

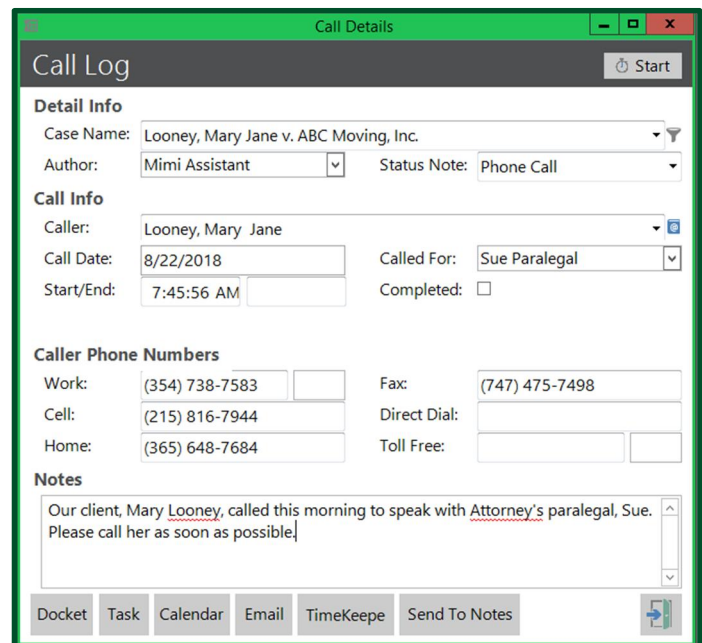
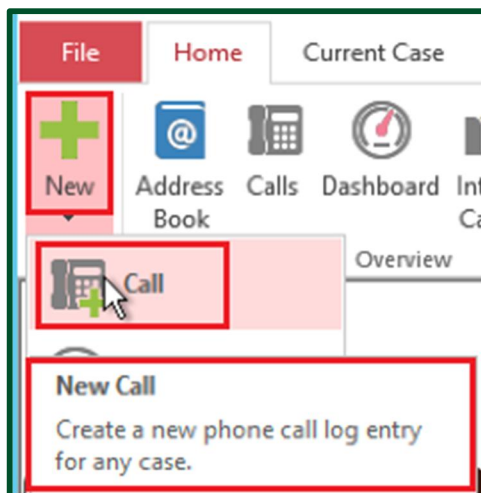
Using the Call Log and Calls Manager in TrialWorks

Version 11 and higher

The **Call Log** enables users to create a new phone call log entry relating to any case directly from the New Button on the Home Ribbon. The **Calls Manager** is a centralized place to view incoming and outgoing calls right from the Home Ribbon. From the Calls Manager, calls are displayed for any case for any user, shown in the timeframes set by you. And, you can expand the window to full-screen, maximizing all fields for full visibility. Best of all, the Calls Manager window can stay open all day long, freeing you up to work anywhere in TrialWorks, while still having immediate access to all of your Calls.

Creating a New Call Log Entry

Home > New Button > Call

A screenshot of the 'Call Log' window in TrialWorks. The window title is 'Call Details'. The 'Call Log' header includes a 'Start' button. The 'Detail Info' section contains: Case Name: Looney, Mary Jane v. ABC Moving, Inc.; Author: Mimi Assistant; Status Note: Phone Call. The 'Call Info' section contains: Caller: Looney, Mary Jane; Call Date: 8/22/2018; Called For: Sue Paralegal; Start/End: 7:45:56 AM; Completed: . The 'Caller Phone Numbers' section contains: Work: (354) 738-7583; Fax: (747) 475-7498; Cell: (215) 816-7944; Direct Dial: ; Home: (365) 648-7684; Toll Free: . The 'Notes' section contains: 'Our client, Mary Looney, called this morning to speak with Attorney's paralegal, Sue. Please call her as soon as possible.' At the bottom, there are buttons for 'Docket', 'Task', 'Calendar', 'Email', 'TimeKeep', and 'Send To Notes'.

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Call Log Entry Features

The screenshot shows the 'Call Details' window with the following data:

Section	Field	Value
Detail Info	Case Name	Looney, Mary Jane v. ABC Moving, Inc.
	Author	Mimi Assistant
	Status Note	Phone Call
Call Info	Caller	Looney, Mary Jane
	Call Date	8/22/2018
	Called For	Sue Paralegal
	Start/End	7:45:56 AM
	Completed	<input type="checkbox"/>
Caller Phone Numbers	Work	(354) 738-7583
	Cell	(215) 816-7944
	Home	(365) 648-7684
	Fax	(747) 475-7498
	Direct Dial	
	Toll Free	
Notes	Our client, Mary Looney, called this morning to speak with Attorney's paralegal, Sue. Please call her as soon as possible.	

Detail Information will automatically default to populate the current Case Name, which can be changed by clicking on the dropdown. The Author field auto-populates from the User Defaults. The user may then select the Status Note from the dropdown menu.

