NEW Call Routing Features

Get phone calls to the right people with Convirza’s custom call routing templates available on all your phone numbers.

This guide reviews Convirza’s telephony features and capabilities. Explore the platform plus understand the many call routing options.
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Tracking Number Builder

The tracking number configuration is split into Basic and Advanced sections.

Tracking Number Basic Setup

Basic Tracking Number setup includes:

- Number Type
  - Single Number
  - Number Pool
  - Reserved Number
- Area Code
- Tracking Number
- Active
- Spam Guard
- Tracking Number Name
- Ad Source
- Routing Options
- Ring to Phone Number
- Add Overflow Number
- Voicemail
- Set Caller ID to

![Tracking Number Basic Setup](image-url)
Advanced Tracking Number Settings

The following options are in the Advanced Tracking Number Settings:

- Call Value
- Repeat Interval (In Hours)
- Voicemail (Number of Rings)
- Configure Voicemail Greetings
- Pre-call Webhook
- Record Call
- Play call recording disclaimer
- Play voice prompt first
- Play Whisper message before connecting
- Custom Sources
- Dynamic Number
- Post Call IVR

You can create a template with tracking number settings that auto populate each time you add a new number. Configure template options in your Group & User Settings.
Advanced Telephony Features

Convirza combines call routing tools with intelligent, handy features. You can customize your call experience to match your business with features such as custom greetings, GeoRouting, automated answering menus, and more.

Under CONFIGURE ROUTING OPTIONS, click on the drop down menu in the field called 'Route Calls By.'
Forwarding to a Phone Number

As the name suggests, a Tracking Number set to forward to a phone number sends the call directly to the specified phone number.

You can set the caller ID that displays:
- Caller’s phone number (Caller ID)
- Tracking Number
Interactive Voice Response

Set up an automated answering menu with Convirza’s Interactive Voice Response (IVR) system. This enables callers to select from a menu of pre-recorded voice prompts. They press the phone keys to connect the right information, person, or department.

Convirza IVR includes 3 levels of menus with a fully customizable message tree and advanced options.

Advanced options include:
- whisper messages
- voicemail
- overflow routing
IVR Location List

Combining GeoRouting with Interactive Voice Response (IVR) menus gives multi-location businesses a ton of flexibility.

GeoRouting sends calls to particular locations, and each of those locations can have their own IVR menus. Individual sites can customize their caller experience.

<table>
<thead>
<tr>
<th>Location</th>
<th>Address</th>
<th>City</th>
<th>State/Province</th>
<th>Zip/Postal Code</th>
<th>Phone</th>
<th>Claimed States/Province</th>
<th>Claimed Zip/Postal Codes</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cedar Hills</td>
<td>10101 Goober Lane</td>
<td>Cedar Hills</td>
<td>UT</td>
<td>84082</td>
<td>(385) 695-3123</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Danio</td>
<td>danio</td>
<td>SLC</td>
<td>UT</td>
<td>84321</td>
<td>(123) 629-2142</td>
<td></td>
<td>84321</td>
<td></td>
</tr>
<tr>
<td>Pleasant Grove</td>
<td>123 Mulberry Lane</td>
<td>Pleasant Grove</td>
<td>UT</td>
<td>84082</td>
<td>(801) 878-0943</td>
<td></td>
<td>84082</td>
<td></td>
</tr>
<tr>
<td>Test23</td>
<td>address</td>
<td>city</td>
<td>UT</td>
<td>12345</td>
<td>(123) 456-7890</td>
<td></td>
<td>12345</td>
<td></td>
</tr>
</tbody>
</table>

EDIT IVR for locations for customized caller experiences.
IVR Report

The new IVR Report provides information on IVR handling and Instant Insights (more on this feature later). Report feedback gives a snapshot of how IVR is working.

Where did my calls go?
How many calls were abandoned? Who abandoned them and when?
GeoRoute to a Location

Convirza has four different ways to route calls.

**Area Code Proximity**
- Phone calls route to the nearest location based on the caller's number.

**Zip Code Proximity**
- Callers hear a prompt to enter their zip code and are routed to the nearest in a list of locations.

**Claimed Zip Code**
- Callers hear a prompt to enter their zip code and will be directed to a matching location.

**Claimed State**
- Phone calls route to state locations based on the caller's number.
The locations are configured from **Settings --> Customization --> GeoRoute**

Another way to create GeoRoute locations is in Call Flow Setup. Click on the drop-down menu in GeoRoute Setting and click on the Manage Locations button,

**Call Flow Setup --> GeoRoute Settings --> Manage Location Lists**

### GeoRoute Locations

**LOCATION LISTS**

- **Add GeoRoute List**: Add a location list then edit them to add locations to each list. IVR can be configured at individual location when a location is added to the list.

