CallRail

A getting started guide to

Using Lead Center and our Mobile App

Take control of your leads

If you miss a call or a text from a prospect, chances are, you've lost a lead. The challenge is, there are more devices, apps, and ways consumers want to communicate, now more than ever. As a result, it's becoming difficult for hard-working small businesses to keep up.

Now, you can take back your leads with Lead Center.

Lead Center is a lead management and communications solution that compiles all of your incoming, active, and recent calls and text messages into one single inbox. You can use it in place of (or alongside) your existing phone system. And Lead Center lets you respond to missed messages in a single click.

Lead Center also adds context to every conversation. Each time you're contacted by a customer, you'll see a timeline of their interactions — from their first call to their most recent text message and everything in between.

78% of people will buy from the first responder[1]

CallRail's Lead Center helps businesses seamlessly engage with their leads through easy-to-use communication tools and workflows. You'll never miss a lead via phone or text, and can automatically track contact details and conversation history all in one place.

In this quick getting started guide for using Lead Center, you'll learn about:

What Lead Center is and the value it provides

How to set up agent permissions and teams

Answering, transferring, and monitoring phone calls

Sending and receiving text messages

Classifying phone calls and text messages

How to use the Lead Center Mobile App

[1] https://www.vendasta.com/blog/lead-response-time

SECTION ONE

Using Lead Center

Lead Center is a lead management and communication system designed to help businesses capture, manage, and engage with their leads, **all in one place**. Lead Center works in sync with your CallRail account to enhance your marketing attribution analysis.

Please note, in order to use Lead Center you must have a CallRail Call Tracking account and at least one number and one user with agent permissions enabled.

Lead Center provides a host of useful features, including:

Communication:

- Place and receive calls and texts from your tracking numbers on your computer or smartphone
- SMS texting, with no character limitations
- MMS texting capabilities for multimedia files
- Respond to prospects who complete forms on your website by phone, text, or email
- Quick Text functionality that allows agents to save an archive of commonly used text messages they can send to prospects and customers at the tap of a button

Contact Center:

- Assign agents to teams and manage agent availability
- Create call queues that direct to specific teams
- Monitor live calls, join one in progress, or whisper something to handling agent only
- Receive voicemails in a general mailbox or individual agent mailboxes
- Warm and cold call transferring between agents

Lead Management:

- View customers' detailed interaction history
- View touchpoint and marketing source, keyword, or campaign data in real time
- Annotation, tag, value, and qualification capabilities

Additionally, the Lead Center mobile app for iOS and Android enables you to make outbound calls, receive incoming calls, transfer calls to other agents, and see interactions in one single inbox. Text messaging via the mobile app is coming soon. The mobile app is available for download in your smartphone's app store.

How to Access Lead Center

1. Sign in to your CallRail account
2. Click on the Lead Center icon in the navigation bar on the left side of your screen (the icon looks like a telephone headset next to a message box)
3. If you have Lead Center access for more than one company in your account, choose the correct company from the dropdown menu
4. Give Lead Center permission to use your microphone. For more information on how to do this, follow these instructions

Lead Center is designed for any business looking to better manage and prioritize their inbound and outbound interactions. The interface is broken down into four areas: the inbox, interaction panel, contact details, and classification panel.

