

Concierge Fire Benefits

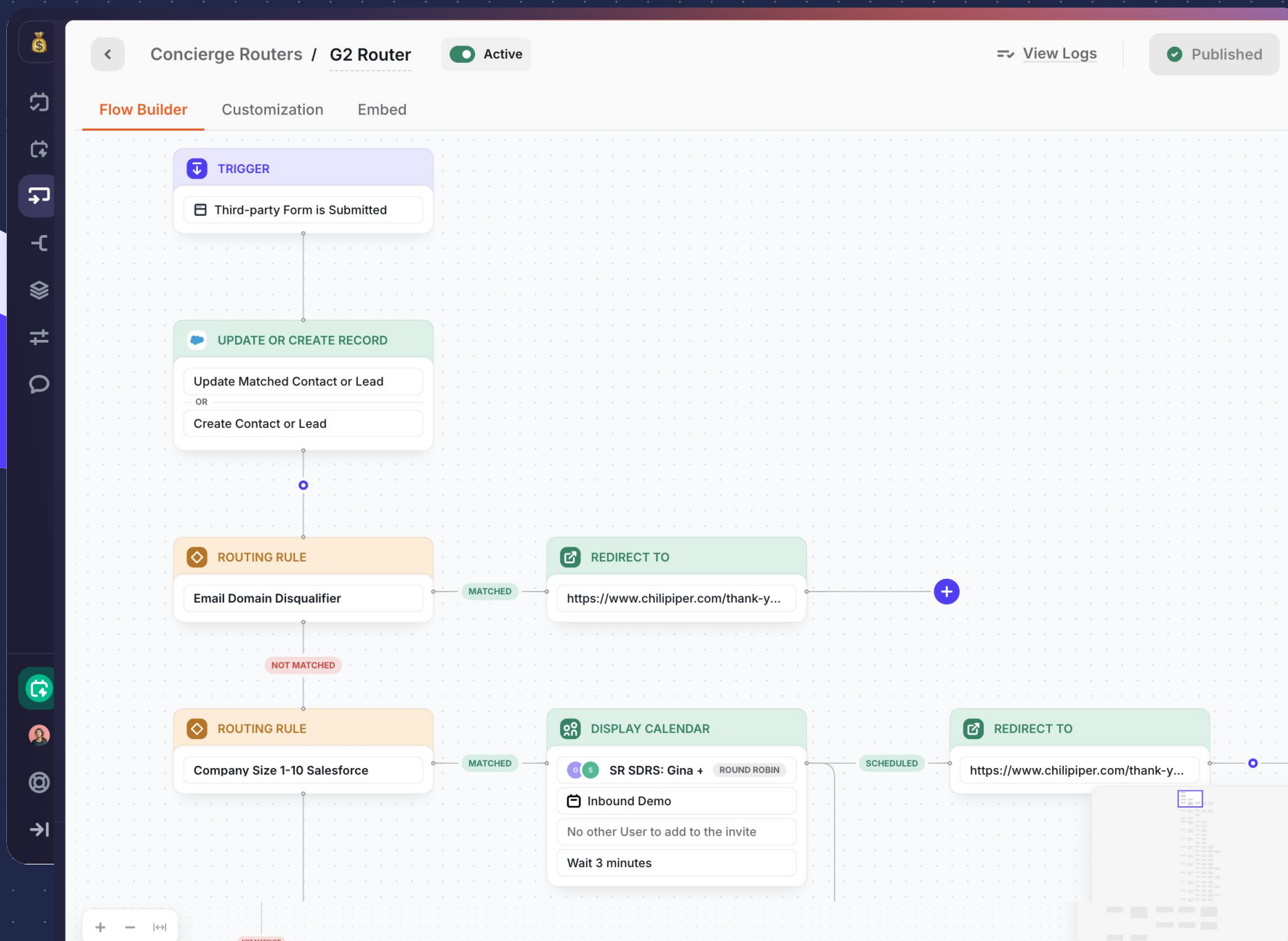
What's New in Concierge ✨

Upgrading from Concierge Legacy? We got you.

All your meeting routers will automatically redirect to Fire. Even if Concierge is operating in more places than you remember, nothing will break.

