DEALERMINE | CRM

Know More. Book More. Sell More.

Inbound Telephony

Inbound Assist allows calls to be re-routed to a purchased inbound number.   Telephony numbers can only be re-directed to a direct in dial line, not extensions. Any inbound line being answered by multiple users can have a Call Queue flow setup to assist with call handling.

**Inbound phone numbers purchased in DealerMine will cost $2 a month for local and $3 monthly for toll-free plus usage costs.

Accepted in DealerMine vs. Accept Calls on Device

Inbound lines can be configured to be "Accepted in DealerMine" or "Accept Calls on Device". The difference is multiple users can accept calls that funnel into DealerMine. This is when a call queue flow is setup. Calls will be directed to DealerMine and answered by any member of the queue.

If a call is setup to "Accept Calls on Device" they will be re-routed to a number which can only be associated with one user. This option is typically used when sending calls to an employee's mobile phone. This option does not require any call queue setup.

Call Queue's

Inbound Assist allows calls to be re-routed to a purchased inbound number.   Click the **Q** button to view all queue's the logged in user has access to.

In the Call Queue screen you will see the following information:

- Number of users in the queue (click to view the **Queue Monitor** screen)
- Name of Queue
- Incoming call button (green if there is an incoming call/grey if there are none)
- Voice mail bubble (green if there is a voice mail waiting / grey if there are none)
- Sound icon (Click this to activate sound on incoming calls / leave grey for no sound)

The **Queue Monitor** screen will allow all users to oversee queue and activity.

- Name of Queue, lists all users with access to the queue.
- Login Date
- Last Activity Date
- Status

Users will only appear in the queue if they have access in Inbound Assist under Users Connected to Lines.

Accepting Calls in DealerMine

When there is an incoming call a notification pop up will display at the top center of the screen, regardless of what screen is currently in view. This notification must be closed by the user.   The Call Queue window will also be in view.
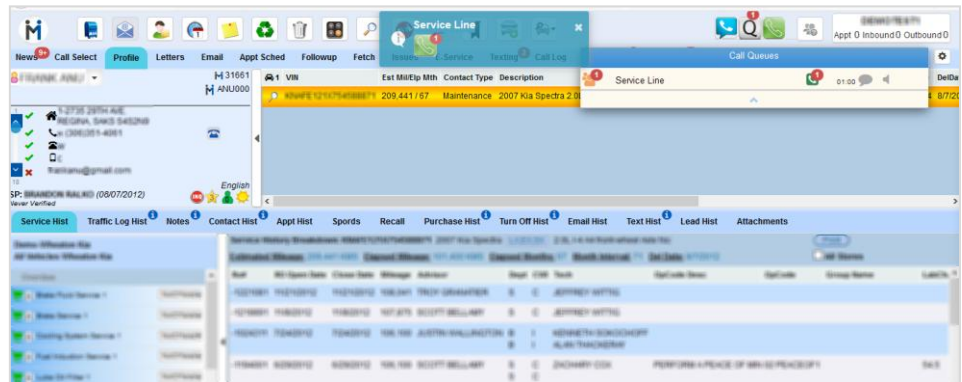
Answering a Call

You can answer a call by clicking either green phone in either the top notification or in the call queue.
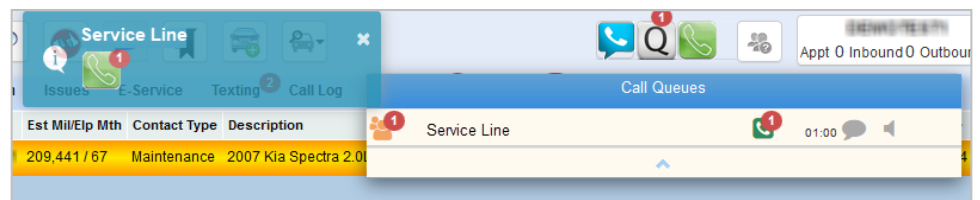

Sound Option

Each queue has a sound option for incoming calls. Click the sound symbol next to the queue you'd like to have a ring notification play on all incoming calls. This is helpful in case a user isn't looking at their screen when a call comes in. Make sure the volume is up high enough on the computer of the user logged in.

Search on Inbound (Option)

IF ON - If the option "Search on Inbound" is ON in Inbound Assist, then once the users accepts the call the search screen will automatically open beginning to search for a matching customer using the phone number.

