DAY 4
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
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
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**
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
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
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
TRIGGERS CONTINUED

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

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

WORKING SESSION