



# Call Logs

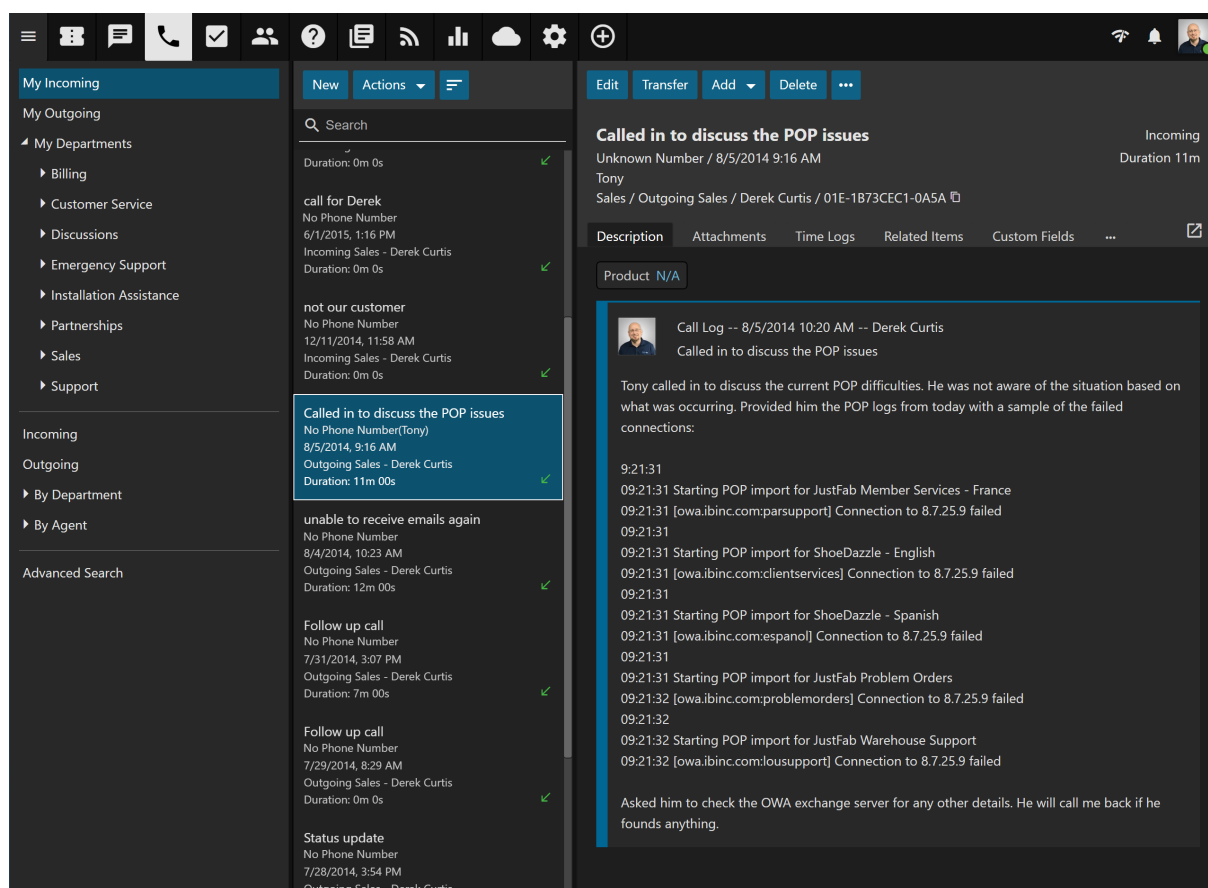
Help Documentation

# Call Logs

## Call Logs Overview

SmarterTrack's call logging feature provides agents with the ability to track customer service and sales calls. By requiring agents to track their phone conversations, companies can help to eliminate calls from falling through the cracks and reduce the number of unresolved customer issues. In addition, managers can use call logs and their associated reports to determine the number of calls answered or placed per agent or group over a period of time, to determine how much of an agent's workload is dedicated to calls, or to identify common phone complaints and their resolutions.

To access your call logs, log into the management interface with your agent account and click on the Call Logs icon.



## Navigating SmarterTrack's Call Logs Interface

### Agent Call Logs vs. Global Call Logs

The Call Logs section organizes all of the call logs for which an agent is responsible. When an agent clicks on My Incoming or My Outgoing in the navigation pane, all call logs for the agent will load in

the content pane, based on whether the agent received the call (incoming) or initiated the call (outgoing).

