# Intro To Call Routing

The boberdoo system prides itself on the ability to track route and bill for leads, and the call routing aspect is no exception.

From a high level overview, the calls will enter and go through your boberdoo system and will route to the correct consumer. This is true call routing instead of just call tracking, which means you can route the call to other lead buyers if the first one doesn't pick up the phone. This allows you to profit off of more calls.

Step 1

You can order number right out of your boberdoo system to use for your campaigns. From under the Phone Routing tab and the Inbound Phone Campaigns to Order Phone Numbers sub-tabs.
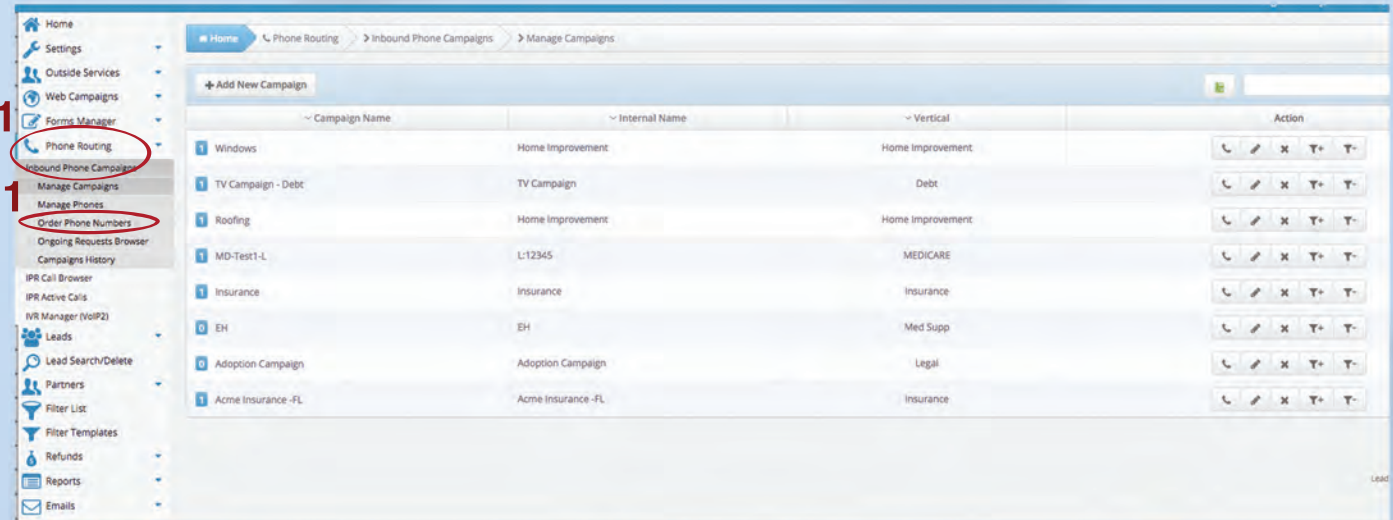
Step 2

You can order them from boberdoo, but you will need a Twillio account to use the phone numbers.

👍 You will need to grab your Twilio account SID and Auth Token.

