

# **Call Logs**

## **(User Manual)**



**By**  
**CHRONODAT, LLC**

For further information, visit us at [www.chronodat.com](http://www.chronodat.com)

For support, contact us at [support@chronodat.com](mailto:support@chronodat.com)

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## **Introduction**

The introduction section of the document describes the scope and objective of Chronodat Call Logs (Office 365/On-Premise) Add-in.

## **Scope & Objective**

Chronodat Call Logs add-in is a tracking and analytics system that helps marketers get conversion reporting and campaign attribution from phone calls. Call Logs add-in Improves ROI by driving more revenue generating calls, increasing conversion rates, personalizing the customer journey, and running more useful campaigns. Sales representatives can quickly enter and update vital information such as call start and end times, the type and purpose of calls, and customer details. Assess customer call patterns from weekly and monthly reports. Gauge customer sensibilities by getting the numbers on inbound and outbound calls. This add-in was built in SharePoint, for use in SharePoint, designed with a high tech, device-friendly interface (mobile or desktop). Both the Support team AND end users can submit new Call Logs.

## **Add-in Overview**

The Chronodat Call Logs Add-in provides a seamless integration of Sales & Marketing call conversation and reporting features, using Office 365 SharePoint Online or On-Premise. The benefits of the add-in are immediate, due to the robust features and user-friendly interfaces it provides.

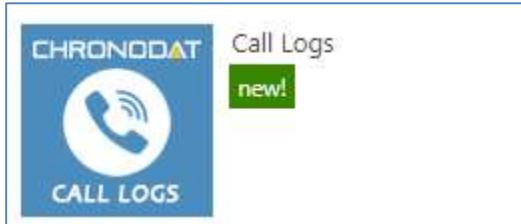
Using this add-in, your Support team has access to color-coded, built-in dashboards for quick metrics & reporting. Dashboards in the form of pie charts, bar charts & grids let everyone see all Call Logs by Status, Priority to quickly assess the current and overdue Support Call Logs.

## Features:

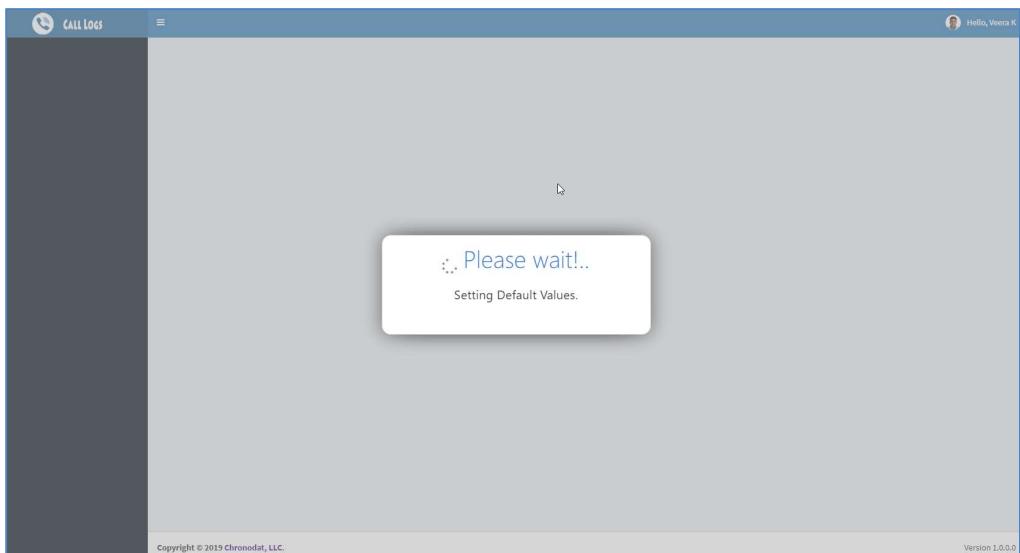
- Helps you to register inbound calls (received from leads and customers) and outbound calls (dialed to leads and customers) with call details.
- Add and maintains call records for every call.
- Our built-in dashboards are color-coded for quick reporting and metrics. They are built to require absolutely no configuration. There is a main Dashboard for all existing Call Logs:
  - ✓ The 10 most recent updates to call logs;
  - ✓ Pie Chart indicating Inbound and Outbound call logs;
  - ✓ Bar Chart indicating weekly call logs;
  - ✓ The 5 most recent updates to call logs
- Fully customizable add-in logo for branding purposes.
- A quick, powerful search engine capable of easily finding change requests
- Export options available into formats such as PDF, CSV, and Excel amongst others.
- A repository for storage, upload, sharing and use of Project Team documents