In addition, incoming and outgoing calls can be viewed by the Department the agent belongs to. That means that every group the agent is active in will be listed and the agent can drill down into all incoming and/or outgoing calls for the Department, or drill down into each group to see their incoming and outgoing call logs.

Administrators and managers who are members of multiple groups may want to view incoming or outgoing call logs for those groups to better evaluate the actual needs of the organization or to gain valuable insight into company operations. To view all call logs in SmarterTrack, the manager or administrator MUST be a member of all groups within SmarterTrack. At the very least, they need to be members of multiple groups in order to see call logs for those groups. Once this is done, they simply click Global Call Logs in the navigation pane.

Regardless of whether you're accessing your own call logs or global call logs, the call logs in the system will load in the content pane when you open the respective call log section. In general, the following details will be available:

- Subject - An agent-generated phrase that usually describes the call log. Very long subject phrases are truncated.
- Phone - The phone number of the caller.
- Name - The name of the caller.
- Start Date - The date and time the call started.
- Group - The group that is assigned to this call log.
- Agent - The agent who handled the call.
- End Date - The date and time the call ended.
- Duration - The length of the call.

## Performing Call Log Actions

In general, the following options are available from the content pane toolbar:

- New - Creates a new call log.
- Actions - Click this button and select the appropriate option to transfer a call log or select all call logs.
- Select All - Selects all call logs.
- Delete - Deletes the selected call log(s). For more information on deleted call logs, see [Deleting Call Logs](#).
- Transfer - Transfer the selected call log(s) to another group or agent. For more information,

see Transferring Call Logs .

- Sort - Sorts the list of call logs in ascending or descending order based on the selected option, such as start date, phone number, department, etc. Clicking on Reset Sort Order will return the sort order to its default status.

## Creating New Call Logs

To create a new call log, click the New Item icon and then click Call Log . Alternatively, an agent can click on the New button in the call log content pane. Regardless of the method used, a new call log window will open that the agent will use. Note: For companies using SmarterTrack Communicator, call logs can be configured to start automatically when a call comes in. In addition, if companies have integrated SmarterTrack with their existing VoIP system, call logs can be configured to begin automatically using the extensive web services.

The new call log window contains all of the call log information (custom fields, related items, and resources), plus the compose tab, which the agent will use to create the call log.

The following fields will appear in the header of the call log. Note: When automating a call log, some of these fields may be auto-populated based on the fields available from the phone server. Agents using SmarterTrack Communicator will have phone number, start and end times, subject and a recording of the call added to each call log automatically. In addition, the call recordings associated to call logs will be compressed after 7 days of inactivity to reduce disk space and reduce the number of files on the server.

- Brand - The primary brand the call log should be created for.
- Group - The Group to assign the call log to, then the agent that is creating the log for the appropriate group. While a Group is required, it is possible for the ticket to be auto-assigned to an agent using whatever distribution method is in place for the Group.
- Agent - The Agent creating the call log, or the Agent to be assigned the call log.
- Incoming Call - Check this box to indicate that the call was an incoming call.
- Subject - The title of the call log.
- Email - The email address of the customer.
- Phone - The phone number of the customer.
- Name - The name of the customer.
- Duration - The date and time the call started and ended.
- Call Details - The details and notes for a call log can be entered in the text box. These notes can in plain text or agents can use the text editor to stylize text, add links to websites, highlight important details and more.

The following options are available in the toolbar of the new call log window:

- Save - Saves the contents of the call log.
- Add - Allows the agent to attach an attachment, a new task, time log, ticket or related item to the call log. For more information on these options, see [Viewing Call Logs](#) .

## Viewing Call Logs

To view a call log, simply click a call log and it will display in the preview pane. If you would rather view the call log in a popup window, double-click the call log instead.

In general, the following options are available from the preview pane toolbar:

- Edit - Allows the agent to modify the selected call log.
- Transfer - Transfers the call log to a new brand, group and/or agent. When clicking the Transfer button, a modal window opens and you are presented with the following options:
  - New Brand - The brand you are going to transfer the log to. (If multiple Brands are set up.)
  - New Group - The new group you are going to transfer the log to.
  - New Agent - The new agent you are going to transfer the log to.
  - Add - Agents can add other items to each call log. This helps in keeping all communication in a single location and neatly organized. It should be noted that adding something like a task or ticket to a call log does NOT change the status of either item. Click this button and select the appropriate option to add a new task or time log to the call log or to add an existing item to the call log.
- Internal Attachment - Adds an attachment from your local machine to the call log. When an agent adds an attachment to a call log, this information is stored in the Attachments tab and is only available for Agents. (They're not available to Users.)
- Related Item - Adds an existing ticket number to the call log. When an agent adds an existing item to a call log, this information is stored in the Related Items tab.
- New Task - Attaches a new task to the call log. When an agent adds a task to a call log, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.
- New Time Log - Attaches a new time log to the call log. When an agent adds a time log to a call log, this information is stored in the Related Items tab.
- New Ticket - Adding a ticket to a call log actually enables an agent to start a ticket for the customer based on their call. This is helpful for those issues where follow up is required for the customer or to transition customers from a phone call to a more cost-effective method of communicating.
- Delete - Deletes the call log. For more information on deleted call logs, see [Deleting Call Logs](#)

