



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.

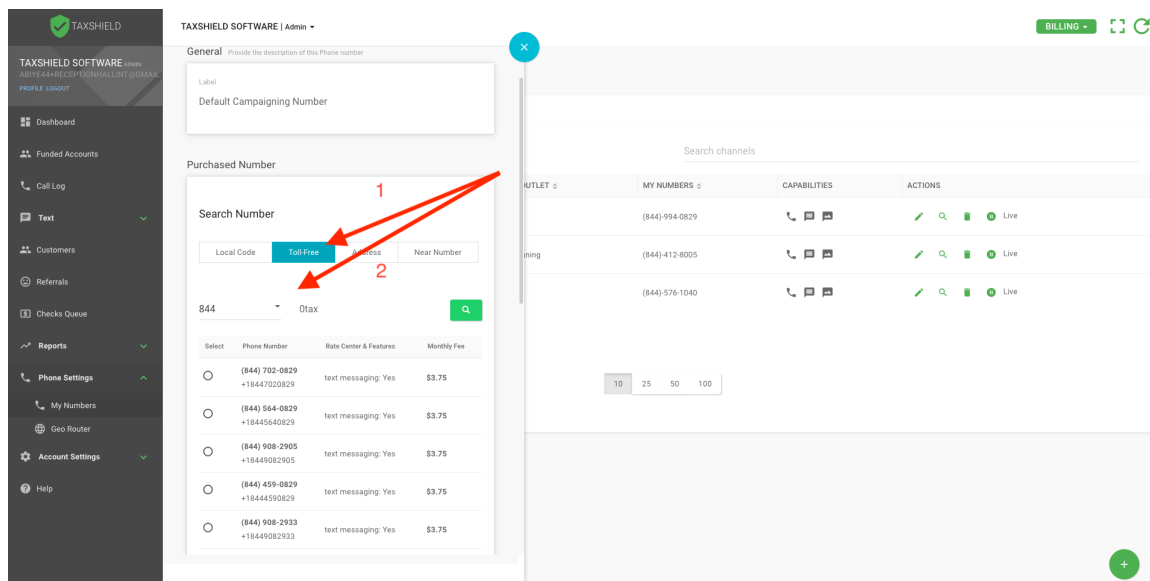
***If you haven't acquired a campaigning phone number, you will need to begin by navigating to the **'Phone Settings' → My Numbers**

- 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 Admin interface. On the left is a dark sidebar with a menu including Dashboard, Funded Accounts, Call Log, Text, Customers, Referrals, Checks Queue, Reports, Phone Settings (highlighted with a red arrow labeled '1'), My Numbers, Geo Router, Account Settings, and Help. The main content area is titled 'TAXSHIELD SOFTWARE | Admin' and 'Setup Phone Analytics'. It features an 'UPDATE PREFERENCES' button and a table of available channels. The table has columns for LABEL, MEDIA OUTLET, MY NUMBERS, CAPABILITIES, and ACTIONS. Three channels are listed: 'Taxshield Main Line', 'Default Campaigning Number', and 'Support Line'. At the bottom right of the main content area, there is a green circular button with a white '+' sign, indicated by a red arrow labeled '2'.

	LABEL	MEDIA OUTLET	MY NUMBERS	CAPABILITIES	ACTIONS
<input type="checkbox"/>	Taxshield Main Line	Custom	(844) 994-0829	📞 📧 📧	✍️ 🔍 🟢 🟢 Live
<input type="checkbox"/>	Default Campaigning Number	Campaigning	(844) 412-8005	📞 📧 📧	✍️ 🔍 🟢 🟢 Live
<input type="checkbox"/>	Support Line	Custom	(844) 576-1040	📞 📧 📧	✍️ 🔍 🟢 🟢 Live

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 "**Otax(0829)**" to make it easier for your Ph. number to be remembered by your clients



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.

TAXSHIELD SOFTWARE | Admin

Prompts Handle greeting message, audio upload or Type

Customer your message!

Message ☐ Audio ☐

Play message

Thank you for calling TaxShield! Please wait a moment while we find an agent to take your call

Routing Choose how you would like to route incoming calls

Select one from Geo Router or Office or Direct Number or Call Center?

Store

Office

Main Office | 13259 SW 9 LANE 9th Lane Miami, FL 33184

How should we handle a caller that is not within a service area?

Phone Number (844) 994-0829

Search channels

OUTLET	MY NUMBERS	CAPABILITIES	ACTIONS
(844)-994-0829		📞 📧 📺	✓ 🔍 🟢 Live
(844)-412-8005		📞 📧 📺	✓ 🔍 🟢 Live
(844)-576-1040		📞 📧 📺	✓ 🔍 🟢 Live

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.

TAXSHIELD

ABIBE ADANE | Admin

Call Log

12276 Total Call today:0

3194 Unique Call today:0

2 Busy today:0

122 No Answer today:0

0 Missed Call today:0

5180 Failed today:0

0 Canceled today:0

YEAR ALL

Search by Phone Number

DATE	CALLER	STORE	SOURCE	ROUTING	AUDIO	ACTIONS	CALL STATUS
10/28/2021 9:55 AM	HOUSTON MS (642) 499-2710 HOUSTON MS	Austin Peay zip: 38127	Website (901) 466-8487 TaxshieldService.com		🟢 0s/49s	🔍 🟢	completed
10/28/2021 9:38 AM	BEATRICE NE (402) 205-1152 BEATRICE NE		(419) 513-8194 Fox/wupw-new-commercial		No audio	🔍 🟢	completed
10/28/2021 8:21 AM	DETROIT MI (313) 465-9315 DETROIT MI		Tv (901) 472-8865 Ch 3 Memphis	(901) 881-9603 Default Call in GeoRouter for Phone Number	No audio	🔍 🟢	completed
10/28/2021 8:09 AM	CHARLOTTE NC (704) 957-7508 CHARLOTTE NC		Tv (901) 472-8865 Ch 3 Memphis	(901) 881-9603 Default Call in GeoRouter for Phone Number	🟢 0s/03:14	🔍 🟢	completed Count: 2
10/27/2021 9:30 PM	SACRAMENTO CA (916) 956-0517 SACRAMENTO CA	zip: 95815	Tv (901) 472-8865 Ch 3 Memphis	(901) 881-9603 Default Call in GeoRouter for Phone Number	🟢 0s/13s	🔍 🟢	completed

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.

The screenshot displays the TAXSHIELD web application interface. On the left is a dark sidebar with navigation links: Dashboard, Call Log, Text, Customers, Referrals, Checks Queue, Reports, Phone Settings, Account Settings, Webinar Contract, and Help. The main content area is titled 'ABIYE ADANE | Admin' and shows a profile for 'ABIYE ADANE' with email 'ABIYE44@GMAIL.COM'. Below the profile, there's a 'To: (901) 560-0366' field and a 'Filter By Date' dropdown set to 'mm/dd/yyyy'. A list of calls is shown for 'Dec 01, 2019'. Each call entry includes the source (Google or Custom), a play button, and a download button. A red arrow points to the magnifying glass icon in the call log table on the right, which lists calls with details like 'No audio', '0s/22s', '0s/38s', '0s/41s', '0s/45s', '0s/51s', and '0s/41s'. The table also shows 'completed' status and 'Count' values (0, 3, 14, 189). A 'BILLING' button and a refresh icon are visible at the top right of the call log table.