

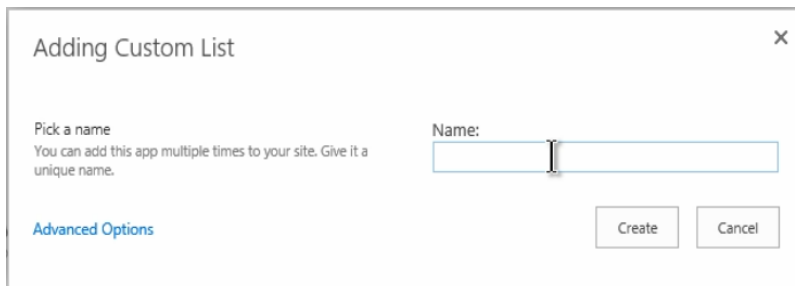
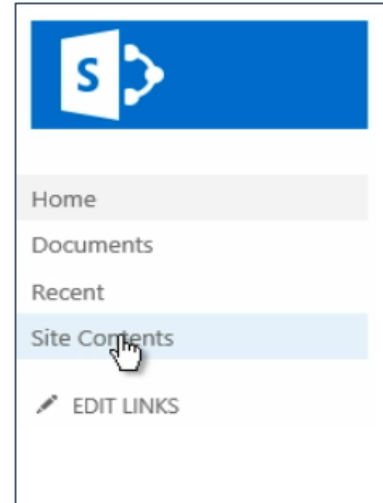
Phone Messages in SharePoint 2013

Create a custom list that automates the handling of incoming phone messages

Start on any SharePoint site

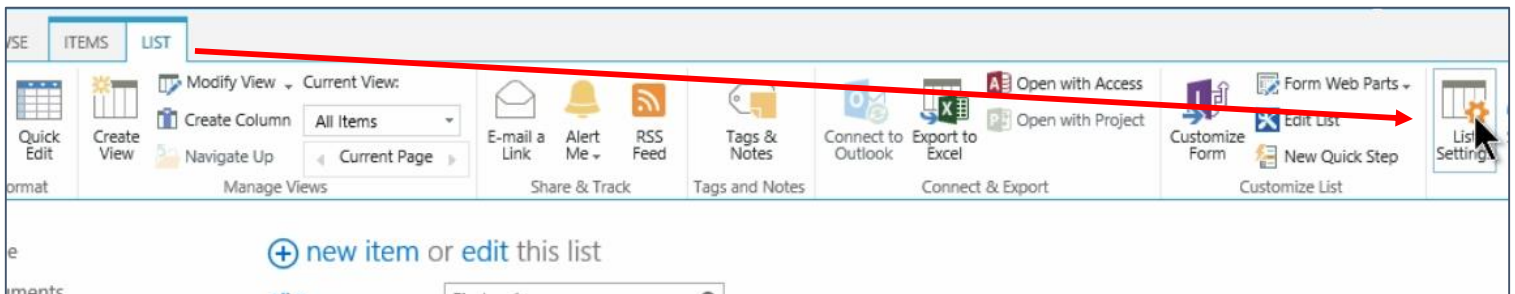
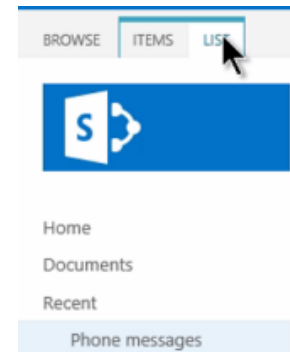
● **Step 1, create an app**

- 1) Click on Site contents
- 2) Click on Add an app
- 3) Click on Custom list
- 4) A dialog box named "Adding Custom List" will open
- 5) Add the name "Phone Messages"
- 6) Click on **Create**



● **Step 2, add to Quick Launch**

- 1) Open the "Phone messages" list
- 2) Open the List tab
- 3) Click on List Settings



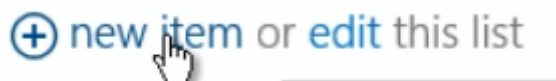
- 4) Click on the link “List name, description and navigation” under General Settings
- 5) Click Yes for “Display this list on the Quick Launch?”
- 6) Click on “Save”

● **Step 3, create columns**

- 1) Click on “Create column”
- 2) Enter the column name **Who called**
 - a) Select “Single line of text”
 - b) Click on OK
- 3) Click on “Create column”
- 4) Enter the column name **Phone number**
 - a) Select “Single line of text”
 - b) Click on OK
- 5) Click on “Create column”
- 6) Enter the column name **Employee**
 - a) Select “Person or group”
 - b) Click on OK
- 7) Click on “Create column”
- 8) Enter the column name **Call Returned**
 - a) Select the “Yes/No”
 - b) Set the default value to “No”
 - c) Click OK

● **Step 4, add a phone message**

- 1) Open the “Phone messages” list
- 2) Click on the “new item” link.



