

# How To Log And Record Client Calls



Learn how to effectively track and manage your professional communications within the MyDay CRM. This guide walks you through the steps to create a record showing the caller details, set reminders, and mark your phone call as completed.

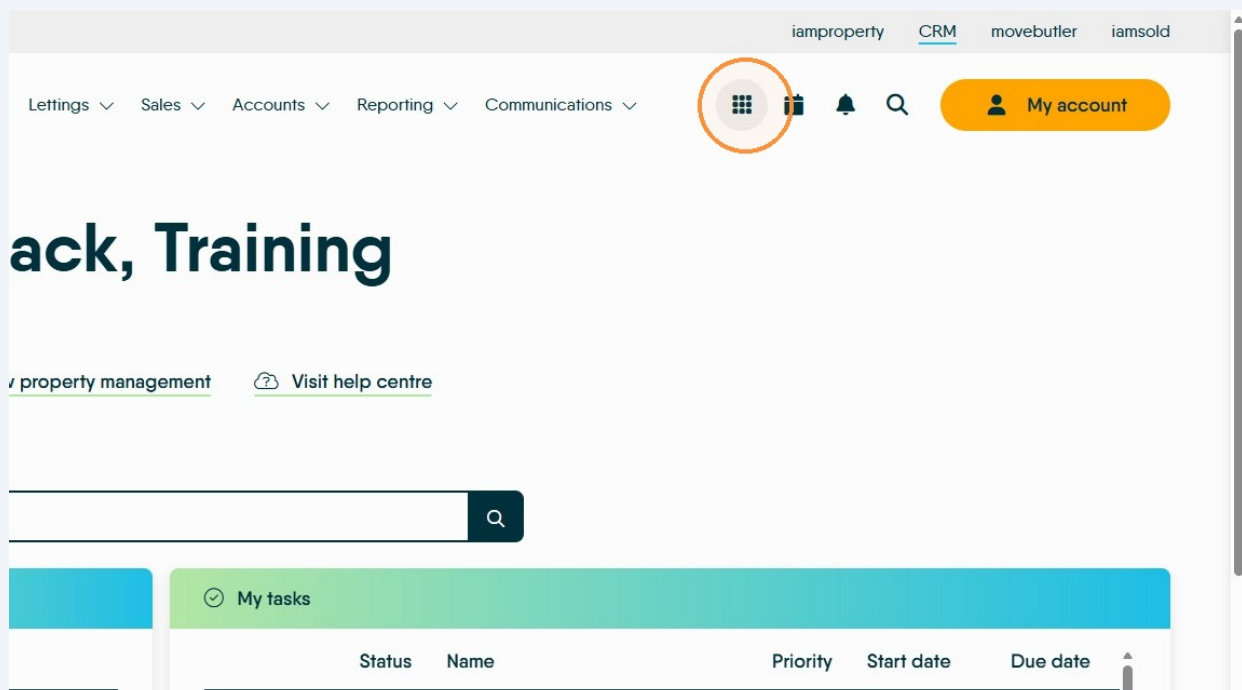
In CRM these are known as 'Log a Call' i.e. make a record someone has called in to the office and 'Plan a Call' make record to remind you to call a client. This feature is important tracking of what is said to Landlord/Vendor/tenant/applicant etc is important



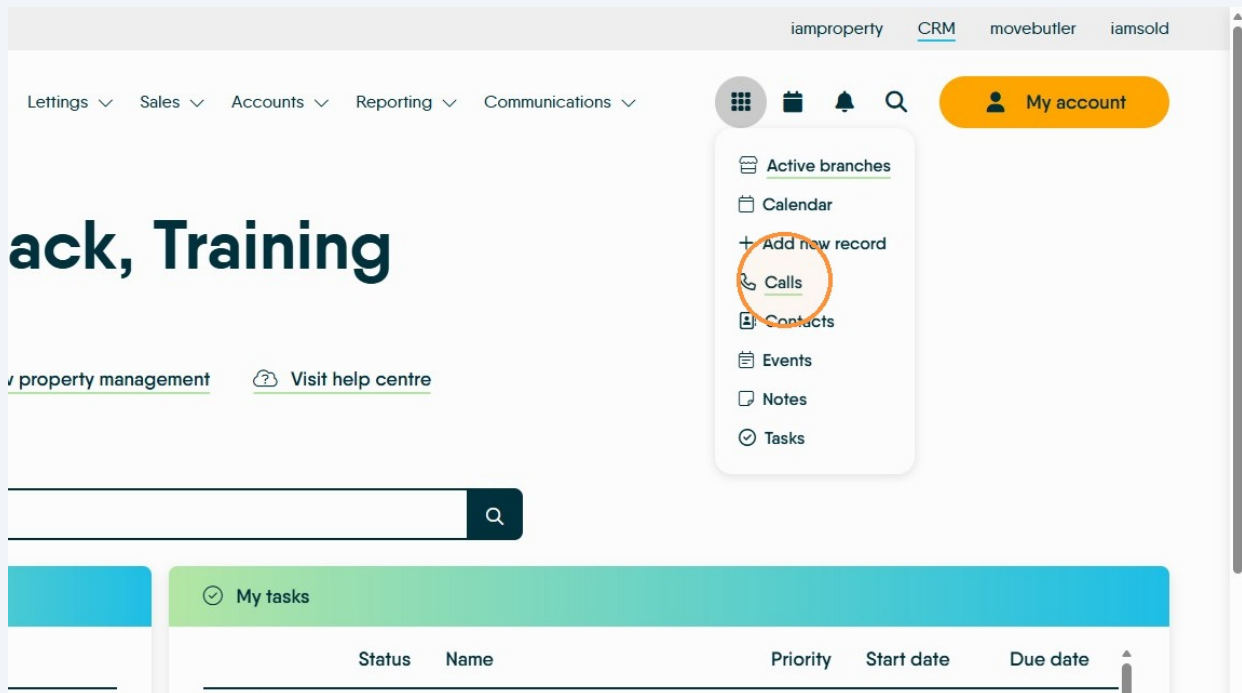
Tip! There are multiple places that calls can be planned or logged from, however the one constant is using the quick access ( you may hear it called 'Bento' or 'Rubics cube' menu) . So, this is the one we will look at here.

