



## Call Log

Your Virtual Call Center! This module tracks every incoming call and provides an audio playback of the duration of the phone call as well as call analytics, so it can be reviewed for quality assurance or training purposes.

**\*\*\*If you haven't acquired a campaigning phone number, you will need to begin** by navigating to the **'Phone Settings' → My Numbers**

- Click the green "+" at the bottom-right of the screen to search and purchase a toll-free or local phone number. (The **Default Campaigning Number** will be the number that is displayed when your clients receive a text from you.)

The screenshot shows the TAXSHIELD Software interface. On the left is a dark sidebar with various menu items: Dashboard, Funded Accounts, Call Log, Text, Customers, Referrals, Checks Queue, Reports, Phone Settings (which is highlighted with a red arrow and the number 1), My Numbers, Geo Router, Account Settings, and Help. The main content area has a header "TAXSHIELD SOFTWARE | Admin" and a sub-header "Setup Phone Analytics". It displays a table titled "3 Channels available" with three rows:

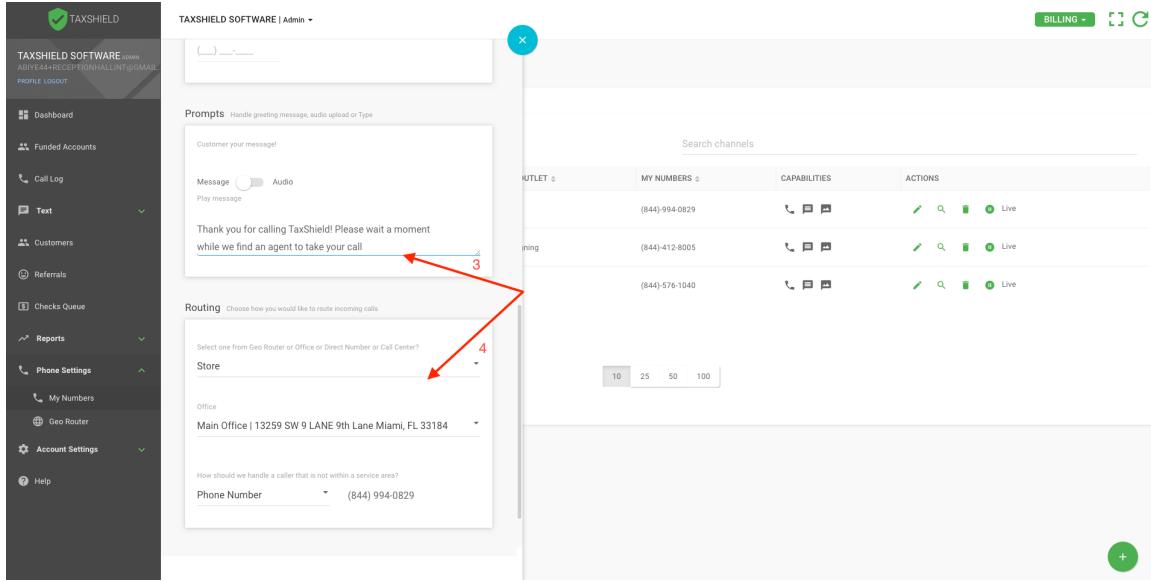
LABEL	MEDIA OUTLET	MY NUMBERS	CAPABILITIES	ACTIONS
Taxshield Main Line	Custom	(844) 994-0829	Call, Text, Live	
Default Campaigning Number	Campaigning	(844) 412-8005	Call, Text, Live	
Support Line	Custom	(844) 576-1040	Call, Text, Live	

At the bottom right of the main content area is a green button with a white "+" sign, with a red arrow and the number 2 pointing to it. The bottom of the screen features a navigation bar with buttons for 10, 25, 50, and 100.

1. From here, you'll select to search for either a toll-free Phone number, or a local phone number. For **toll-free numbers**, you'll be able to select a number of prefixes such as **888, 844, 800** etc. from a drop-down menu.
2. For **local numbers**, you can enter a desired area code for the prefix. After the desired prefix has been entered, you can also select a mnemonic number such as "**0tax(0829)**" to make it easier for your Ph. number to be remembered by your clients

