CALL LOG Infographic

ROOK CONNECT

Call Again

All Call Logs must be scheduled, it's mandatory that any Call Log with the Next Action of Call Again must be assigned a Reminder/Follow Up Date for when the next call is to happen.

Move To Sales Pipeline

Before any Call Log can be moved to any staff's Sales Pipeline you must select to whom you wish to transfer the Call Log lead to. Once the Next Action of Move To Sales Pipeline is applied and you select from the pop up window that appears the staff name you wish to transfer this Sales Pipeline lead to, the Call Log lead will be moved to the To Be Scheduled section of the selected staff and that staff will be alerted via email that they have been assigned a new lead for review. This lead will have a status of Not Scheduled so staff know to schedule the next action with this lead.

Transfer Lead

All Call Log staff have the ability to transfer Call Logs back and forth to one another for follow up. Once you select the Next Action of Transfer Lead and select the staff from the pop up window, that staff will be alerted of the new lead via email and the Call Log lead will transition to the To Be Scheduled section of the Call Log with a Not Scheduled status

Reminder/Follow Up

Staff need to be alerted in the Daily Activity Log (top right box of the software) of how many calls they have planned for the day. In settings we want the ability to trigger email alerts to staff as well as software alerts in the Daily Activity Log, so staff would receive an email alert of all calls that are scheduled for the day at 5 am in the morning for the day.