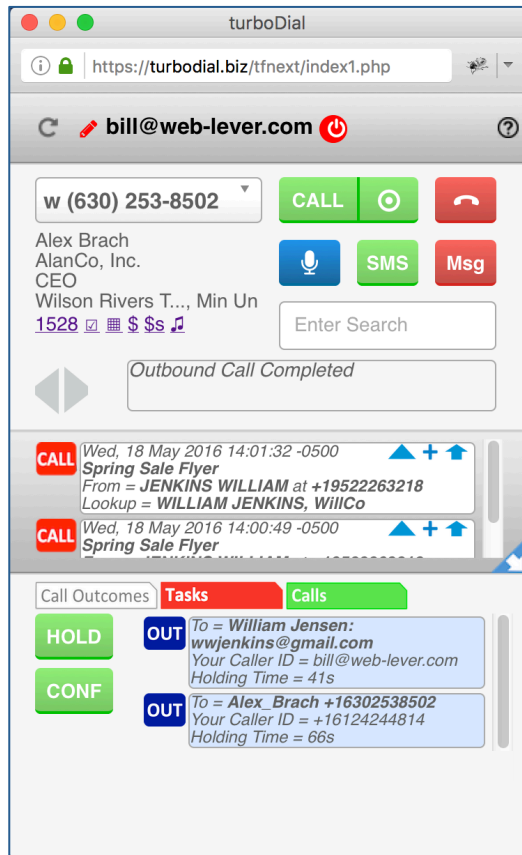


# TURBODIAL



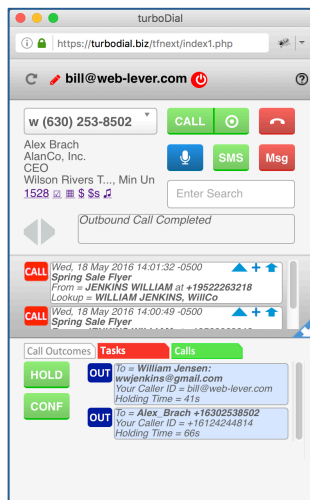
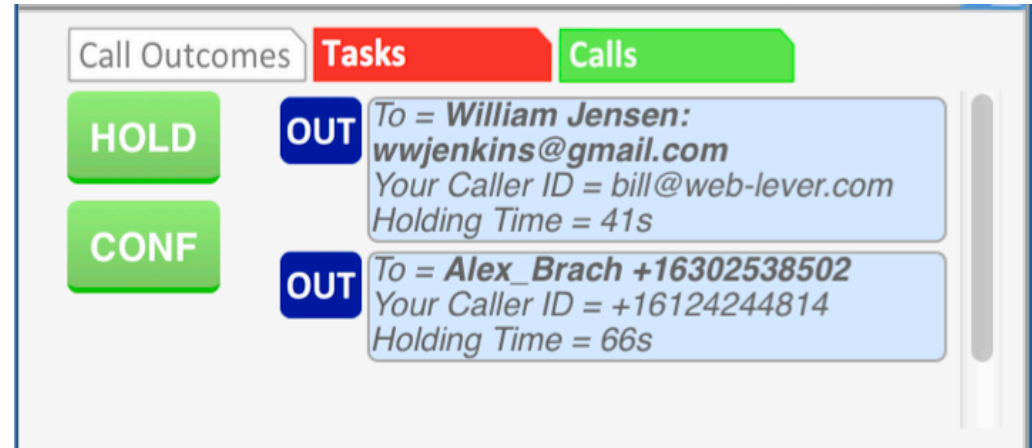
## Feature Overview

# Enhanced Call Handling

# Enhanced Call Handling

## Base Features

- Hold
- Conference
- Warm Transfer



## Optional Add-On

- Upgrade to include the add-on in your account at <https://sd123.customerhub.net>
- Enhanced Call Handling features are found on the **Calls** tab in the lower-left quadrant of turboDial

# Enhanced Call Handling

## Optional Add-On

The screenshot displays a software interface for call handling. At the top, there are three tabs: 'Call Outcomes' (white), 'Tasks' (red), and 'Calls' (green). Below the tabs, on the left, are two green buttons labeled 'HOLD' and 'CONF'. The main area shows two call records, each with a blue 'OUT' status indicator and a light blue text box containing call details. A vertical scrollbar is visible on the right side of the interface.