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IVR Manager

Set up questions to present to the caller, and use their answers to route them just like a web lead.
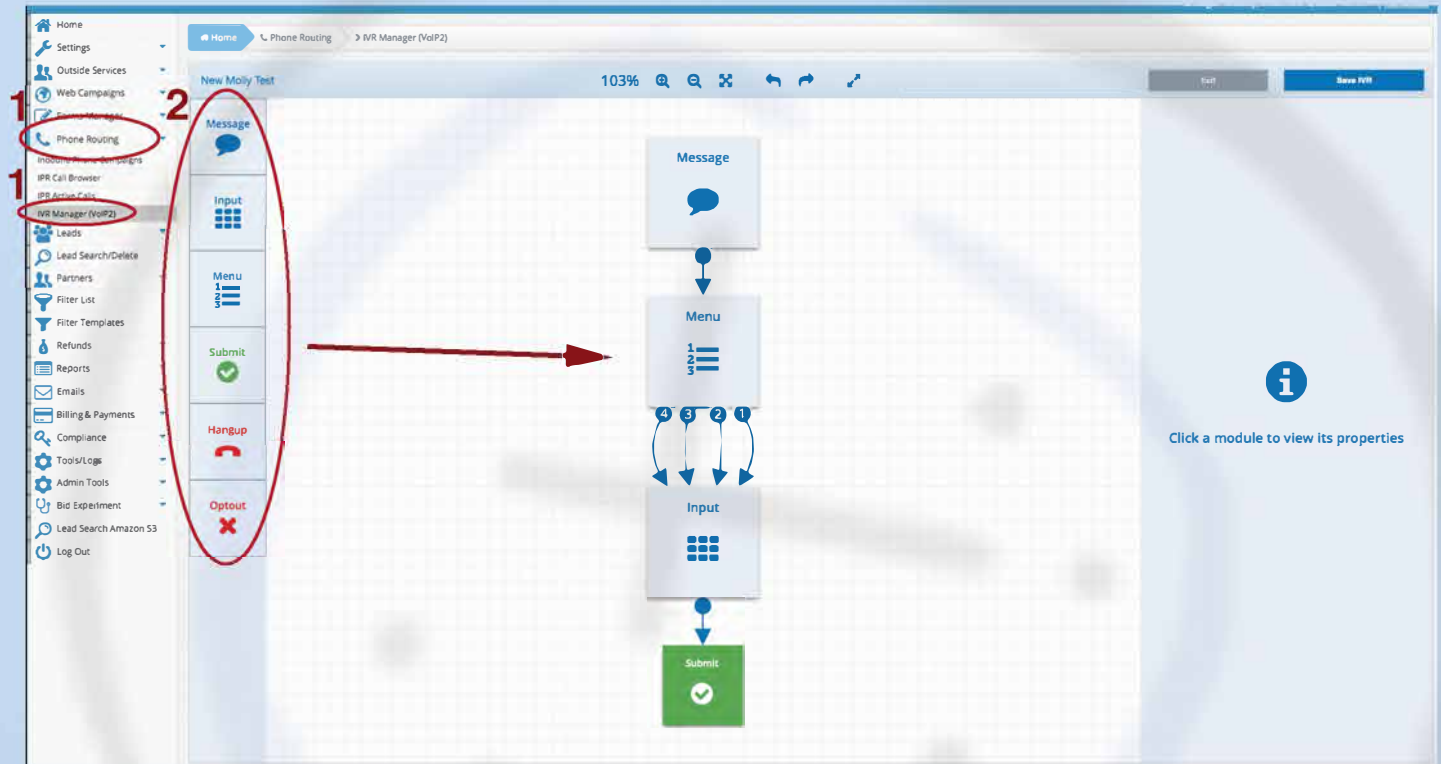
Step 1

To get to the IVR Manager, select the Phone Routing tab, then the IVR (VoIP2) sub-tab.

You can apply different welcome messages, hold music, default phone routing for calls that don't match, caller ID check, or duplicity checks.

Step 2

Drag and drop different options onto the grid to build your IVR.

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Partner Setup For Call Routing

Just like with web leads, you partner will need an active account, available funds and a matching filter set to receive calls.

Step 1

To start, head to the Partner tab, Manage Partners Account. From there, select the edit partner button (pencil icon).

