



Day 2:
Intro to CTM
Part II

A person with long brown hair is seen from behind, sitting at a wooden desk and working on a silver laptop. A tan bag with a white lace detail is on the desk next to the laptop. A white coffee cup is also visible. The scene is lit with natural light from a window. A white rectangular box is overlaid on the image, containing the text 'WORKING SESSION' in white capital letters.

WORKING SESSION

EDIT SCORED CALL FIELDS & SCORE A CALL

- **Navigate to the Calls Tab > Call Scoring**
- Name your Score Column
- Enable Converted and name field
- Enable Converted Amount
- Name field Revenue
- Enable Reporting Tags
- Enable Limit the tag list and create list:
 - Sale
 - Support
 - Employment
 - Appt Schedule
 - Mars
- Save Changes



WORKING SESSION

CREATE A CUSTOM FILTER AND SAVE IT

- **Navigate to the Calls Tab > Call Log > Filters**
- Select the date range to **This Month**
- Add type **Inbound Text**
- Remove type **Outbound Calls**
- Select the Tracking Source **Website**
- Select the Reporting Tag to include **Sale**
- Set the Total Time to be greater than or equal to **120 seconds**
- Set Score Calls to between **3 & 5 Stars**
- Set Converted to **Is Set**
- **Save Filter**



WORKING SESSION

EXPORT THE CALL LOG

- **Navigate to the Calls Tab > Call Log > Export Calls**
- Select Export Method **Email**
- Input your email address
- Select your saved filter **Converted website calls over 2 minutes**
- Select phone format **###-###-####**
- Set the time format to **HH.MM.SS**
- Set the export format to **CSV**
- Schedule the export to run **Weekly**
- Select **Run Export Now**



WORKING SESSION

CALL SETTINGS

- **Navigate to the Numbers tab >Call Settings**
- Select **Account Level**
- Enable recording for **outbound calls**
- Enable **Transcribe my calls**
- Enable **Include transcription in notification emails**
- Enable **Auto Text response**
- Create response:
 - **Thanks for contacting us, Respond with "Spring" and receive a 20% promo code.**
- **Save Changes**



WORKING SESSION

TRANSCRIPTIONS

- Place a test call and review the transcription
- Navigate back to the call settings and enable **Enhanced Transcriptions**
- Place a test call and review the transcription
- Compare results



WORKING SESSION

KEYWORD SPOTTING RULES

- **Navigate to the Reporting tab > Keyword Spotting**
- Select **New Rule**
- Select **+Add Keyword**
- Add: **Sales, Credit Card, Purchase, Order, Buy, Money**
- Add Action **Tag Call** as **Sale**
- Add Action **Score Call** as **3 Stars**
- Add Action **Convert Call** as **\$25.00**
- Save Changes
- Add Account Level call settings
- Place a test call



WORKING SESSION

SPAM DETECTIVE

- **Navigate to the Numbers tab > Call Settings**
- Scroll to the Spam Detective Tab
- Enable **The Spam Detective**
- Select **Solve CAPTCHA**
- Save Changes



WORKING SESSION

SCHEDULES

- **Navigate to the Numbers tab > Call Schedules**
- Select **New Schedule**
- Name schedule & Description **After Hours**
- Set the time zone to **GMT 05:00**
- Save Changes
- Select **Work Days** from **12:00am - 9:00pm**
- And from **5:00pm - 12:00am**
- Save Changes



WORKING SESSION

SCHEDULES

- **Navigate to the Numbers tab > Call Schedules**
- Select **New Schedule**
- Name schedule & description **Business Hours**
- Set the time zone to **GMT 05:00**
- Save Changes
- Select **Work Days** from **9:00am - 5:00pm**
- Save Changes

A person with long brown hair is seen from behind, sitting at a wooden desk and typing on a silver laptop. A tan messenger bag with a white lace scarf is slung over the desk. To the left, there is a white coffee cup and an orange portable power bank. The background shows a window with some papers pinned to it.

WORKING SESSION

VOICEMAIL

- **Navigate to the Numbers tab > Voice Menus (IVR)**
- Select **New Voice Menu**
- Select from the pre-set **Voicemail**
- Customize your greeting message
- Tag this call as **Voicemail**
- Save Changes

A person with long brown hair is seen from behind, sitting at a wooden desk and working on a silver laptop. A tan bag with a white lace detail is on the desk next to the laptop. A white coffee cup is also visible. The scene is lit with soft, natural light, suggesting an office or cafe environment. The text 'WORKING SESSION' is overlaid in a white box on the left side of the image.

WORKING SESSION

VOICE-MENUS

- **Navigate to the Numbers tab > Voice Menus (IVR)**
- Label Sales
- Select **Dial Number, Select receiving number**
- Name your menu **Main Routing**
- Name the description **Main Routing - Business Hours**
- Set the schedule to **Business Hours**
- Add a greeting: **Thank you for calling, please press 1 for sales, 2 for support, 3 for employment, 4 for appointment scheduling, and 5 to leave a voicemail.**
- Save Changes

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WORKING SESSION

NOTIFICATIONS

- **Navigate to the Reporting tab > Notifications**
- Name it **Weekly Calls**
- Set the type to be **Weekly Digest of Calls/Texts/Forms**
- Save Changes
- Add Recipient Email Address
- Save Changes
- Create a Subject line of **Account Name Weekly Calls/Text/Forms**
- Select the fields to include in the notifications
- Save Changes



WORKING SESSION

TEXT MESSAGE TRIGGERS

- **Navigate to the Text tab > Triggers**
- Select **New Trigger**
- Name it **Spring Saving Promo**
- Save Changes
- Add Rule: **Body - Contains - Spring**
- Add Action **Reply to Message**
- Use promo code: **Flowers18 for a 20% discount on your next purchase.**
- Add tracking numbers
- Save Changes



WORKING SESSION

TEXT MESSAGE TRIGGERS

TEST EVERYTHING!