## Configuring Chronodat Call Logs Add-in

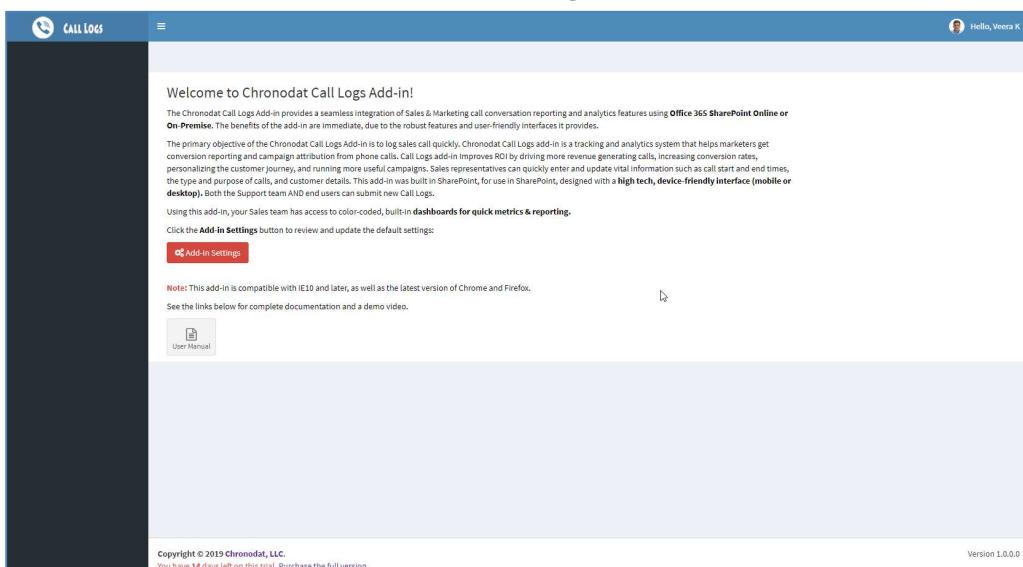
1. Click Call Logs.



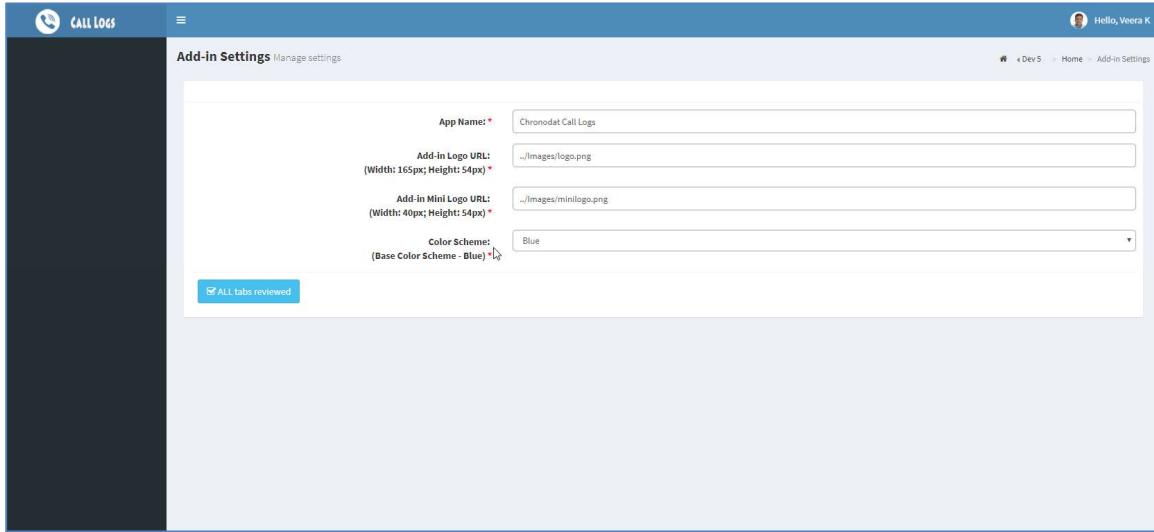
2. On first run, add-in configures default settings. Please wait for about 30 – 60 seconds to complete the installation/configuration.



