Call Logs

(User Manual)





For further information, visit us at <u>www.chronodat.com</u> For support, contact us at <u>support@chronodat.com</u> Version 1.0.0.0 | Created: 08-29-2019

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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.

🔇 CALL LOGS	≖	👔 Hello, Veera K
Cattloos	₽ ∴ Please wait! Setting Default Values.	Fieldo, Vecra K
	Copyright © 2015 chronodat, LLC.	Version 1.0.0.0

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

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	Webcame to Chronodat Call Logs Add-in! Bit chronodat Call Logs Add-in provides a samiles integration of Sales & Marketing call convenzation reporting and analytics features using Office 365 Shareheint Online or Convension reporting and analytics of the Add-in are immediate, due to the robust features and user-fiendly interfaces it provides. The provide office of the Chronodat Call Logs Add-in its to gale acide all calls(). Chronodat Call Logs Add-in its to gale acide all calls(). Chronodat Call Logs Add-in its to gale acide all calls(). Chronodat Call Logs Add-in its to gale acide all calls(). Chronodat Call Logs Add-in its to gale acide all calls(). Chronodat Call Logs Add-in its to provides and particity calls internation takes and gale interprove Porting and carporation reporting and carporate relations. This add-in margins. Sale in reportentities care analytic report and upde report and report report and report report and report report report and report repor	
	Copyright © 2019 Chronodat, LLC. You have 14 daws left on this trial. Purchase the full version.	Version 1.0.0.0

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

🔇 CALL LOGS	,≡,:	👔 Helio, Veera K
	Add-in Settings Manage settings	🕷 《Dev 5. > Home > Add+in Settings
	App Name: *	Chronodat Call Logs
	Add-in Logo URL: (Width: 165px; Height: 54px) *	/images/logs.png
	Add-in Mini Logo URL: (Width: 40px; Height: 54px) *	"/Images/minilogo.png
	Color Scheme: (Base Color Scheme - Blue) *	Blue
	C ALL tabs reviewed	

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

CALL LOGS	E Add new Call Log
	Add-In Administrators Manage Add-In Administrators
 ♣ Home ☑ All Logs 	Add New/Edit Administrator
 Multipp Customers My Logs 	rew item or edit this list Current View Find an item Current View
Settings Add-in Settings Add-In Admins Call Types	 Veera K Anuradha Edla John Lee Nita Daniel
O License O Manage Lists DOCUMENTS & CALENDAR	
Team Documents Team Calendar	

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:

🔇 CALL LOGS	■ CAdd new Call Log				🌒 Hello, Veera K
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Ør All Logs ←					
嶜 Customers	All Call Logs	🔟 Today's Call Logs	Left Weekly Call Logs	네 Monthly Call Logs	G All Call Log Statistics - *
📥 My Logs	0 0	0 0	0 0	0 0	
0 \$ Settings <	Inbound Outbound	Inbound Outbound	Inbound Outbound	Inbound Outbound	
DOCUMENTS & CALENDAR					
Team Documents	E Latest CallLogs				
🋗 Team Calendar	My Call Logs (0) All Call Logs (0)				Inbound 0
	View/Edit/Delete Call IE	Purpose of Call Call Dire	ection Customer Call D	Duration Modified	Outbound 0
	There are no items to show in this view	of the CallLogs list.			
				6	
	Weekly Calls			× ×	View All Call Logs
	0 08/23/2019 08/24/2	019 08/25/2019 08/28/2	819 08/27/2019 08/28	8/2019 08/29/2019	
	Copyright © 2019 Chronodat, LLC.				Version 1.0.0.0

Click button "Add new Call Log" button to register new calls:

🔇 CALL LOGS				👔 Hello, Veera K
NAVIGATION	Chronodat Call Logs Global Dashboar			🖷 🖌 Dev 5 👒 Home
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DOCUMENTS & CALENDAR		Call Type * Completed Call *		
🛢 Team Documents	Latest CallLogs	Call Direction *		
🏙 Team Calendar	My Call Logs (0) All Call Logs (0)	© Outbound Customer * Customer 1 ▼		Inbound 0
	View/Edit/Delete Call ID	CallSummary	Modified	Outbound
	There are no items to show in this view of the			
				Recently Updated Call Logs * *
	Weekly Calls	Call Start Time * 8/29/2019 @ 4 PM * 00 *	- x	View All Call Logs
	1	Call End Time * 8/29/2019 III 4 PM * 00 * Call Owner * Enter a partie of empili address		
		Call Owner * Enter a name or email address Follow-up Required?		
		Save: Cancel		
	0 08/23/2019 08/24/2019		08/29/2019	
	00202010			
	Copyright © 2019 Chronodat, LLC.			Version 1.0.0.0

CALL LOGS								Ģ	Hello, Anuradha Ei
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	View/Edit/Delete	Call ID	Purpose of Call	Call Directio	n Customer	Call Duration	Modified	Outbound	4
	-	180	Closing #4567	Inbound	ABC Inc	01:00:00	@ 36 minutes ago	Gatoona	
	⊙ ₿X	200		mooning	Aberne	01.00.00	-	Recently Updated Call Log	55 - ×
	⊙ ≥ ×	181	Model House #3456	Inbound	ABC Inc	01:00:00	② 37 minutes ago	179 - Complete rough	pluming, electric
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My logs views display calls logged by the current user.

🔇 CALL LOGS										(Hello, Anuradha Edla	
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DOCUMENTS & CALENDAR	Showing 1 to 2 of 2 entries										_	
Team Documents										Pr	revious 1 Next	
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	Copyright © 2019 Chronod	at, LLC,									Version 1.0.0.0	

Document Repository

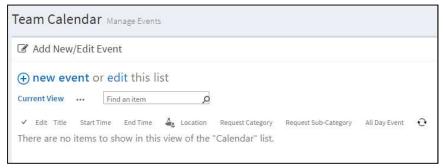
- You can upload & store team documents.
- Click Team Documents.

🕑 Add New/Ec	lit Document				
	Find a file	م	G Share Request Sub-Category	More 🗸 Project Client	
		Drag files here to up	load		

- 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**

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