## Accessing Calls

- 1 From any screen in CRM. Click **"Quick Access"** menu

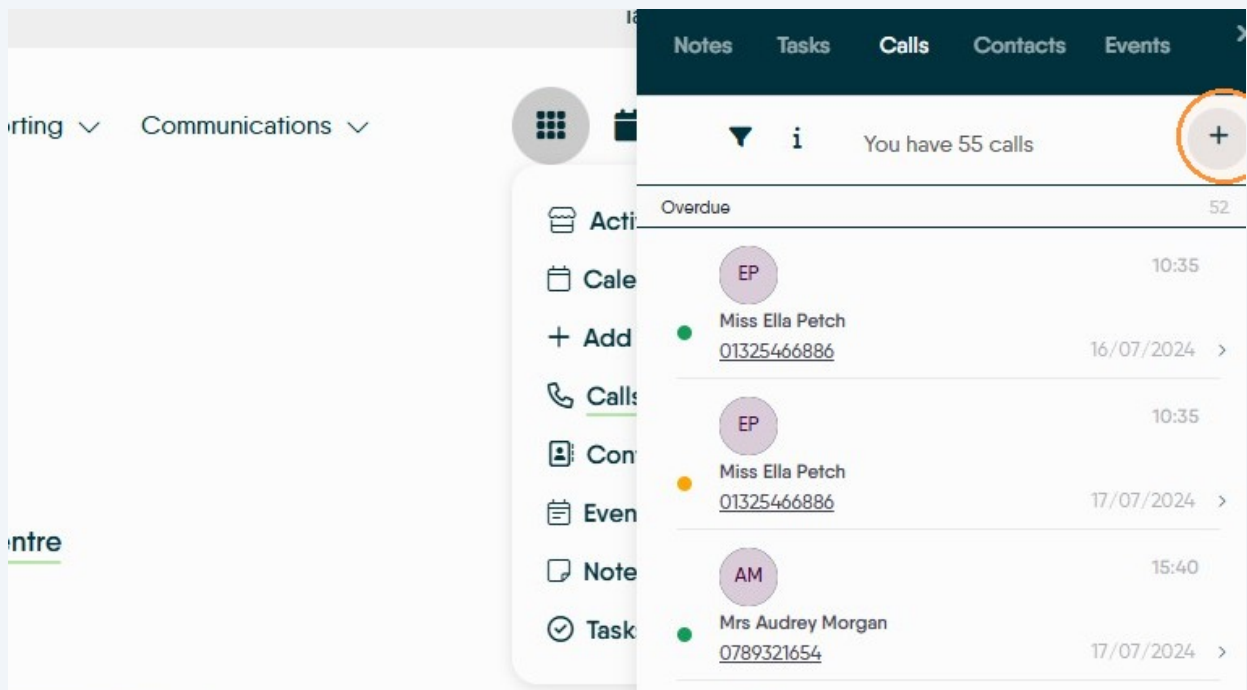


## 2 Click "Calls"



## Creating a Call Record

### 3 Click the "+" (add button) to create a new call record

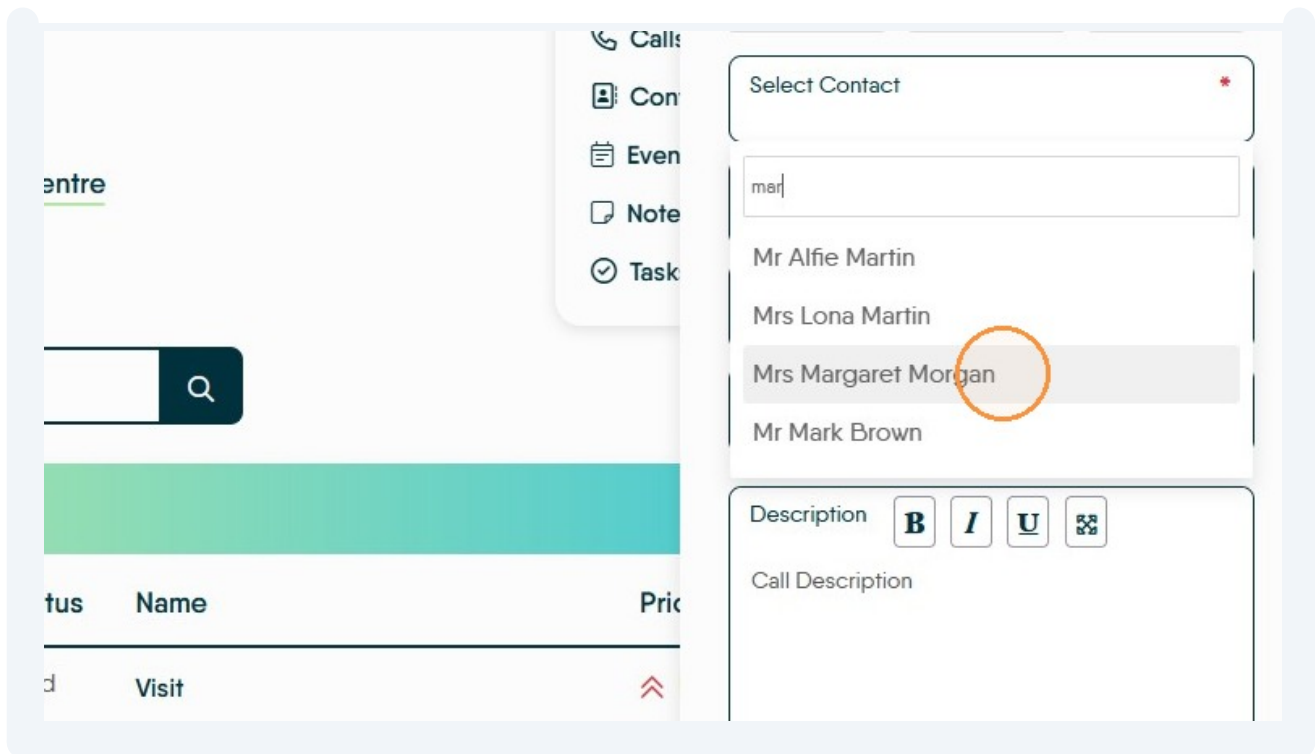


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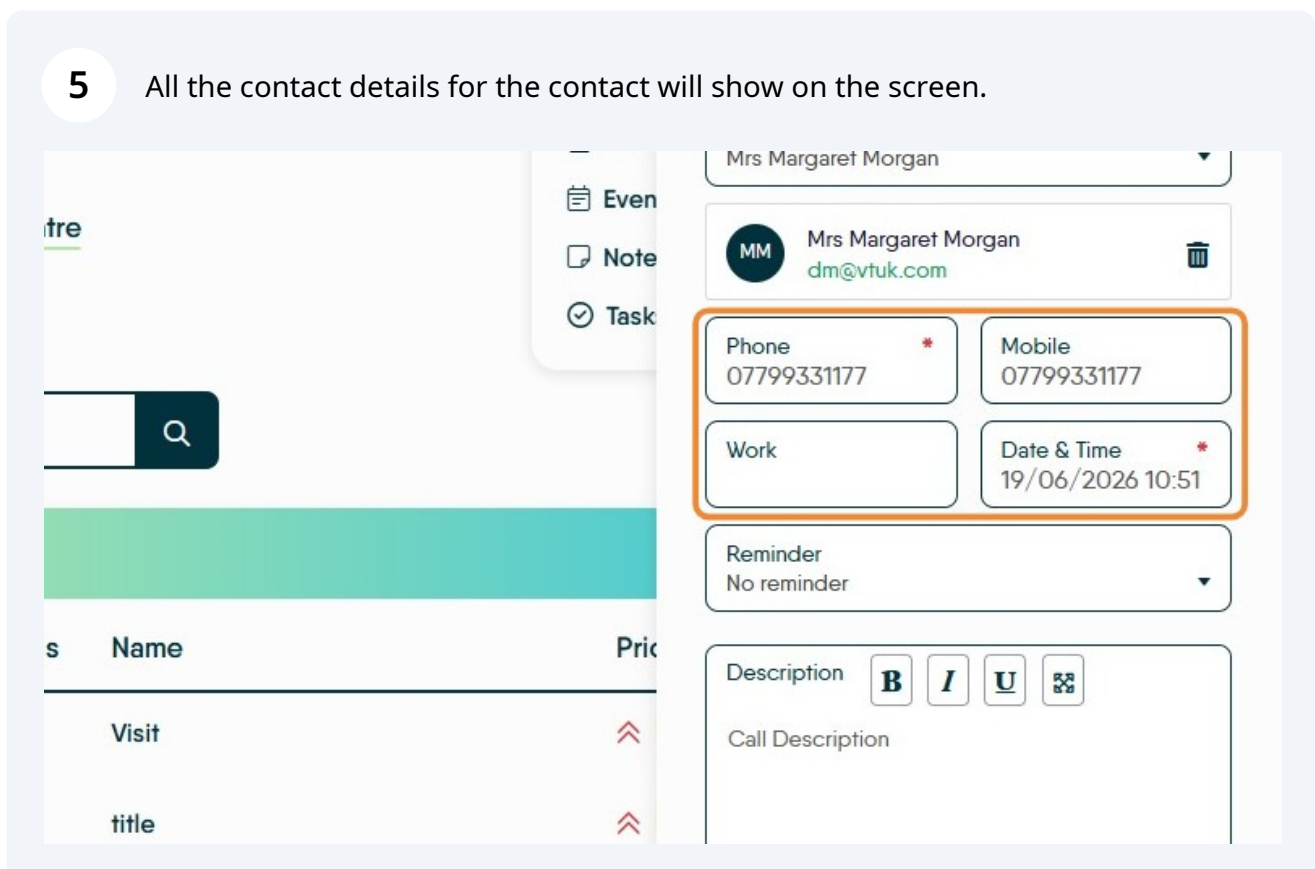
Set a **Priority** for the Call, if required select 1 of the options.  
In the "**Select Contact**" start typing the name of your contact, after 3 characters CRM will start to return results.

Select the contact you want and their details will show on the screen.

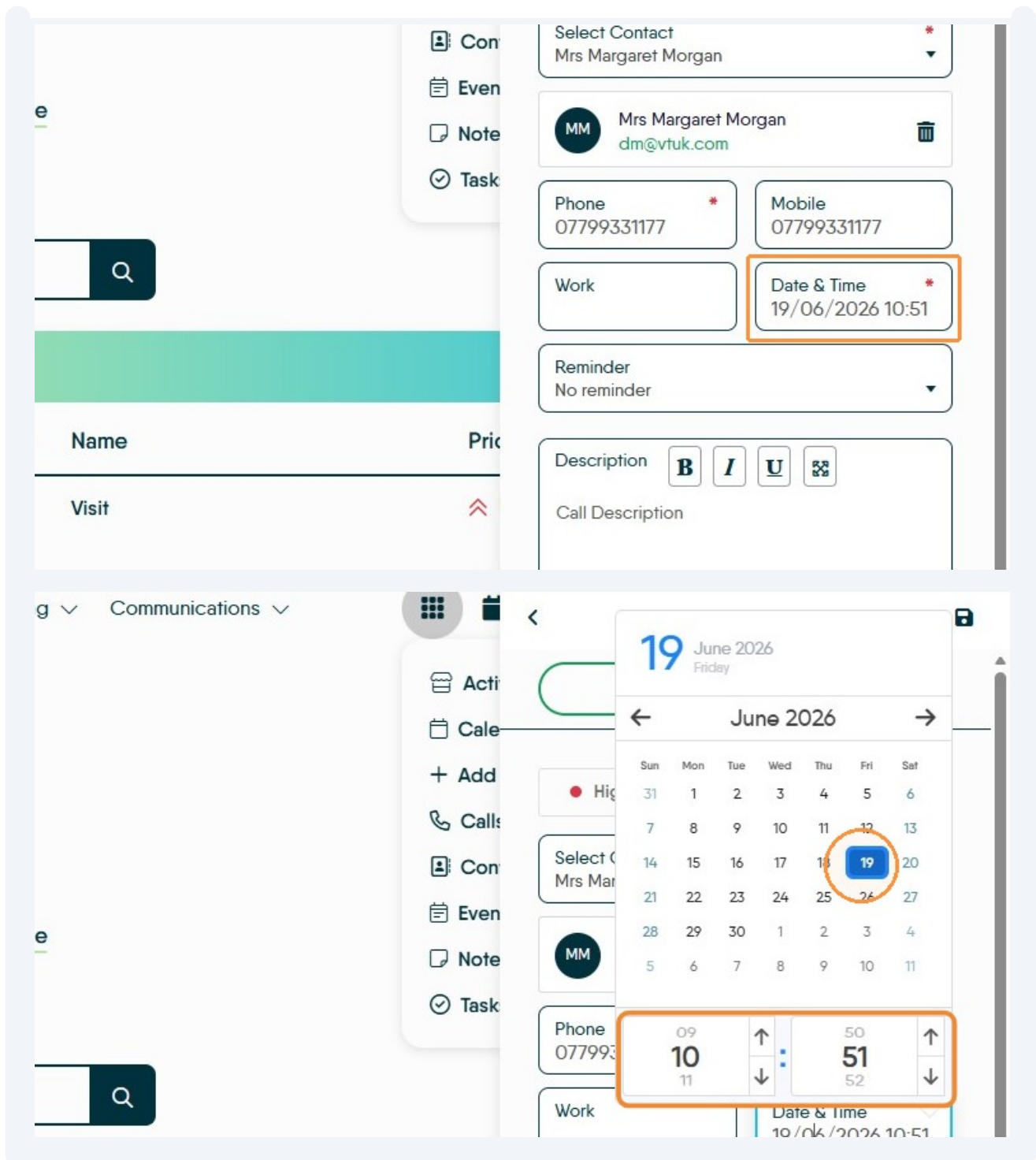
The image displays two screenshots of a CRM interface for adding a new call. The top screenshot shows the 'Add new call' form with a sidebar on the left containing navigation options: Activities, Calendar, Add, Calls, Contacts, Events, Notes, and Tasks. The form has tabs for Notes, Tasks, Calls, Contacts, and Events. A 'Mark Call as Completed' button is at the top. Below it, the 'Priority' section has three options: High (red dot), Medium (yellow dot), and Low (green dot). The 'Select Contact' dropdown is highlighted with an orange box. Below this are fields for Phone, Mobile, Work, and Date & Time (19/06/2026 10:51). The bottom screenshot shows the same form, but the 'Select Contact' dropdown is now open, showing a list of contacts. The 'Select Contact' dropdown is highlighted with an orange box. The 'Date & Time' field is now 19/06/2026 10:51. A 'Reminder' dropdown is at the bottom, set to 'No reminder'.