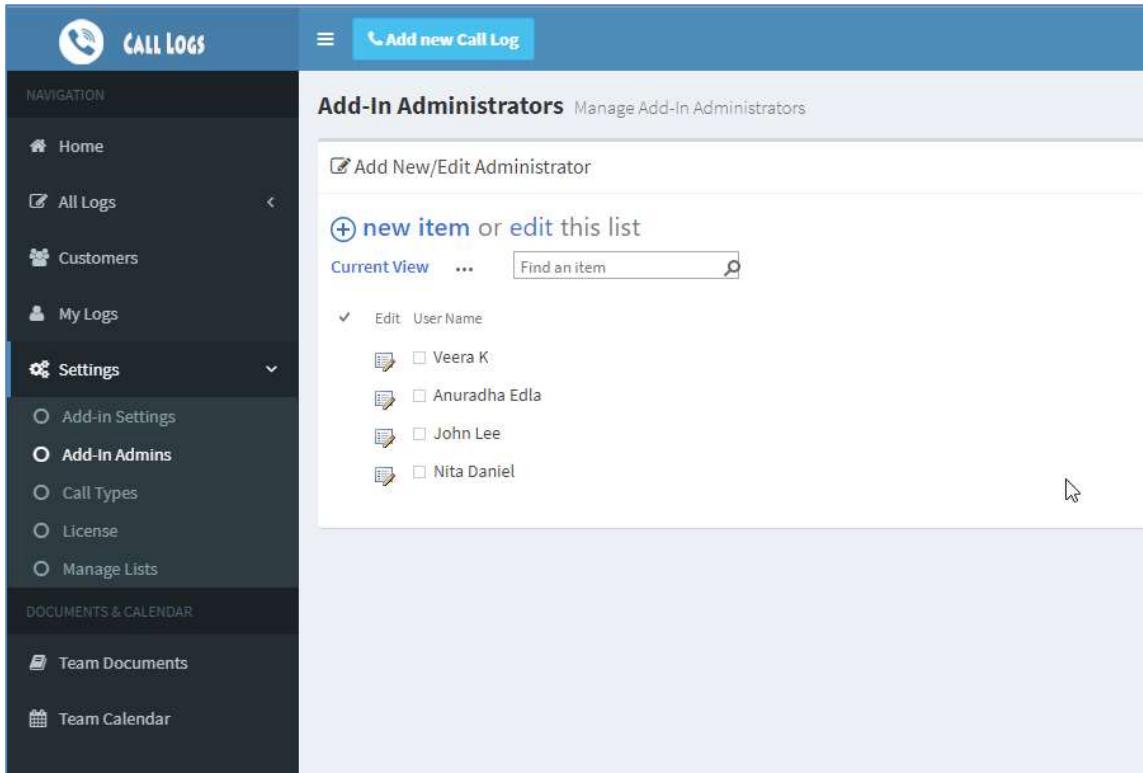
3. Click the red button to review the Add-in Settings.