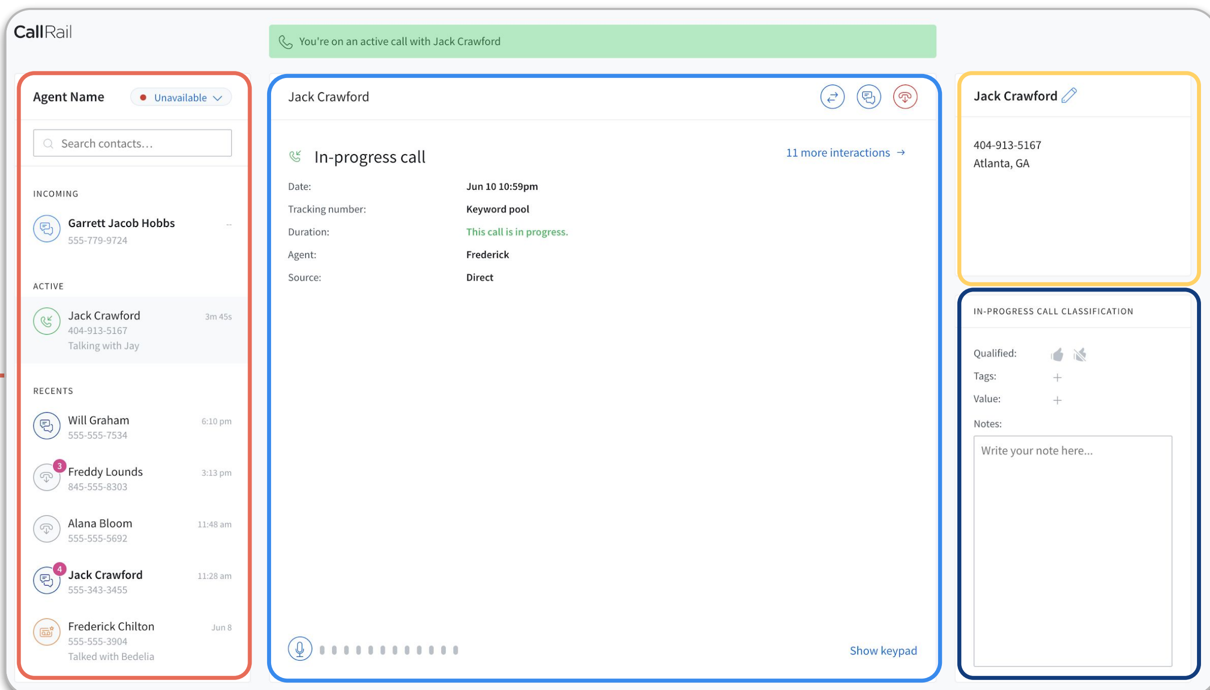
Inbox

The inbox is in the panel on the left hand side. It contains a running list of people who are currently or were recently in contact with your business via phone calls, text messages, or form submissions. The inbox is divided into three sections: incoming, active, and recent.

- **Incoming** includes interactions that are currently inbound and are waiting to be accepted or answered by an agent
- **Active** includes interactions that an agent is currently handling
- **Recents** are interactions that have concluded

Contact Details

The contact details in the top right of the screen contains basic information about whichever lead you have selected at the time. It matches up with the name and phone number as recorded in other areas of CallRail, such as the Call Log and reporting tools. You can edit the contact details at any time.



Interaction Panel

The interaction panel is where the action happens – the telephone dialer and texting interface live here. This is where you can find out additional information about a lead's most recent interaction with your business, including granular conversation details and the source that drove them to contact your business. This is also a great place where you can access the full interaction history of that particular lead, giving you a timeline view of each interaction they've had with your business over time.

Classification Panel

The classification panel can be found in the bottom right corner of the screen whenever you are actively handling an interaction or when you select a lead from your Recents list. This panel allows you to mark a lead as qualified or unqualified based on whether or not that lead is a viable prospect. You can also add tags to an interaction, assign a monetary value, and include notes (which saves automatically as you type). The information you record in the classification panel is transferred to your main CallRail account to support your reporting and analysis.

SECTION TWO

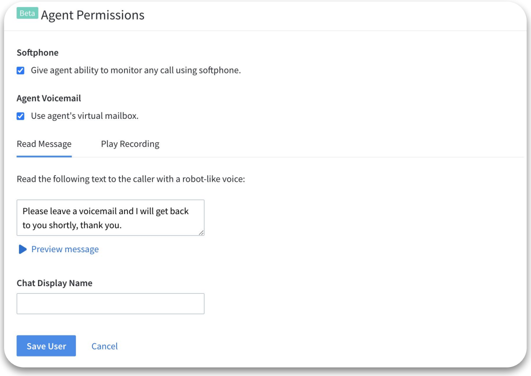
Agents and Teams

Lead Center can be set up for individuals or teams of agents for optimal efficiency and/or customer experience when you have multiple departments or specialized teams.

Adding Agents to Lead Center

Any CallRail user can be added to Lead Center as an agent. If the person you want to add as an agent is not yet a CallRail user, read these instructions to learn how to add new users to your account. There is a per user cost for each new Lead Center agent added depending on which Lead Center pricing plan you are on. When you go to add a new agent in your account, the cost will be displayed.

1. Click the Account icon in the navigation bar at the top left of your screen, then click Users in the My Account panel
2. Find the user you want to add to Lead Center and click the pencil icon to edit user on the right side of the row
3. Scroll to the Agent Permissions card at the bottom of the page and click the Enable Agent Permissions button



Setting Up Agent Voicemail

Lead Center allows you to set up voicemails for individual agents. Calls will go to an agent's individual voicemail when a call flow is configured to ring that agent's phone and they are unavailable. If you are interested in the ability to transfer phone calls between members of your team, setting up agent voicemail is an important part of creating a positive prospect experience. (You can learn more about call transfers in Section 3.)

1. Click the Account icon in the navigation bar at the top left of your screen, then click Users in the My Account panel
2. Find the user whose voicemail you want to edit and click the pencil icon on the right side of the row
3. Scroll to the bottom of the page to the section called Agent Permissions and
4. Check the box next to "Use agent's virtual mailbox"
5. To set the message people will hear when they reach your voicemail you have two options: create a voice recording, or type a message that will be read by an automated voice
    - To use an automated message, select the Read Message tab and type your outbound message in a the box
    - To use a recording, click the Play Recording tab, then click Choose Recording. You can choose an existing audio file that has already been uploaded in CallRail, upload an audio file from your computer, or create a new recording to use as your voicemail message
6. Click Save User

For additional information on how to adjust agent permissions or to remove agents from Lead Center, check out these instructions.

