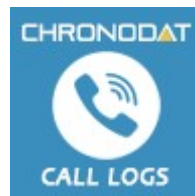


Call Logs

(User Manual)



By
CHRONODAT, LLC

For further information, visit us at www.chronodat.com

For support, contact us at 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.

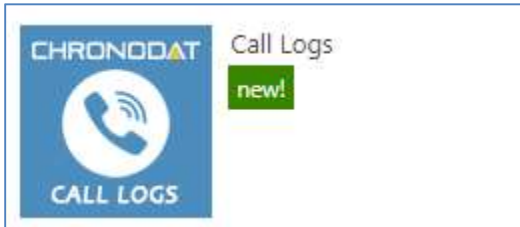
Using this add-in, your Support team has access to color-coded, built-in dashboards for quick metrics & reporting. Dashboards in the form of pie charts, bar charts & grids let everyone see all Call Logs by Status, Priority to quickly assess the current and overdue Support Call Logs.

Features:

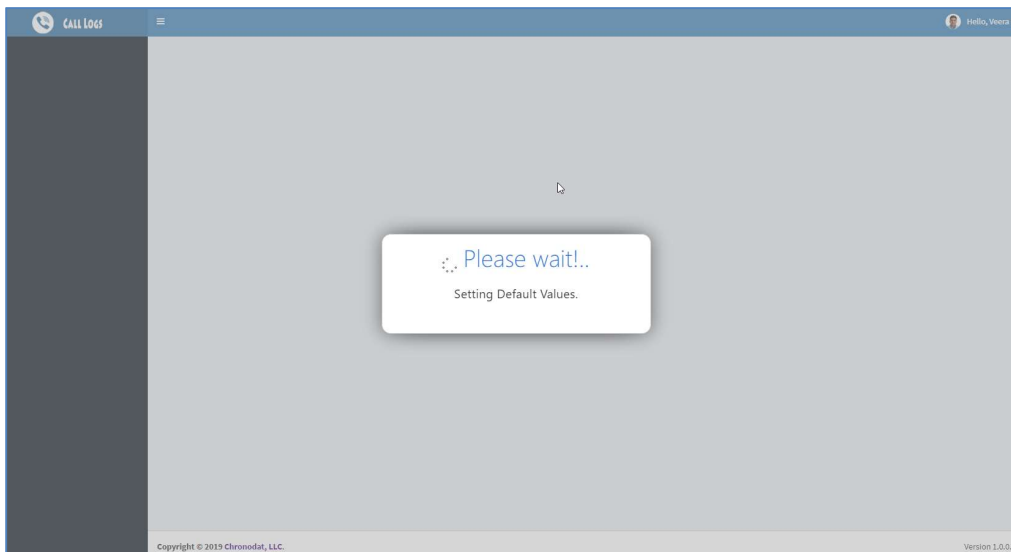
- Helps you to register inbound calls (received from leads and customers) and outbound calls (dialed to leads and customers) with call details.
- Add and maintains call records for every call.
- Our built-in dashboards are color-coded for quick reporting and metrics. They are built to require absolutely 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

