Key concepts

Overview

Alchemer Voice captures customer conversations, extracts short statements called insights from them, and links those insights to the accounts and contacts in your CRM. Every insight links back to the conversation it came from. This article defines the terms you'll see across the product.

How Alchemer Voice works

- **Capture:** Conversations arrive through integrations, manual upload, Slack capture, email sync, or support tickets.
- **Analyze:** Alchemer Voice transcribes each conversation and extracts insights, using the analysis allowance on your plan.
- **Explore:** Filter insights, group them into topic sets, label them, and ask the Analyst for reports.

Conversations

Conversation: Anything a customer said or wrote that Alchemer Voice has captured. Each conversation has a type and a purpose.

Conversation type: Meeting, Phone call, Support case, Chat thread, or Email thread. Meetings and phone calls are measured in minutes of audio or video. Support cases, chat threads, and email threads are text-only and are counted individually.

Conversation purpose: What the conversation was for: Support, Product feedback, Customer success, Implementation, Technology demo, Technical sales, Sales, Sales prospecting, Consulting, Marketing, Training, Internal, Unknown, or None. The purpose decides which kinds of insight Alchemer Voice looks for, so a support call and a sales call are analyzed differently.

Draft conversations and Pending conversations: Two extra tabs on the conversations list. Drafts are uploads that haven't finished processing. Pending conversations are waiting to be processed, or weren't processed.

Insights and topics

Insight: A single, self-contained statement extracted from a conversation, such as a pain, a job the customer is trying to get done, a feature request, or an emotion. See How insights are generated for the categories.

Topic set: A group of insights that Alchemer Voice clusters into themes. Filter your insights to the segment you care about, then ask Alchemer Voice to generate a topic set. Each theme in the set is a topic.

Outlier: An insight that didn't fit into any topic in a topic set.

The Analyst: A chat-style assistant that researches your insights and writes reports with citations back to the original conversations.

Organizing and access

Label: A tag you attach to conversations, insights, or accounts so you can organize and filter them. Labels are either My (only you) or Team (shared).

Visibility (My, Team, Group): Many lists have a My tab (items you own or took part in) and a wider tab, for example My conversations and All conversations, or My topic sets and Team topic sets.

Internal email domains: Your company's own email domains, such as company.com. Alchemer Voice treats people on these domains as colleagues rather than customers. This controls which participants generate insights and which emails are imported.

Accounts and CRM records: When you connect a CRM, Alchemer Voice links conversations and insights to your accounts, contacts, leads, and opportunities, so you can filter by customer, segment, or deal stage. Find them under Accounts in the left-hand menu.

PII tiers

Alchemer Voice redacts personal information in transcripts and groups it into three tiers. Each tier can be unredacted separately. To learn who can unredact each tier, see PII redaction and unredacting.

Tier	Covers
Financial	Bank account numbers, credit card numbers, IBANs, health card numbers, social security and social insurance numbers, US Medicare IDs
Documents	Dates of birth, driver's license numbers, government-issued IDs, passport numbers
Contact details	Names, email addresses, phone numbers, addresses, ages, zip codes, vehicle identification numbers

Permissions

What you can see and do depends on your role. Ask an admin if something is missing. See Roles and permissions and Groups.

Area	Permission or role

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My, Team, and Group tabs	Roles can grant access to your own items, to items belonging to people in your groups, or to everyone's. Without the wider access, only the narrower tab is shown. If a tab or menu item is missing, check your role in Admin > Team.
Groups	Admins manage groups in Admin > Team.
Internal email domains	Admins manage the list in Admin > Company.
Unredact tier 1, financial PII	Unredact financial PII
Unredact tier 2, documents PII	Unredact document PII
Unredact tier 3, contact details PII	Unredact contact PII

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