

TURBODIAL

Create & Modify SIP Credentials

SIP Credentials are defined here then configured into SIP devices used for Outbound calls and as destinations for Inbound calls

Add New or Modify Existing Credential:

+

Password:
Must have 12+ characters, mixed case, letters and digits

Assigned User:
For Outbound Call Notes

Outbound Call Screen Pop to Assigned User?

Outbound Caller ID:

Record Outbound Calls?

Update - saves changes to All Credentials

Values for SIP Device Registration:

Domain: wl116td.sip.us1.twilio.com
User Name: FrontDesk
Password: -hidden-

- How To -

Create
SIP Credentials
& Use Them with
VOIP SIP Devices

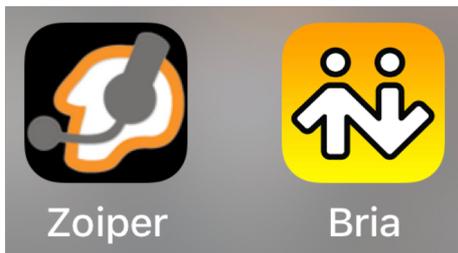


Benefits

- Utility of an “always-on” hard phone



- Flexibility of PC & mobile SIP softphone clients



- Expanded user access to turboDial
 - Allow anyone in your company to make & receive calls that are tracked in Infusionsoft

Topics

- Setup
 - Create/Modify/Delete a SIP Credential
 - Register a VOIP SIP Device using the Credential
 - Forward an Inbound Number to the Credential
- Outbound Calls & Note Records
- Inbound Calls & Note Records
- Call Reports
- Example SIP Devices
- Simultaneous Ringing to VOIP Number Destinations
- Advanced Call Handling Features
- Additional Notes

Setup:

Create & Modify a SIP Credential

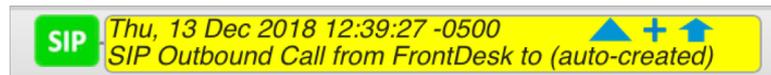
- Login to the turboDial panel as an Admin User
- Open "Advanced Feature" Config in turboDial
 - Choose to Modify your SIP Credentials

Create & Modify SIP Credentials

- Click the + button to add a Credential name
 - Unique. Letters & digits. No spaces or special characters
- Set a Password
- Choose Assigned User
 - Outbound Call Note Records will be assigned to this User
 - Has no effect on Inbound Calls and Note Records
- Outbound Call Screen Pop?
- Choose Caller ID for Outbound Calls
- Record Outbound Calls?
 - Has no effect on Inbound Calls
- Make note of the Values for SIP Device Registration
 - Use these to configure device(s) to use this Credential
- Click Update
 - The Update button applies to all Credentials. All Credentials with modifications will take effect upon Update.

Add New or Modify Existing Credential:



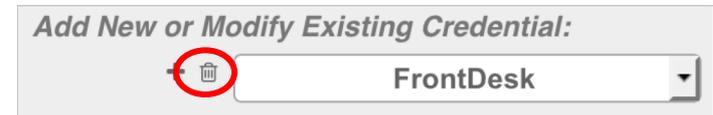


Values for SIP Device Registration:

Domain: wl116td.sip.us1.twilio.com
User Name: FrontDesk
Password: tDSIPuser001

Setup: Delete a SIP Credential

- Choose the SIP Credential
- Click the “Trash” button
- Click Update
 - Credential will be deleted upon Update.
 - If you changed your mind: Click ‘close’ rather than Update
- Deleted credentials will immediately disable any devices registered to them
 - Inbound & Outbound calls will fail
 - Reconfigure your devices and Inbound Numbers before deleting the credential



Setup: Register a VOIP SIP Device using the Credential

- Find the account configuration screen for your device
- Install the “SIP Device Registration” values for your turboDial SIP Credential

Values for SIP Device Registration:

Domain: wl116td.sip.us1.twilio.com

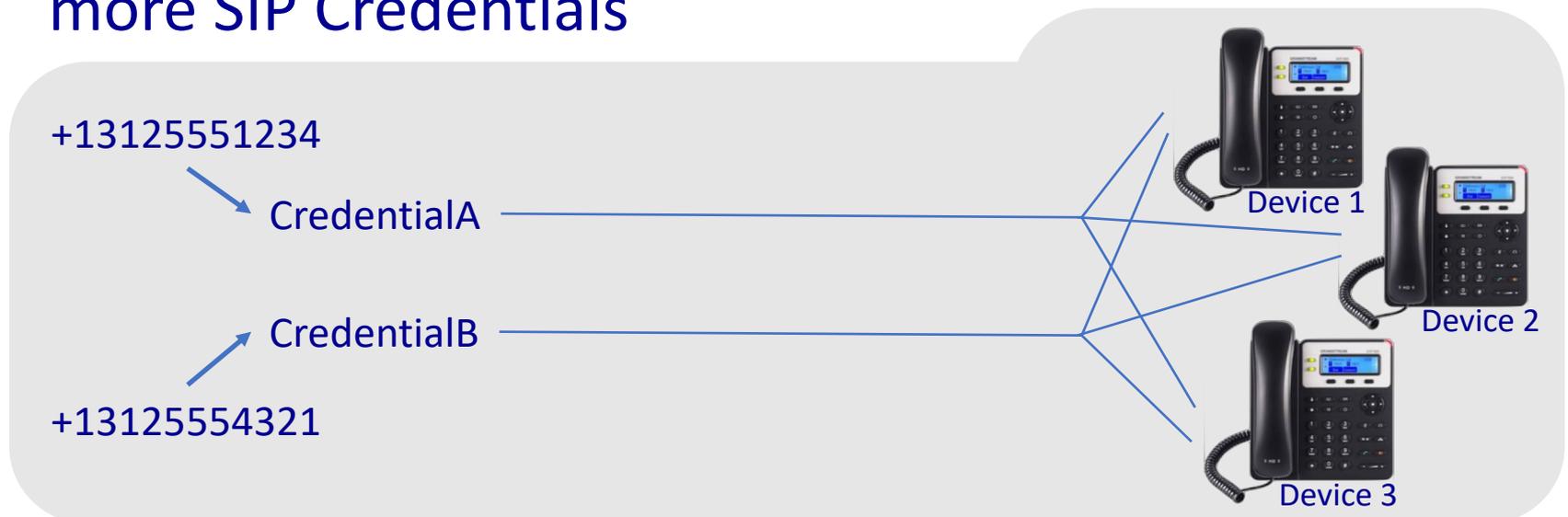
User Name: FrontDesk

Password: tDSIPuser001

- Enable “keep-alive” settings and timers to ensure your firewall port remains open for the device
- Save your settings and activate the account

Setup: Register a VOIP SIP Device using the Credential

- Up to 10 separate devices can register using the same Credential.
 - Inbound call to a Credential: all devices registered to the Credential will ring simultaneously
- Most VOIP SIP devices allow you to register 2 or more SIP Credentials

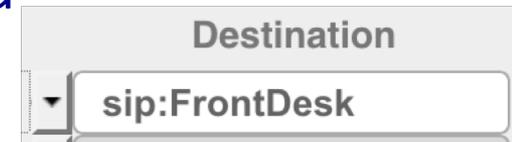


Setup: Forward an Inbound Number to the Credential

- Note: When forwarding an Inbound Number to a SIP Credential, only 1 forwarding destination is allowed
 - A work-around is described later in this presentation

Steps in the turboDial panel:

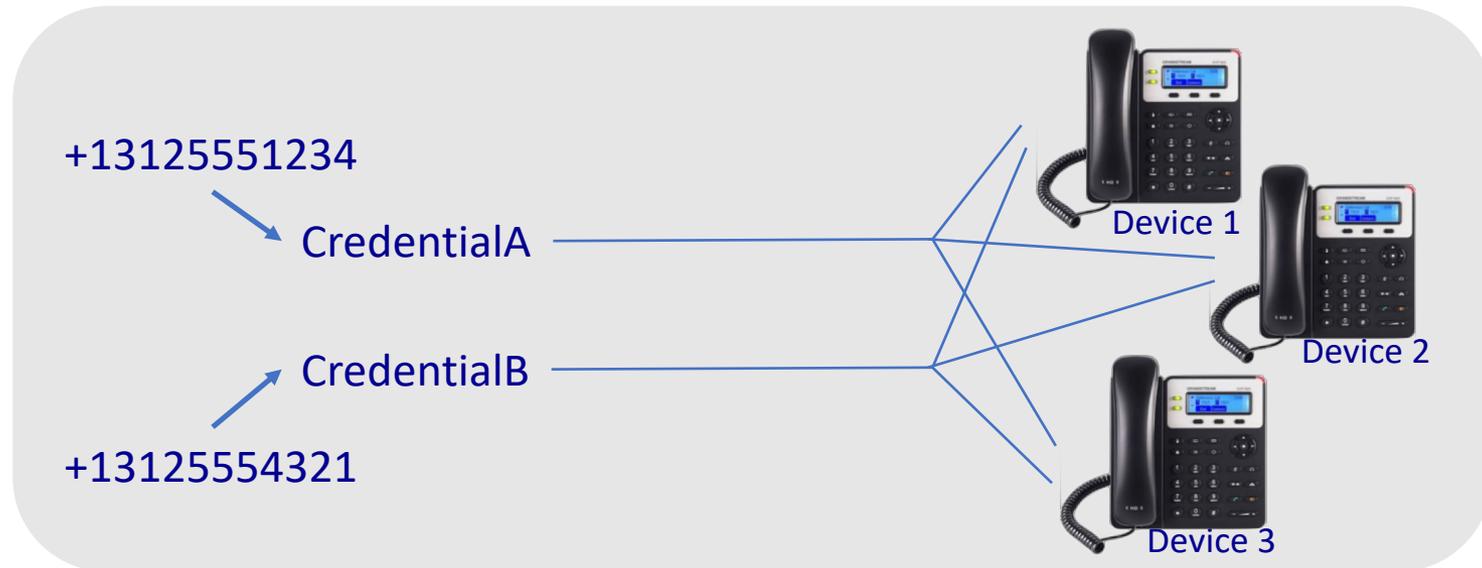
- Choose the number in the “Inbound&SMS” Selector
- Click the Modify button
- Click “Update & Next” to move to screen 2
- Open the “Quick Fill” selector for the first field
- Choose the SIP Credential
 - Notice that no additional destinations are allowed
- Click the “Update & Next” button
- Click “Update” on screen 3



Inbound Numbers & Credentials

An Inbound Number can
Forward to only 1 SIP
Credential

A VOIP SIP Device can
Register to multiple SIP
Credentials



Above Example:

An Inbound Call to either Number will ring all 3 Devices

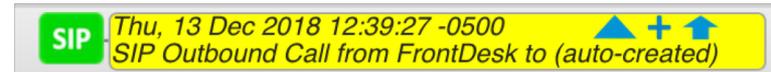
Outbound Calls & Note Records

When you start a Call with a VOIP SIP device...

- The call will be recorded, if indicated by the Credential option
- The called number is used to lookup the Infusionsoft Contact ID
 - If not found – Contact is auto-created if indicated by the Global Option: “Add Missing Contact on Calls&SMS”

When the Call is answered...

- The Outbound Call Screen Pop is displayed, if indicated by the Credential option
- The Note Record is Created
 - Assigned to the User indicated in the Credential settings
 - Attached to the Contact, if known
 - Note Record title will be:
turboDial: Call from sip:<credential name>
or
turboDial: Call from sip:<credential name> - Recorded
- If there are multiple devices registered to the Credential the Note Record will not identify which device made the call



Inbound Calls & Note Records

When you receive a call on a VOIP SIP device...

