

TURBODIAL

How-To

Call Notes in Enhanced Inbound

The screenshot shows a web browser window titled "turboDial" with the URL "https://turbodial.biz/tfnext/index1.php". The browser address bar shows the email "bill@web-lever.com". The main interface features a search bar with the number "+19524791228" and a dropdown menu. Below the search bar, there are several action buttons: "CALL" (green), "SMS" (green), "Msg" (red), and a microphone icon (blue). The name "William Jenkins" is displayed below the search bar. A notification box shows "Call Note Updated = 7240 Call Ownership Assigned to You". At the bottom, there are two call log entries:

- CALL** Sat, 26 Sep 2015 17:21:01 -0500
From = JENKINS WILLIA at +19524791228
Lookup = William Jenkins
- CALL** Sat, 26 Sep 2015 17:20:01 -0500
From = JENKINS WILLIA at +19524791228
Lookup = Unknown

Automatic Inbound Call Notes

If you have the Enhanced Inbound feature:

- turboDial automatically creates a Call Note at the end of an Inbound Call
 - Very similar to Outbound calls
- Purpose
 - Document each call
 - Enable Dashboard reports
 - Provide access to Call Recordings

Example Call Note – Main Tab

Task

Information **Recurring** Call Data

Contact can only be set using turboDial

Linked Information

Contact **William Jenkins**

Task Information

Creator: System

Action Description: turboDial: Inbound Call to Phone - Ri

Action Date: 09-25-2015 12:30 PM

Completion Date: 09-25-2015

Creation Notes

Inbound Call from +19524791228
Started at: Fri, 25 Sep 2015 12:35:37 -0500
Number called was: +19523146150 and Forwarded to: +16302538502

Twilio
ID=CA4184ee6b790616b4881700346a7

User **Bill Jenkins**

Advanced Info

Action Type: Please select an action type

Priority: 3. Non-Essential

Start Date: [Calendar Icon]

Notifications

Notify Immediately

None
Bill Jenkins
Debbie Producer
Sohan Chotia
William Jensen

Send individual notifications

Pop Up Reminder: Please select a pop up reminder before due date

User can be set in Infusionsoft or using turboDial

Save **Delete** **Save & New** **Convert To Appt** **Accept Task**

Created: System Friday, September 25, 2015 12:35 PM
Last Updated: System Friday, September 25, 2015 1:36 PM

Example Call Note – Custom Tab

Custom Field Tab

Task

Information Recurring Call Data

Call Data

Call Outcome

Duration

Call Recording

Leave Message Recording

Start Time

Save
Delete
Save & New
Convert To Appt
Accept Task

Created: System Friday, September 25, 2015 12:35 PM

Last Updated: System Friday, September 25, 2015 1:36 PM

See this Guide to learn how to create the custom fields



+ Enhanced Call Notes with Custom Fields

Example Dashboard Report

Bill's Inbound Calls - Past 7 Days ↺ ×				
Id	Contact	User	Title	Duration
7230	William Jenkins	Bill Jenkins	turboDial: Inbound Call to Phone - Recorded	3
7228	William Jenkins	Bill Jenkins	turboDial: Inbound Call to Phone - Recorded	4
7188	Alan Bradford	Bill Jenkins	turboDial: Inbound Call to Phone - Recorded	2
7182	Alal Brach	Bill Jenkins	turboDial: Inbound Call to Phone - Recorded	27
7206	Alal Brach	Bill Jenkins	turboDial: Inbound Call to Phone	

Due:

Showing 5 of 5

Assigning Inbound Call Notes

Two Fields to be “Assigned”:

- Contact (person who called you)
 - turboDial attempts to automatically assign a Contact to the Call Note using the ‘from’ phone number
- User (person who received the call)
 - turboDial does not automatically assign the User to the Call Note

Assigning Inbound Call Notes

Why Assign Call Notes?

- Provide access to call history and recordings associated with a Contact
- Attribute calls to employees (Users) for Dashboard Reports

Using the Assign Buttons

The screenshot shows the turboDial web interface. At the top, the browser address bar displays `https://turbodial.biz/tfnext/index1.php`. Below the address bar, the user is identified as `bill@web-lever.com`. The main interface features a dropdown menu with the number `w +19524791228`. To the right of this menu are several action buttons: a green **CALL** button, a green button with a target icon, a red button with a phone receiver icon, a blue button with a microphone icon, a green **SMS** button, and a red **Msg** button. Below these buttons is a search bar labeled "Search or Number". A notification box states: "Call Note Updated = 7240 Call Ownership Assigned to You". At the bottom, a list of call logs is visible. Two call log entries are shown, each with a red **CALL** icon and a blue assign button (a plus sign between two upward-pointing arrows) highlighted with a red box. The first call log entry is: "Sat, 26 Sep 2015 17:21:01 -0500 From = JENKINS WILLIA at +19524791228 Lookup = William Jenkins". The second call log entry is: "Sat, 26 Sep 2015 17:20:01 -0500 From = JENKINS WILLIA at +19524791228 Lookup = Unknown".

Using the Assign Buttons



View the Contact who has been assigned.
Assign yourself as the call note owner, unless it is already assigned to a User



Contact not assigned or assigned incorrectly.
Add a new Contact and assign.
(Re)Assign yourself as the call note owner



Contact not assigned or assigned incorrectly.
(Re)Assign to the currently viewed Contact.
(Re)Assign yourself as the call note owner

Using the Call Note Search Tool

What if you want to assign a call but don't have the screen pop? For example:

- You weren't logged in to turboDial when the call arrived, or
- You took the call while away from your PC and by the time you returned turboDial had shut down

Answer: Use the search tool to re-send the screen pop

- Find the Note ID in your dashboard report
- Enter a forward-slash followed by the Note ID, e.g. /1234
- The screen pop for that call will reappear

More User Guides

Also see these videos for more setup instructions:

- [Overview & Demonstration of Enhanced Inbound](#)
- [Inbound Call Dashboard Reports](#)