Creating Teams in Lead Center

Lead Center administrators can group agents into teams. Teams help by organizing your agents based on their roles, functions, schedules, or other factors. You'll use these teams when you create queues and build call flows (which you can learn more about in Section 3).

For example, you can create a team for each department in your company to ensure that all calls route to the appropriate group based on menu steps.

1. Click the Account icon in the navigation bar at the top left of your screen, then click the Manage Teams button in the My Account panel
2. Click the plus button at the top right
3. Type the team name in the box at the top. Some examples of team names include "night shift" or "sales team"
4. Select the agents you want to add to the team from the dropdown menu
5. Click the Create button at the bottom right

Please note that you'll need to add teams to a call flow once you're done creating them so they can start receiving calls. For more information on adding teams to call flows, read these instructions.

SECTION THREE

Call Flows, Queues, Transferring, and Monitoring

Call Flows

Call flows determine how your incoming calls are routed and what callers experience when they call your tracking numbers. They can be configured to direct calls to various teams, such as sales and customer service, or specific agents. They can include pre-recorded greetings, phone menus, voicemail boxes, and more. Your configuration will be unique to the needs of your business. You can find resources on how to build call flows here.

Creating a Lead Center Call Flow

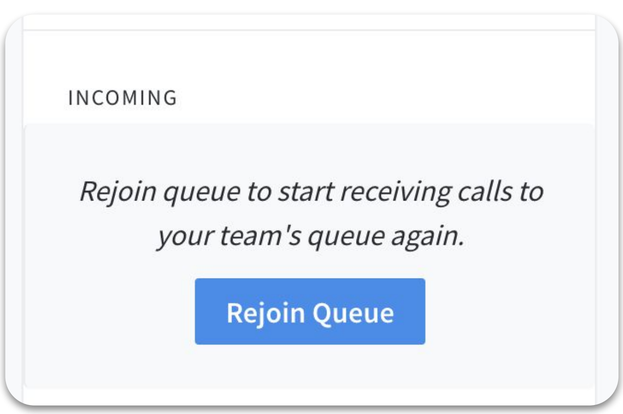
You can create a new call flow or edit an existing call flow to route calls to Lead Center.

1. Click the Tracking tab at the top of the screen
2. Select the company you want to access from the dropdown menu
3. Click Call Flows under the Calls & Text menu in the sidebar on the left
4. To edit an existing call flow to send to Lead Center, click on the name of the call flow in the list. To create a new call flow, click the Create Call Flow button. You can start a new call flow from scratch or use one of the available templates
5. Configure the steps of the call flow to meet your specific needs. When you reach the step of the flow that determines where to route the call, you'll follow one of the choices below to route to Lead Center:
    - Call Queues
    - Dial Step
    - Simulcall
    - Round Robin

To learn more about Lead Center Call Flows, read these detailed instructions.

Call Queues

When configuring a Lead Center call flow, your administrator may choose to use a call queue, which puts calls in a line based on the order they are received. Calls go to the first available agent, or, if more than one agent is available, the agent who has been idle the longest. Calls show up in the Incoming section of each agent's inbox, one at a time, until someone answers.

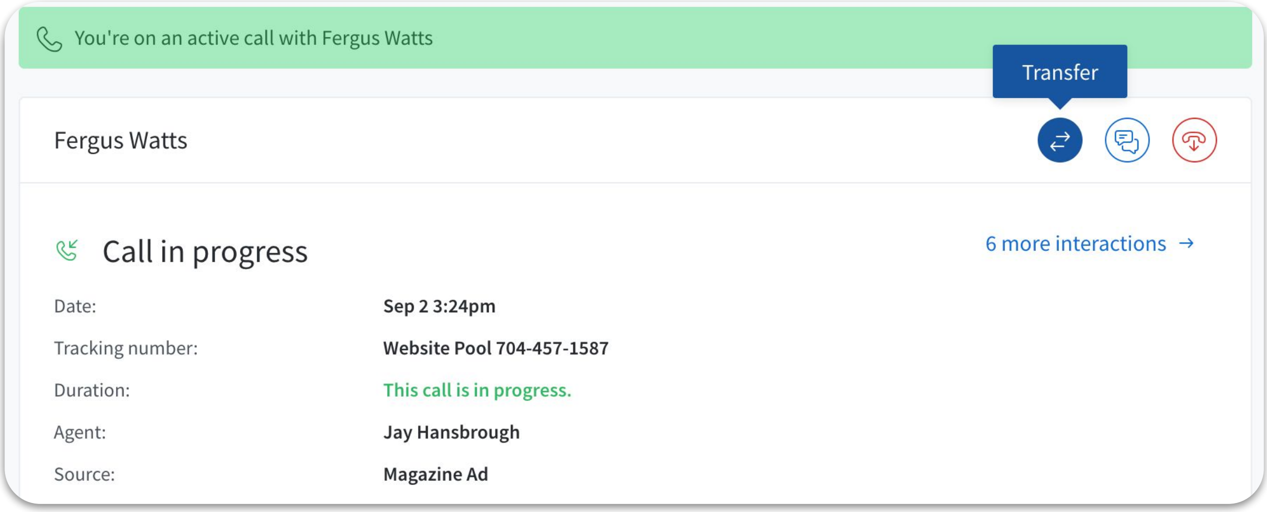


While agents are actively on a phone call, they're removed from the queue of active agents and are not available for incoming calls. After the call has ended, the agent must hit the Rejoin Queue button in the inbox to make themself available again.