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Created</th>
<th>Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>GeoRoute List 1</td>
<td>5</td>
<td>2020-02-12 12:45:07 pm</td>
<td></td>
</tr>
</tbody>
</table>

**LOCATION EDITOR FOR GEOROUTE LIST 1**

Add individual locations to a location list or enter many locations quickly with the bulk import option. As calls come in, they are automatically routed to the location that meets specified criteria. The call cannot be auto-routed, a voice prompt will ask caller to enter the Zip/Postal code or select from a list of stores. Claimed Zip/Postal Code is an optional field to be used for "Zip/Postal Code Claimed" Geo Routing and Claimed States/Provinces is another optional field to be used for "States/Provinces Claimed" Geo Routing.

<table>
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<tr>
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<th>City</th>
<th>State/Province</th>
<th>Zip/Postal Code</th>
<th>Phone</th>
<th>Claimed States/Provinces</th>
<th>Claimed Zip/Postal Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ellenwood, GA</td>
<td>Anvilblock</td>
<td>Ellenwood</td>
<td>GA</td>
<td>32024</td>
<td>(555) 555-5555</td>
<td></td>
<td>32024</td>
</tr>
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<td>32024</td>
</tr>
</tbody>
</table>

**Action**

- Add IVR
- Edit
- Delete

**Download Template**

IVR configurations cannot be imported or exported.

**Done**
Route Calls Based on Percentage

Phone calls route to specific locations, departments, phone numbers, or extensions by volume.

For example, if you have three dental practices and one office has double the dentists. You can send 25% of calls to your two smaller offices and half the calls to your biggest office.

Follow a Schedule (Time of Day Routing)

Route calls to different ring-to numbers by the time of day and day of the week.

For example, calls can automatically go to an after-hours answering service or remote office on the weekends.
Voicemail

Most phone systems have voicemail. However, Convirza provides a more flexible implementation that integrates with call tracking, routing, and reports. All calls are followed from marketing touch points to conversations, including voicemails.

You can listen to voicemail recordings under your Call Logs Report.

There are two ways to configure voicemail for a Tracking Number.

**Send Directly to Voicemail**
- Tracking Numbers route straight to voicemail without ringing any agents.

**Voicemail Checkbox**
- Ring an agent first before going to voicemail. If an agent does not answer the phone within the specified number of ring calls, it will route to voicemail.
Alerts for Voicemail

Call Actions can be configured to send emails and text message alerts when calls go to voicemail.

After adding a Tracking Number, click on Call Actions in the bottom section of your campaign builder.

Tell Convirza where to send voicemail alerts.

Call Actions send alert when you get a voicemail.
Track Outbound Calls

Outbound call routing gives all the same benefits of inbound call tracking. Track, record, and analyze calls made by your team.

Get a more holistic view of calls handled by your business when you capture information on conversations you initiate with leads, prospects, and customers.

To track your outbound calls:
1. Dial the tracking number
2. Enter (optional) 4-digit authentication pin
3. Dial the phone number you want to call
Hunt Options

No one likes to miss a customer call just because an agent is unavailable. Hunt Options intuitively ring your team wherever they are, assuring all calls get answered.

Overflow Routing
  ☐ Calls move from one number to the next ring-to number. You can specify the number of rings before a call forwards to the next overflow number.

Rollover Routing
  ☐ Route calls to a group of numbers or voicemail. Again, you can set the number of rings before rolling over and up to 12 rollover numbers.

Simultaneous Ring
  ☐ Reduce call waiting times by ringing all available agents. This hunt option is very easy to set, simply check the box to the right of "Simultaneous Ring."
Instant Insights

Understand phone conversations and sales conversions with instant feedback from your team members.

As soon as calls finish, agents respond to a quick post-call survey with three options.
1. Record Lead or Sale
2. Record Agent ID
3. Record both Lead or Sale and Agent ID

Managers get Instant Insight into call outcomes. They know who handled the call and if the call resulted in a lead or a conversion.
Instant Insights Report or IVR KeyPress Report

Get an overview of Instant Insights in the Post Call section at the bottom of the new IVR KeyPress Report.

The report provides a quick pulse on your calls.

- Know how many leads and sales you have.
- Filter by agent ID, sales, and more to generate custom views.
- See which campaigns are doing well.
- Get a glimpse at how individual agents are performing.

<table>
<thead>
<tr>
<th>TOTAL CALLS</th>
<th>Calls with Instant Insights</th>
<th>Calls with Agent ID</th>
<th>Calls with Call Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>386</td>
<td>7</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Play Call 00:00:32 07-29-2020 ... New Group ... New Group ... 8339241632 ... 7164166506 0 0 0
Play Call 00:01:33 05-05-2020 ... New Group ... New Group ... 8339241632 ... 5705923662 0 0 0
Play Call 00:01:31 05-06-2020 ... New Group ... New Group ... 8339241632 ... 5705923662 0 0 0
Play Call 00:01:10 05-06-2020 ... New Group ... New Group ... 8339241632 ... 801054501 0 0 0
Play Call 00:00:31 03-24-2020 ... New Group ... New Group ... 8339241632 ... 8016584501 333 0 0
Play Call 00:04:08 03-21-2020 ... Schnees A... test | 8559659530... 2247574731 0 0 0
Play Call 00:00:28 03-10-2020 ... Schnees A... test | 8559659530... 8188526404 1,234 Yes 0

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