Step 2

From the edit partner screen, select the Lead Filter Sets sub-tab. This will bring you to the partner's filter sets.
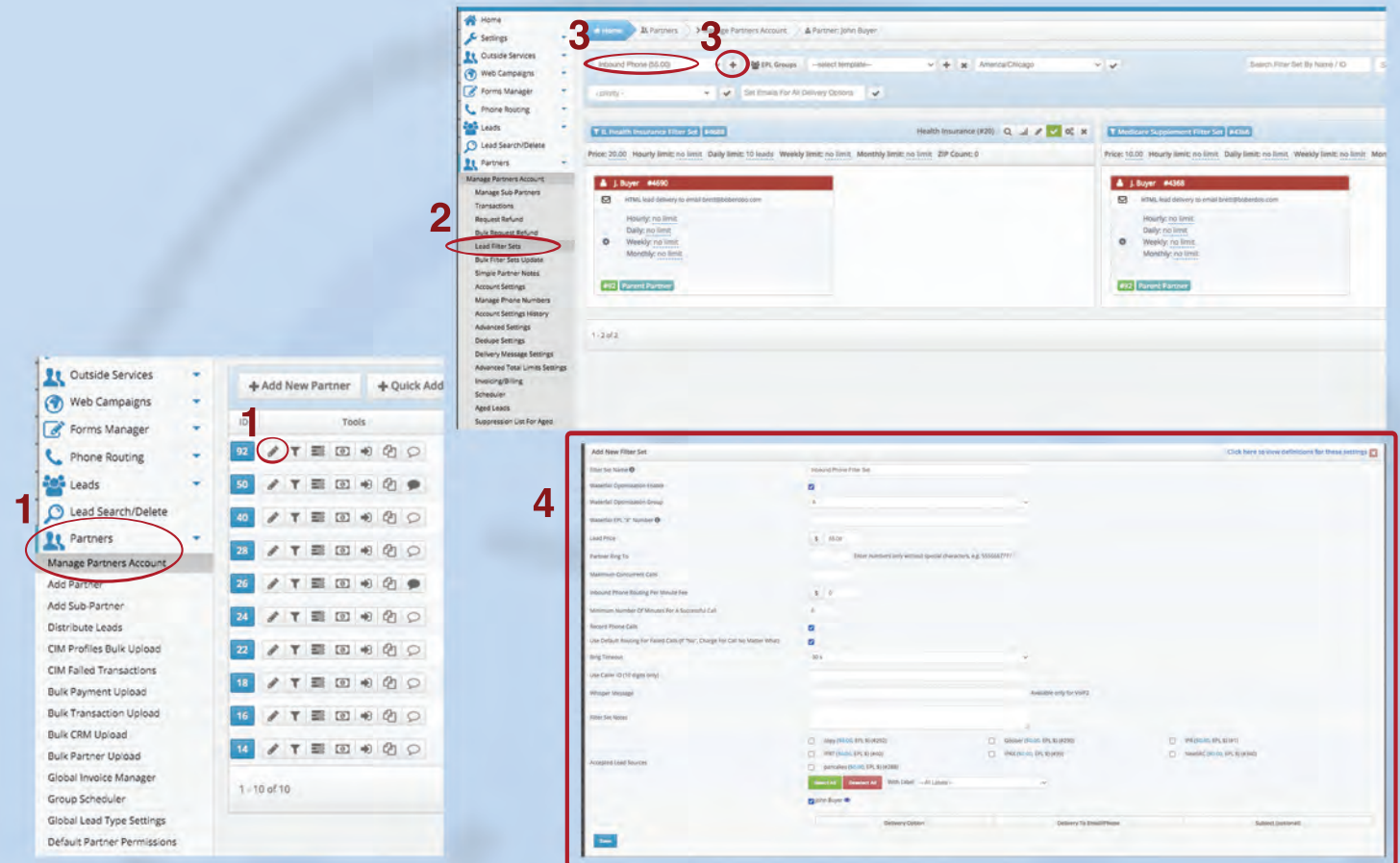
From this page, you can edit partner filtersets or create new ones.

Step 3

To create a new Inbound Phone filter set, select it from the top of the page, then select the + button to start creating one.

Step 4

Set all the specifics for filter set just as you would a web lead, but with call specific fields such as ring to number and call concurrency.

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Call Routing Reports

You can also set up timed reports to get them automatically for times you set up.

Step 1

Using boberdoo reports is a good way to keep track of all your leads. There are many reports that can be used for call routing. To see them, go to the reports tab, then the Inbound Phone sub-tab.

Step 2

The most useful report for call routing would be the Inbound Phone Drill Down Report shown here.

Step 3

This will show you many options, such as matched order, failed attempts, rollback attempts, etc.

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Live Transfers

There are three different types of live transfers that you can use.

Call Matching (Standard Live Transfers) - When using live transfers with call matching, the live call is transferred and routed to the buyers based on the phone information of the lead. This means that the lead's area code (or other information collected through an IVR) is used to determine exactly which buyer the call will be routed to. Although the call center rep collects additional information from the lead that eventually is routed to the buyer, this additional information does not influence the routing logic of the live call.

Data Matching (Full Response) - When using live transfers with data matching (full response method), the live call is transferred and sold to the buyer based on the data collected by the call center rep during the initial call. After the call center rep collects the information from the lead, the rep submits the complete data lead into the boberdoo system. All of the lead details are posted into the boberdoo system to find a single matching lead buyer. boberdoo then returns the matching buyer's information back to the call center rep, so the rep can transfer the call to the buyer that received the data.

Data Matching (Ping Post) - *This method requires extensive system customization and custom training. Please contact support to discuss your options before committing to this method.

When using live transfers with data matching (ping post method), the live call is transferred and sold to the buyer based on the data collected by the call center rep during the initial call. For example, if the call center rep collects the lead's zip code, mortgage amount and credit rating, any or all of these fields are used to determine the best buyer before a call into the boberdoo system is placed. This is done by pinging partial lead details into the boberdoo system and to your network of buyers in order to collect and sort the best available buyers.