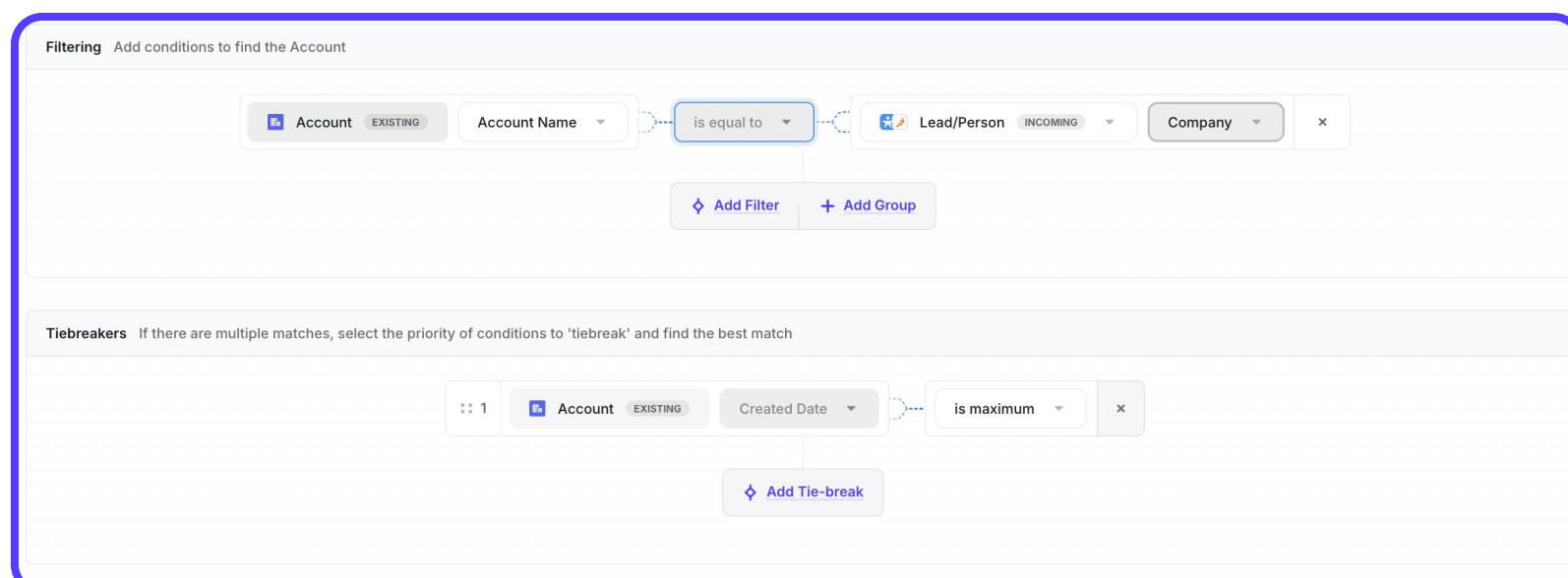
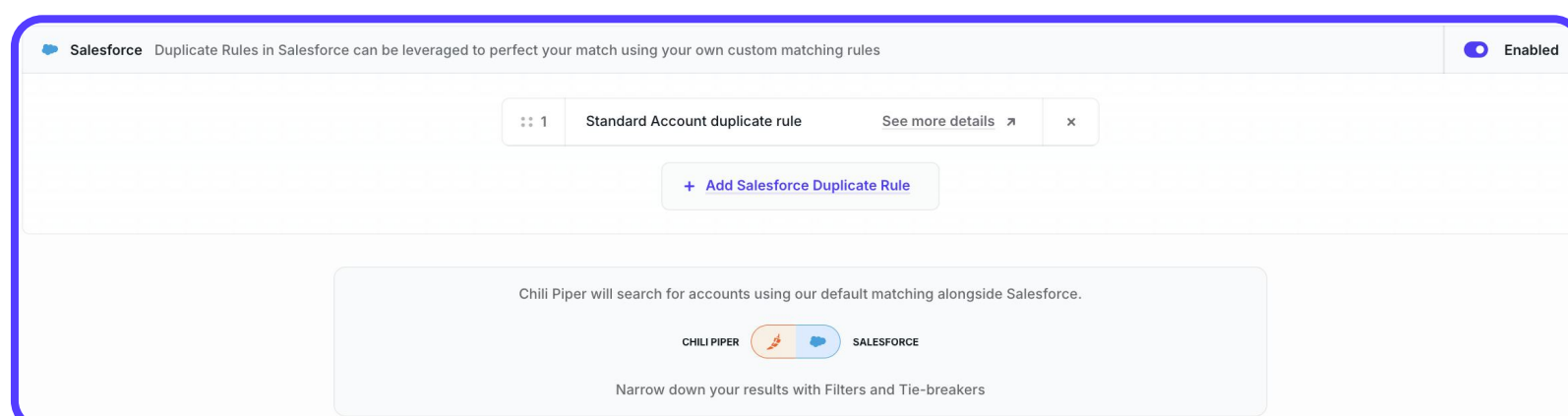