General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Rating settings
- Audience targeting settings
- Form settings

Columns

A column stores information about each item

Column (click to edit)

Title

Modified

Created

Created By

Modified By

- Create column
- Add from existing site columns



- Home
- Documents
- Recent
- Phone messages
- Site Contents

3) Fill out the form

4) Click on Save

A screenshot of a form with a left-hand navigation menu containing 'Home', 'Documents', 'Recent', 'Phone messages', 'Site Contents', and 'EDIT LINKS'. The main form area contains the following fields: 'Title *' (text input), 'Who called' (text input), 'Phone number' (text input), 'Employee' (text input with placeholder 'Enter a name or email address...'), and 'Call Returned' (checkbox). 'Save' and 'Cancel' buttons are located at the bottom right.

5) Check the entry

A screenshot of a list view titled '+ new item or edit this list'. It includes a search bar 'Find an item' and a table with the following columns: Title, Who called, Phone number, Employee, and Call Returned. The first row is highlighted and contains the following data: Title: Bert called ✱, Who called: Bert, Phone number: 123465, Employee: Peter Kalmström, Call Returned: No. A mouse cursor is pointing at the 'Bert called ✱' cell.

● **Step 5, hide the title**

1) Go to the List settings.

2) Click on **"Title"** under the **Column section**

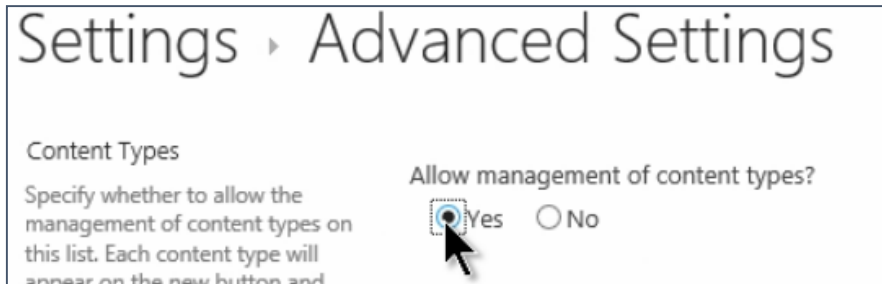
3) Select the radio button **"No"** at "Require that this column contains information"

A screenshot of the 'Additional Column Settings' dialog box for a 'Single line of text' column. It includes a 'Description' text input field, a 'Require that this column contains information:' section with radio buttons for 'Yes' and 'No' (where 'No' is selected), an 'Enforce unique values:' section with radio buttons for 'Yes' and 'No' (where 'No' is selected), and a 'Maximum number of characters:' text input field with the value '255'.

- 4) Click OK
- 5) Go on **Advanced settings**
- 6) Click “Yes” to Allow management of content types

General Settings

- [List name, description and](#)
- [Versioning settings](#)
- [Advanced settings](#)



- 4) Click OK
- 5) Click on the **Item** link under the new heading Content Types

Content Type	Visible on New Button	Default Content Type
Item	✓	✓

- 6) Click on “Title”
- 7) Click on the radio button “Hidden (Will not appear in forms)”

Columns

Name

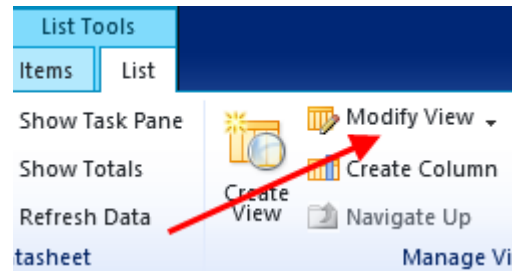
[Title](#)
Who called

This column is:

- Required (Must contain information)
- Optional (May contain information)
- Hidden (Will not appear in forms)

- 8) Click OK

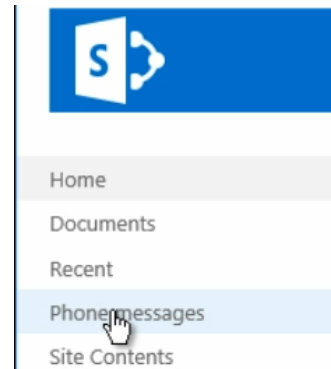
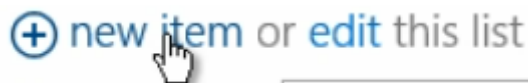
- 9) Open the Phone messages list
- 10) Open the List tab
- 11) Click on Modify view
- 12) Uncheck the box to remove the "Title" field
- 13) Click OK



Display	Column Name	Position from Left
<input type="checkbox"/>	Title (linked to item with edit menu)	1
<input checked="" type="checkbox"/>	Who called	2
<input checked="" type="checkbox"/>	Phone number	3
<input checked="" type="checkbox"/>	Employee	4
<input checked="" type="checkbox"/>	Call Returned	5
<input type="checkbox"/>	App Created By	6

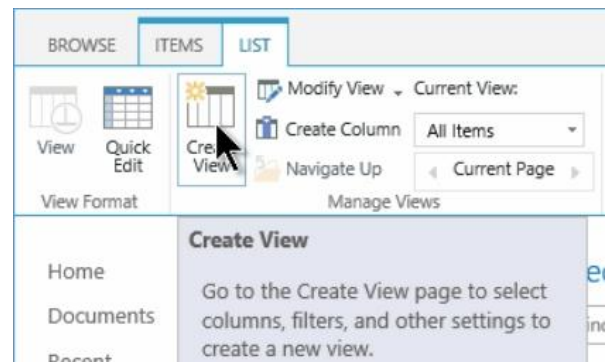
● **Step 6, add another phone message**



- 1) Open the "Phone messages" list
- 2) Click on the "new item" link.



