



DAY 4
Working session



WORKING SESSION

Create 6 new users

- 2 users on the sales team - Call Agents
- 2 users on the support team - Call Managers
- 1 user for HR - Administrator
- 1 Appointment Scheduler - Marketing Manager
- mm@calltrackingmetrics.com, Mickey Mouse
- mm1@calltrackingmetrics.com, Minnie Mouse
- dd@calltrackingmetrics.com, Donald Duck
- dd@calltrackingmetrics.com, Daisy Duck
- g@calltrackingmetrics.com, Goofy
- p@calltrackingmetrics.com, Pluto

A person with long brown hair is seen from behind, sitting at a wooden desk and working on a silver laptop. A tan messenger bag is slung over the desk, and a white coffee cup is visible. The scene is dimly lit, suggesting an indoor office or home workspace.

WORKING SESSION

CREATE A CALL QUEUE

- **Navigate to the Numbers tab > Queues > Filters**
- Name the queue **Sales**
- Add waiting message: **Sorry for the delay, one of our team members will be with you shortly**
- Set time to **after 15 seconds**
- Add **Business hour schedule**
- Distribute calls to agents **Simultaneously**
- Set no answer routing to **Voice Menu > Voicemail**
- Add **Mickey & Minnie Mouse**

A person with long brown hair is seen from behind, sitting at a wooden desk and working on a silver laptop. A beige bag with a white lace detail is on the desk next to the laptop. A white coffee cup is also visible. The scene is set in a bright, modern office environment. The text 'WORKING SESSION' is overlaid in white on a semi-transparent dark blue rectangle.

WORKING SESSION

CREATE A CALL QUEUE

- **Navigate to the Numbers tab > Queues > Filters**
- Name the queue **Support**
- Add waiting message: **Sorry for the delay, one of our team members will be with you shortly**
- Set time to **after 15 seconds**
- Add **Business hour schedule**
- Distribute calls to agents **Simultaneously**
- Set no answer routing to **Call Queue > Sales Team**
- Add **Donald & Daisy Duck**

A person with long brown hair is seen from behind, sitting at a wooden desk and working on a silver laptop. A tan messenger bag is slung over the desk, and a white coffee cup is visible. The scene is lit with soft, natural light from a window. The text 'WORKING SESSION' is overlaid in white on a semi-transparent dark blue rectangle.

WORKING SESSION

CREATE A POST CALL SURVEY

- **Navigate to the Numbers tab >Voice menus**
- Select **New Voice Menu**
- Name it **Customer Feedback**
- Main Greeting **Press 1 if you were satisfied with your call, press 2 if you were not satisfied with your call.**
- Tag this call **Customer Satisfaction Survey**
- Menu Item 1 **Hang Up**
- Play Message: **When you're happy, we're happy. Thanks for the feedback**
- Tag this **Call Happy Caller**

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 is slung over the desk, and a white coffee cup is visible. The scene is dimly lit, suggesting an indoor office or workspace.

WORKING SESSION

CREATE A POST CALL SURVEY CONTINUED

- Menu Item 2 **Leave Message**
- Play Message: **Sorry we didn't meet your expectations, please leave a message letting us know how we could have done better.**
- Tag this **Upset Caller**



WORKING SESSION

TRIGGERS

- **Navigate to the Call Tab > Triggers**
- Select **New Trigger**
- Name Upset Customer Alert
- Trigger **Manual Update**
- Enable **Trigger for all Activities**
- Add Workflow
 - **Select Tags > Includes any > Upset Caller**
- Add Action
 - Send Email
 - To: p@calltrackingmetrics.com, Pluto
 - Subject: Upset Customer Alert



WORKING SESSION

TRIGGERS CONTINUED

- Use tokens to compose the message
 - Activity: ID, Date/Time, Tags
 - Name, Phone Number
- Save changes.



WORKING SESSION

CUSTOM FIELDS

- **Navigate to the Settings Tab > Custom Fields**
- Select **New Panel**
- Add Field **Transaction ID &** field type **Text, Save to Activity**
- Add Field **Transaction Affiliate >** Field type **Picker, Save to Activity**
 - **Google AdWords**
 - **Facebook Ads**
 - **Organic**
 - **Direct**
 - **Referral**



WORKING SESSION

CUSTOM FIELDS CONTINUED

- Add Field **Item Category** field type **Picker, Save to Activity**
 - Truffles
 - Cakes
 - Dipped & Dunked
- Add Field **Item Name Truffles** field type **Picker, Save to Activity**
 - Bakers Dozen Assorted Truffles
 - Truffle Singles
 - Assorted Dark Chocolate Truffles
 - Milk Chocolate Covered Truffles

Save, Reopen & Edit

add **Item Name Truffles** as a
Dependence



WORKING SESSION

CUSTOM FIELDS CONTINUED

- Reopen & Edit
- add **Item Name Truffles** as a **Dependence**
 - Choose **Field Item Category**
 - Field **Value Truffles**
- Save



WORKING SESSION

TEST EVERYTHING!