- 5 All the contact details for the contact will show on the screen.



- 6 If the call is being '**Added**' or planned for the future. Click the "**Data & Time**" field and set the date and time that the call is being made.



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**"Reminder"** if a reminder is required, set the time in the drop down menu. The options are from 5 minutes to 1 day before.





19/06/2026 10:51

Reminder  
10 minute(s) before

Description

**B** **I** **U**

call to say hello

Select Negotiators

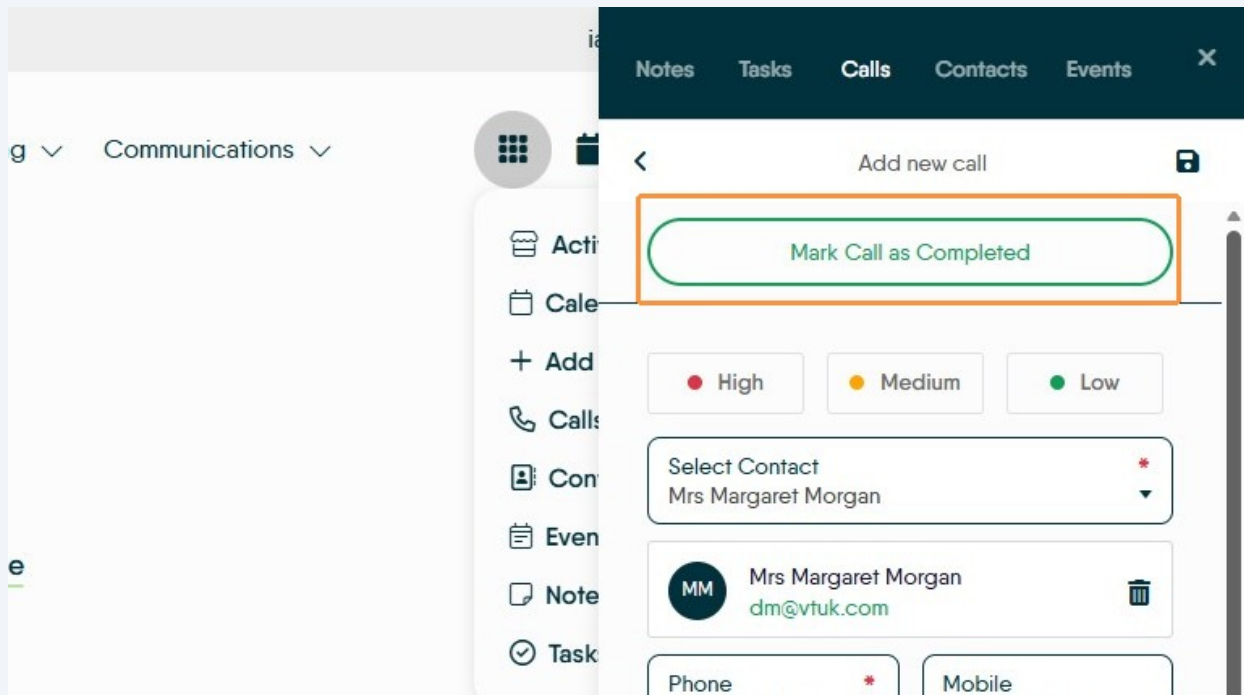
19/06/2026 10:51

Reminder  
10 minute(s) before

VTUK USER  
James Morgan  
David-George Morgan  
Training Dave  
Ian Johnson  
Brooke Morgan