● **Step 7, add views**

- 1) Under the **List** tab click on "Create View"
- 2) Select the link **Standard View**
- 3) Create a "Today's phone calls" view
 - a) Enter the View name "Today's phone calls"
 - b) Set the view to show items only when the column Created is equal to [TODAY]



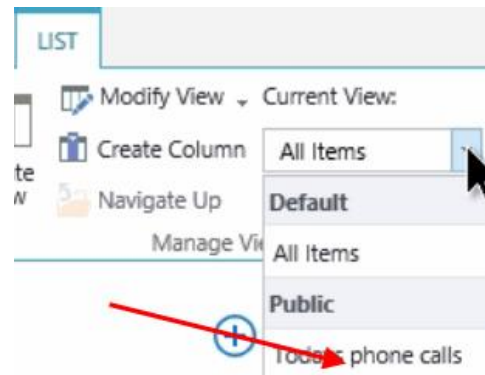
-  Show all items in this view
-  Show items only when the following is true:

Show the items when column



Created

is equal to

- c) Click OK
- d) Go back to the Phone messages list and check that there is a "Today's phone calls" among the views



- 4) Under the **List** tab click on "Create View"
- 5) Select the link **Standard View**
- 6) Create an "Un-returned" view
 - a) Enter the View name "Un-returned"
 - b) Set the view to show items only when the column Called returned is *not* equal to Yes

-  Show all items in this view
-  Show items only when the following is true:

Show the items when column

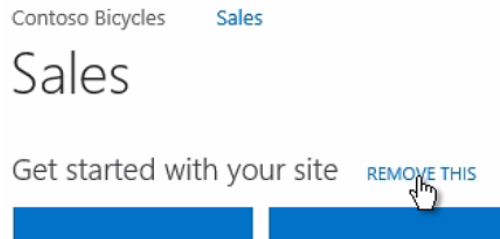
Call Returned

is not equal to

- c) Click OK

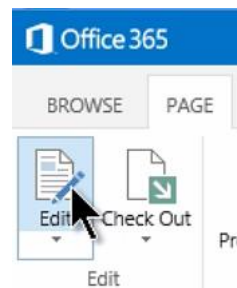
● **Step 8, add the Un-returned view on the home page**

- 1) Go to the home page
- 2) Remove the default “Get started” content from the Sales subsite start page
 - a) Go to the Sales subsite
 - b) Click on “Remove this”



3) Add a **web part**

- a) Open the Page tab
- b) Click on the Edit button
- c) Put the cursor where you want to place the web part
- d) Open the Insert tab
- e) Click on the Web Part button



f) Select the Phone messages list

Parts

- Content and Structure Reports
- Documents
- Form Templates
- MicroFeed
- Pages
- Phone messages
- Reusable Content

g) Edit the web part

Phone messages

[+ new item](#) or [edit this list](#)

<input checked="" type="checkbox"/>	Who called	Phone number	Employee
<input type="checkbox"/>	Bert	123465	<input type="checkbox"/> Peter Kalm
<input type="checkbox"/>	Adam	7897987987	<input type="checkbox"/> Martin Bel

h) Select "Un-returned" in the Selected View dropdown

i) Click OK to the warning message

j) Expand the Appearance category

k) Set the Chrome Type to None

l) Click OK

Phone messages

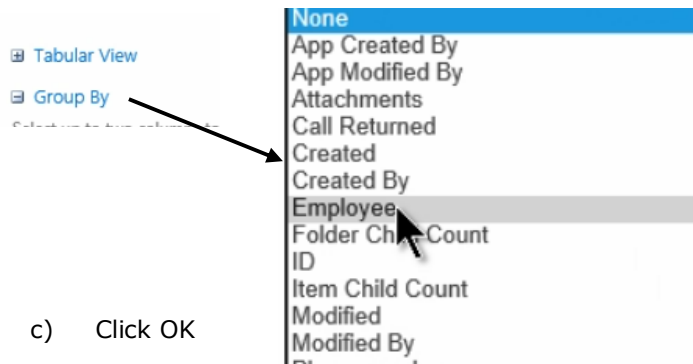
List Views

You can edit the current view or select another view.

Selected View **Un-returned** ▼

● **Step 9, add a third view**

- 1) Under the **List** tab click on "Create View"
- 2) Select the link **Standard View**
 - a) Enter the View name "Grouped per person called"
 - b) Group the view to show the items by the column Employee in ascending order



- c) Click OK

- 3) Check the list