Call Transferring

You can transfer an active call to any agent in Lead Center with a cold or warm transfer.

With a cold transfer, when you click the transfer button, you are immediately disconnected as the caller is sent to a different agent. With warm transfers, when you click the transfer button and select the agent to transfer to, you'll be able to speak to the agent first, before you complete the transfer so you can bring them up to speed on the details of the call. Additionally, if both agents want to stay on the call and 'conference' with the caller, they can.



Making a Cold Transfer

1. On an active call, click the Transfer button in the top of the interaction panel
2. Find the name of the agent to whom you would like to transfer the call. Click Cold Transfer
3. You will be disconnected from the customer. They will hear ringing, as they would if they were calling the agent direction. Once the agent answers, the transfer is complete

Making a Warm Transfer

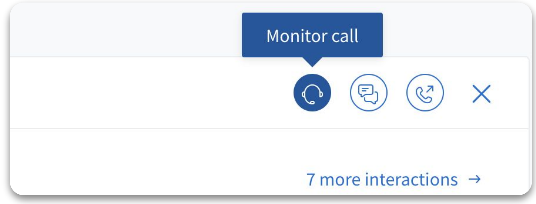
1. On an active call, click the Transfer button in the top of the interaction panel
2. Find the name of the agent to whom you would like to transfer the call. Click Warm Transfer
3. When you click the warm transfer button, the custom will be put on hold. You will hear ringing while you connect to the other agent
4. Once the agent picks up, you'll be able to speak to them while the customer remains on hold. Click Unhold Caller to bring the caller into the conversation with the other agent

Please note that in order to use the warm transfer feature, you must be on the Premium Lead Center plan.

For more information on call transfers, read these instructions.

Call Monitoring

Call monitoring allows agents and administrators to listen in on conversations between other agents and customers. There are three different types of call monitoring available to agents and administrators in Lead Center.



- **Silent call monitoring** allows agents to listen to an active call without alerting the other people on the line — neither the agent nor the customer will know you are are there
- **Barge monitoring** allows an agent to join a call that another agent has in progress to offer additional support, clarity, etc.
- **Whisper monitoring** allows agents and administrators to speak to another agent during a current call without the customer being able to hear. People frequently use this option for coaching or training agents

How to Use Silent Call Monitoring

1. Click on any active call in the inbox
2. Click on the Call Monitoring icon in the top left of the interaction panel
3. You will be able to hear the conversation, but neither the agent nor the customer will know you are listening or be able to hear you. To stop monitoring, click the Call Monitoring button a second time

How to Use Whisper Monitoring

1. Click on any active call in the inbox
2. Click on the Call Monitoring button in the top left of the interaction panel
3. To speak to the agent, click the Talk to Agent button in the bottom of the interaction panel. The agent will see a message letting them know that you have joined the call. They will be able to hear you while the customer will not
4. Click Return to silent monitoring when you are done talking to the agent, if you would like to continue listening to the call on mute. Or, click the Monitor call icon again to leave the call

How to Use Barge Monitoring

1. Click on the active call in the inbox
2. Click on the Call Monitoring button in the top left of the interaction panel
3. Click the Join the call button on the bottom of the interaction panel. The agent will see a message letting them know that you have joined the call. Both the agent and the customer will be able to hear you
4. Click Return to silent monitoring when you are done talking to the agent and customer, if you would like to continue listening to the call on mute. Or, click the Monitor call icon again to leave the call

To learn how to use the call, barge, and whisper monitoring features, read these [instructions].

SECTION FOUR

Phone Calls in Lead Center

One of Lead Center's primary functions is serving as a telephone system with which agents can place and answer phone calls over the internet using their computer's microphone or our Lead Center mobile app on their smartphone.

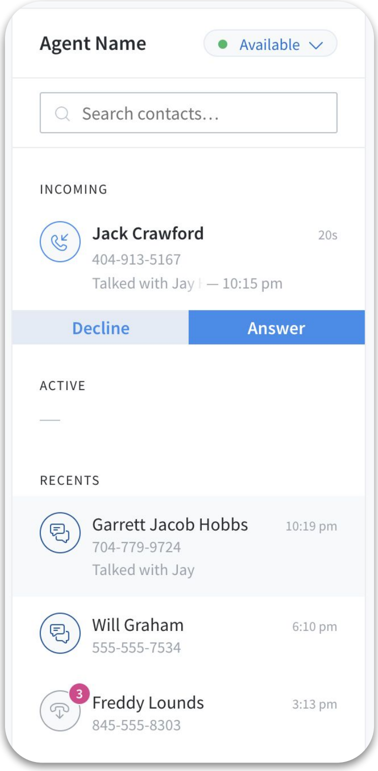
To place and answer phone calls, you must be added as an agent in Lead Center (to learn more about this, read Section 2) by an account administrator. You must also be part of a Lead Center call flow. Administrators must create a call flow that routes calls to Lead Center, then edit one or more tracking numbers to include in the call flow.