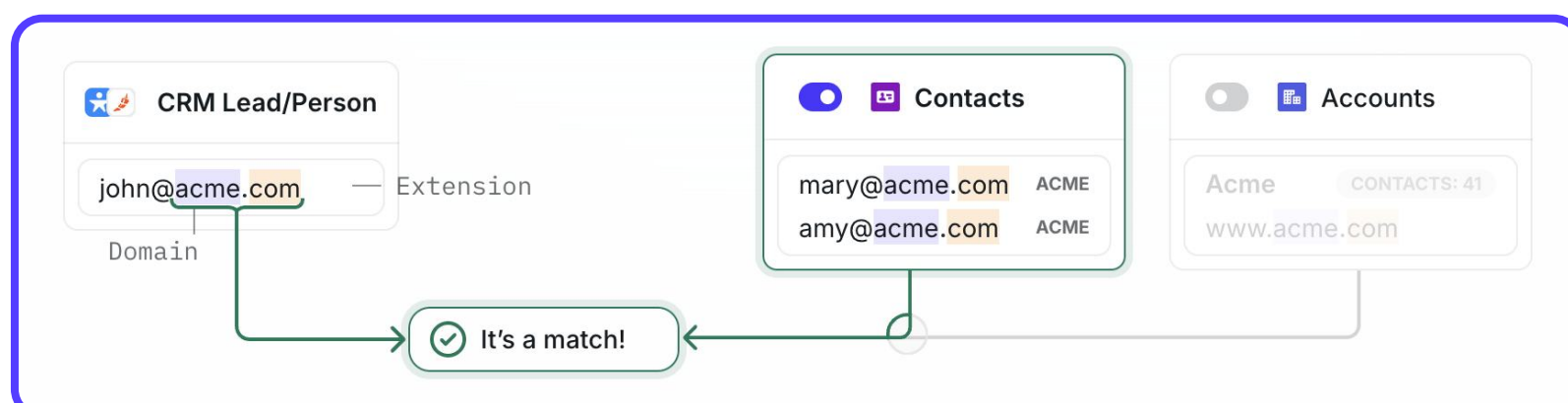
Concierge Flow