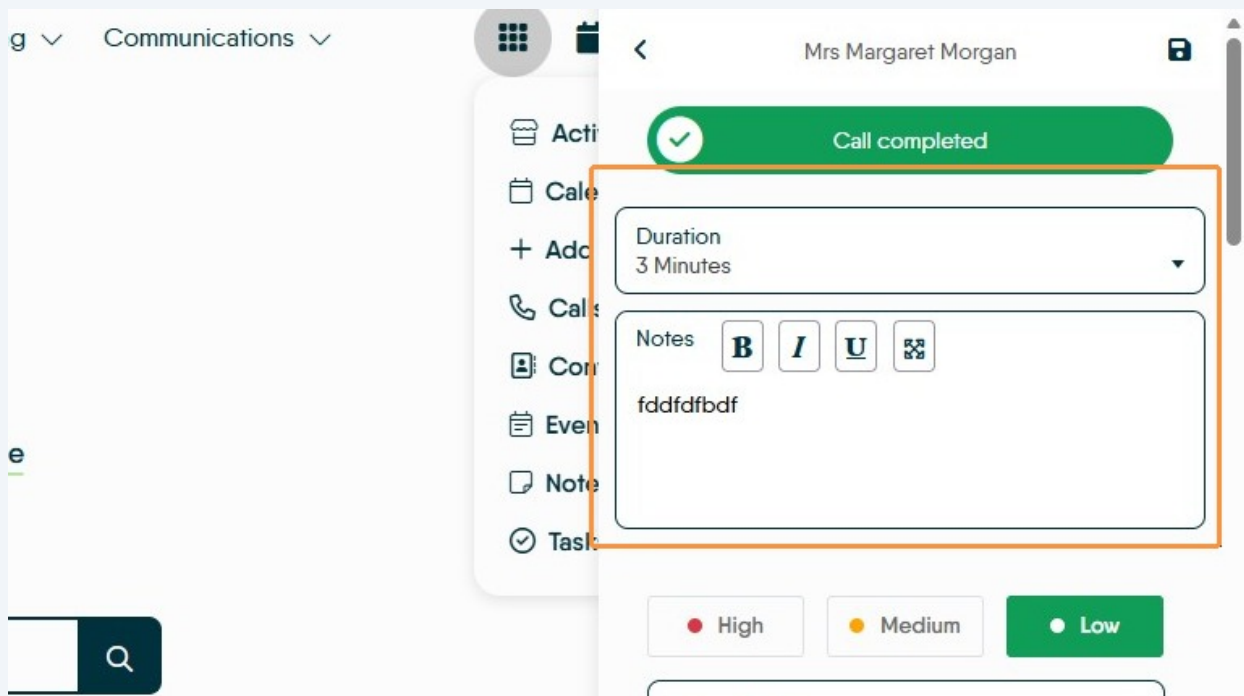
Select Negotiators

- 10 To complete a call click **'Mark Call as Completed'** to open the completion details



The screenshot shows a mobile application interface for adding a new call. A dark blue header bar contains tabs for 'Notes', 'Tasks', 'Calls', 'Contacts', and 'Events', with a close button (X) on the right. Below the header, a white card titled 'Add new call' is displayed. At the top of the card is a green button labeled 'Mark Call as Completed', which is highlighted with an orange rectangular box. Below this button are three radio buttons for priority: 'High' (red dot), 'Medium' (yellow dot), and 'Low' (green dot). A 'Select Contact' dropdown menu is set to 'Mrs Margaret Morgan'. Below the dropdown is a contact card for 'Mrs Margaret Morgan' with email 'dm@vtuk.com' and a trash icon. At the bottom are input fields for 'Phone' and 'Mobile'.

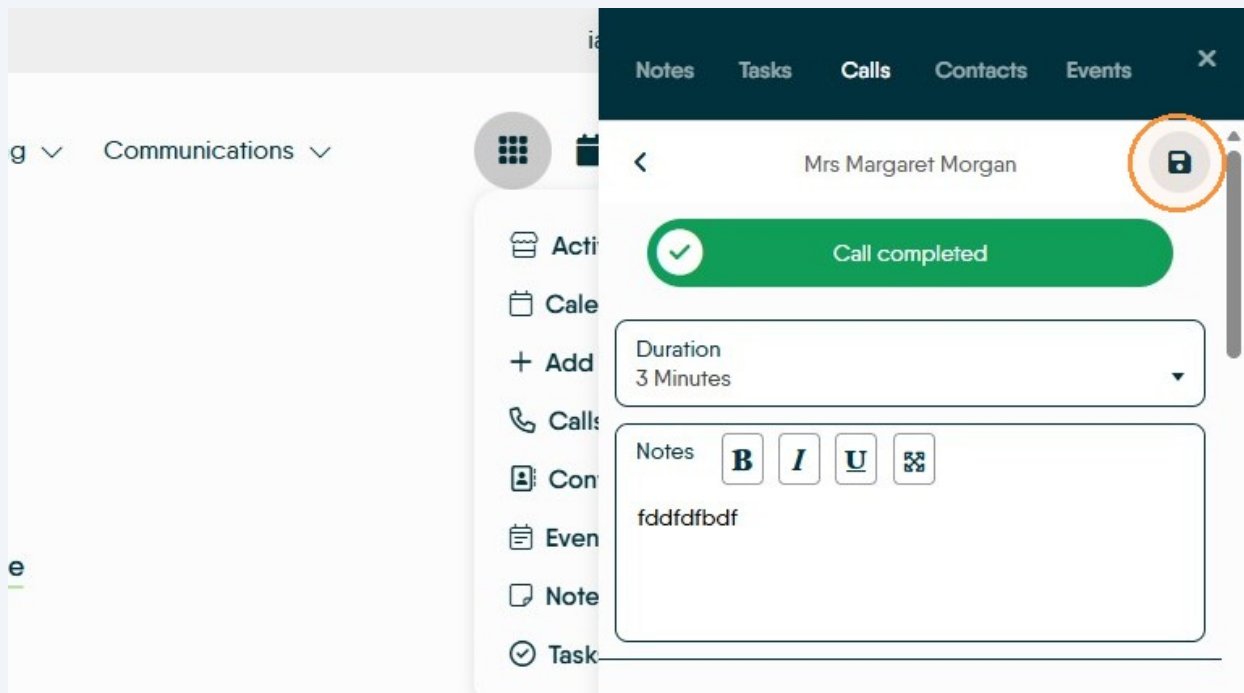
- 11 Add the duration of the call and some notes to describe the call outcome.