Status	Call Details
OUT	<i>To = William Jensen: wwjenkins@gmail.com Your Caller ID = bill@web-lever.com Holding Time = 41s</i>
OUT	<i>To = Alex_Brach +16302538502 Your Caller ID = +16124244814 Holding Time = 66s</i>

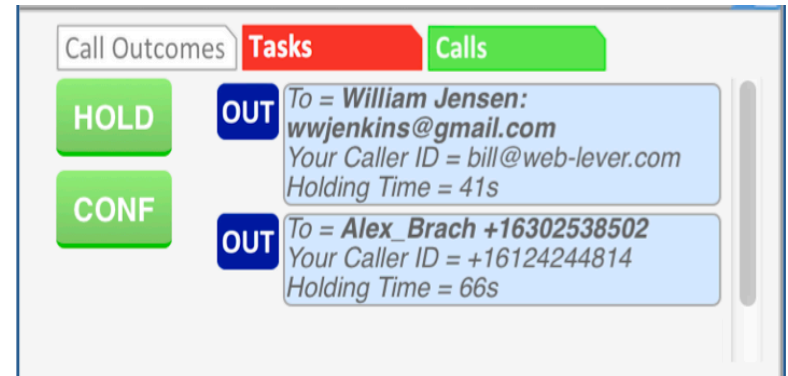
# Put a Call on Hold

## Required:

- You have an active outbound call

## One Click Operation:

1. Click the HOLD button
2. You will be disconnected from the call
3. The other person will begin hearing music
4. The call will appear in the Holding Calls list
5. The Note record will be saved with 'Transferred to Hold or Conference' appended to the title



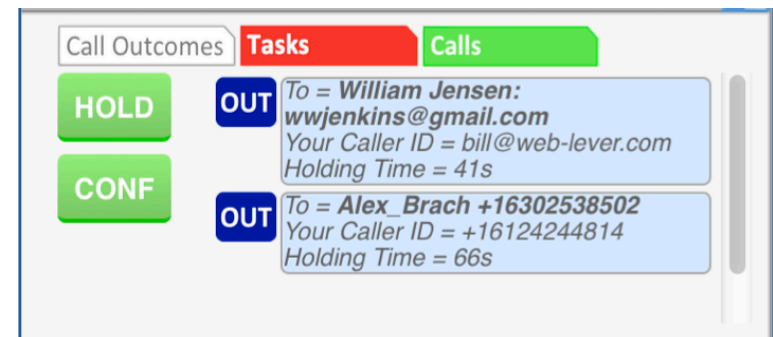
# Reconnect to a Call that is Holding

## Required:

- You have no active call and 1+ calls on hold

## One Click Operation:

1. Click on the call in the Holding Calls list
2. The call will disappear from the Holding Calls list
3. You will hear “Connected” and can begin speaking to the other person



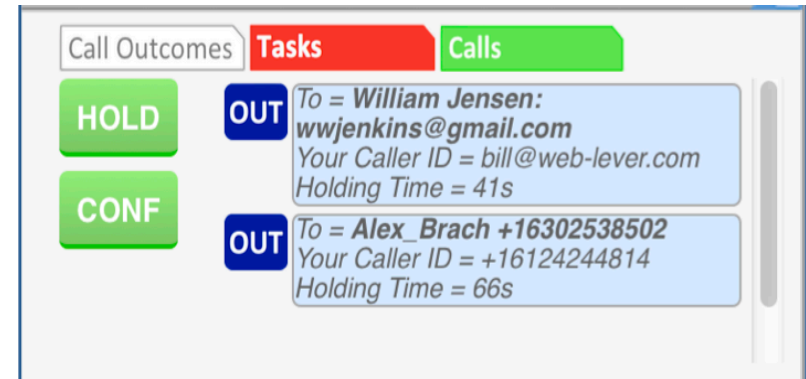
You can reconnect using a different Calling Device than you started with