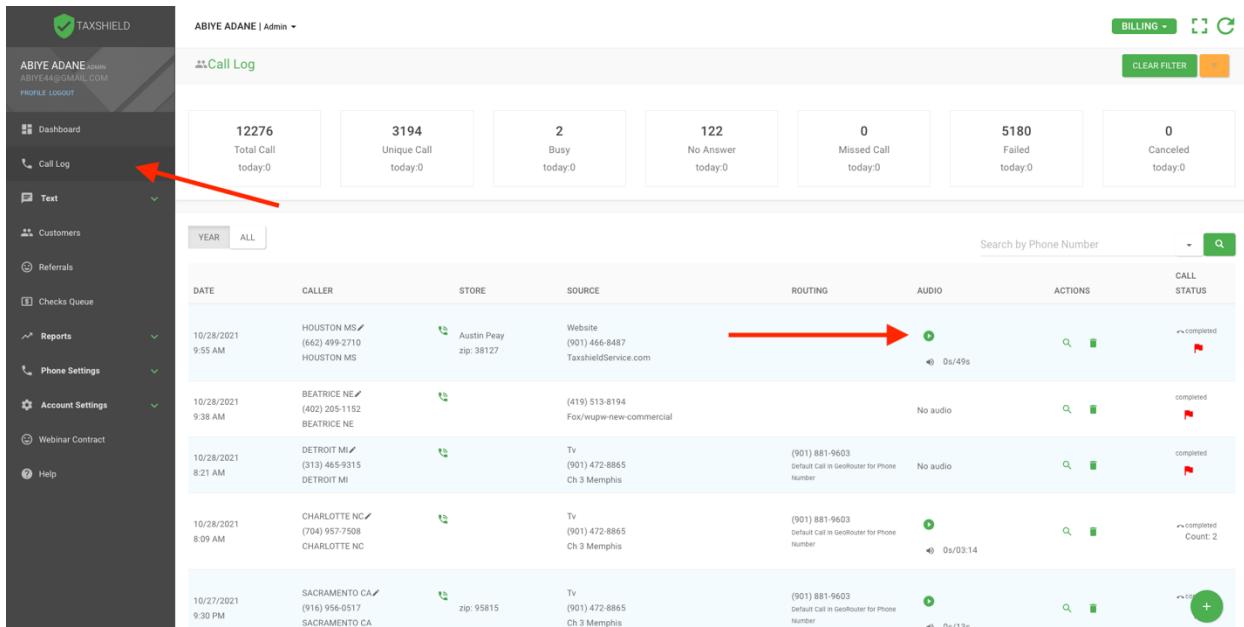
Select	Phone Number	Rate Center & Features	Monthly Fee
<input type="radio"/>	(844) 702-0829 +18447020829	text messaging: Yes	\$3.75
<input type="radio"/>	(844) 564-0829 +18445640829	text messaging: Yes	\$3.75
<input type="radio"/>	(844) 908-2905 +18449082905	text messaging: Yes	\$3.75
<input type="radio"/>	(844) 459-0829 +18444590829	text messaging: Yes	\$3.75
<input type="radio"/>	(844) 908-2933 +18449082933	text messaging: Yes	\$3.75

3. Next you'll **configure** the **Prompt** that is heard when your clients call into the phone number that they received a text from. You can either type your own personal message in there, which will be read by a bot when the call is placed by the client. Or you can select "Audio" and import an .mp3/.mp4 with pre-recorded audio for your prompt.
4. Lastly, you'll need to **configure** the **Routing** of the call. You can select which **Store** you'd like to receive the call or **input a specific number** that the call will be forwarded to; as well as a fail-safe number that can be input to catch the call if the first number is unable to take the call.



Once you have a Default Campaigning Number set up, you can now use that phone number for marketing. Let's go to the **Call Log** menu in the Menu Panel on the left side of the screen so we can view our incoming calls.

1. Lists are ordered by Office; and can be sorted by: Store Name, Source, Phone Number, or Label. You can listen to the audio playback of a particular call by clicking the green 'play' button next to the caller.



2. You can also **click on the magnifying glass to pull up a Customer's Phone Call Log**. This is especially handy if there are multiple phone calls under one Customer Profile. From here, you can play a particular call or download the call entirely.

ABIYE ADANE | Admin

To: (901) 560-0366, , TN

Filter By Date mm/dd/yyyy

Dec 01, 2019

Source: Google 0s/0s

Austin Peay 0s/43s

Source: Custom Text Back Number 0s/46s

Source: Google 0s/0s

Call Log Details:

- (901) 881-9603 default Call in Georouter for Phone number 0s/38s completed Count: 61
- (901) 881-9603 default Call in Georouter for Phone number 0s/41s completed Count: 3
- (901) 881-9603 default Call in Georouter for Phone number 0s/45s completed Count: 14
- (901) 881-9603 default Call in Georouter for Phone number 0s/51s completed Count: 189
- (901) 881-9603 default Call in Georouter for Phone number 0s/41s completed Count: 189