Call Info allows the user to select the Caller from the dropdown, which displays all Contact Records associated with the case. If the caller is not already associated, click on the Address icon to select a contact record from the database or create a new entry. Check the "Completed" box if there is no further follow up required.

Caller Phone Numbers will automatically populate after the caller Contact Record is selected.

Notes allows the user to communicate the nature of the caller's message.

Notice the additional buttons at the bottom of the Call Details Screen:

- **Docket** - Create a TrialWorks Docket Entry to follow up on the Call Log Entry.
- **Task** - Add a task reminder to Outlook relating to the Call Log Entry.
- **Calendar** - Add an Outlook calendar entry relating to the Call Log Entry.
- **Email** - Capture all of the fields from the Call Log Entry and email them to someone.
- **TimeKeeper** - Create a TimeKeeper Entry to log the time spent on the call.
- **Send To Notes** - Send the content of the Call Log Entry to the Notes Tab.

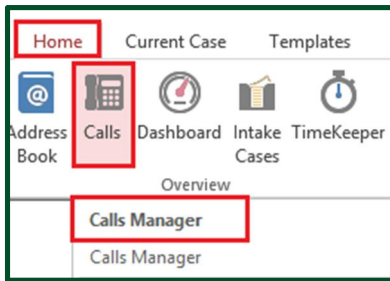


The Notes Tab reveals the details of the Call Log Entry:

Date	Category	Topic	Author	Notes	Status Note Code
8/22/2018	Client Related	Client Updated Needed	Mimi Assistant	Our client, Mary Looney, called this morning to speak with Attorney's paralegal, Sue. Please call her as soon as possible.	Phone Call

Calls Manager Features

From the Home Ribbon Bar, Call Log Entries may be viewed in the Calls Manager.



The screenshot shows the 'Calls Manager' application window. At the top, there is a header with the title 'Calls Manager' and a date range 'This Month, Wed Aug 1 - Fri Aug 31 2018'. Below the header, there are filter options: 'Filter by Master Client ...' and 'Filter by Case ...'. The main area contains a table with the following columns: 'Completed', 'Case Name', 'Caller', 'Call Date', 'Start Time', and 'End Time'. The table lists three call log entries:

Completed	Case Name	Caller	Call Date	Start Time	End Time
<input type="checkbox"/>	Loonev. Marv Jane v. ABC Movind. Inc.	Loonev. Marv Jane	8/22/2018	7:45:57 AM	7:55:00 AM
<input type="checkbox"/>	Parker. Penelope v. Parker. Paul	Parker. Percv Paul	8/8/2018	11:30:37 AM	11:45:00 AM
<input type="checkbox"/>	Mass Tort Test Case 2	Johnson. M.D.. Maric	8/8/2018	11:28:07 AM	2:00:00 AM

At the bottom of the window, there is a status bar showing 'Record: 1 of 3' and 'Unfiltered'. There are also buttons for 'Call Log Report' and 'Email'.

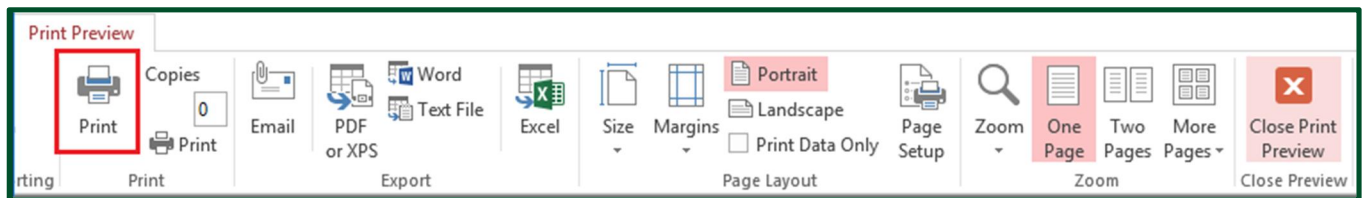


The Calls Manager allows users to

- Filter calls by Master Client and/or by Case.
- View calls for ALL users in the Firm, or, by individual User.
- View calls by Year, Month, Week, Day or a customized date range.
- Add, edit or delete Call Log Entries.
- Email the contents of a Call Log Entry to someone.
- Create a Call Log Report (see image below.)

Calls Manager Report

With the click of the Call Log Report button from the Calls Manager, you can print your Call Log Report:



Call Log Manager Report

<i>Name/User</i>	<i>Start Time</i>	<i>End Time</i>	<i>Notes</i>
Looney, Mary Jane Mim I Assistant	8/22/2018 7:45:57 AM	8/22/2018 7:55:00 AM	Our client, Mary Looney, called this morning to speak with Attorney's paralegal, Sue. Please call her as soon as possible.
Parker, Percy Paul Diane Attorney	8/8/2018 11:30:37 AM	8/22/2018 11:45:00 AM	You can write any note in this section.
Johnson, M.D., Marion Diane Attorney	8/8/2018 11:28:07 AM	8/22/2018 2:00:00 AM	You can write any note in this section.

