

CallPlease Call Logs Explained

CallPlease, the most advanced call productivity app, enables individual users and teams to manage call logs, history and activity from any device, anytime. Through real-time collaboration, replace the ancient message pad with the fully customizable CallPlease interface to manage the calls that are important to you and your team when they matter most. Built in mind with streamlining your mobile lifestyle, CallPlease helps foster your professional & personal relationships by allowing you to increase the number of productive interactions in your network each day. Say goodbye to call chaos and hello to CallPlease.

WHAT'S A CALL LOG?

CallPlease Call Logs are completely mobile, customizable and dynamic lists of your calls and messages, and work with any size company, office, or team, in any configuration. Get the most out of CallPlease by discovering which type of Call Logs are best suited for you and your business.

To get the best experience with CallPlease, choose from two types of users and two types of call logs.

WHICH USER TYPE IS RIGHT FOR ME?

Primary

For Individuals who need to manage their own personal calls (with or without support from others) and/or who want to share their calls and call info with others. **Sign up as an Individual, Executive, or Part of Group/Team to become a Primary User.**

Support

For individuals responsible for collaborating with a Primary user to provide call management support and information. Sign up as an Assistant or Receptionist to become a Support User.

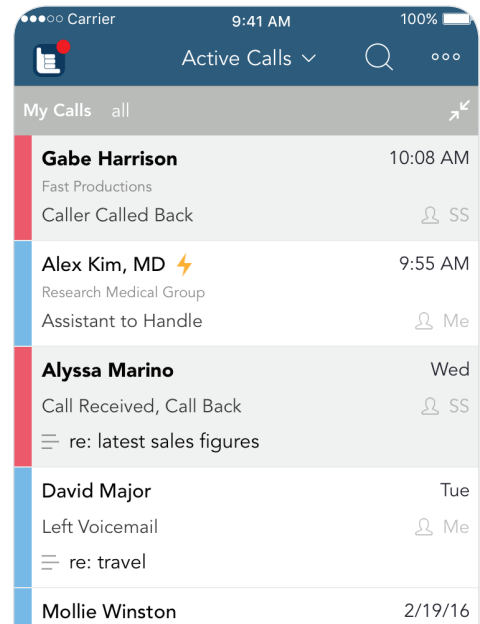
WHAT ARE THE TWO TYPES OF CALL LOGS?

Personal Logs

Used to manage and track a **Primary User's** private and **personal calls**, messages, info and actions. Personal logs are supported by the real-time collaboration between **Primary and Support Users**.

Shared Logs

Used to manage calls, messages, info and actions within groups & teams. Shared logs are supported by the real-time collaboration between **all users assigned to the log**. And **everyone in your company**, including all **Primary and Support users** are allowed to work together on **Shared Logs**.



HOW DO CALLPLEASE CALL LOGS WORK?

PERSONAL CALL LOG

Creating a Personal Call Log

- Sign-up as a **Primary User** and CallPlease will automatically create a **Personal Call Log** for you.
- Do you have someone who assists you with managing your calls? If so, provide access to your **Support User(s)**. Whether it's your receptionist, assistant, admin, etc., CallPlease supports an unlimited number of **Support Users** to help manage your call chaos.
- **Personal Call Log** information is accessible to the **Primary User** and all **Support Users**. This access enables real-time collaboration between all users.
- **Support Users** can connect to multiple **Personal Logs**, supporting any number of **Primary Users**.

Logging Calls with a Personal Call Log

- As a **Primary User**, you can input and update calls on your personal, cloud-based call log at any time on any device. Use your **Personal call log** to return phone calls, update call progress, and keep notes on your correspondence.
- If **Support Users** have access to your **Personal Call Log**, they can add, update, and track call information for you. Changes made by everyone will sync in real time. All logs have customizable notifications, actions and alarms.



*Support User Accounts are designed to assist Primary User accounts and do not receive or use their own Personal Call Log.

SHARED CALL LOGS

Creating a Shared Call Log

- Sign up as **Part of a Group/Team** to create either an **Interactive** or **Queue** Shared Call Log to support an unlimited number of users.
- Already a CallPlease user? Create a Shared Call Log by signing in on the web app (www.CallPlease.com), tap the Gear Icon, and select "Shared Call Logs".
- All account types, **Primary and Support Users** can access shared call logs.
- Your CallPlease subscription allows for an unlimited number of Shared Call Logs.

Logging Calls with an Interactive Call Log

An Interactive Call Log is a single call log that multiple users share to log, track, and manage calls. You and your team can see and monitor all actions taken on each call by everyone collaborating on the log.

Logging Calls with a Queue Call Log

A Queue Call Log is a cloud-based "ticketing" system for the distribution of calls throughout a group or team. You and your team log incoming calls into the queue. From there, each call is assigned to the Personal log of a selected User, or to another shared log. Once a call has been assigned from the queue, it will appear on the personal or shared log and can be managed and updated accordingly.

Example of an Interactive Call Log in a Law Firm



Members of the legal team with access to the shared log are all able to input, track, and complete calls related to a specific case

Example of a Queue Call Log in a Real Estate Office



Receptionist enters calls. Administrator assigns them to brokers.

PERSONAL CALL LOGS IN ACTION

Effectively organize and track your correspondence and streamline communication with your assistant(s).

Exec/EA Configuration (aka Exec/Assistant)

CallPlease allows an Executive and Assistant(s) to share call information throughout the day, in sync at all times. If an Exec is off site at meetings and an assistant takes a message from the office, by inputting the call into CallPlease, the Exec will immediately receive a notification of the missed call. Any call actions taken by the Exec will notify the assistant in real time. No more long discussions upon returning to the office about which calls need to get made or returned!

Receptionist Configuration

Allows Receptionists to log calls and messages to any number of personal or shared call logs. For example, the office receptionist can log and distribute calls to each office member's personal call log, automatically notifying them of every missed call or message.

INTERACTIVE CALL LOGS IN ACTION

Achieve total collaboration along with transparency and accountability by sharing and monitoring your team's call progress. Here are several ways to benefit from CallPlease Interactive Logs:

Project Specific Logging

Example: Entertainment Industry

Teams of agents use CallPlease interactive logs to track calls and share information pertaining to specific clients. Production companies collaborate on calls for each movie and TV project.

Example: Law Firms

An interactive log helps legal teams collaborate on multiple cases at a time.

Supervision & Accountability

Example: Sales Teams

Supervisors can ensure accountability in the sales team by tracking and monitoring calls and performance of each salesperson.

Working in Partnership

Example: Stock Brokerage

Use a Shared Call Log in an office where multiple brokers handle calls from the same clients to streamline communication.

Information on the Go

Example: Medical Facility

In a busy doctor's office, an interactive log allows doctors and nurses to effectively communicate missed calls in real time to more efficiently respond to patient's requests.

QUEUE CALL LOGS IN ACTION

Use the queue as a hub for incoming calls that can be distributed to members as your team sees fit. Here are several ways to benefit from CallPlease Queue Logs:

Project Assignment

Example: Real Estate Brokerage

As calls with new opportunities come in to a real estate brokerage, they can easily be logged and distributed to the appropriate broker regardless of whether they are in the office or the field.

Fast and Efficient Delegation

Example: Customer Service Industry

Assign job requests to the next available employee, such as incoming plumber requests or other service calls.

Example: Sales Teams

Representatives can easily see, assign, and accept sales requests.