- Actions (...)
- Assistance - Allows an agent to view relevant knowledge base articles based on the contents of the call log. These articles can then be used to help resolve customer issues.
- Print - Allows the agent to print the information contained in the description and details tabs of the task. Note: If viewing the management interface from a mobile device, this option may not be available.
- Manual Event - Selecting this opens a modal window. If any manual events are created for call logs, they are displayed here and available for use.

### Tabs within a Call Log

Call log information is organized within the following tabs:

- Attachments - This tab includes details about any files that are attached to the call, including who attached it, a link to the file, the file size and more.
- Time Logs - This tab includes any time logs attached to the call, including full details such as the time log category, duration and description.
- Related Items - This tab lists any related tickets that are attached to the current call log. Details include the ticket subject, a link to open the ticket in a new window, any attachments to the ticket and more.
- Custom Fields - This tab includes any custom fields the administrator created to help customize your company's call logs. This information can be populated by a user, an agent, or a third-party application (via the administrator).
- History - This tab displays information about the log, including when it was opened, the user who opened it and more.

In addition, agents can see how long they are working on the call by viewing the "Time on page" at the bottom of the call log window. This timer starts at 0h 0m 0s and continues counting until the agent navigates to another page. This is especially convenient for agents that need to complete time logs.

## Transferring Call Logs

On occasion, an agent may need to transfer a call log to another agent or group. For example, if a call is transferred between agents, the log will also need to be transferred so the new agent can add notes and other information. Note: The ability to transfer call logs is determined by the role permissions. By default, agents can transfer call logs. For more information, see Roles .

To transfer a call log, select the call log and click the Actions menu in the content pane toolbar and

click Transfer . Alternatively, you can click Transfer in the preview pane toolbar if you are viewing the call log in the preview pane. This will open a popup window with the following fields:

- New Brand - The brand you are going to transfer the log to.
- New Group - Select the group to which the call log should transfer from the list.
- New Agent - Select the agent to which the call log should transfer from the list.

Click OK to transfer the call log.

## Deleting Call Logs

On occasion, an agent or administrator may need to delete a call log from the system. Note: The ability to delete a call log is determined by the role permissions. By default, agents cannot delete call log. For more information, see Roles .

To delete a call log, simply select the desired log(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete a call log they are currently viewing by clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a call log they are presented with a confirmation dialog. Once a call log is deleted, it is no longer available for review or action and will eventually be purged from the system. Note: Deleted call logs are automatically purged every 90 calendar days.

Once a call log is deleted, it can not be recovered. However, agents and managers can search any deleted items using the Advanced Search feature in SmarterTrack. For more information, see Searching Call Logs . Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

## Searching Call Logs

As time passes, finding a specific call log can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find call logs quickly and easily.

### Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the call log section you are viewing (i.e. all items, deleted items, etc.) for matches and display the results in the content pane. Note: The basic search functionality uses the Search String field for rendering results.

## Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a call log. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

### General Criteria

The following fields are available:

- Search In - This dropdown allows you to select either all call logs EXCEPT deleted ones or to only search in deleted call logs.
- Call Log Number - To search by call log number, type the call log number in this field.
- Search String - Type the specific keywords to be queried. The subject and description sections of call logs will be searched for these keywords.
- Phone Number - To search by phone number, type the phone number in this field.
- Email Address - To search by email, type the email address in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and due dates in these fields or click the calendars and select the appropriate dates.
- Creation Date - To search by the date the task was created, enter the creation date in the fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by the date the task was last edited, enter the modified date in the fields or click the calendars and select the appropriate dates.
- Department - To search by department, select the appropriate department from the list.
- Agent - To search by agent, select the appropriate agent from the list.
- Sort Results - To specify the order in which results are displayed, select the appropriate option from the list.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range or avoiding searches on body text.

### Custom Fields

The administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your administrator.