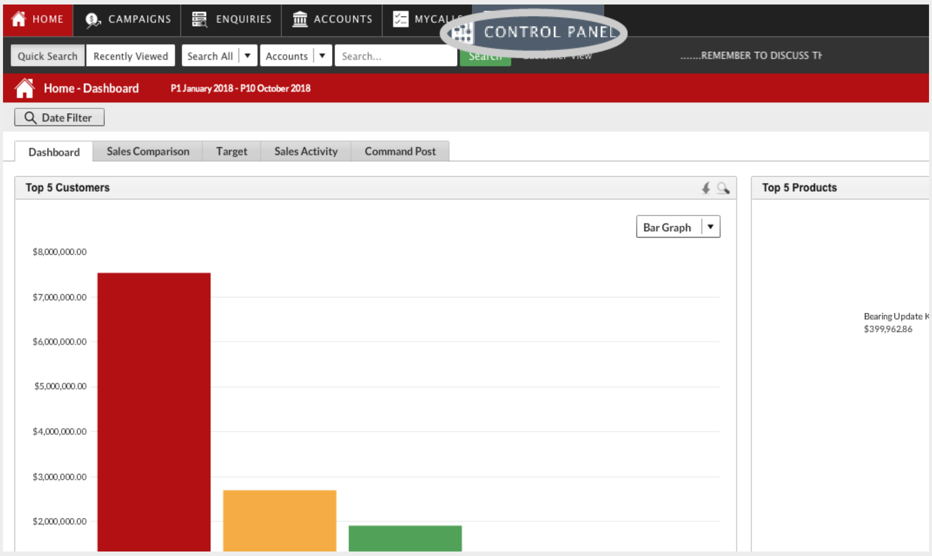
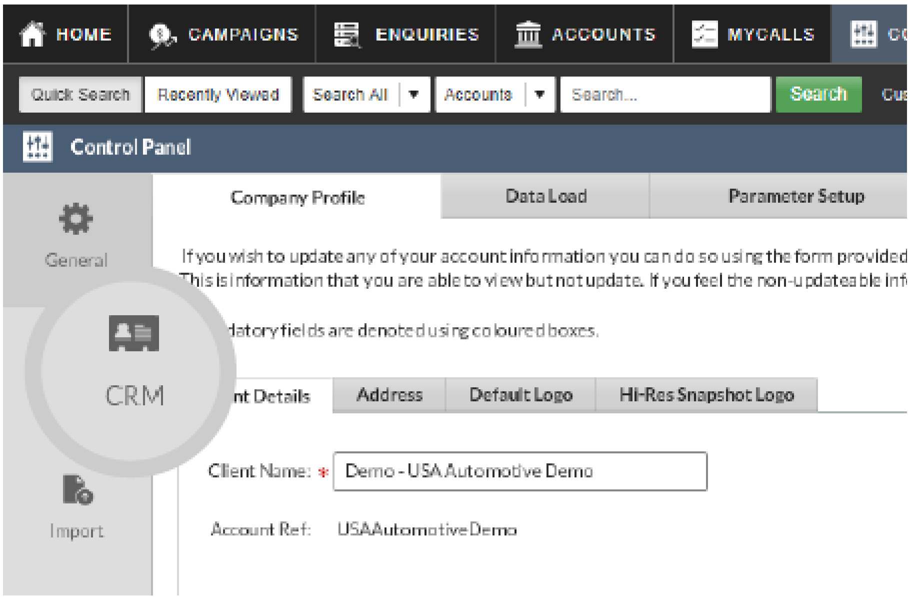
HOW TO ADD OR EDIT A CALL TYPE

This guide will show you how to add or edit a call type and make it available for user selection.
In this example, we will add a new call type - 'Incoming call from customer'.
Please Note: This can only be completed by a Power User.

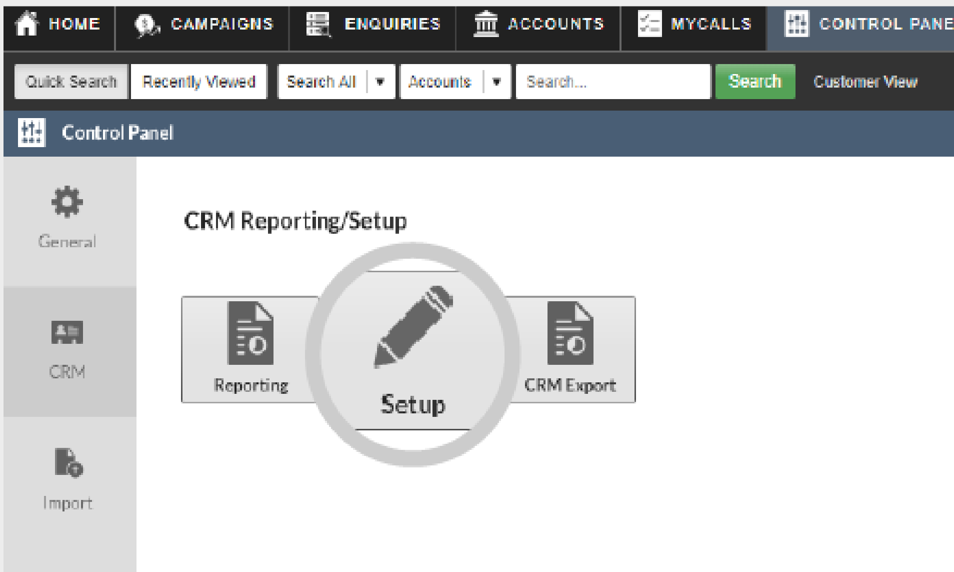
01 From the home screen, click the **CONTROL PANEL** tab.