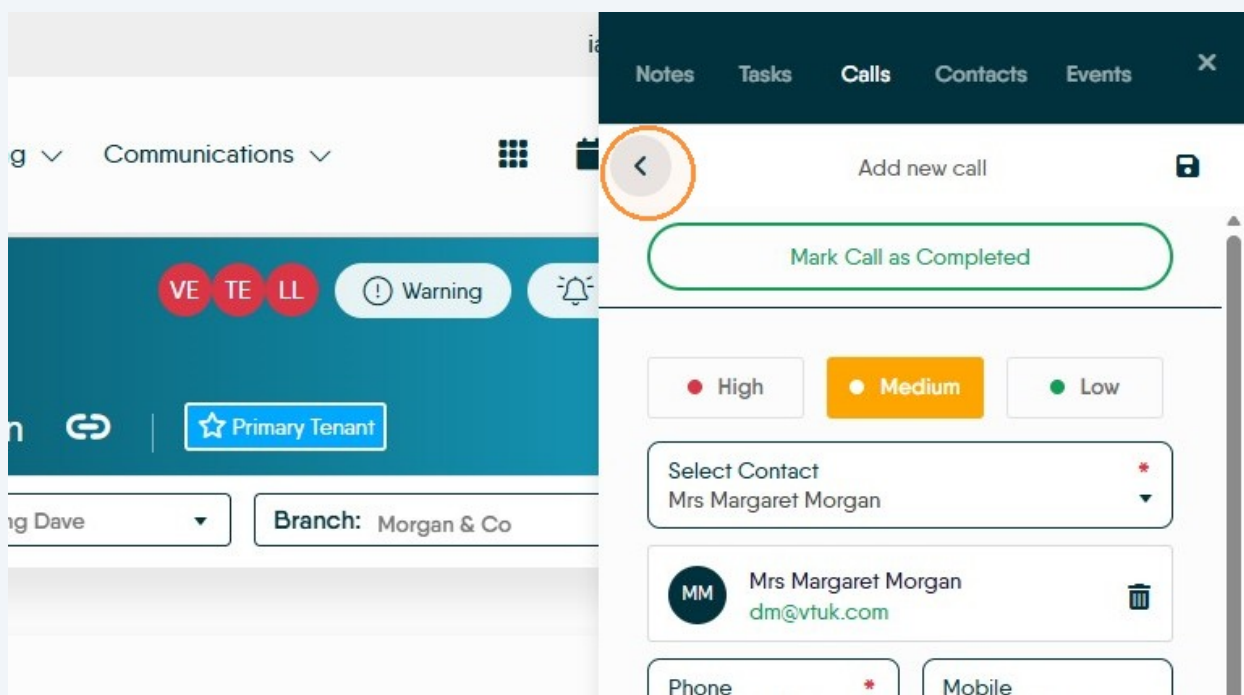
The screenshot shows the 'Call completed' screen for 'Mrs Margaret Morgan'. A green header bar at the top of the card contains a checkmark icon and the text 'Call completed'. Below this, a 'Duration' dropdown menu is set to '3 Minutes'. A 'Notes' text area contains the text 'fddfdfbdf' and is highlighted with an orange rectangular box. Above the notes are formatting buttons for bold (B), italic (I), underline (U), and a link icon. At the bottom are three radio buttons for priority: 'High' (red dot), 'Medium' (yellow dot), and 'Low' (green dot).

- 12 Click the **"Save"** icon to save the record and the 'X' to close the calls panel.

Once saved the call will be recorded in the Journal for the contact used.



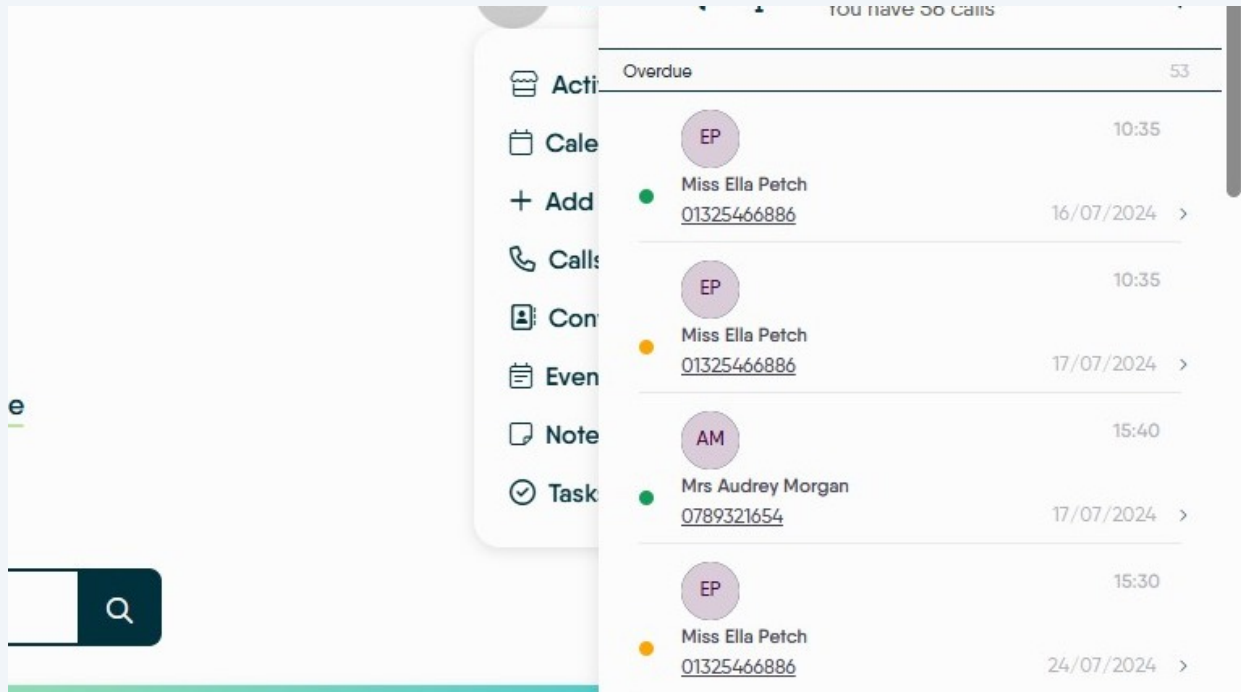
- 13 To move away from the call, without editing anything, click the back arrow.