- Example: Start the call with the softphone, later move it to your cell phone

# Start a Conference

## Required:

- You have 2+ calls
  - 1 active and 1+ holding, or
  - 2+ holding



## One Click Operation:

1. Click on the CONF button
2. You will be disconnected from any active call and it will be added to the Holding Calls List
3. You will hear “Creating a New Conference”
4. All calls in the Holding Calls List will be joined to the Conference
5. All calls will disappear from the Holding Calls List
6. All parties will hear a join beep and can begin speaking
7. A leave beep will sound when any party leaves the conference

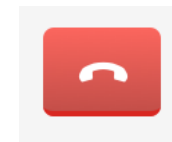
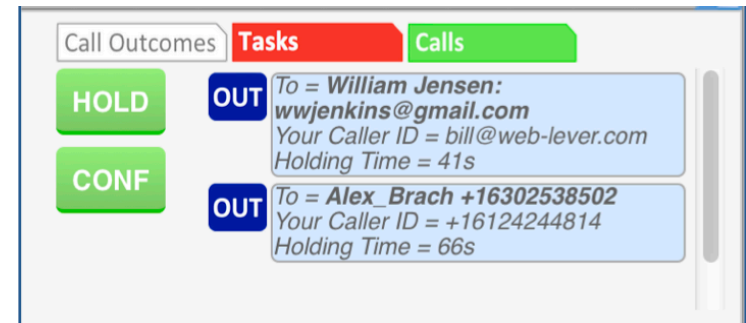
# Warm Transfer a Call to a Contact

## Required:

- You have an active outbound call

## Operation:

1. Click on the HOLD button
2. Move turboDial to the Contact you will transfer the call to
3. Click the CALL button to call that Contact
  - When the Contact answers provide any necessary explanation
4. Click the CONF button to begin a conference
  - When the conference begins provide any necessary introduction
5. Click the Hangup button to disconnect
  - The other parties can continue their conversation



# Additional Items to Know

- For any Call, the final Duration and Recording URL is saved to the Note record when
  - The Call is ended, or
  - The Call is placed on Hold, or
  - The Call is joined to a Conference
- When a Call comes off Hold or joins to a Conference
  - It does not result in further updates to the Note record
  - Recording does not continue
- If the other party hangs up while on Hold, their Call in the Holding Calls list will disappear



# TURBODIAL

The screenshot displays the turboDial web interface. At the top, the browser address bar shows the URL <https://turbodial.biz/tfnext/index1.php> and the user is logged in as [bill@web-lever.com](mailto:bill@web-lever.com). The main interface features a search bar with the number **w (630) 253-8502** and buttons for **CALL**, **📞**, and **📞**. Below this, contact information for Alex Brach, CEO of AlanCo, Inc., is displayed, along with buttons for **📞**, **SMS**, and **Msg**. A search input field contains the text "Enter Search". A status bar indicates "Outbound Call Completed". The call log shows two entries for "Spring Sale Flyer" on Wed, 18 May 2016, with details such as "From = JENKINS WILLIAM at +19522263218" and "Lookup = WILLIAM JENKINS, WillCo". At the bottom, there are tabs for "Call Outcomes", "Tasks", and "Calls". The "Calls" tab is active, showing a list of call outcomes with buttons for **HOLD** and **CONF**, and details for outgoing calls (OUT) to William Jensen and Alex Brach, including caller ID and holding times.

## Enhanced Call Handling Base Features

- Call Hold
- Conference
- Warm Transfer