In this section, you'll learn how to answer and transfer incoming phone calls and place outbound calls through Lead Center.

Answering Incoming Calls

When someone calls one of your tracking numbers, they will appear in the Incoming section of the inbox. All of the agents who are active and associated with the call flow that routed the call will see the lead in their inbox.

1. Click the Answer button below the name of the lead to immediately connect with the caller
2. Click the Decline button to decline the call—you'll no longer see the call in the Incoming section of your inbox, but other agents may continue to see it, depending on how your call flow is configured
3. You can also click the name of the contact, above the Answer and Decline buttons. This will show the information about the caller in the interactions panel, including caller ID, the name of the tracking number that was called, and the marketing source, keyword, or campaign that drove them to call your business. You can then answer the call using the buttons in the inbox or the icons at the top of the interactions panel
4. To hang up, click the hang up icon in the top right of the interaction panel

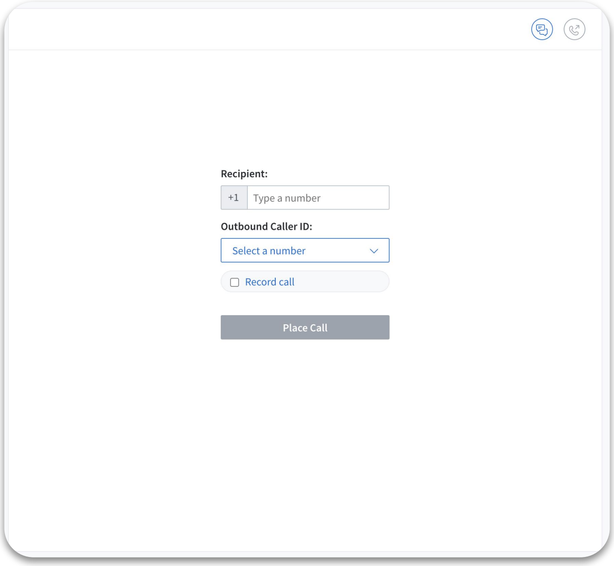


How to Place Phone Calls

You can place calls from the interactions panel or from Quick Actions within the inbox.

Placing Calls from the Interaction Panel

The telephone dialer and texting interface are both located in the interaction panel. You can toggle between the two using the icons in the top right corner of the panel.



1. To place an outbound call, open the dialer and input the phone number you want to call in the Recipient box
2. Choose a tracking number from the dropdown menu (this is the number that will show up on the recipients caller ID when you call)
3. Click the check box that says “Record Call” if you’d like to record the call. There are different laws that apply to call recording, and they vary from place to place. Check your current state and federal laws before using this feature
4. Click Place Call

Calls can also be placed from the interaction panel when a lead is selected from the Recents list. To learn more about how to do that, read these instructions.

Placing Calls Using Quick Actions from the Inbox

Quick Actions allow you to quickly place a call (or send a text) to a lead that is in the Recents list in your inbox. The inbox is located in the left panel.

1. Scroll to the lead you want to call in the Recents section
2. Click on the icon next to the lead
3. Click the Plus button to show Quick Actions
4. Click the phone icon to auto-populate the dialer with the lead’s phone number
5. Click Place Call

With Smart Caller ID, Lead Center remembers which tracking numbers you use when which customers. Lead Center automatically sets your outbound caller ID to the number used during the most recent interaction with any given customer.

For more information on placing calls, refer to these instructions.

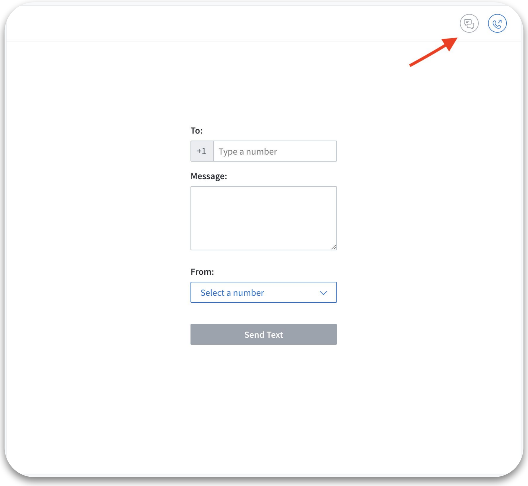
SECTION FIVE

Text Messages in Lead Center

With Lead Center, you are able to send outbound texts and respond to inbound texts from your desktop computer using your CallRail tracking numbers.

