

SmartChoice Salesforce Call Recording Details

1. If the 'Calls' or 'Call Details' are not visible in the Navigation bar, click the 'Edit' icon on the right side. (If these options are already present, skip to step 8.)



2. Click Add More Items



3. Click All

d1u00000guzxua0-dev-ed.lightning.force.com/lightning/page/home							
		Q Search					
Opportunities 🗸 Leads 🗸 Tasks 🗸 Files 🗸		Add Items					
e Good evening, Scott Talley. Let's get selling!	Available Items	Q Search favorites					
	Favorites	0 items selected					
I by me and closing this quarter A ^r	AI						



4. Click the search bar

g.force.com/lightning	force.com/lightning/page/home						
		Q Search					
Tasks 🗸 Files 🥆		Add Items					
t's get selling!	Available Items Favorites	Q Search all items 0 items selected					
P	All	Alternative Payment Methods App Launcher					
		+ Approval Requests					

5. Search for Calls and Call Details and click the '+' sign next to each item.

Favorites		Calls X Call Details X	
All	2	2 items selected	
		Call Details	
		Calls	

6. Add the new items to the navigation bar.

	8	Test Lead
Cancel Add 2 Nav tems	¥	SC Test Acct 1-



7. Click Save



8. Click the Calls button

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		✓ Chatter Groups ✓ Calendar ✓ People ✓ Cases ✓ Forecasts Calls ✓ Call Details ✓	Ð
		×	
		elationships med by me and created in the last 90 days Build Pipeline Leads owned by me and created in the last 30 days	
		0 Upcoming Activity 0 Upcoming Activity 2 2 Past Activity Contacts 0 Past Activity	
9.	Select a	call record to review	
		Q Search	
		Calls Recently Viewed F 4 items • Updated a few seconds ago	
		Call Name	
		1 CALL - 0025	
		3 CALL - 0023	
		4 CALL - 0019	



10. Click here for related information to the call (Accounts, Leads, Contacts, etc.)

												Q	Search
Sales	Home	Opportunities	V L	eads 🗸	Tasks	~	Files	~	Accounts	~	Contacts	~	Campaigns
Call CALL -	0025												
	I for	$O_{jj'}$		<u> </u>	\bigvee	1	20.00		$\leq \cap$	11	1. N	\backslash	
Related	Details												
Call Name	Details	_									Owner		
Call Name CALL - 0025	Details	-									Owner	Talley	
Call Name CALL - 0025 Agent	Details										Owner	Talley	
Call Name CALL - 0025 Agent Scott Talle	Details										Owner	Talley	
Call Name CALL - 0025 Agent Scott Talle Customer Phone	Details								/		Owner	Talley	

11. Click the Call Details button

													*	•	٩	?	¢	Ļ	6)
~	Chatter	Groups	~	Calendar	\sim	People	\sim	Cases	~	Forecas	ts	Calls	~	Call De	ails	~				p1
1.00	47 1	1918-21	1.7	1111-		17 M	*****	\1ttHts	1	1144.5		11 /	111		all Det	tails	GHIHA	- 1111	en c	1
											New	v Contac	t	Edit	Ne	w Op	portur	ity	•	
	110		10		1	0	11	S	. 1	- 110	-					\frown	11		11	

12. Select a call record

***	Sales	5 Home	Opportunities	\sim	Leads	∨ Ta	asks	\sim	Files	\sim	Accoun	ts 🗸	Contact	5 ~	Campaigns	~
11:-11	1 11	11.5.111	11111211 33	1111	11	11:11-	111	1	111.	-11	1117	111211	X IIIIiti	C	11:10-111	
	Call D	Details														
	AII															
8																
50+ i	items • So	orted by StartTin	ne • Filtered by All	call d	etails • Up	dated a fev	w seco	onds a	go							
-																
		Call Details	Name	~	Extensio	n Nu 🕚	~ S	StartT	ïme 🕹			\sim	EndTime			~
1		Call Log - 03	50 6	â	101		g	9/5/20	24 4:39	9 PM			9/5/2024	4:40 P	м	
2		Call Log - 034	49		101		ç	9/5/20	24 4:0	1 PM			9/5/2024	4:02 P	M	
3		Call Log - 034	47		101		ç	9/5/20	24 3:58	B PM			9/5/2024	3:58 P	M	
4	Π	Call Log - 034	45		101		9	9/5/20	24 3:36	5 PM			9/5/2024	3:36 P	M	



13. Once inside a call record, click here to play the recording in a modal pop-up window.

Agent		Customer Phone
Scott Talley		% (719) 266-2837
Extension Number		StartTime
101		9/5/2024 4:39 PM
SID		EndTime
omni19cloud-1725568795.18410		9/5/2024 4:40 PM
Stage Of Calls		Type Of Call
HangUp	/	Outgoing
Play Recording		Recording URL
0		https://omnicloud.smartchoiceu
		1725568795.18410&enterprise_
Call		Duration
CALL - 0021		23
Created By		Last Modified By
CTL App Site Guest User, 9/5/2024 4:39 PM		💍 CTI_App Site Guest User, 9/

14. Pop-up Recording player

▶ 0:00 / 0:17	- •) :	
		Cancel

15. Click here to close the player

lecording	



16. To download a recording, from the Call details record page, click here

1	StartTime 9/5/2024 4:39 PM
1	EndTime 9/5/2024 4:40 PM
1	Type Of Call Outgoing
	Recording URL https://omnicloud.smartchoiceus.com/ent/playrec.html?rec=omni19cloud- 1725568795.18410&enterprise ID=dinnfh&x=40718c4090704704d498
	Duration
/	23
	Last Modified By
	Stee Guest User, 9/5/2024 4:40 PM

17. Click the options menu



18. Click Download



19. Choose a file name and then click Save

2	7/29/2024 9:34 7/26/2024 11:34	File folder File folder				
				~		
				~		
			Save	Cancel .::		
				0:06 / 0:17	•	÷