

How to Use Click-to-Dial and Call Logging in Conquer Voice

Conquer Voice's **Click-to-Dial** feature streamlines your calling process by enabling single-click calls directly from Salesforce records. Coupled with **automated call logging**, this functionality enhances efficiency and ensures accurate record-keeping.

Initiating a Call with Click-to-Dial

To utilize the Click-to-Dial feature:

1. **Access Salesforce Records:**
 - Navigate to the **Lead**, **Contact**, or **Opportunity** record you intend to call.
2. **Identify Click-to-Dial Icons:**
 - Locate the **blue phone icon** next to the contact's phone number.
3. **Place the Call:**
 - Click the blue phone icon to initiate the call through Conquer Voice.

	☐ Name ↑	Company	Phone
1	☐ 11	1	 (630) 747-8690
2	☐ Aaren Dransfield	Jabbertype	 (817) 239-3230
3	☐ abhuy kliop	xyz	 (909) 875-4353
4	☐ Adaline Molfino	laxworks	 (817) 239-3230

Note: Ensure that your Conquer Voice is connected via **Computer Audio** or **Call Me** before initiating calls.

CONQUER Voice

Audio Connection

☐ Call Me

☒ Computer Audio

Select a Server

Automatically Detect

Microphone Test

Default - Internal Microphone

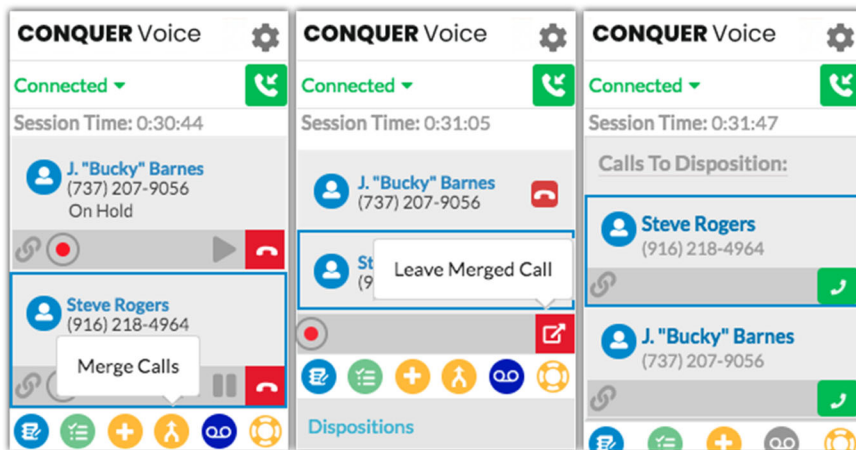
Speakers Test

Internal Speakers

Adding a Call During an Active Conversation

If you need to add another participant during an ongoing call:

- 1. Place the Current Call on Hold:**
 - Click the **Hold** button in the Conquer Voice interface.
- 2. Add a New Call:**
 - Select the **Add Call**  button.
- 3. Choose the Dialing Method:**
 - Click-to-Dial:** Find the desired contact in your CRM and click the blue phone icon next to their number.
 - Quick Dial:** Use pre-configured quick dial options.
 - Dial Pad:** Manually enter the phone number using the built-in dial pad.
- 4. Merge Calls:**
 - Once the new call connects, you can merge it with the initial call to facilitate a three-way conversation.



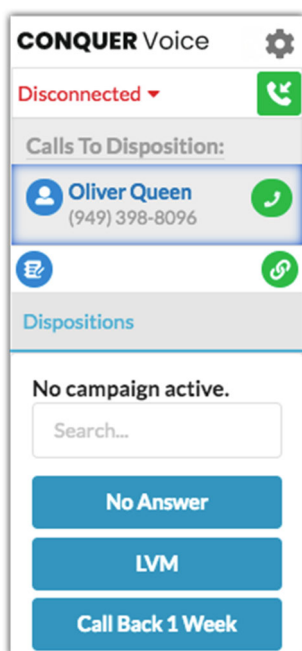
Note: If the **Dial Pad** option is unavailable, contact Conquer Support to verify if this feature is enabled for your organization.

Understanding Call Logging and Dispositions

Conquer Voice automates call logging to maintain comprehensive records of your interactions.

1. **Call Logging:**
 - All calls made through Conquer Voice are automatically logged in Salesforce under the respective contact's activity history.
2. **Applying Dispositions:**
 - After concluding a call, select an appropriate **Disposition** to categorize the call outcome.
 - Dispositions can trigger predefined automations, such as follow-up tasks or updates to the contact's status.

Note: Completing the call process requires a final step: selecting a disposition. This ensures accurate call logging and outcome tracking.



Best Practices for Effective Use

- **Ensure Connectivity:** Always verify that Conquer Voice is properly connected before initiating calls.
- **Maintain Accurate Records:** Regularly update contact information in Salesforce to facilitate efficient Click-to-Dial functionality.
- **Utilize Dispositions:** Consistently apply Dispositions after each call to maintain organized records and trigger necessary follow-up actions.

By leveraging Conquer Voice's Click-to-Dial and automated call logging features, you can enhance your sales communication efficiency and maintain precise records within Salesforce.