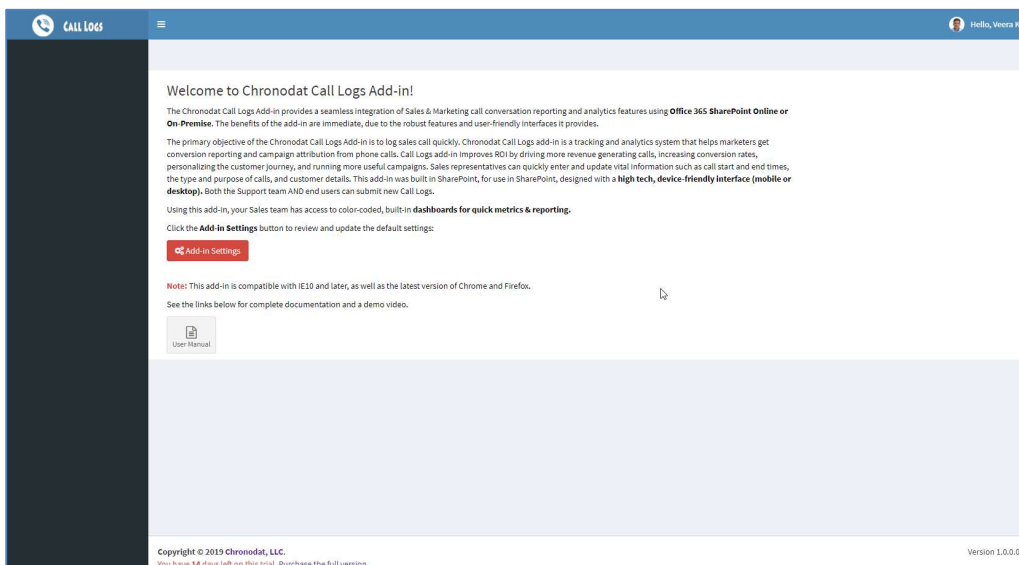
1. Click **Call Logs**.



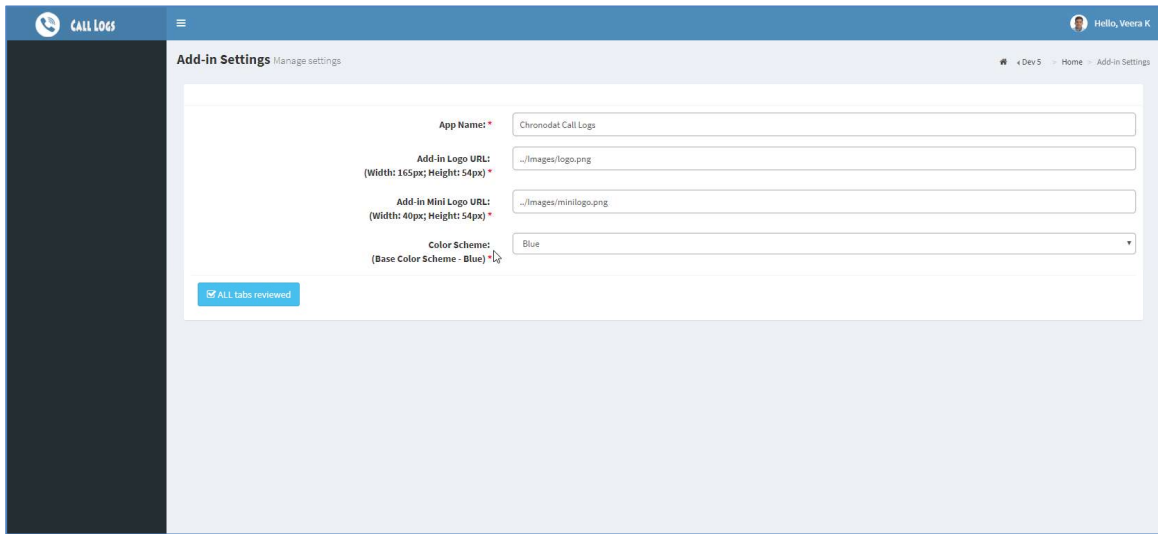
2. On first run, add-in configures default settings. Please wait for about 30 – 60 seconds to complete the installation/configuration.