Placing Texts from the Interaction Panel

The texting interface and phone dialer are both located in the interaction panel. You can toggle between the two by clicking the icons in the top right corner.



1. Click the text message icon at the top of the interaction panel
2. Enter the phone number of the person you want to text in the To: box
3. Type your message in the Message box
4. Choose a tracking number from the dropdown menu (this number will show on the recipient's phone as the send of the text)
5. Click Send Text

Texts can also be placed from the interaction panel when a lead is selected from the Recents list in the inbox. To learn more on how to do this, read these instructions.

Sending Texts Using Quick Actions from the Inbox

Quick Actions allows you to quickly send a text message to a lead that is in the Recents list in your inbox.

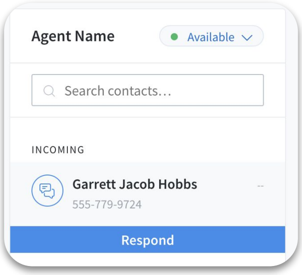
1. Scroll to the lead you want to text in the Recents section and click on the icon next to the lead
2. Click the Plus button to show Quick Actions
3. Click the text message icon to auto-populate the dialer with the lead’s phone number
4. Click Send Text

Viewing and Accepting Text Messages

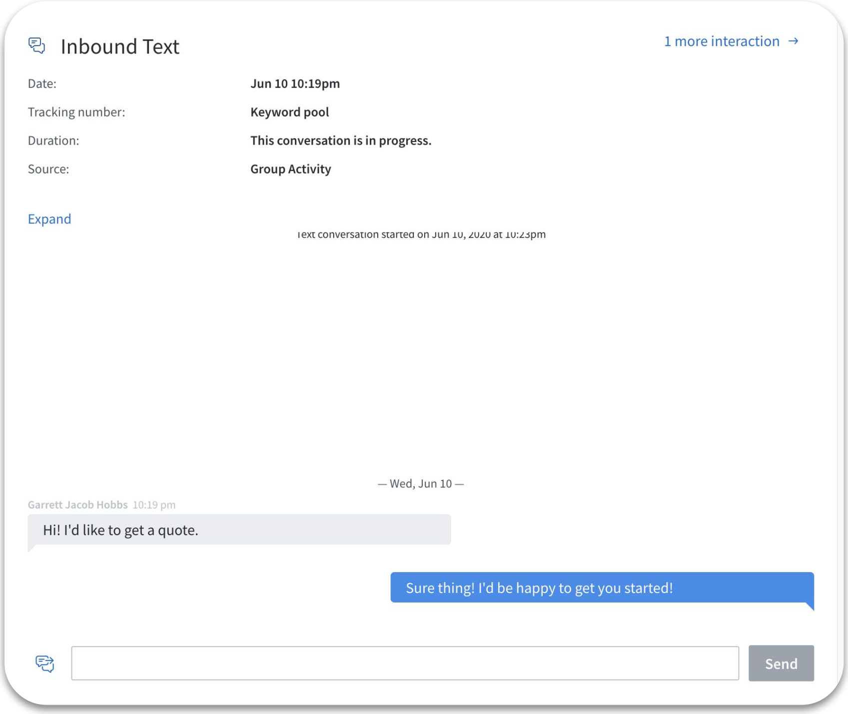
When someone sends a text message to one of your tracking numbers and gets routed to Lead Center, the text will appear in the Incoming section of the inbox. All of the agents who are active and associated with the call flow will see the message.

Since the person sending the text message isn't waiting on the line like they would for a phone call, a text message will stay in the Incoming section of the inbox until someone accepts it and begins the conversation. Texts will time out and switch to the Recents section after 12 hours.

1. Click the Respond button under the text in the inbox to start the conversation



2. The texting interface will appear at the bottom of the interaction panel, underneath caller ID and attribution information. Use the box at the bottom to input your message and click Send



3. Like with phone calls, you can click on the name of the lead to populate the interaction panel to view the message and the lead's information before choosing to accept the text. Then you can accept the text using the Respond button in the inbox or the text icon in the top left of the interaction panel

Closing a Text Message

Once you’ve sent a response, if you are not actively texting with the lead, you can close out the text.

1. Click the Close text icon at the top right of the interaction panel
2. This will transfer the interaction into the Recents section
3. Leaving a text conversation inactive for 30 minutes will also close the conversation and transfer it to Recents

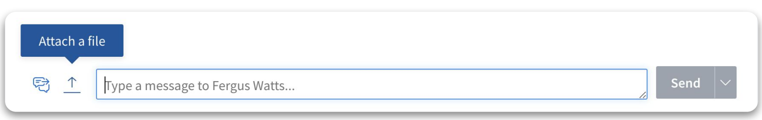
Multimedia Text Message (MMS) in Lead Center

With MMS texting, you can send and receive files, like images, audio clips, and video files via texts.