4. Update Add-In settings. Enter the name you want for your Chronodat Call Logs, set add-in log and theme.



5. Person who installs the add-in becomes add-in administrator. Add-in administrator can view "Settings" menu in add-in.



6. Add/Update "Call Types" by clicking Call Types menu in Settings.

## Add-In Home/Dashboard

After the initial configuration, add-in home page displayed as mentioned in the below snapshot:

Chronodat Call Logs Global Dashboard

All Call Log Statistics

Inbound 0

Outbound 0

Recently Updated Call Logs

View All Call Logs

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Click button “Add new Call Log” button to register new calls:

New Call Log

Call Logs 0 Outbound

Modified

Inbound 0

Outbound 0

Recently Updated Call Logs

View All Call Logs

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The screenshot shows the Chronodat Call Logs Global Dashboard. On the left, there's a navigation sidebar with links like Home, All Logs, Customers, My Logs, Settings, Team Documents, and Team Calendar. The main area has a header with 'Add new Call Log' and 'Hello, Anuradha Edla'. It features several summary boxes: 'All Call Logs' (142 Inbound, 40 Outbound), 'Today's Call Logs' (2 Inbound, 0 Outbound), 'Weekly Call Logs' (83 Inbound, 26 Outbound), and 'Monthly Call Logs' (102 Inbound, 27 Outbound). Below these are sections for 'Latest CallLogs' (listing two entries: 'Closing #4567' and 'Model House #3456') and 'Weekly Calls' (a bar chart showing call volume by date). To the right is a 'All Call Log Statistics' section with a donut chart and detailed statistics for Inbound (142) and Outbound (40) calls. A 'Recently Updated Call Logs' section lists five recent entries.

Category	Description	Type	Customer	Call Duration	Modified	
View/Edit/Delete	180	Closing #4567	Inbound	ABC Inc	01:00:00	36 minutes ago
View/Edit/Delete	181	Model House #3456	Inbound	ABC Inc	01:00:00	37 minutes ago

Call Log	Description	Type	Customer	Call Duration	Modified
179	Complete rough plumbing, electrical and HVAC	Outbound	Customer: ABC Inc	Modified By: Anurad...	
178	Follow-up on #456	Inbound	Customer: ABC Inc	Modified By: Anurad...	
180	Closing #456	Inbound	Customer: ABC Inc	Modified By: Anurad...	
181	Model House #3456	Inbound	Customer: ABC Inc	Modified By: Anurad...	
182	New Unit #234 Follow-up	Inbound	Customer: ABC Inc	Modified By: Anurad...	

My logs views display calls logged by the current user.

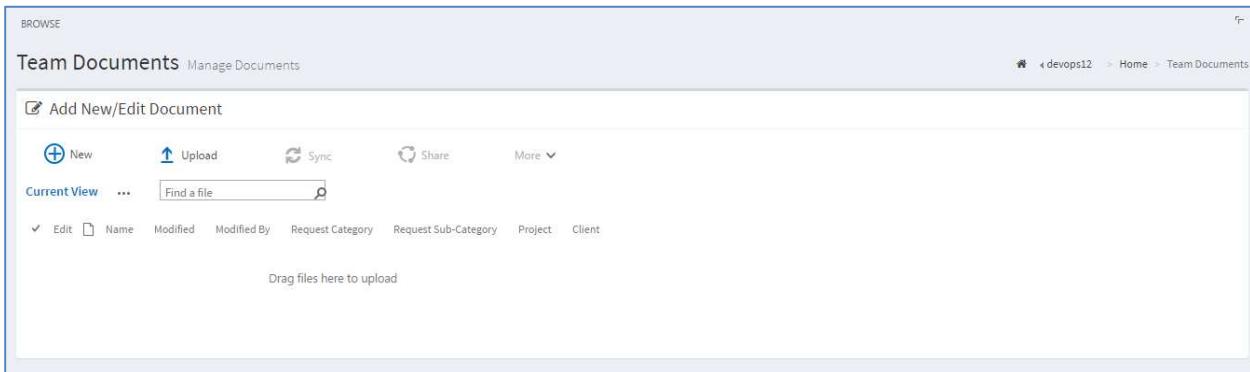
The screenshot shows the 'My Call Logs' view. The left sidebar includes 'Home', 'All Logs', 'Customers', 'My Logs' (which is selected), 'Settings', 'Team Documents', and 'Team Calendar'. The main content area has a header with 'Manage Call Logs' and 'Hello, Anuradha Edla'. It displays a table of call logs with columns: View/Edit/Delete, Call ID, Title, Customer, Call Direction, Call Type, Call Owner, Call Start Time, Call End Time, Call Duration, and Modified. Two entries are listed: 'Closing #4567' (Inbound, Completed Call, Anuradha Edla, 01:00:00, 15 minutes ago) and 'Model House #3456' (Inbound, Completed Call, Anuradha Edla, 01:00:00, 16 minutes ago). At the bottom, it says 'Showing 1 to 2 of 2 entries' and has 'Previous' and 'Next' buttons. The footer includes copyright information and a version number.

