

Enhancing Data Hygiene with Automatic Field Display

Conquer Voice's **Automatic Field Display** feature simplifies post-call workflows by automatically presenting the relevant fields for updating records based on call outcomes or dispositions. This ensures accurate data entry, saves time, and maintains exceptional data hygiene within Salesforce.

What is Automatic Field Display?

Automatic Field Display is a smart post-call feature that:

- **Streamlines Data Entry:** Automatically displays the specific fields that need updating after a call.
- **Ensures Consistency:** Standardizes the data entry process across your team.
- **Improves Data Hygiene:** Reduces errors and omissions, ensuring clean, accurate Salesforce records.

Key Benefits:

- Saves time by eliminating manual searches for fields.
- Increases accuracy by guiding reps to update the correct information.
- Boosts efficiency in call logging and follow-ups.

Setting Up Automatic Field Display

Step 1: Configure Call Dispositions

- Access Conquer Voice Settings:**
 - Log into Salesforce and navigate to Denali Workspace > Voice.
- Define Dispositions:**
 - Create or update call dispositions that align with your workflows (e.g., "Interested," "Not Interested," "Follow-Up Needed").

Dispositions

Disposition Groups

Search

Q

Edit Order

Create Disposition

Name	Sort Order	Created At	Last Updated ↓	Actions
No Answer	3	6/7/2023 12:52 PM	-	 
Voicemail	1	6/7/2023 12:54 PM	-	 
Normal Call	2	6/7/2023 12:54 PM	-	 

Showing 1 - 3 of 3 entries

<<

<

1

>

>>

Show 10 | 25 | 50 | 100

Step 2: Map Fields to Dispositions

- Select Dispositions:**
 - For each disposition, assign the fields that need to be updated in Salesforce.
 - Example: For "Follow-Up Needed," map fields like "Next Contact Date" and "Notes."
- Save Configuration:**
 - Ensure that the mapping is saved and applied to your team's workflow.

Add a Field [X]

Object
Lead

Optional Fields
[X] City [X] Converted Date

Required Fields
[X] Company [X] Email

Save

Step 3: Test the Setup

1. **Simulate Calls:**
 - Make test calls and select different dispositions to verify that the correct fields are displayed post-call.
2. **Adjust as Needed:**
 - Refine mappings based on team feedback or new workflow requirements.

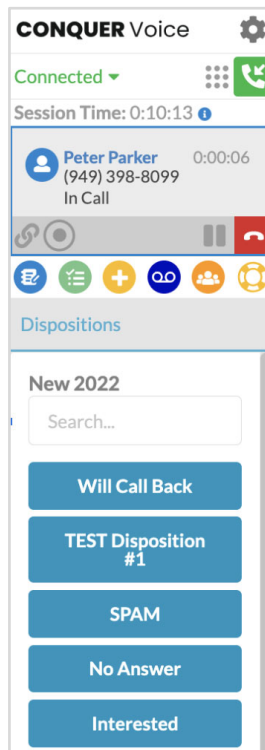
Using Automatic Field Display During Calls

Step 1: Make a Call

- Use **Click-to-Dial** or **Preview Auto-Dialer** to initiate a call through Conquer Voice.

Step 2: Select a Disposition

- At the end of the call, choose the appropriate disposition from the dropdown menu.



Step 3: Update the Fields

- The mapped fields will automatically appear for input.
- Fill in the required information (e.g., "Outcome Notes," "Next Steps").

CONQUER Voice

Connected

Session Time: 0:11:01

Peter Parker

(949) 398-8099

In Call

0:00:54

Interested

City

Las Vegas

Company *

Daily Bugle

Created Date

01/19/2021, 09:27 A

Email *

peterparker.com

Save

Step 4: Save and Log

- **Save** the updates, ensuring the call is logged accurately in Salesforce.

Best Practices for Automatic Field Display

1. **Align Dispositions with Workflows:**

- Regularly review and update dispositions to reflect changes in your sales or service processes.

2. **Train Your Team:**

- Educate reps on the importance of selecting the correct dispositions and updating fields promptly.

3. **Monitor Data Accuracy:**

- Use Salesforce reports to identify incomplete or inaccurate records and refine field mappings as needed.

4. **Encourage Notes:**

- Ensure that reps add detailed notes in relevant fields for better context during follow-ups.
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Troubleshooting and Support

Common Issues:

- **Fields Not Displaying:** Verify that the disposition-to-field mapping is correctly configured in settings.
- **Incorrect Fields Displayed:** Review and adjust the mappings for the affected dispositions.

Need Assistance?

- **Contact Support:** Email support@conquer.io for technical help.
 - **Visit the Help Center:** Explore detailed articles at the [Conquer Help Center](#).
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Licensing and Feature Access

If Automatic Field Display is not available in your current Conquer Voice license, here's how to get started:

- **Contact Sales:** Email sales@conquer.io for feature details and pricing.
- **Schedule a Demo:** Experience the benefits of Automatic Field Display by **booking a demo** today.

By leveraging Automatic Field Display, your team can ensure clean, accurate records while saving valuable time on manual data entry. This feature supports more efficient workflows and better decision-making with high-quality Salesforce data.

For more resources, visit the [Conquer Help Center](#) or contact us directly at support@conquer.io.