IF OFF - If the option "Search on Inbound" is OFF in Inbound Assist, then once the user accepts they call they will have to click the Search button when they are ready to begin searching for the customer. The user will have to type in information to be searched upon, such as phone number, name etc.
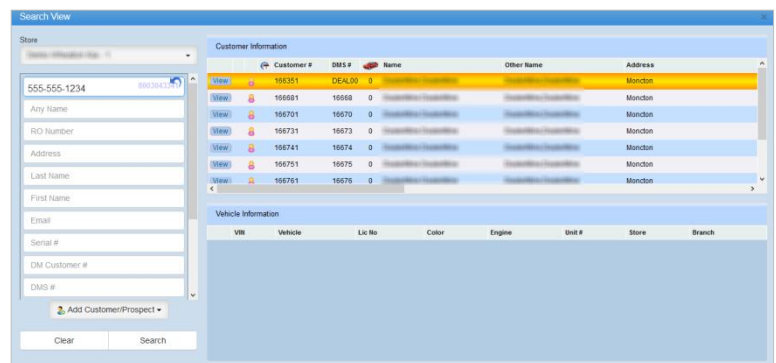
Call in Progress

Once on the profile after choosing a customer profile, the call screen disappears. You can view it anytime by clicking on the "Call In Progress" icon as shown here. From here you can do any of the following:

1. Hang up
2. Hang up and Recycle
3. Transferred Call – this will ensure the call does not hang up after being transferred.
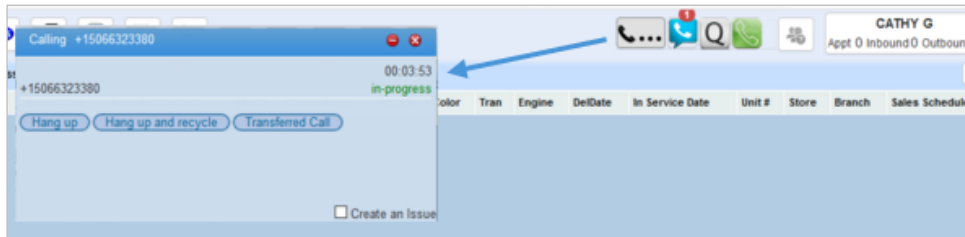
Contact History

Each inbound call that is connected to a customer (upon searching) will have an entry recorded in Contact History showing the call and allowing any user with access to play it back. If the call isn't connected to a file it will exist only in the Call Log for referencing.

Checking Voice Mails

 When there is a voice mail waiting to be checked, the voice mail button will show a red orb. Click it to view where the voice mails exist (if there is more than one queue). The voice mail pop up will open allowing you to click the blue voice mail button again to listen to the message.

Click the **Link** Icon to begin searching for a matching customer.

Status drop down - the status drop down will display 4 selections;

1. **Completed** - when Completed is select this will indicate no further action is need and will be removed from the user's Call Queue
2. **Deleted** - this will not delete the Voice Mail from DealerMine however will delete it from   the user's   Call Queue
3. **In Progress** - as soon as a user clicks the Voice Mail icon from the Call Queue the voice mail status will be In Progress and will be assigned to that user.
4. **Pending** - when pending is select this will indicate that the Voice Mail will need more action, the Notes popup will open as comments are required.

**A voice mail cannot be marked as Deleted or Completed until the user has listened to the voice mail.

Assign to drop down - when a Voice Mail needs to be assigned to a specific user simply click on the pencil then click on the drop down to select from all users that are logged into that Call Queue.

**Users must have sound on their computers in order to listen to voice mails.

Call Log

Users must have access to view the Call Log. The Call Log stores all Telephony calling activity, whether it is inbound or outbound.

The Call Log is a central place where a user with access can view and listen to telephony conversations. The **Results** tab will consist of a Calendar and date selector drop down, filters to drill down on searches, and a check box "Show Voice Mails only".   At the top of the Result grid we will display the Total Calls, Durations, Price and how many are Unlinked for the selected date range and filter selections.   When a voice mail is listened to, we will display in the grid which user listened to the voice mail.

**Right click on any row (recording) to Search Customer, View Profile, Assign To and Unlink.
** Customers are linked up on Inbound calls when they're searched. If a customer is lined by mistake they can be unlinked in the Call Log.

NOTES: