



Fast Track Packs

When you invest in call tracking, it's important to position your business for success from the start. Our professional services and support teams are here to help you get started, and we'll support you every step of the way with customized training and account implementation.

TIMELINES

30–60
days

EXPRESS PACK

Get started with a 30-day custom onboarding to identify your goals and build out your account to meet those immediate objectives.

REMOTE PACK

Tailored onboarding to set your remote team up for success, configuring essential tools like the cloud-based softphone.

PROFESSIONAL PACK

Dive deeper into complex routing, tags, and workflows for your organization with additional optimizations, testing, and evaluation before launch.

PROFESSIONAL PLUS PACK

Train your organization for long-term success and have free range to configure as many advanced integrations and customizations as you need.

Fast Track Timelines

	30 DAYS	45 DAYS	60 DAYS
EXPRESS Custom onboarding	consultation • configuration & testing • wrap-up		
REMOTE Custom onboarding for remote teams	consultation • configuration & testing • wrap-up		
PROFESSIONAL Onboarding and implementation	consultation • configuration & testing • optimization • training & wrap-up		
PROFESSIONAL PLUS Onboarding & advanced implementation	consultation • configuration • integration set-up • testing • optimization • training • wrap-up		

OUR PROCESS

Our Fast Track Packs are designed to get your CTM account up quickly and working the way you envision. Our first call (the kick-off) will establish that our team understands your objectives, suggests a solution within best practices and schedules subsequent calls and check-ins until all pack items are complete.

We will train you on how to build out your account and record all the calls for future reference. Of course, our support team is also available during this time (and after the pack is complete) as a resource for quick questions.

	EXPRESS	REMOTE	PROFESSIONAL	PROFESSIONAL PLUS
Kick-off orientation call	Included	Included	Included	Included
User set-up	Standard roles	Standard and access control groups (up to 5)	Standard and access control groups (up to 5)	Standard and access control groups (up to 50)
Creation of sub-accounts	Up to 20 (standard billing)	Up to 35 (standard billing)	Up to 50 (standard billing)	Unlimited (custom billing)
Guided porting process	250 numbers included	500 numbers included	1500 numbers included	2500 numbers included
Purchasing of tracking numbers with source and routing configuration	Up to 25 numbers	Up to 75 numbers	Up to 150 numbers	Up to 500 numbers
Creation of custom tracking sources	Up to 5	Up to 5	Up to 25	Unlimited
Receiving number configuration	Up to 1	Up to 5	Up to 25	Unlimited
Adwords/Analytics set-up	Up to 1 account	Up to 5 accounts	Up to 25 accounts	Up to 50 accounts
Overview and configuration of IVR menus	Up to 1	Up to 1	Up to 10	Unlimited
Overview and configuration of voicemail box	Up to 1	Up to 1	Up to 10	Unlimited
Overview and configuration of Advanced Routing	Call Queues (up to 1)	Call Queues, Smart Routers, and Geo Routes (up to 25)	Call Queues, Smart Routers, and Geo Routes (up to 25)	Unlimited
Overview and configuration of triggers	Up to 1	Up to 1	Up to 10	Unlimited
Overview and configuration of notifications	Up to 5	Up to 5	Up to 25	Unlimited
Create tags for classifying interactions	Up to 5	Up to 25	Up to 25	Unlimited
Testing of dynamic number insertion	Up to 5 sites	Up to 1 for each sub-account	Up to 1 for each sub-account	Up to 100 sites
Call flow testing	N/A	Included	Included	Included
Further optimization	N/A	Included	Included	Included
Softphone configuration	N/A	Softphone, team settings & chat (chat license required)	Softphone, team settings & chat (chat license required)	Custom features
Configure/test integrations with Salesforce, Shopify, Bizible, Marin, Zoho CRM, Kenshoo, etc.	N/A	N/A	Salesforce only	Unlimited
Group training sessions	N/A	Up to 2 virtual sessions	Up to 2 virtual sessions	Up to 5 virtual sessions
Overview and configuration of reseller pricing schedules	N/A	N/A	N/A	Up to 5 pricing schedules