

Client Call Log Summary Screen

Updated on October 2023

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Business Purpose:

The **Call Log Summary** page displays a tabular list of the program's call history.

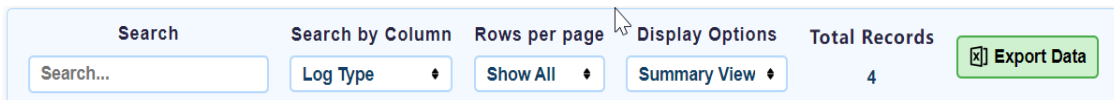
How to:

1. Clicking on the [Back to Client Search](#) button will take the user the Client Management – Search screen.
2. For each call log history record, there are the following columns are displayed: **Call Type**, **Call Number**, **Call Location**, **other Loc.**, **SQ Outcomes**, **Created By**, **Created Date** and **Note**.
3. All column headings are clickable and will execute a sort alternating between ascending and descending based upon the column heading. (For example, when you click on the **Created Date**, the history records are then sorted in ascending order, the record with the oldest signature date will appear first.)

| Log Type | Call Number | Call Location | Other Loc. | SQ Outcomes | Created By | Created Date | Note |
|--------------------|-------------|---------------------|------------|---------------------|--------------|-------------------|----------------------|
| Incoming Call | 3 | City of Toronto ... | | Follow-up / Ch... | Smith, Laura | 18 Oct 2023 10... | Note |
| Administrative ... | | | | | Smith, Laura | 18 Oct 2023 10... | Note |
| Outgoing Call | 2 | City of Toronto ... | | Internal Transf... | Smith, Laura | 18 Oct 2023 10... | Note |
| Incoming Call | 1 | City of Toronto ... | | Referral to a Sl... | Smith, Laura | 17 Oct 2023 16... | Note |

4. Clicking on the [Note](#) button will open a pop-up window.
5. The user can perform a **Search** by entering a text in the textbox field and filtering by following:
 - Search by Column
 - All Columns
 - Log Type
 - Call Location
 - Other Location

- Created date
 - Call Number
 - Created by
 - SQ Outcomes
- Row per page
 - Show All
 - 5 Rows
 - 7 Rows
 - 10 Rows
 - 20 Rows
 - 30 Rows
- Display Options
 - Summary View
 - Detailed View



6. Clicking the green [Export Data](#) button will download the Excel file. It will upload Excel table data based on the selected filtering.
7. To go to next of previous pages, the user can click on page numbers such as **1**, **2** or click on the arrows: **First**, **Prev**, **Next** and **Last**.

Important Notes:

1. The total number of records is shown in the **Total Records** in the filtering section.