360 CTI APP

Link Unknown Calls

360 DEGREE CLOUD TECHNOLOGIES PVT. LTD.

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Link Unknown calls

Overview

The "Link Unknown Call" functionality within the CTI application serves to create a lead or contact entry in instances of incoming or outgoing calls involving unidentified or unknown numbers. This feature autonomously generates a new lead or contact entry utilizing the respective number. In scenarios where the number lacks an association with an existing lead or contact record, the system generates a fresh lead or contact entry for that specific number. This efficient process guarantees the capture and organisation of potential leads or contacts, thereby enriching the comprehensive management of customer relationships.

Functionality- If we get an incoming call from the unknown number, in that case our record will automatically be created as per the selection of the respective object ("Lead" and "Account & Contact.") with fields.

We have two choices: "Lead" and "Account & Contact."

If we choose "Lead," we get three options: "Both," "Incoming," and "Outgoing."

For **"Account & Contact,"** we also have three options: "Both," "Incoming," and "Outgoing."

If we pick "Account & Contact," it means a lead won't be created. Only one thing can be created at a time. The main purpose of this is that whenever a call comes from an unknown number, this function is activated.

Let's say you have a person in charge (Lead), and in the settings for unknown calls, the lead option is chosen for both incoming and outgoing calls. Whichever category you pick for the lead, it will automatically be saved in the chosen respective fields. This happens automatically.

This feature currently only support in Lead, Contact and Accounts

Steps to setup the Unknown Call

Users can setup the Link Unknown call in General Settings and In User Config.

To setup the Link unknown Calls fields in CTI General Settings ,

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follow the below steps:

Navigate to the CTI Setup Tab >> Go to the General Settings >> Click to Edit Button >> Search for Link Unknown Call under Unknown call settings >> Choose the Respective Object and Type (“Both”, “Incoming” and “Outgoing”) >> Set the fields by providing the values” >> Click on “Save” button

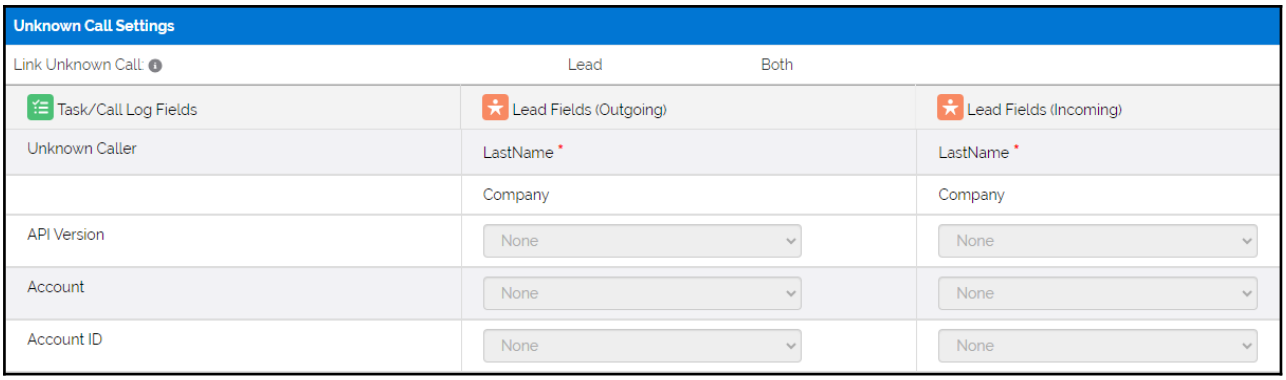


Fig 1: Unknown Call Settings

Below is the description of the details of the settings related to Task/Call Log Fields, Object Field (Outgoing), and Object Field (Incoming):

1. **Task/ Call Log Fields** - Task/Call Log Fields are the data points that are recorded when a call is logged or a task is created for an incoming or outgoing call. These fields provide important information about the call.

2. **Object Field (Outgoing) -** This pertains to the mapping of outgoing task field data onto corresponding object (Lead/Contact & Account) fields when conducting an outgoing call to an unidentified or unknown number.

3. **Object Field (Incoming) -** It pertains to the mapping of incoming task field data onto corresponding object (Lead/Contact & Account) fields during an incoming call from an unidentified or unknown number.

   When you receive an unknown incoming call, in that case, the relevant information will be stored in the selected objects ('Lead'/ 'Accounts & Contact') and types ('Both', 'Incoming', and 'Outgoing') in 'Link Unknown Call', as per the chosen fields.

   Note- In case Link Unknown Call is set in both User Config and General Settings so priority should be given to User Config.

To setup the Link unknown Calls fields in CTI in User Config,

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follow the below steps:

Go to the CTI Setup >> In User Config click on Edit >> Navigate to the “Link Unknown Call” >> Choose the Respective Object and Type (“Both”, “Incoming” and “Outgoing”) >> Click to “Save” button

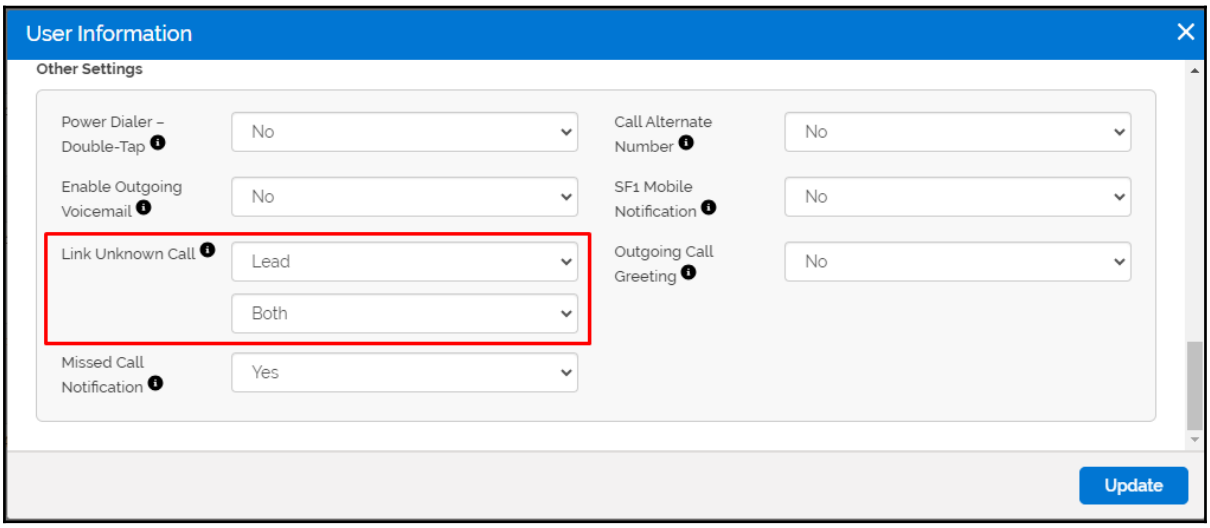


Fig 2: User Information

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