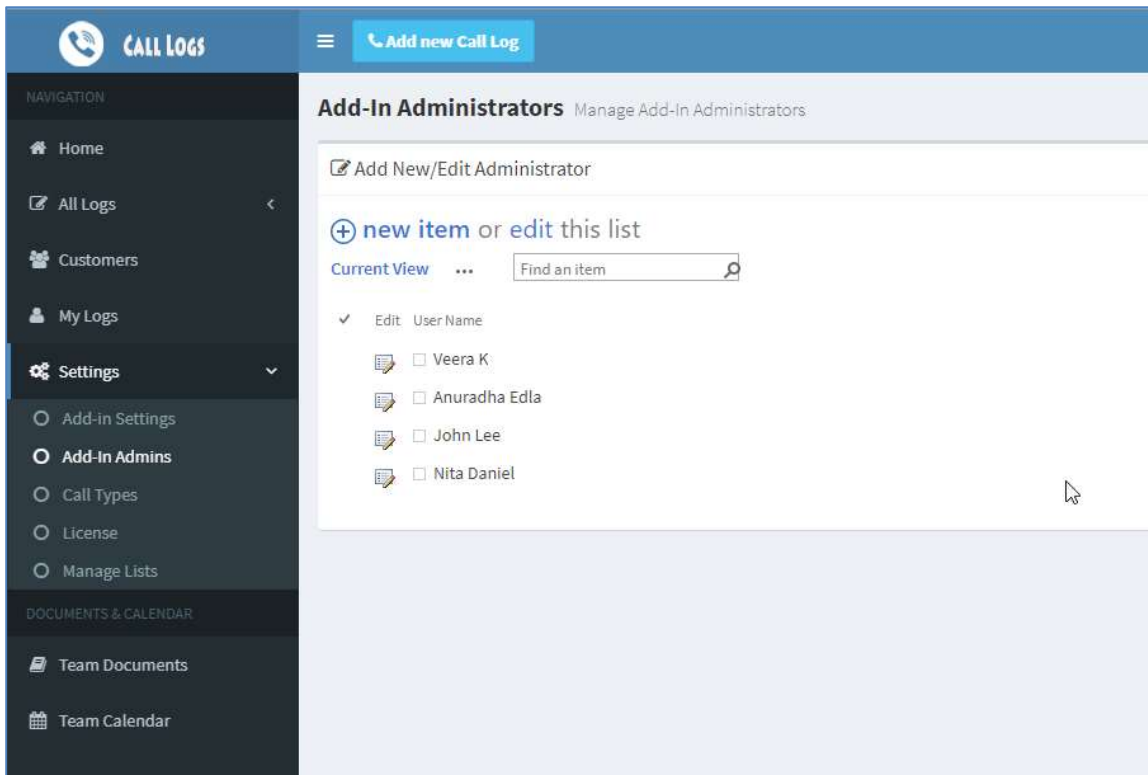
3. Click the red button to review the Add-in Settings.



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



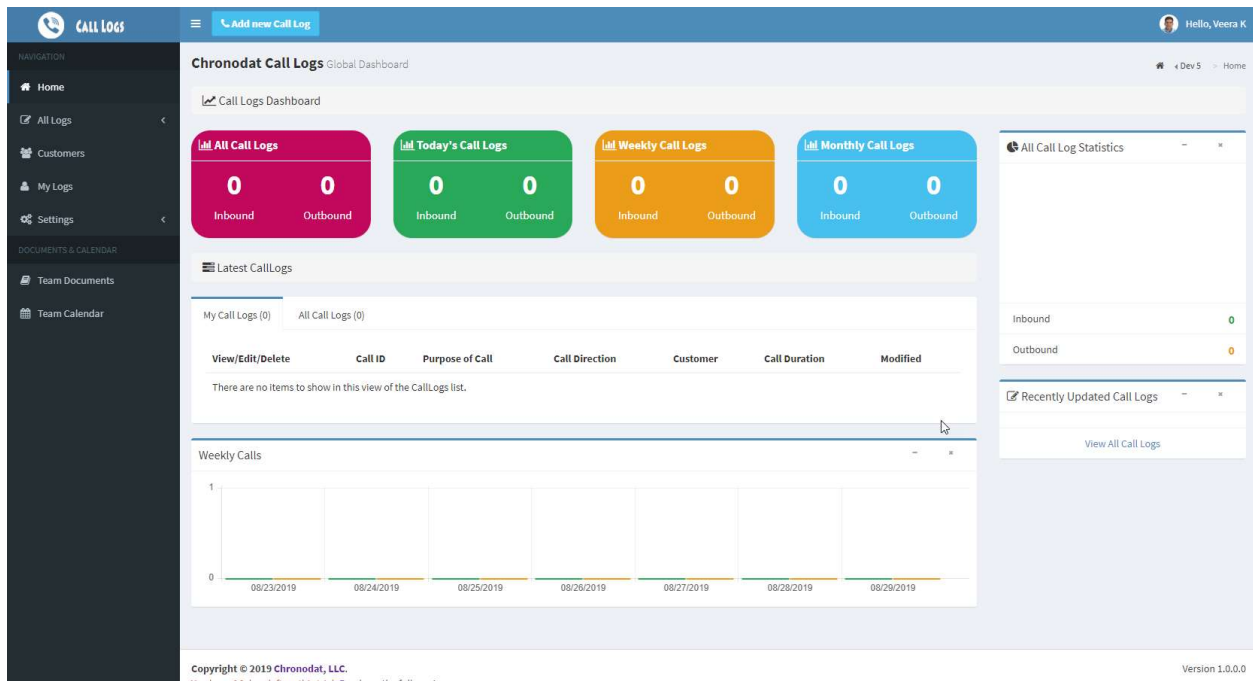
5. Person who installs the add-in becomes add-in administrator. Add-in administrator can view “Settings” menu in add-in.



