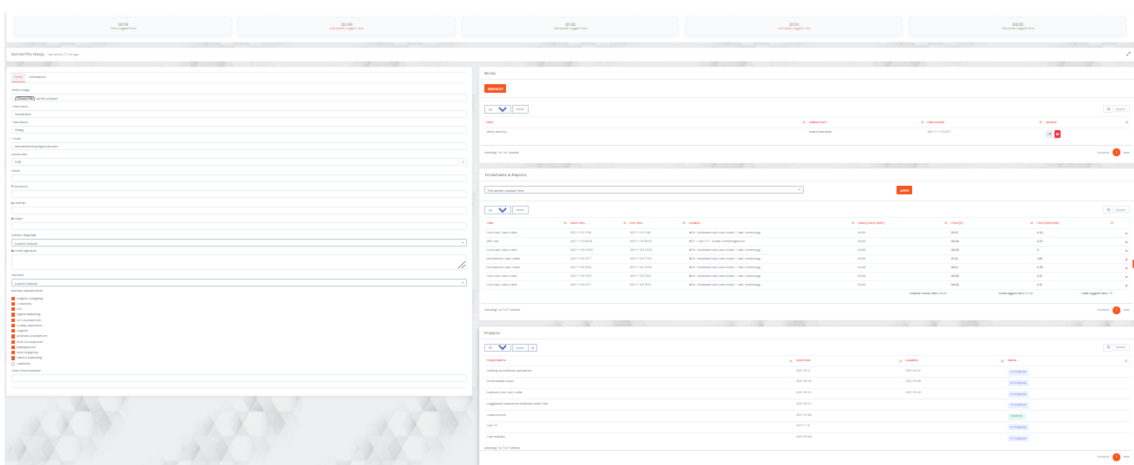
If you want to know the details of the Caller, you can click the Caller name.

After clicking the Caller Name, you will be shown the details of the Caller.

1. This portion gives you the Name, email address and the Departments the caller is currently a member in.
2. Clicking this, you will be able to edit the details of the caller.

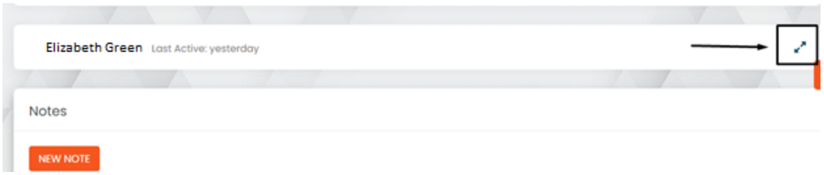
VIEW CALLER DETAILS

If you want to edit the Caller details, you can click this icon for editing.

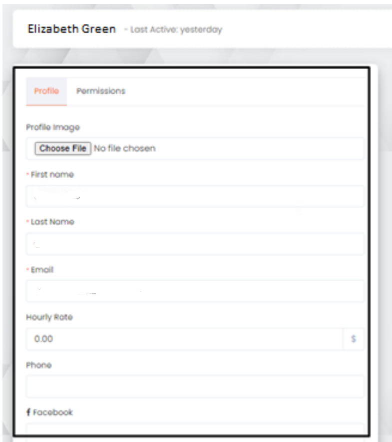


Once you click this icon, you will be redirected to this editing page.

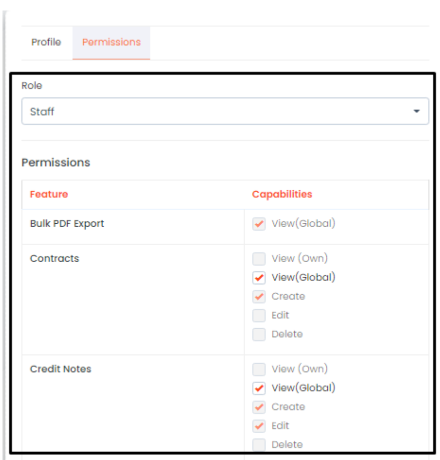
EDIT CALLER PERSONAL DETAILS



If you want to edit or expand Caller's Personal details, you can click here.



After clicking the icon, the above editable details of the caller will appear. You can click icon to hide the details again. After editing the details, you can click the "Save" button to save the recent modification done.



Clicking the Permissions option allows you to view the features the caller is allowed to use.