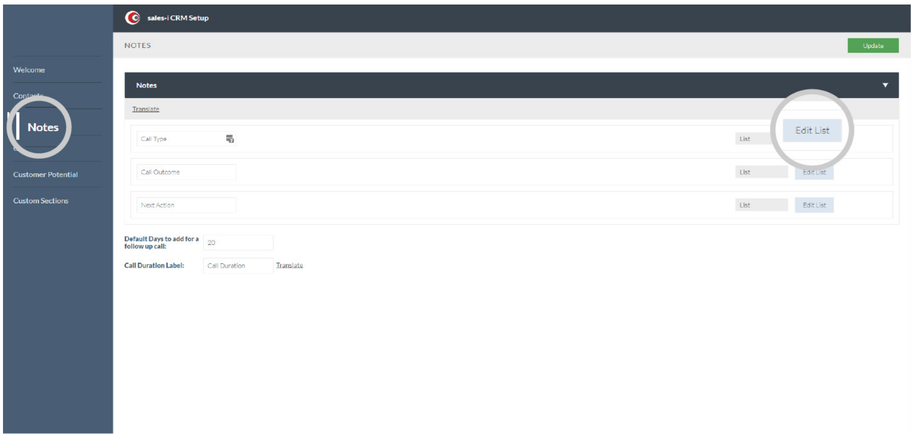




02 Now, click **CRM** from the options on the left hand side.

03 Next, click **Setup.**





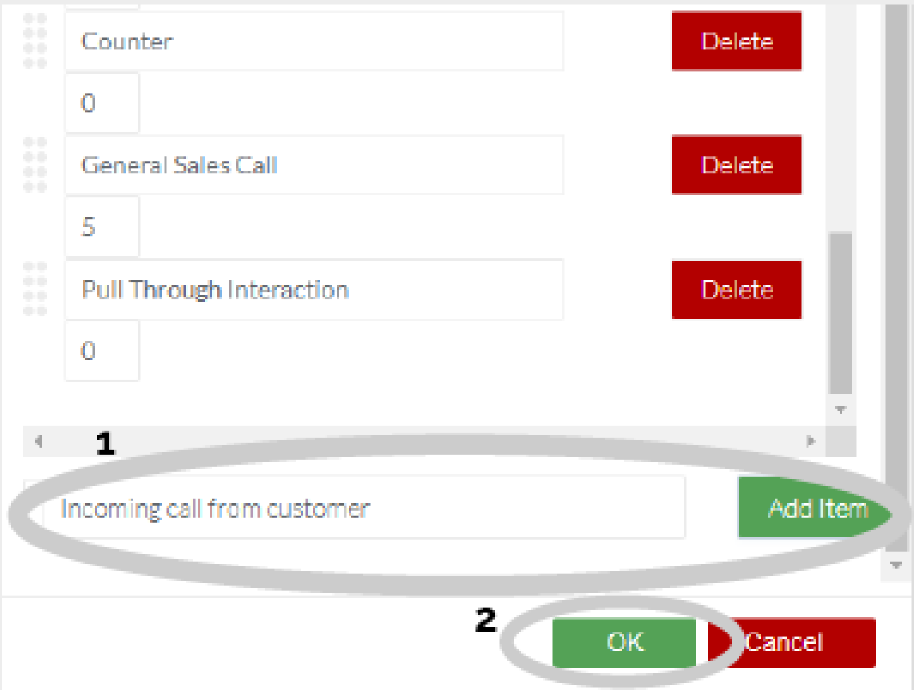
04 Click **Notes** from the options on the left hand side.

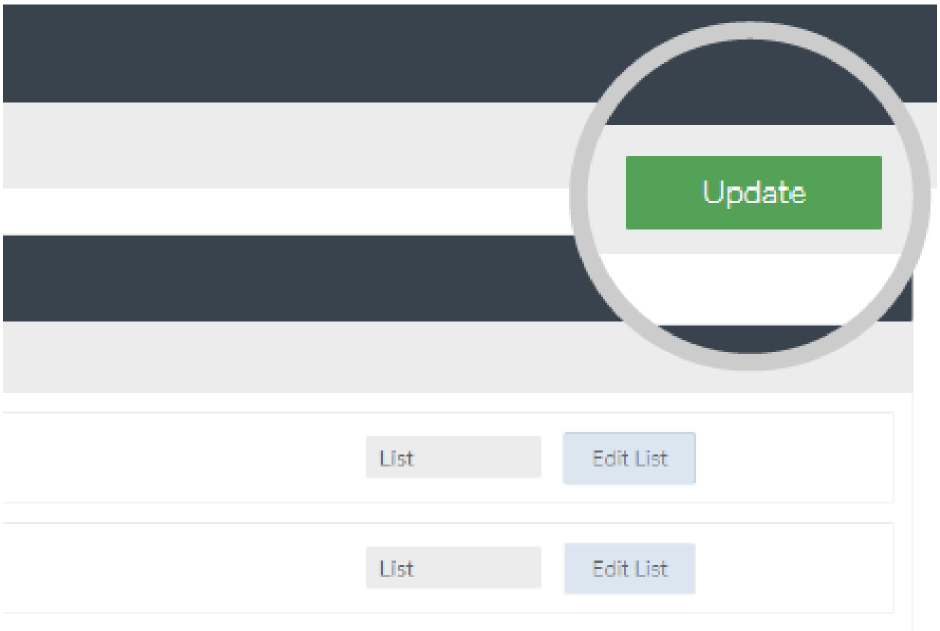
Then, click **Edit List** on the Call Type line in the middle of your screen.

05 A pop-up box will now open.

Check your call type option doesn't already exist, if not scroll to the bottom and type the new Call Type option.

Finally, click the green **Add Item** button then click **OK**.





06 Next, click the green **Update** button in the top right hand corner of your screen to save your new call type option and make it available for selection.