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

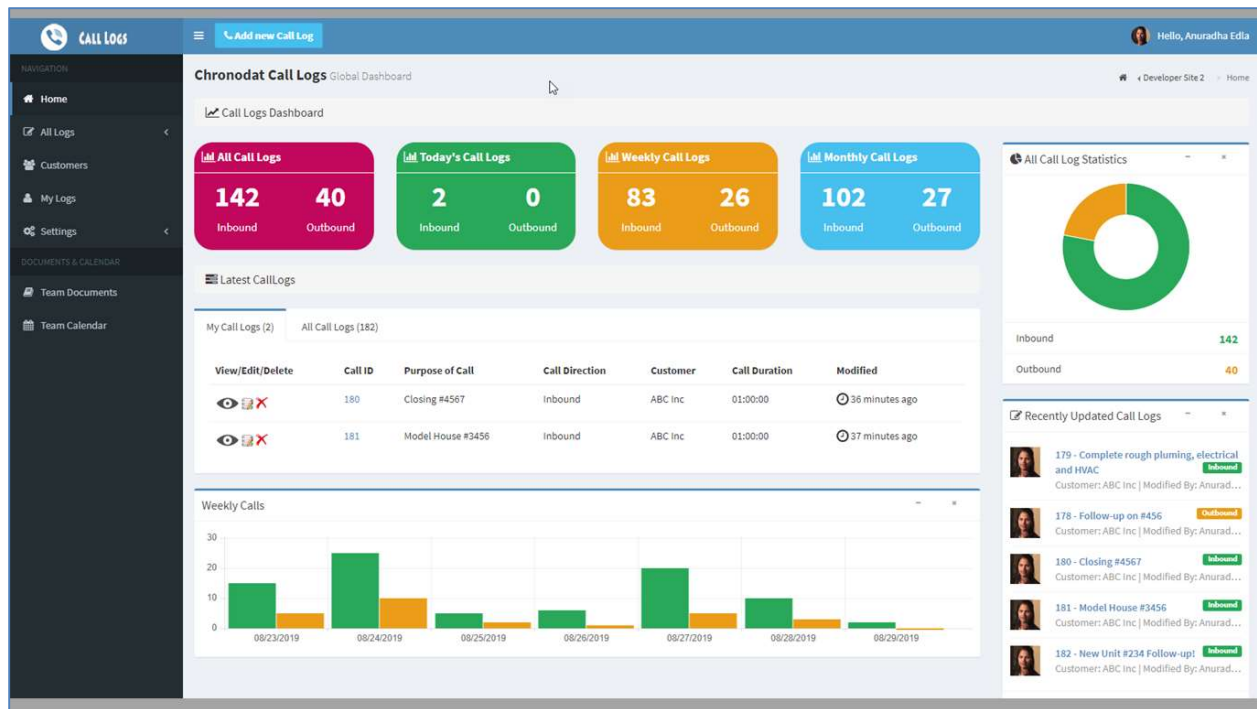
Add-In Home/Dashboard

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



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

The screenshot shows the 'New Call Log' form overlaying the dashboard. The form has a title bar 'New Call Log' and an 'EDIT' button. It includes a toolbar with icons for Save, Cancel, Paste, Copy, Attach File, and Spelling. The form fields are: 'Purpose of Call' (text input), 'Call Type' (dropdown menu with 'Completed Call' selected), 'Call Direction' (radio buttons for 'Inbound' and 'Outbound'), 'Customer' (dropdown menu with 'Customer 1' selected), 'Call Summary' (text area), 'Call Start