Full visibility into how prospects are routed. Now you can also create/update records right after trigger WHILE performing routing/booking the meeting.



The most advanced lead-to-account matching yet

In Concierge Fire, you can match leads/persons to Account on both domain rules and Salesforce duplicate rules. You can also set up tiebreakers and filtering.



Advanced routing made simple

Route on CRM data or form values, or a combination of both.

The screenshot shows a routing rule configuration interface with two groups of conditions:

- Group 1:**
 - Condition 1: Company (Company) contains 11-50
 - Condition 2: Company (Company) CRM 1 is any of Hubspot CRM, Salesforce
 - Condition 3: Person (Person) Country is any of United States of America (+2)
- Group 2:**
 - Condition 1: Lead (Lead) Compa... is equal... 11-50
 - Condition 2: Lead (Lead) CRM is any of Salesforce, Hubspot CRM
 - Condition 3: Lead (Lead) Country is any of United States of America (+2)

Buttons for 'Add Condition' and 'Add Sub-group' are visible at the bottom of each group.

CRM actions, the way you want

Update and create records only when it's necessary. Plus, more CRM actions than ever before.

The screenshot shows a workflow diagram:

- TRIGGER:** Third-party Form is Submitted OR Router link is clicked or Router li...
- ROUTING RULE:** NA - Finance
- DISPLAY CALENDAR:** Eugenia Brown (You), Super Demo, No other User to add to the invite, Wait 10 minutes
- ACTION:** Update or Create Record, Update Ownership, Update Field, Create Event, Add to Campaign, Redirect To

Flow: Trigger → Routing Rule (Matched) → Display Calendar → Action (Scheduled/Not Scheduled)

The screenshot shows a workflow diagram with a sequence of actions:

- TRIGGER:** Third-party Form is Submitted OR Router link is clicked or Router li...
- ROUTING RULE:** NA - Finance
- DISPLAY CALENDAR:** Eugenia Brown (You), Super Demo, No other User to add to the invite, Wait 10 minutes
- REDIRECT TO:** thankyou.com (Scheduled), Back to Form (Not Scheduled)
- UPDATE OR CREATE RECORD:** Update Matched Lead (Scheduled), Update Matched Lead (Not Scheduled)
- UPDATE OWNERSHIP:** Lead Owned as Assigned (Scheduled)

Flow: Trigger → Routing Rule (Matched) → Display Calendar → Redirect To → Update or Create Record → Update Ownership

Scheduling with multiple attendees

Invite additional participants and automatically factor in their availability.

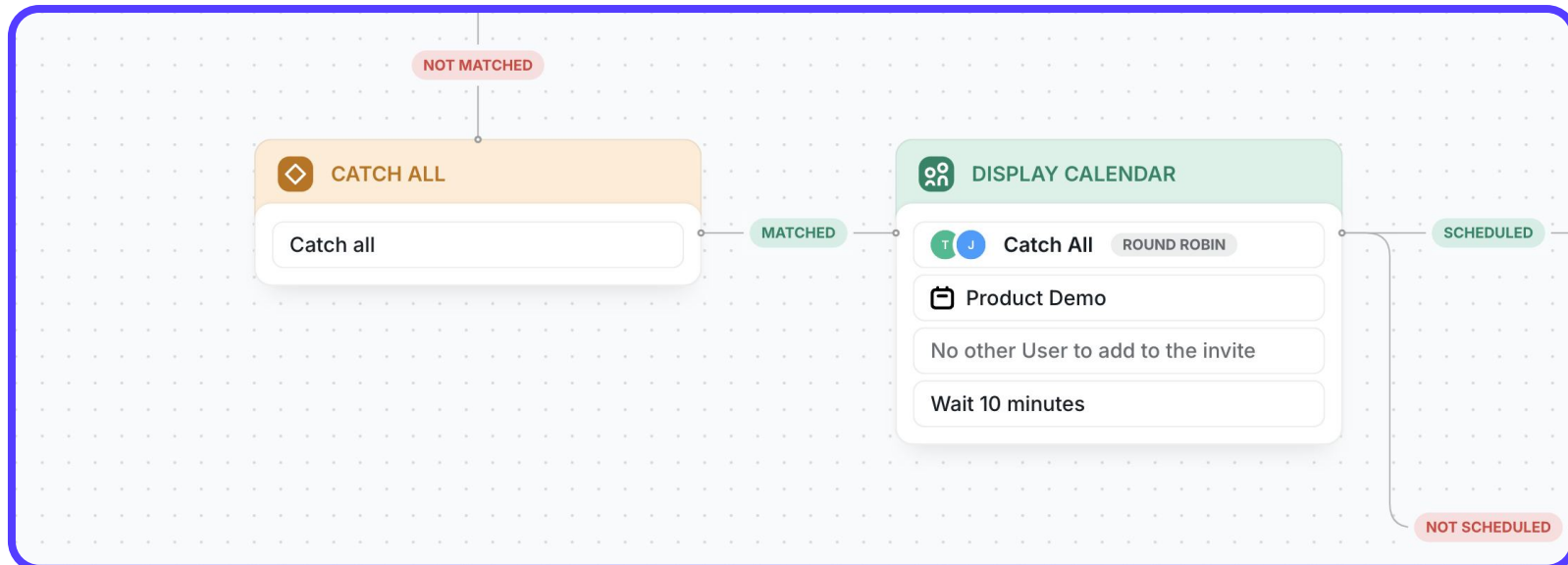
The screenshot shows the 'Display Calendar' configuration interface:

- Owner:** Individual
- Meeting Type:** Super Demo, 30 minutes | Conference Details
- Additional Invitee(s):** Aaron Wallace (Required)

Buttons for 'Change' and 'Select Users' are visible.

