callPlease™
Messages Managed. Finally.

now with CISCO Spark

quickStart Guide

CallPlease is sophisticated software so it can take a few steps to really understand how it can make you more efficient and effective. Follow these 10 steps to get experience some of the most used features in CallPlease.

1. **Sign-up for your Free Trial**: The standard trial is 14-days of unlimited access. This Guide can help you determine if CallPlease is the right tool for you.
    a. Click here to sign-up: https://goo.gl/q8CtC4
    b. There are a few options for the type of account to set-up. If in doubt, start as a Boss or an Assistant, either way you will be the Organization Admin and can add people or change their status.
    c. Complete the forms and then you are in the web portal
2. **Download the App(s)**: You can have CallPlease on as many devices as you would like.
    a. Apple App Store: goo.gl/HAiEv5
    b. Google Play Store: goo.gl/CcomWJ
3. **Invite others to join**: During the trial, all users in your organization are free
    a. Under the ***Gear*** menu, select the ***People*** menu
    b. Add people as Execs, Assistants, or IT Admins. All you need is their names and emails addresses
4. **Create a Shared Call Log**: Shared logs come in two flavors and allow everyone in them to maintain visibility into the calls in the log and contribute to making them.
    a. Under the ***Gear*** menu, select the ***Shared Call Logs*** menu
    b. Click the ***Plus*** next to ***Add a new shared call log***
    c. Give it a name and accept all the defaults. You can change them later.
    d. Select the ***Members*** submenu and add coworkers to the shared log
    More about shared call logs here: https://goo.gl/AGmfs6
5. **Sync your Contacts**: There are lots of ways to enable CallPlease to auto-enter contact details, but to start, sync the contacts on your phone to CallPlease.
    a. Under the three dots menu, select ***Settings***.
    b. Select ***Sync Contacts***. All you contacts are now available on your device and the web portal.
6. **Make a few calls**: CallPlease is great for adding calls on the go or scheduling your calls for the future.
    a. Use the big plus button on your mobile device or the plus at the top of your calls display on the portal to make or schedule calls
    b. After the call ends, CallPlease will prompt you to capture what just happened and what should happen next for that call.
7. **Customize a Call Action**: Call Actions are your short cut for telling yourself or your teammates what should happen next. You can add actions that are about calling or other things you regularly do after a call, like send an email or invite to connect on social media. Everyone can create their own custom actions, or you can share them across teams.
    a. Under the pencil menu, select ***Call actions and then select a call log from the drop down.***
    b. Add a new action or modify an existing one.
8. **Assign a call**: CallPlease makes it easy to pass a call to someone else on your team. ***Assign Call*** is a call action when you are in a shared log.
9. **Schedule a recurring call**: Are their important customers or contacts that you want to remember to talk to regularly? Recurring calls appear on your call logs at regular intervals that you can customize. Create one under the pencil menu
10. **Integrate with Cisco Spark**: CallPlease call log details can be captured in a Spark Space for others who may or may not use CallPlease to be able to see and comment on.
    a. Connect your Spark Account to CallPlease. In your profile settings, select the ***Integration*** tab and sign into your Cisco Spark account. Now the ***Spark Space*** option will appear on the ***Call Settings*** menus.
    b. Connect a call to a Spark Space by editing the Call Details.

A full User Guide can be downloaded here: https://goo.gl/Gaz2ZU