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# Process Document:

**CRM – Careers**

Liverpool John Moores University

**CRM Activities: Adding a Phone Call**

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**Adding a Phone Call to a case in CRM**

Phone calls will be added retrospectively.

There are several ways of adding a Phone Call Activity to a case. This guide will show you the quick way to add a phone call.

1. In order to record a **Phone Call** you must first ensure you are in a **Case** and not a Contact record. Check you are in a case by looking for the ‘chevrons’ which will appear along the top of the screen, as shown below.



1. Once you are in the correct case,navigate to the middle of the screen, and click on ‘Activities’
2. Click on **Add Phone Call** and the following box will open



1. Populate the following;
You will need to enter a **description**
**Due** – add the date and time
**Call with** – this will default to the name of the person the case is about
**Direction** – outgoing or incoming
You can also tick the **Left voice mail** box if necessary.
2. Click **ok**
3. Return to the case by clicking on the **Case Name** on the top ribbon. When you return back to the case, the saved phone call will show under **‘Activities’** in the centre of the screen. You may have to refresh the screen to check it appears.