View/Edit/Delete	Call ID	Title	Customer	Call Direction	Call Type	Call Owner	Call Start Time	Call End Time	Call Duration	Modified
180	Closing #4567	ABC Inc	Inbound	Completed Call	Anuradha Edla	August 25 2019 7:16 PM	August 25 2019 7:16 PM	01:00:00	15 minutes ago	
181	Model House #3456	ABC Inc	Inbound	Completed Call	Anuradha Edla	August 25 2019 6:16 PM	August 25 2019 6:16 PM	01:00:00	16 minutes ago	

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## Document Repository

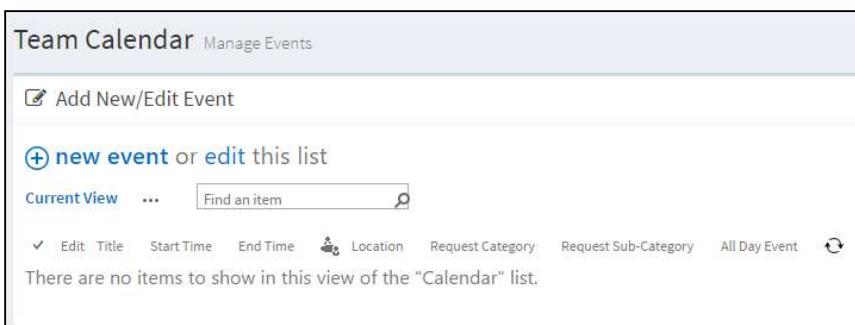
- You can upload & store team documents.
- Click **Team Documents**.



- To create a new Word document from where you are right now, click **New**.
- You can upload a document right to this location by using the **Upload** button. Click Choose File, navigation to the file location, click **Open**, and then **OK**. Fill out the fields in the form (required fields are indicated with an asterisk), then click Check In. Now you see your file in the list.

## Using the Team Calendar

- You can maintain a Team calendar in Chronodat. Click **Team Calendar**.



- To add an event to the Calendar, click **New event**.

## Security

The Call Logs add-in contains configurable access levels. Security is maintained by the Site collection Admin, who can grant access by:

- Creating a **new Security group**
- Using any **existing SharePoint group** in the Parent site
- Creating access for a View-Only user
- Same using OOTB SharePoint site permissions

## **Installation & Configuration**

The Chronodat Call Logs add-in is very easy to install, and we will help you to configure the add-in if needed. With only a few configuration settings, you are up and running!

## **Compatibility**

The add-in is compatible with IE10 and later, as well as the latest version of Firefox

## **Support**

Enjoy the free trial for 15 days. For personalization/customization (branding, information displayed, users displayed in the result etc.) please contact **[support@chronodat.com](mailto:support@chronodat.com)**

- We provide free configuration level support along with this purchase.
- No personal information is collected or shared.