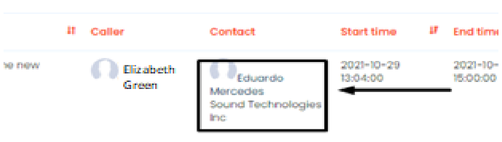
NOTES

You can also add notes for the specific caller.

1. You can click the "New Note" button to add a new note.

   After clicking the button, you will be able to write the note in the text area and then click the "save" button.
2. This portion shows the details of the previous notes added for this caller.
3. You can click this icon to re-edit this existing note.
4. You can also delete the note by clicking this icon.

CLICKING CONTACT

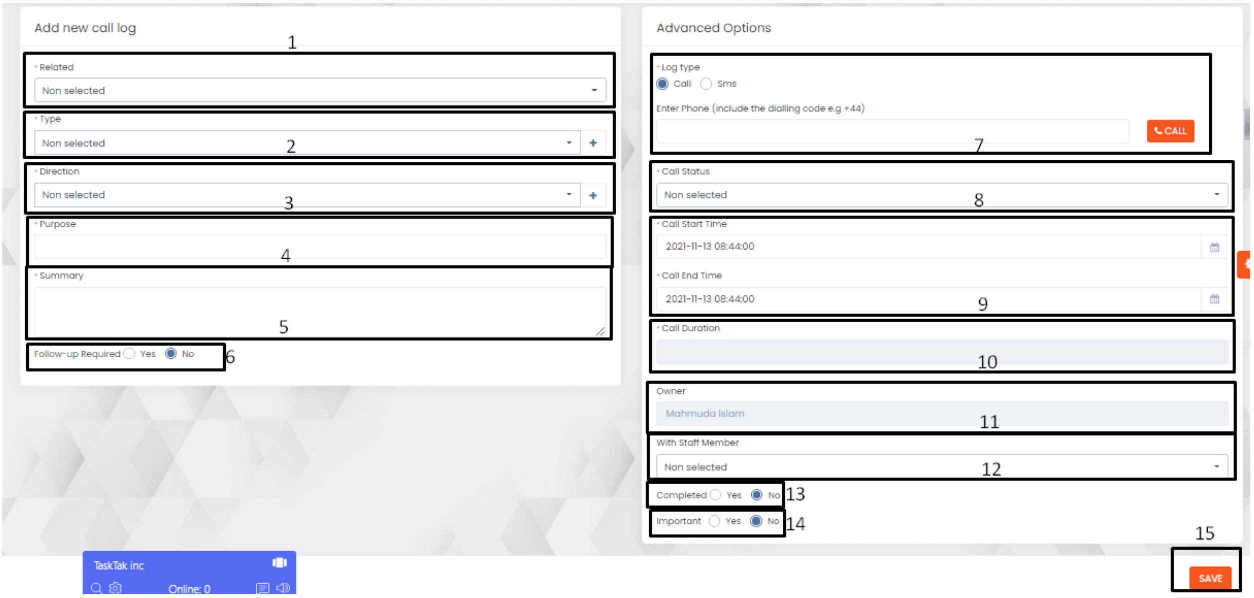


If you want to view the details of the client, Click the Contact details portion.

After clicking the client details, the company profile will be shown. Here you can edit the information of the client and finally click the save button.

NEW CALL LOG

To create a new Call log, Click the "New Call Log" button.



Right after you click the button, you will be redirected to this page.

1. Here you select the type of client you want to contact with.
2. Here you can select the type of call you want or have conducted.
3. You can select the direction (whether the call was incoming or outgoing).
4. Here you need to state the purpose of the call.
5. Here you need to write the summary of what happened during the call and what is the outcome.
6. Select if there is a need of Follow up or not.
7. You can select the Log type here.

If you select the "Call" type, then enter the phone number of the client and click the call button.

If you click the "SMS" type, then enter the phone number of the client and write the SMS(within the character limit) and finally click the Send button.

8. Select the Status of the call log.
9. Enter the Start and End time of the Call.
10. After you input the start and end time, the call duration will be automatically shown.
11. This shows your name.
12. You can select other staff members if they were part of the call conducted.
13. Select whether the call was completed or not.
14. Select whether the call was important or not.
15. Finally click the save button to add a new call log.

