Using IVR and Telephony Management in Salesforce

Conquer Voice's **Call Flows IVR** (Interactive Voice Response) system and telephony management tools simplify and centralize communication workflows directly within Salesforce. This guide walks you through the setup, configuration, and best practices for IVR and telephony features.

What is Call Flows IVR and Telephony Managment?

Call Flows IVR (Interactive Voice Response):
An automated system that interacts with callers, gathers information, and routes calls to the appropriate department or agent based on predefined rules.

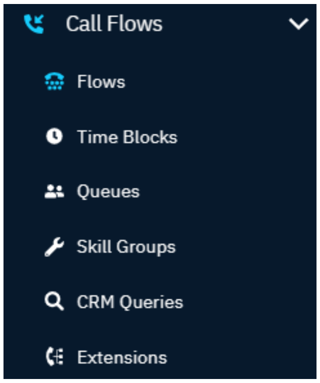
Telephony Management:
Centralized tools within Conquer Voice that allow teams to manage inbound and outbound calls, configure routing logic, and streamline communication workflows.

Benefits:

- **Seamless Salesforce Integration:** Manage calls and call routing directly within your CRM.
- **Enhanced Customer Experience:** Reduce wait times and ensure calls reach the right person quickly.
- **Efficiency:** Automate call routing and eliminate manual processes.

Setting up Telephony Features

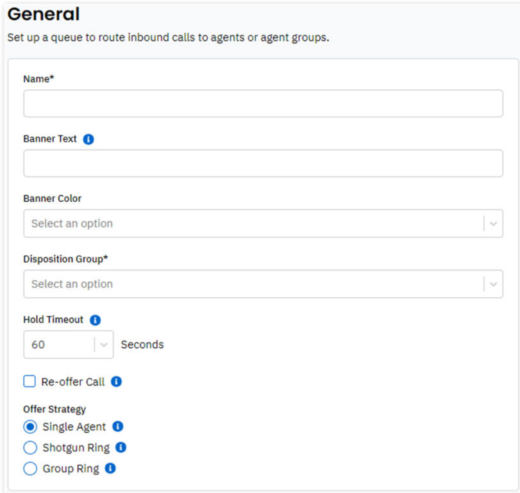
Let's get started. Configuration of the various Call Flow IVR components allows you to create Steps that align with your specific business requirements. You'll do this in the Denali Workspace app within Salesforce.



Step 1: Configure Call Flows Steps in Workspace

1. **Configure Extensions:**
    - Create and fill in the necessary configurations such as Name, Assignment, Primary Extension, Voicemail & Greeting Configuration. Then Save.
    - The created Extension can now be assigned to individual agents for direct routing of calls or for use in a Call Flow.
2. **Configure Call Queues:**
    - Create and fill in the necessary information such as Queue Name, Banner and Color, and Offer Strategy. Then Save.
    - Assign Agents or Agent Groups to the queue.

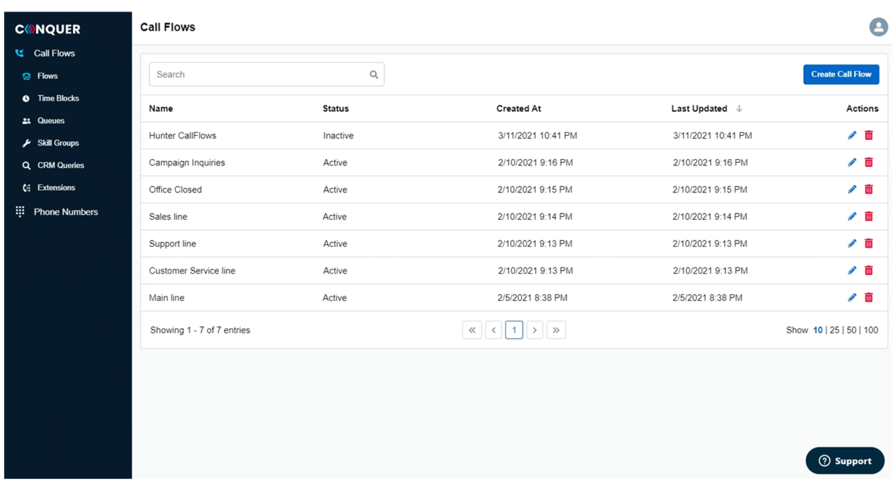
- Save your configurations to create the queue in Workspace



3. **[Time-Based Routing:]**
   - Define business hours and create fallback rules for after-hours calls (e.g., voicemail or off-site routing).