Time' (date and time picker set to 8/29/2019 4 PM:00), 'Call End Time' (date and time picker set to 8/29/2019 4 PM:00), 'Call Owner' (text input with placeholder 'Enter a name or email address...'), and a 'Follow-up Required?' checkbox. 'Save' and 'Cancel' buttons are at the bottom right.



My logs views display calls logged by the current user.

My Call Logs Manage Call Logs

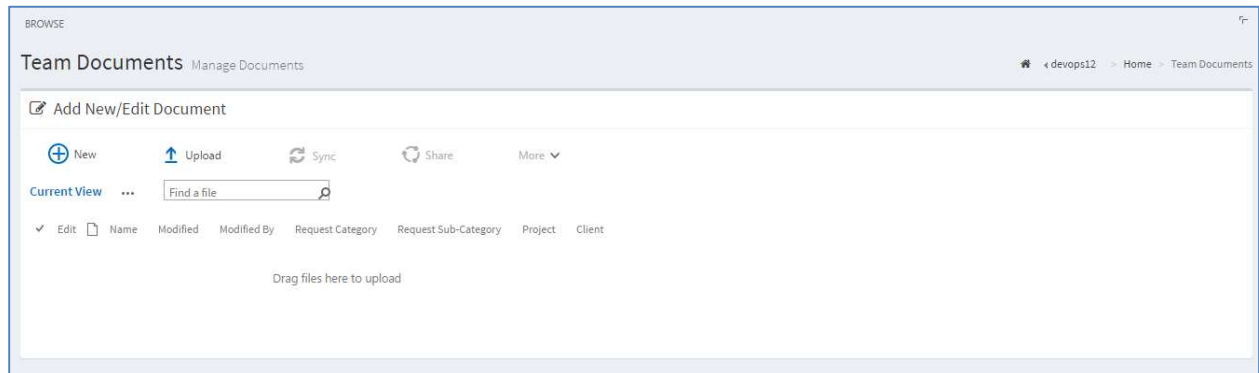
Showing 1 to 2 of 2 entries

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

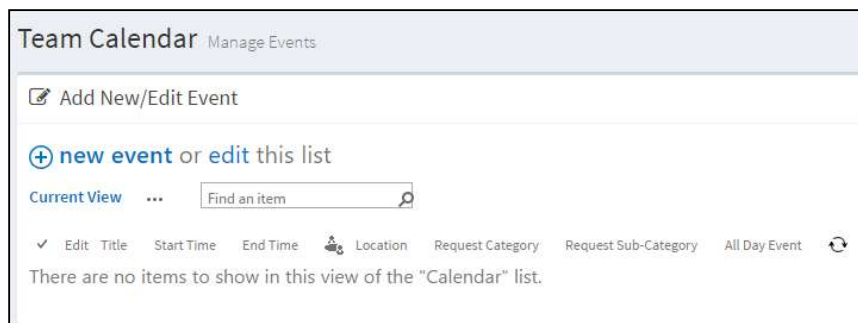
- You can upload & store team documents.
- Click **Team Documents**.



- 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**

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