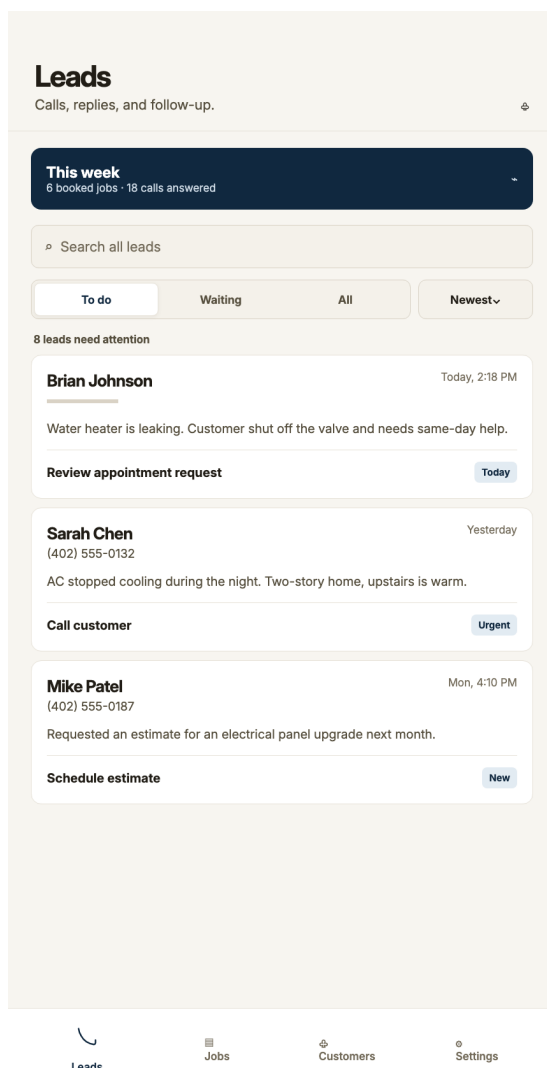


1 Review the request

A three step product walkthrough using sample data



Sample Leads screen. Names and requests are demonstration data.

See what needs attention

Open Leads to review incoming requests and follow-up work. Select a lead to see the details before choosing the next action.

A useful question for your demo: Where would our missed-call requests appear, and who on our team would review them?

2 Read the call details

The context for a useful next step

Lead details

Review appointment request
The customer selected a time online. Create the job or decline it.

[Decline request](#) [Create job](#)

Customer request

NAME Brian Johnson

PHONE

REQUEST Water heater is leaking and needs same-day service.

ADDRESS 2228 South 64th Plaza, Omaha, NE

Call summary
Customer noticed water near the heater, shut off the valve, and requested the earliest available appointment.

Notes

Gate code, parts to bring, or other details

[Save note](#)

Leads Jobs Customers Settings

Sample lead details. Available records depend on the call and provider.

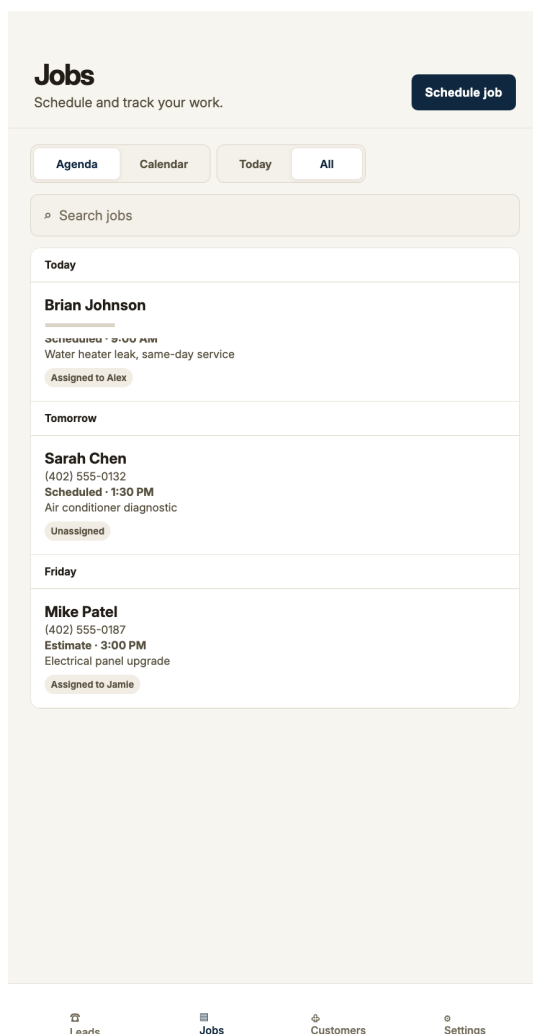
Understand what the caller needs

Review the request, caller information, notes and booking status. Recordings and transcripts appear when available. Decide whether to contact the caller, save a customer or schedule a job.

A useful question for your demo: Which details should the receptionist collect for our services?

3 Keep the schedule organized

Booking follows the availability saved in Handled Calls



Sample job agenda. Select Calendar to change the view or Schedule job to add work.

Choose the booking approach

With instant voice booking enabled, the receptionist can check saved availability and create a job after the caller accepts an eligible time. Otherwise, the request waits for your team. Website appointment requests require owner approval.

The app uses its own schedule; Google Calendar, Outlook and other external calendar sync are not currently supported.

See this with the team: handledcalls.com/book-a-demo/