Setting Up Call Flows IVR

Creating a new Call Flow and assigning it to a phone number in Conquer Voice is a straightforward process. Here's a step-by-step guide to help you through it:

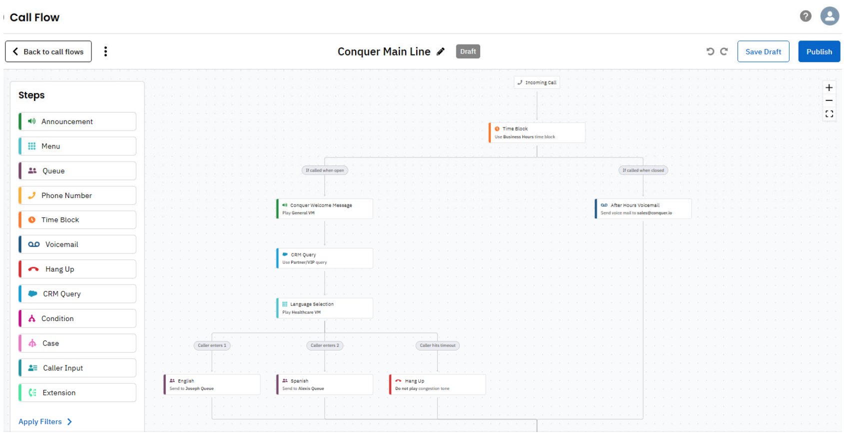


Step 2: Create a new Call Flow

1. **Access Denali Workspace**

- Log into Salesforce and navigate to the “Denali Workspace” application.
- Select Call Flows from the menu.

2. **Create and Configure a New Call Flow**
   - Click on “Create Call Flow”.
   - Name your Call Flow (e.g., "Customer Support Routing").
   - Use the drag-and-drop flow builder to design your Call Flow.
   - Add Call Flow steps such as **Announcement**, **Menu**, **Queue**, **Phone Number**, **Time Block**, **Voicemail**, and **Hang Up**.
   - Utilize triggers like time of day or call priority to customize routing.



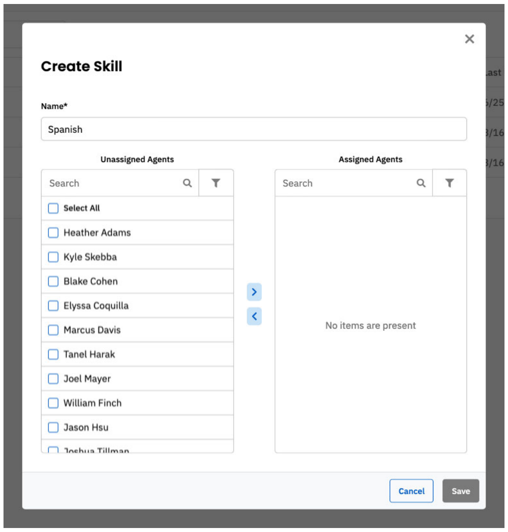
***Note*:** For detailed information about these Call Flow steps, visit the [Conquer Support Center.]()

3. **Save and Publish**
   - Save your Call Flow as a draft if you need to make further edits.
   - Once finalized, click Publish. Only published Call Flows can be assigned to phone numbers.
4. **Assign the Call Flow to a Phone Number**
   - Navigate to the “Phone Numbers” page within Workspace.
   - Select the Phone Number you wish to assign the Call Flow to.
   - Assign the published Call Flow to the selected Phone Number and Save.
5. **Test and Revise**
   - Make some calls to simulate various scenarios and ensure your Call Flow works as intended.

- You can edit a Call Flow by clicking on Edit and making necessary changes in the canvas view. Simply publish again after the changes have been made.