- Lead Center agents can send common image files via outbound text
- Customers can send common image, audio, and video files to Lead Center agents via inbound text
- For outbound texts, the file size limit is 5MB. For inbound texts from customers, file size limits are determined by the user’s service carrier

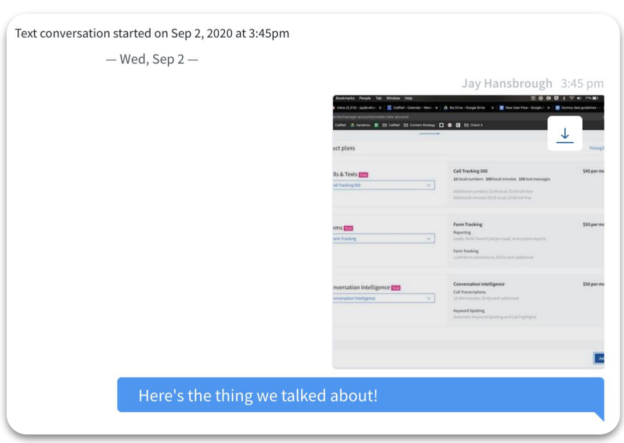
How to Send an MMS Text

1. Open the texting interface
2. Click the Attach a file icon
3. Select a file from your device
4. Type a message in the message box if you life, then click Send



How to Download a File from an MMS Text to your Computer

1. Open the text conversation with the file you want to download
2. Hover your mouse over the preview of the file
3. Click the download icon



SECTION SIX

Classifying Phone Calls and Texts

Classifying your interactions in CallRail is the first step to organizing and analyzing your leads. There are three main ways to classify an interaction: mark as qualified, add a tag, or assign a monetary value.

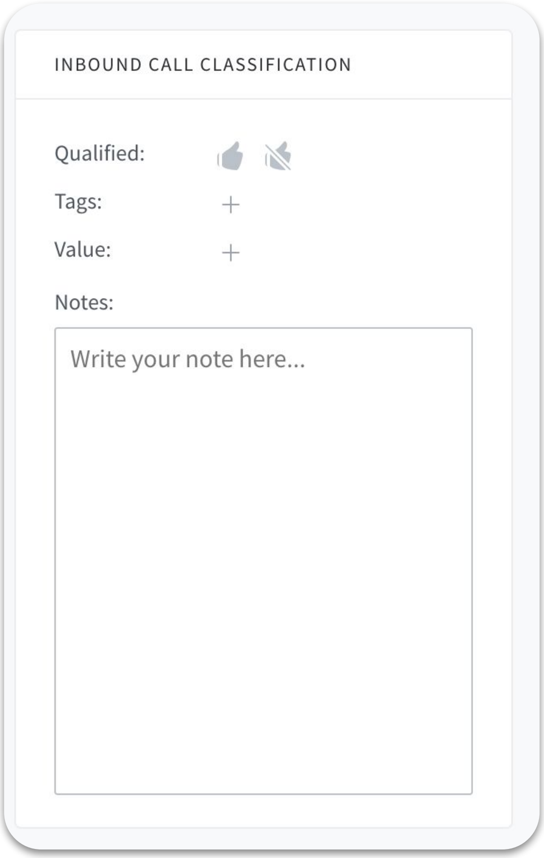
Qualifying leads allows you to create more enhanced reporting around which marketing efforts are attracting good leads and moving leads through the sales funnel. There are multiple ways to qualify leads in CallRail, read these instructions to learn more.

Tags are a helpful way to sort and categorize your calls and form submissions. Each company in your account has its own set of tags that can be created, edited, and color-coded to help you sort data faster. Learn more with these instructions.

Adding values to calls helps you keep track of high-value leads and see the amount of revenue brought in by each agent, PPC keyword, and marketing source. To learn more about values, check out these instructions.

Classifying Interactions in Lead Center

Agents can qualify, tag, assign a value to, or take notes on any interaction in Lead Center during or after the interaction takes place using the classification panel in the bottom right.



1. For agents currently handling an interaction, the classification panel in the bottom right will reflect the current interaction
2. To access the classification panel for an interaction after it has ended, click the name of the person in the Recents section of the inbox
3. You can also select past interactions from a person's interaction history. Once you've selected a person's name in the Recents section of the inbox, click the "more interactions" link in the top right corner of the interactional panel
4. Choose the interaction you'd like to classify from the timeline and use the classification panel to make changes

To learn more about classifying phone calls and texts in Lead Center, read these instructions.

After the above steps are taken, agents can view this information for each individual caller and/or lead, and the Lead Center admin can view this information in bulk to spot trends.

SECTION SEVEN

Lead Center Mobile App

To support today's flexible teams, the Lead Center mobile app allows agents to handle business communications at the office or on the go. You no longer have to be sitting at your desk waiting for a call, Lead Center goes where you go.

The app is available for both Android™ and iOS, can be installed on smartphones and tablets, and any Lead Center agent can use it.