- The “Inbound&SMS” settings determine:
 - Call Recording
 - Assigned User
 - Users who will receive a Screen Pop alert
- The Caller ID number is used to lookup the Infusionsoft Contact ID
 - If not found – create the contact if indicated by the Global Option: “Add Missing Contact on Calls&SMS”
- The Note Record title will identify the Credential:
 - turboDial: Inbound Call to sip:<credential>
 - or
 - turboDial: Inbound Call to sip:<credential> - Recorded
- If there are multiple devices registered to the Credential the Note Record will not identify which device answered the call

SIP Call Reports in Infusionsoft

- Outbound Calls
 - Task-Note Report
 - Main Search = turboDial: Call from sip:
- Inbound Calls
 - Task-Note Report
 - Main Search = turboDial: Inbound Call to sip:
- Optionally add the Credential Name
 - turboDial: Call from sip:FrontDesk

Edit Filters

Search Misc Criteria Custom Fields Columns

Search Criteria

Main Search turboDial: Call from sip:

Edit Filters

Search Misc Criteria Custom Fields Columns

Search Criteria

Main Search turboDial: Inbound Call to sip:

Example SIP Devices

- Standalone Desk IP Phones

- Grandstream GXP1625
- Yealink SIP-T20



- SIP VOIP Softphones

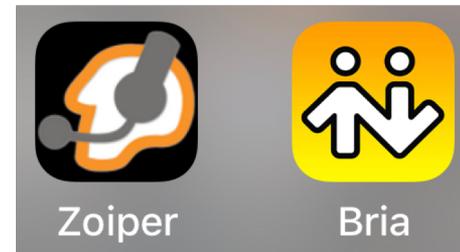
- PC/Mac
 - X-Lite
 - Zoiper



- Android & iOS

WiFi is sufficient. No cellular connection needed

- Zoiper
- Bria



Inbound Simultaneous Ringing to Multiple Destinations

- Problem: When setting an Inbound number to forward to a SIP Credential, only 1 forwarding destination is allowed
- Work-around:
 - Configure an Inbound Number to ring the SIP Credential
 - Configure the “Inbound Call Actions” screen to “None”
 - That Inbound Number can be used as a Destination for another Inbound Number
 - Multiple simultaneous ringing destinations will be allowed since the SIP Credential is not directly selected



Inbound Simultaneous Ringing to VOIP Number Destinations

- Problem: VOIP numbers don't behave well when used as a simultaneous ringing destination.
 - A VOIP number won't allow the other destinations to ring
 - This is true for any VOIP number: Twilio, Ring Central, Vonage ...
 - Remember: All turboDial/Twilio calls are VOIP
- Work-around for turboDial numbers:
 - An Inbound Number in turboDial configured with "None" for Inbound Call Actions (config screen 3) will allow other destinations to ring.

Inbound Call Actions

Select Action Type for +19526495442

None Voice Mail Auto-Attendant
 Queue Find-Me

Advanced Call Handling Features

- Call Handling Features:

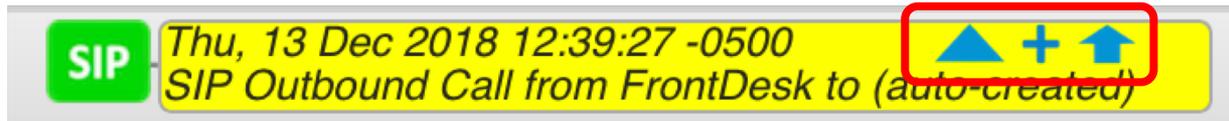
- Hold
- Conference
- Park
- Transfer



- Inbound & Outbound SIP Device Calls must be associated to your turboDial Panel before the Advanced Call Handling Features are available
- Use the Screen Pop “Assign Buttons” to associate your panel and enable Advanced Features



Using the Assign Buttons



View the Contact who has been assigned to the call
Assign yourself as the call note owner.
However, if it is already assigned to a User it will not be reassigned to you



Add a new Contact and assign the call to them
Assign yourself as the call note owner



Assign call to the currently viewed Contact
Assign yourself as the call note owner

Additional Notes

- Many VOIP SIP Devices have feature buttons, e.g. Hold, Transfer.
 - Feature buttons are not currently supported by turboDial
 - Device buttons, e.g. Mute, Redial, will work
- The turboDial Mobile Apps are not integrated to SIP VOIP softphone clients on your mobile device
 - A SIP VOIP device can be used as a Calling Device by selecting an Inbound Number that rings it
- Glossary
 - VOIP – Voice over Internet Protocol: A service for using the Internet as a medium for voice telephone calls
 - SIP – Session Initiation Protocol: The protocol for setting up and controlling VOIP calls



- Thank You -

SIP Credentials