Step 3: Advanced Configuration

1. **Call Forwarding:**
    - Route calls to external numbers or mobile phones during off-hours to ensure that they are not missed.
2. **Quick Dial:**
    - The Quick Dial tab in the dialer displays Agent Extensions that are linked with a Conquer Phone Number. Custom numbers can also be added.
3. **Enable Dynamic Routing:**
    - Route calls based on caller data matched with agent **licensing, skills, or performance metrics**.
    - Example: Direct calls related to complex technical issues to senior agents with specialized training.



Managing Telephony in Daily Operations

Monitoring Call Activity

- Use the **Real-Time Dashboard** to track:
  - Inbound call volume.
  - Queue wait times.
  - Call completion rates and agent performance.

Name

Queue Group 1

Primary Group: Agent Group 1 — Agent Count: 23

Absolute Position	Effective Position	Agent Name	Agent State	Idle Time	Offer Availability	Inbound Ready	Connection Status	Agent Paused	Agent A Leg	Strike Count	Call Cap
1	1	Bruce Wayne	Idle	01 : 03 : 12	Available	Enabled	Connected	Active	Connected	0/2	0/3
2	2	Peter Parker	Idle	00 : 41 : 25	Available	Enabled	Connected	Active	Connected	0/2	2/3
3	-	Steve Rodgers	Wrap Up	00 : 38 : 02	Unavailable	Enabled	Connected	Active	Connected	0/2	2/4
4	-	Natasha Roman...	Wrap Up	00 : 20 : 14	Unavailable	Enabled	Connected	Active	Connected	0/2	2/5
5	-	Matt Murdock	Wrap Up	00 : 14 : 51	Unavailable	Enabled	Connected	Active	Connected	0/2	0/5
6	-	Tony Stark	Wrap Up	00 : 08 : 58	Unavailable	Enabled	Connected	Active	Connected	0/2	2/5
7	-	Bruce Banner	On Call	00 : 00 : 00	Unavailable	Enabled	Connected	Active	Connected	0/2	0/3
8	-	Nick Fury	On Call	00 : 00 : 00	Unavailable	Enabled	Connected	Active	Connected	0/2	3/4
9	-	Barry Allen	Offline	01 : 09 : 06	Unavailable	Disabled	Connected	Active	Disconnected	0/2	3/3
10	-	Logan Howlett	Offline	00 : 50 : 06	Unavailable	Disabled	Connected	Active	Disconnected	0/2	1/4

Load More

[Adjusting Call Routing Rules]

- Modify routing rules based on seasonal demand, team availability, or changes in business needs.
- Example: Route calls related to specific products to specialized teams during an event for optimized coverage.

[Handling Emergency Scenarios]

- Configure emergency routing protocols for urgent customer needs, ensuring high-priority calls are flagged and routed to available agents immediately.

Best Practices for IVR and Telephony Management

1. **Simplify IVR Menus:**

    - Avoid creating overly complex IVR flows. Keep options concise and intuitive to minimize customer frustration.
2. **Monitor Performance:**
    - Regularly review analytics to identify bottlenecks, such as long wait times or dropped calls.
3. **Personalize the Experience:**
    - Use CRM data to greet customers by name or tailor options based on previous interactions.
4. **Train Your Team:**
    - Ensure agents understand routing logic and are prepared to handle escalations effectively.
5. **Regular Updates:**
    - Periodically update IVR menus and routing rules to reflect organizational changes, new services, or campaigns.

Troubleshooting and Support

If you encounter issues with IVR or telephony management:

- **Check Configuration:** Verify menu options and routing rules in the IVR settings.
- **Test Your Setup:** Use test calls that mimic real-world scenarios to identify misconfigured or broken workflows.
- **Contact Support:** Reach out to **support@conquer.io** for expert assistance.

Licensing and Feature Access

If IVR and Telephony Management are not included in your current Conquer Voice license, we're here to help:

- **Contact Sales:** Email us at **sales@conquer.io**.
- **Schedule a Demo:** Experience these powerful features by **booking a demo** today.

By fully utilizing Conquer Voice's IVR and telephony management tools, you can enhance customer satisfaction, streamline call handling, and drive operational efficiency. For more resources, visit the Conquer Help Center.