Currently, the Lead Center mobile app can be used to take and make phone calls from your tracking numbers using your mobile device, and transferring calls to other agents using the cold transfer function. Text messaging will be coming soon, along with other functionality such as monitoring, warm transfers, and classification.

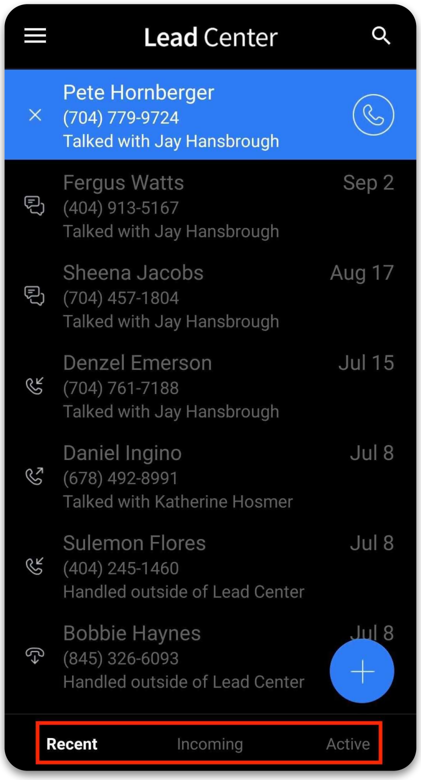
How to Install the Lead center Mobile App

1. Access the App Store® app using your iOS device or Google Play using your Android device
2. Search for "Lead Center" and click Install
3. You can also access the apps with the links below:
    - [Lead Center for iOS] (for Apple® devices)
    - [Lead Center for Android] (for non-Apple devices)

Using the Inbox in the Mobile App

The inbox is divided into three sections, just like the inbox on the desktop version of Lead Center. Use the tabs at the bottom of the screen to switch between Recent, Incoming, and Active sections of the inbox.

To call a lead from the inbox, select their name and click the phone icon on the right. Make sure the outbound caller ID is correct, then tap Place Call.



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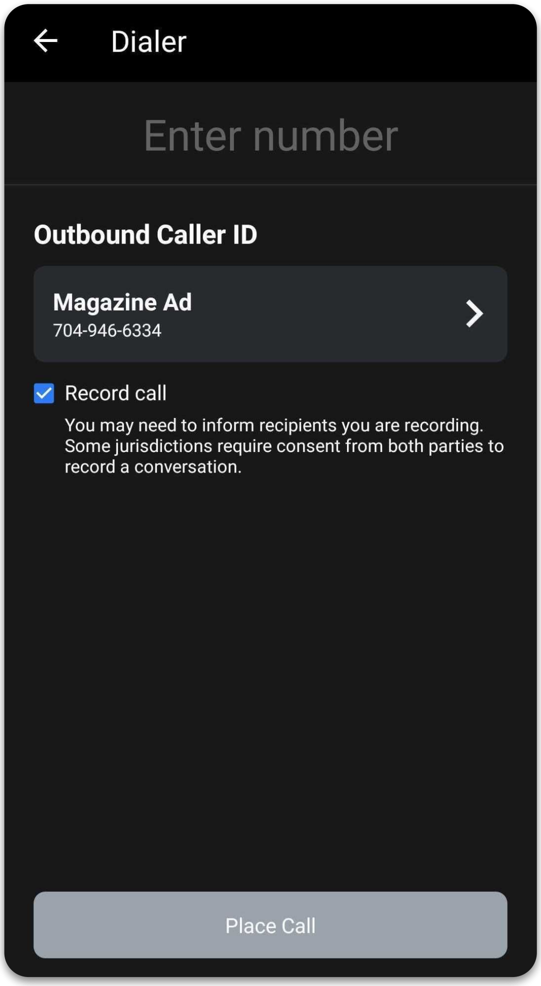
Android is a trademark of Google LLC.

Placing Outbound Calls from the Dialer

To place an outbound call, click the plus (+) icon in the bottom right corner of the inbox. Enter the phone number you would like to call, and select the tracking number you'd like to use as your caller ID (from the perspective of the person you are calling, it will look like you are calling from this number).

To record the call, tap the check box under the tracking number. Please note: due to App Store restrictions, outbound call recording is currently not available on iOS devices.

Additionally, to return a phone call in the mobile app, you can use Quick Actions like in the desktop version. To learn more on how to do that, reference Section 4 of this guide.



Transferring Calls

While you're on a call, tap the Transfer button and choose the agent you would like to transfer the call to from the list and tap their name. You'll be disconnected from the customer. They will hear ringing, as they would if they were calling the agent directly. Once the agent answers, the transfer is complete.

For more information on how to install the Mobile App, using the inbox, placing outbound calls, and transferring calls, read these instructions.

If you have any questions about Lead Center or the Mobile App, reach out to our team at (866) 208-8055 or sales@callrail.com.

CallRail

callrail.com