## Managing Call History

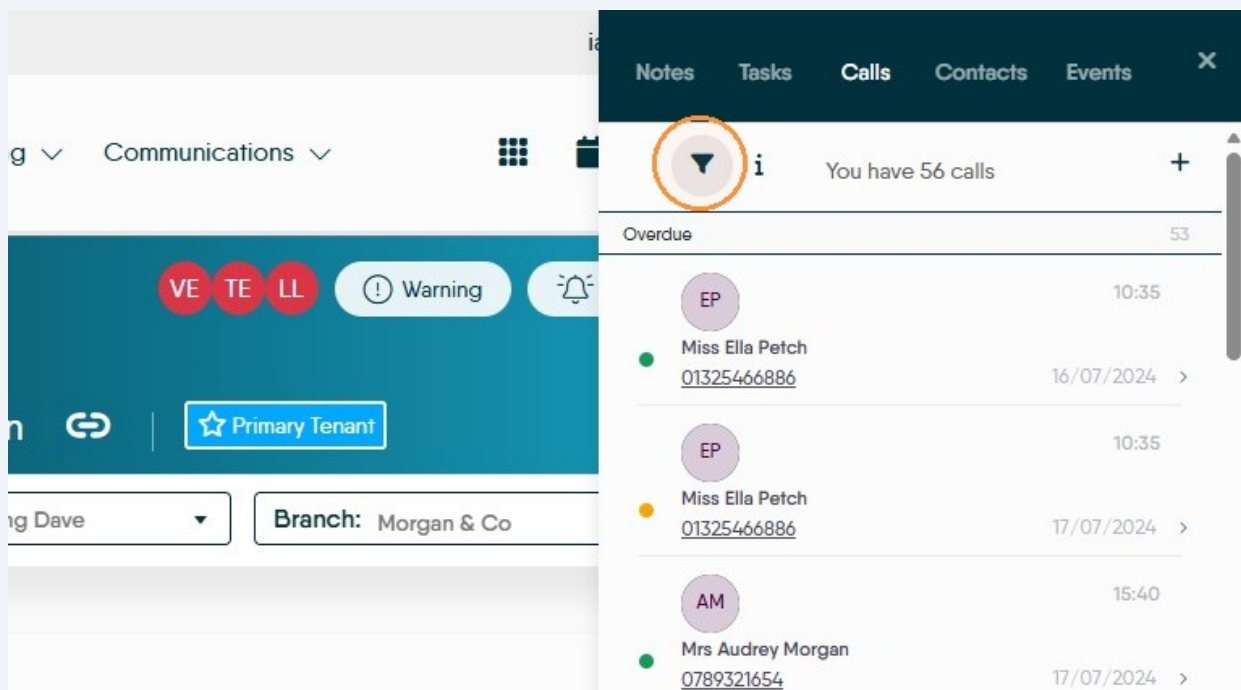
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The call list shows all currently due and overdue calls. The Most Overdue are shown first. Select a call from the list to view its details