No lead left behind

Make sure every lead is accounted for, even if they don't match your routing rules. Our automatic catch-all feature ensures that nothing falls through the cracks.



Finally — no more complaints about unfair lead distribution

Distribute meetings evenly across multiple different Routers or even products. Same as in legacy, cancelations and no-shows are automatically credited back to reps — and you set up different weighting depending on your needs.

Distribution Reporting

View the distribution of scheduled meetings, and Records amongst your Team Members.

Meeting Distributions | Record Distributions

Distro x ChilliCal x +3 | Last 7 days

-23.68% since previous 7 days	+12.5% since previous 7 days	+100% since previous 7 days	+20% since previous 7 days
29 Meetings scheduled	9 Meetings rescheduled	1 No Shows	24 Canceled meetings

Distribution Name	Used In	Team
All AEs 11-50	Chilli Piper Prod Events CHILIPPER.COM PROD LIVE +2	+3 All AEs 11-50
All AEs	Events Chilli Piper Prod +1	+4 All AEs
All AEs 51-250	Chilli Piper Prod Events CHILIPPER.COM PROD LIVE +2	+3 All AEs 51-250

Customizable Redirects

Redirect Prospects to a specific URL after they schedule a meeting.

REDIRECT TO

www.chilipiper.com/thank-you/success

Redirect To

Specific URL
Redirect Prospects to a specific URL after they schedule a meeting.

Add form values to redirect URL
If enabled, the form values will be added to the redirect URL as query parameters. Ex: `www.chilipiper.com/thank-you/success?PersonEmail=prospect@chilipiper.com`

Disabled

Map your form automatically

Enter your form's URL and we do the rest. Chili Piper will automatically map your form fields to what's in your CRM — all you have to do is double-check.

Auto Map

Point us to your webpage and we will find and map your form fields for you!

Enter your form's URL

Find Form

Cancel | Map Fields

The answer to: “Why wasn’t I routed that lead?”

With Chili Piper Fire, you can see exactly why a meeting was (or was not) routed to a certain rep.

NA Company Size 51-250 Salesforce Hubspot CRM MATCHED

- Company: Company size 1 contains 51-250 Data: 51-250
- Company: CRM 1 is any of Hubspot CRM, Salesforce Data: Hubspot CRM
- Person: Country is any of United States of America, United Stat... Data: United States
- Contact: Company Size Contact is equal to 51-250 Data:
- Contact: CRM Contact is any of Salesforce, Hubspot CRM Data:
- Contact: Mailing Country is any of United States of America, United Stat... Data:
- Lead: Company Size is equal to 51-250 Data:
- Lead: CRM is any of Salesforce, HubSpot CRM Data:
- Lead: Country is any of United States of America, United Stat... Data:

Round Robin, your way

Strict Round Robin lets you route in sequential order, while Flexible Round Robin shows combined availability.

Coming: Double Round Robin / Ownership

Round Robin between two different teams. For example, if you need to round-robin between a group of Account Executives and Solution Engineers — you can do that.

Customization with or without CSS — your choice

Easily customize your scheduling modal and confirmation modal. Use default styling settings with your own brand colors — or develop your own custom style via custom CSS. Your choice.

Implementing Concierge is as easy as copy-paste

Concierge is a simple javascript that you can plug-in to your website.

```

<!-- Add the following code to the body or footer of your landing page with the form or i
<script src="https://calendar.chilipiper.com/concierge-js/cjs/concierge.js" type="text
<script>
ChiliPiper.deploy("calendar", "new-router-ob2r1q", {"formType": "Hubspot"})
</script>
    
```