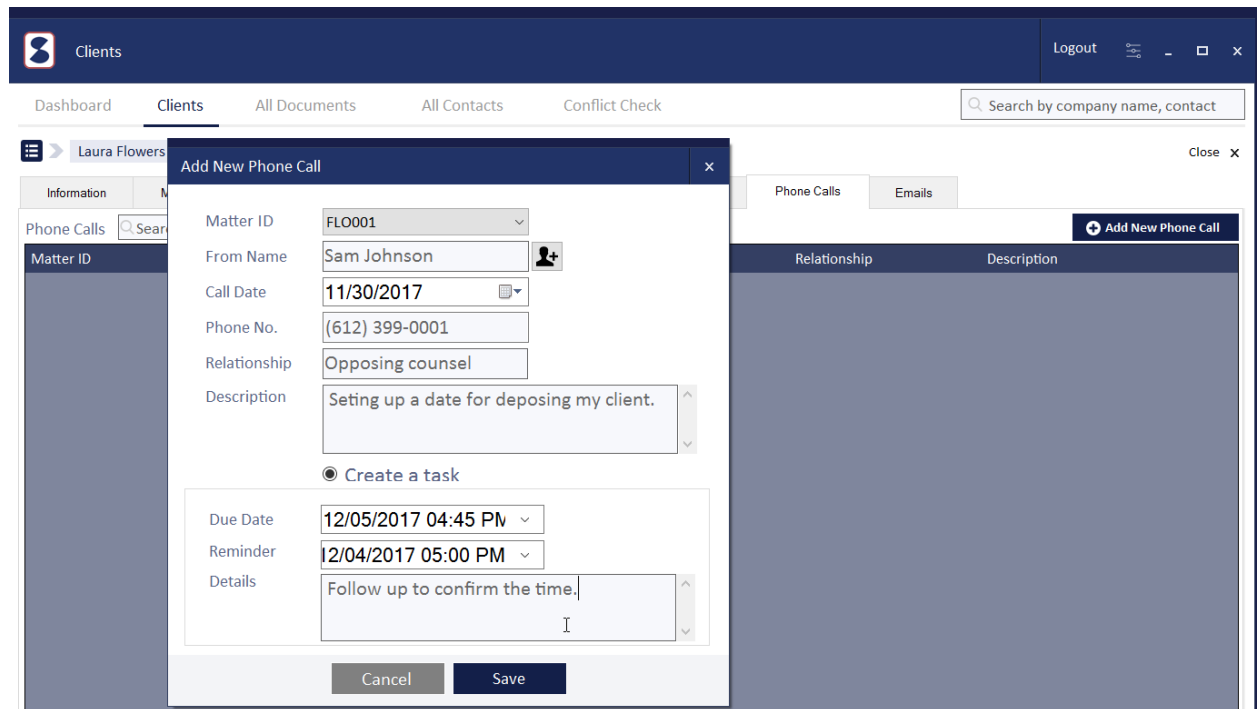


Creating a phone log

From the client tab, click the “Edit” button for a specific client and go to the “Phone Calls” tab. You can add new phone calls by clicking on the “Add New Phone Calls” button. If you enter any existing contact name into the “From Name” field, related information automatically appears into the fields. If you are adding a new contact, you can click the add contact icon to the right of the name field, and fill in the related fields.



The screenshot shows a web application interface for managing phone calls. A modal window titled "Add New Phone Call" is open over a "Phone Calls" tab. The form contains the following fields:

- Matter ID: FLO001
- From Name: Sam Johnson (with an add contact icon)
- Call Date: 11/30/2017
- Phone No.: (612) 399-0001
- Relationship: Opposing counsel
- Description: Setting up a date for deposing my client.
- Create a task
- Due Date: 12/05/2017 04:45 PM
- Reminder: 12/04/2017 05:00 PM
- Details: Follow up to confirm the time.

Buttons for "Cancel" and "Save" are at the bottom of the modal. The background shows a sidebar with "Laura Flowers" and a main area with "Phone Calls" and "Emails" tabs, and a table with columns "Relationship" and "Description".

Editing an existing phone call

You can edit an existing phone call by clicking the “Edit” button.

Deleting an existing phone call

You can delete an existing phone call by clicking the “Delete” button. Note: Sentian Solutions does not recommend deleting any phone calls from the program.

Searching for phone call

You can search for a phone call by entering search keywords such as: “from, matter ID, date, phone, relationship” into the search field.