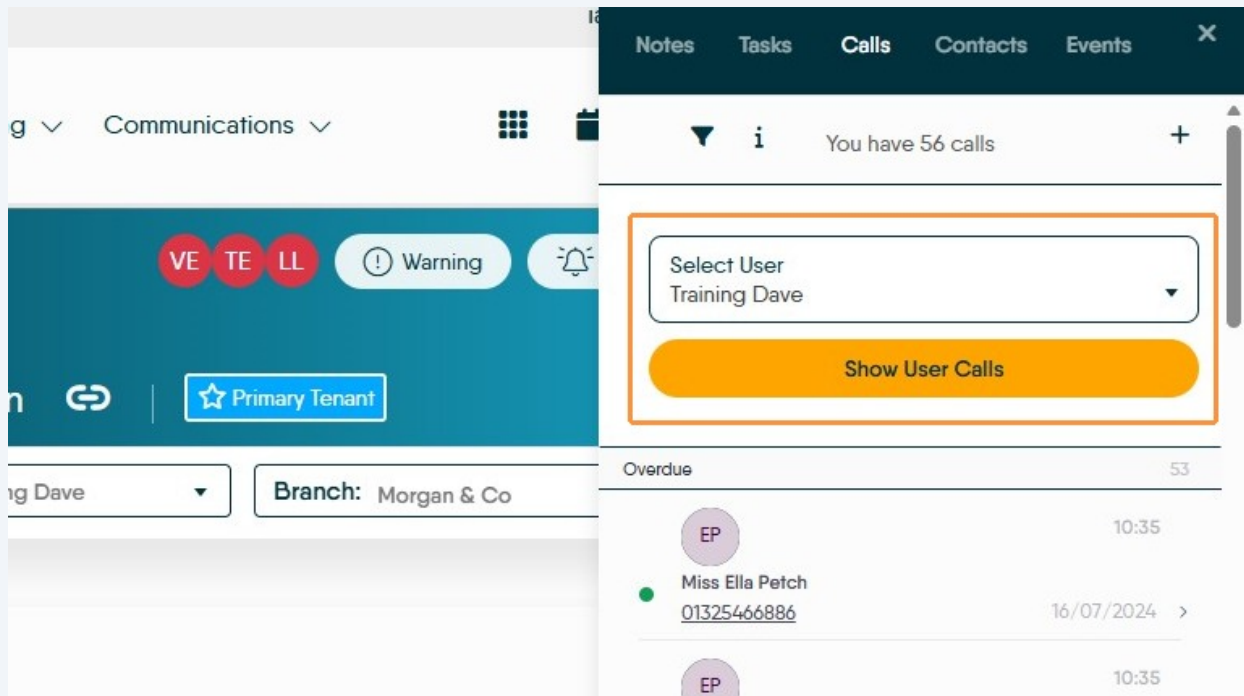


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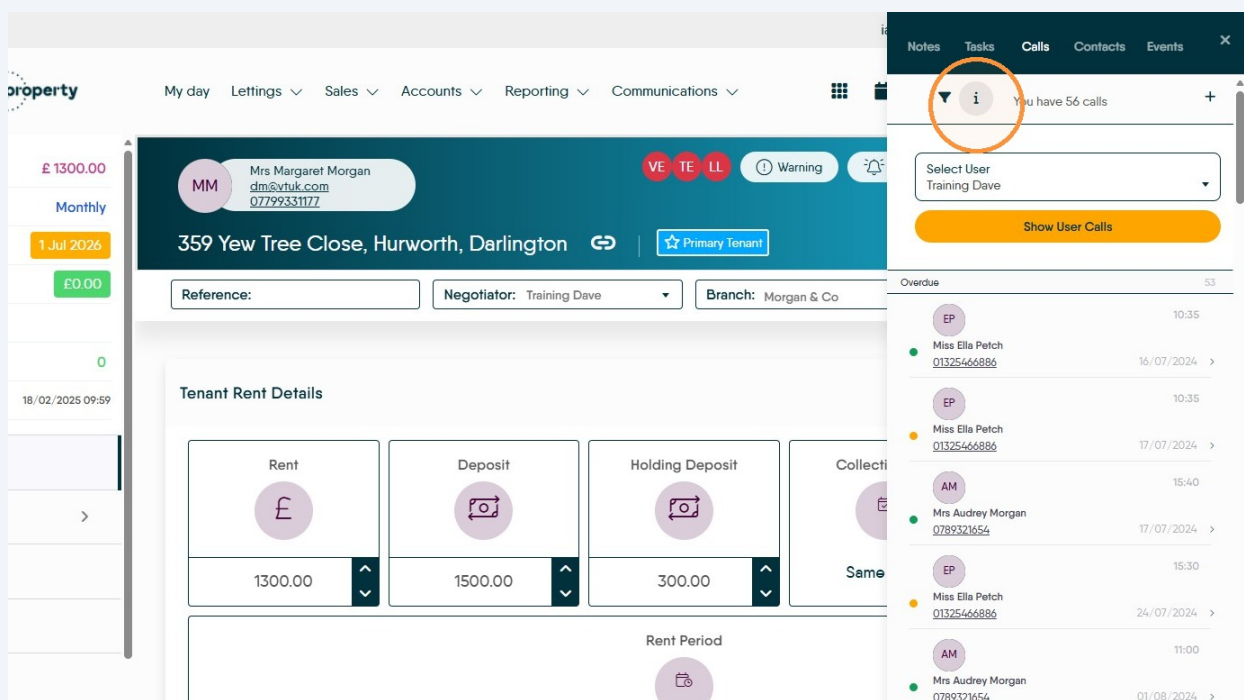
To **Filter** the call list and view specific Negotiators, click here.



- 16 Click **"Select User"** and select the required user from the drop down menu



- 17 Click the **"i"** to view how many calls are in each of the priorities.



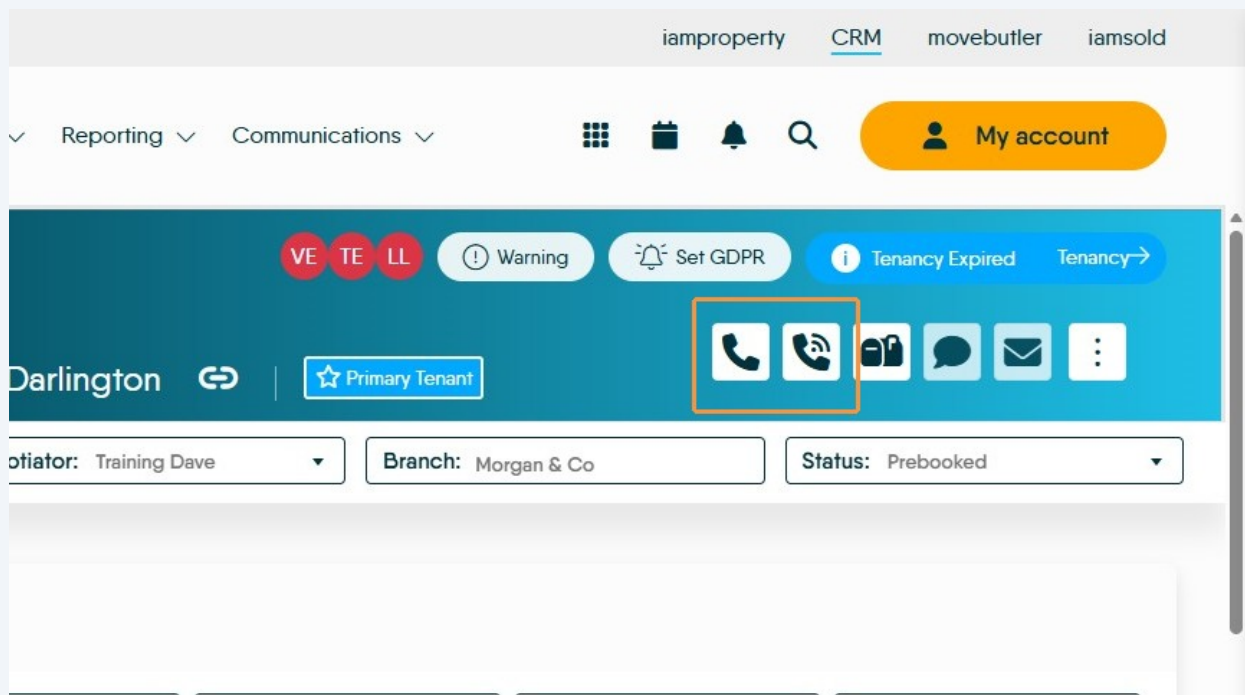
The screenshot displays a property management software interface. The main header shows navigation tabs: My day, Lettings, Sales, Accounts, Reporting, and Communications. The left sidebar includes a calendar view with a date selector set to 1 Jul 2026 and a balance of £1300.00. The main content area shows a tenant profile for Mrs Margaret Morgan, with contact details and a warning icon. Below the profile, there are fields for Reference, Negotiator (Training Dave), and Branch (Morgan & Co). The 'Tenant Rent Details' section shows a table with columns for Rent, Deposit, and Holding Deposit, with values of 1300.00, 1500.00, and 300.00 respectively. A call log overlay on the right side, titled 'Hi Training Dave You have 56 Calls', shows a progress bar for '3 Completed' out of 'Total 56' calls, categorized by priority: High (0), Medium (9), and Low (47). Below the progress bar, a list of overdue calls is shown, including calls to Miss Ella Petch and Mrs Audrey Morgan.

## Where else can calls be created?

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Calls can be created from anywhere that the record is a person e.g. Applicant, Vendor, Landlord etc. Also from the 3-dot menu in a lot of the Dashboards

19 The options are at the top of the screen



20 Click '**Add Call**' to plan a future call as shown above. The 'Log call' option will open the related Journal to create a call note.