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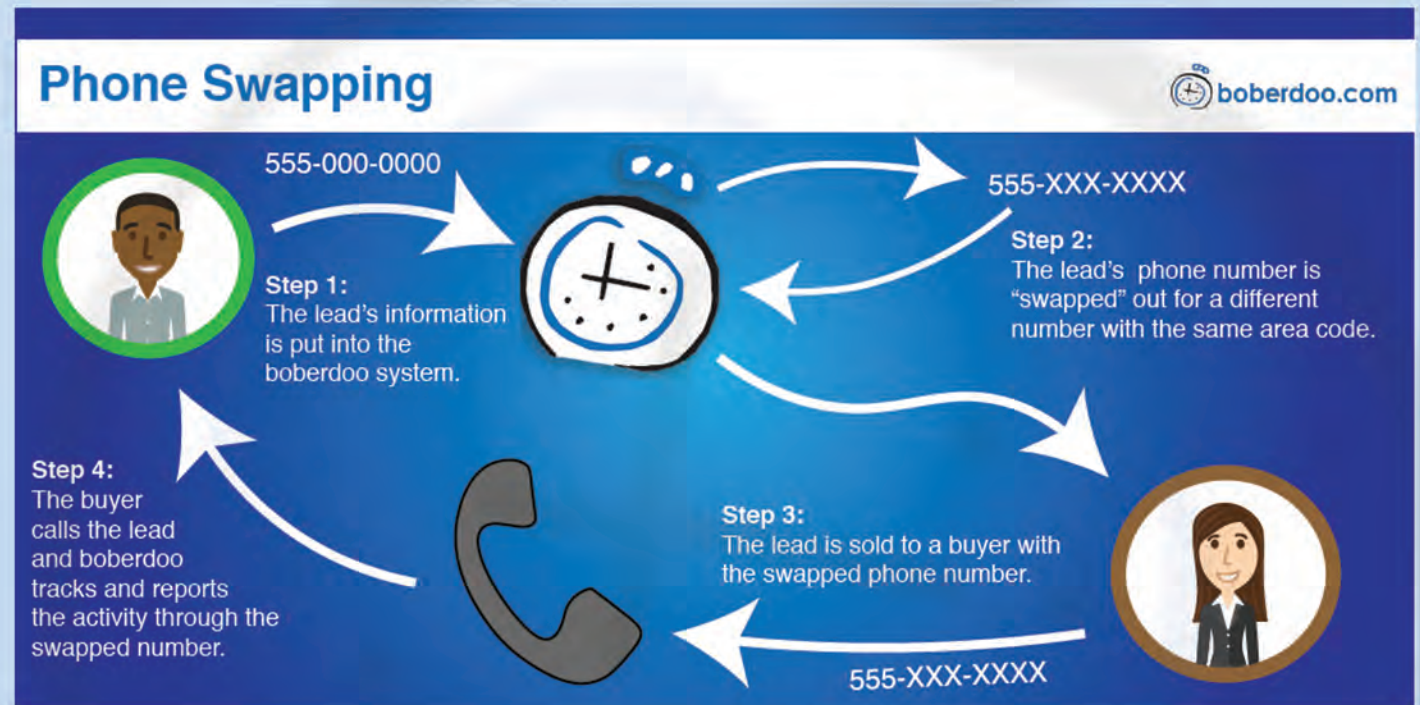
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Onboarding & System Setup

Phone Swapping

Phone swapping is an effective way to track calls and use the data to improve your business.

Phone swapping is a feature that "swaps" out the number that is submitted with the lead for one in the same area code that can be tracked.

When your lead buyer(s) call the swapped number, it is forwarded to the lead's phone number and connected as normal, but swapping the number allows your lead system to report on the calls made to that specific lead.

The overall lead flow and process is not interrupted, so neither the lead buyer nor the lead itself will notice any change in their communication. This provides data that is actionable for a variety of use cases which you can **read about here.**

Phone Swapping

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555-000-0000

555-XXX-XXXX

Step 1:
The lead's information is put into the boberdoo system.

Step 2:
The lead's phone number is "swapped" out for a different number with the same area code.

Step 4:
The buyer calls the lead and boberdoo tracks and reports the activity through the swapped number.

Step 3:
The lead is sold to a buyer with the swapped phone number.

555-XXX-XXXX

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