RECORDED CALLS

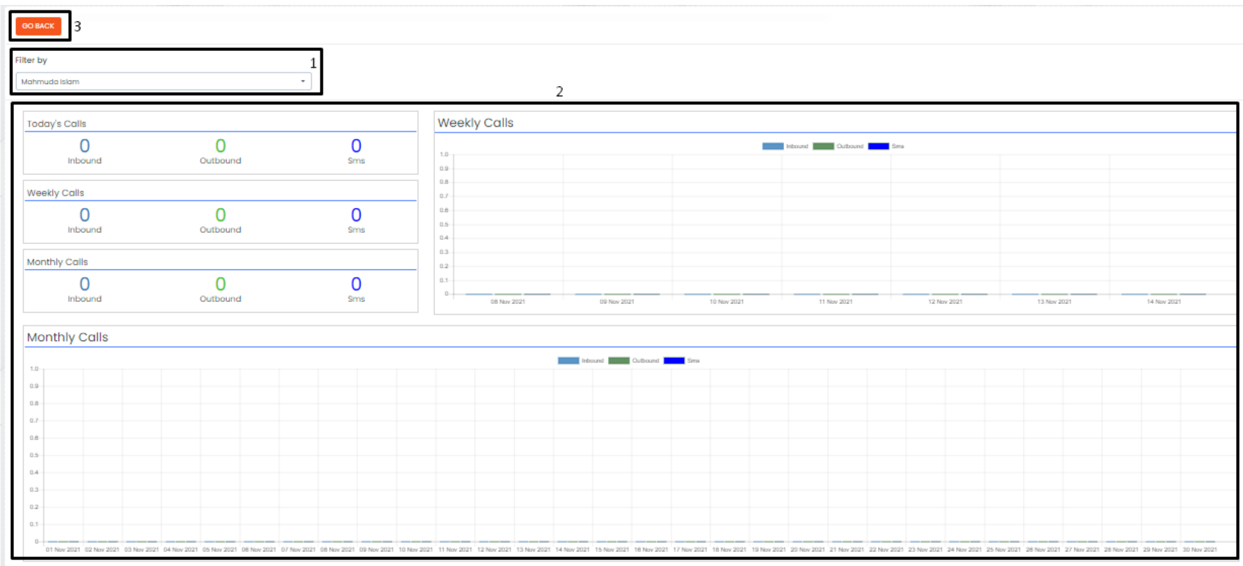
To View the list of Calls recorded, you can click the recorded calls option.

After clicking the button, you will be redirected to these recorded calls page.

1. This portion shows the Call log purpose, the Caller's Name, Customer's Name and Phone number, the date the Call was conducted and the recorded file.
2. You can click this button to go back to the main page.

OVERVIEW

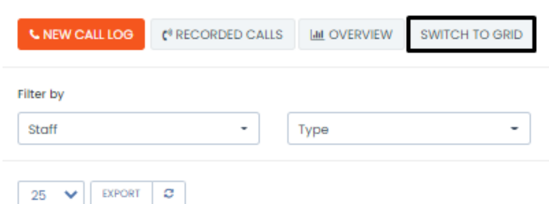
To view a summary or an overview analytics of the Call logs, you can click the "Overview" Button.



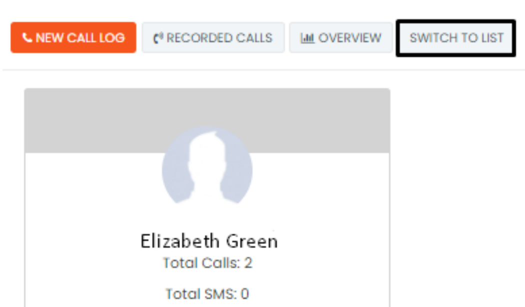
After clicking the Overview button, the Call Log Analytics page will be shown.

1. You can filter the Call log analytics by selecting a specific Caller.
2. This portion shows Bar graphs and the total value of Todays, Monthly and weekly calls of Inbound, Outbound and SMS type of Logs.
3. You can click this button to go back to the main page.

SWITCH TO GRID/LIST



To view the call logs in a grid view, Click this "Switch to Grid" button.



This is the Grid View. In case you want to switch back to the list view, click this "Switch to List" button.