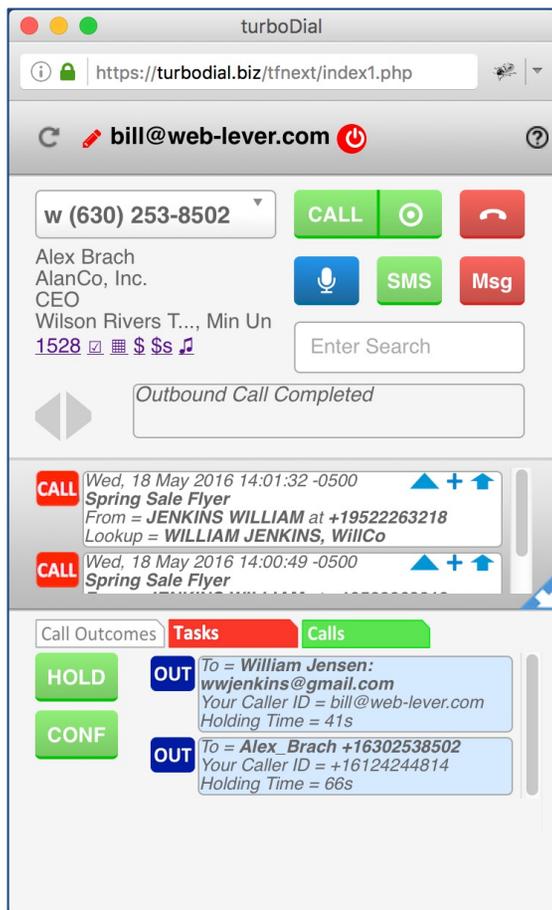


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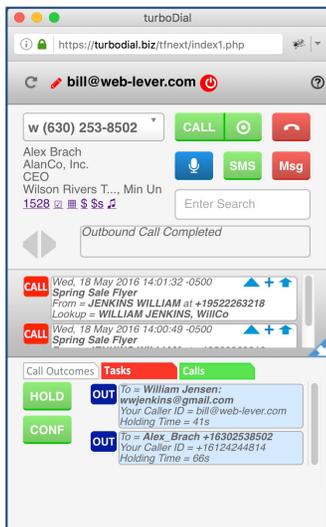
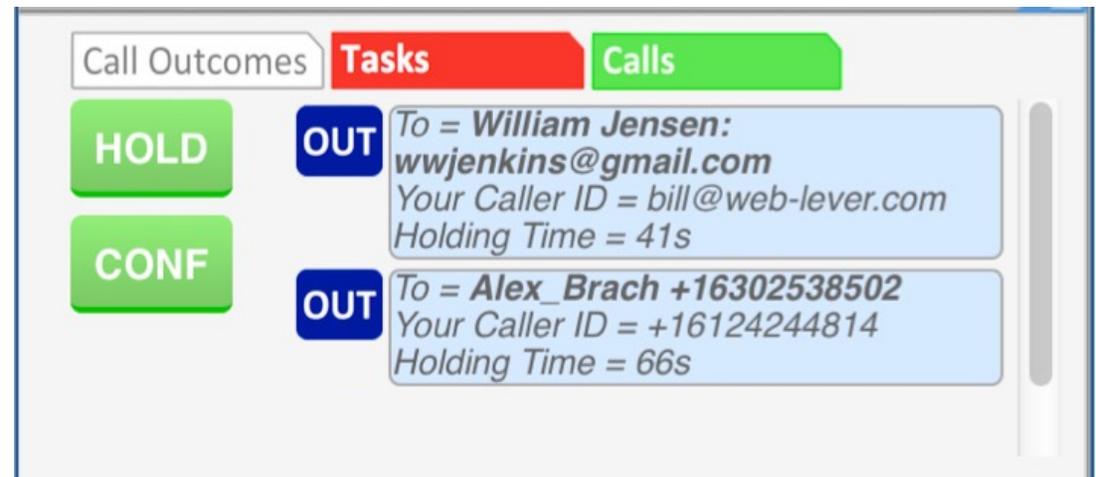
Feature Overview

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'. To the right of these buttons is a list of outgoing calls, each preceded by a blue 'OUT' label. The first call entry shows the recipient as William Jensen with email address wwjenkins@gmail.com, a caller ID of bill@web-lever.com, and a holding time of 41 seconds. The second call entry shows the recipient as Alex_Brach with phone number +16302538502, a caller ID of +16124244814, and a holding time of 66 seconds. A vertical scrollbar is visible on the right side of the call list.

Call Outcomes	Tasks	Calls
HOLD	OUT	To = William Jensen: wwjenkins@gmail.com Your Caller ID = bill@web-lever.com Holding Time = 41s
CONF	OUT	To = Alex_Brach +16302538502 Your Caller ID = +16124244814 Holding Time = 66s

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



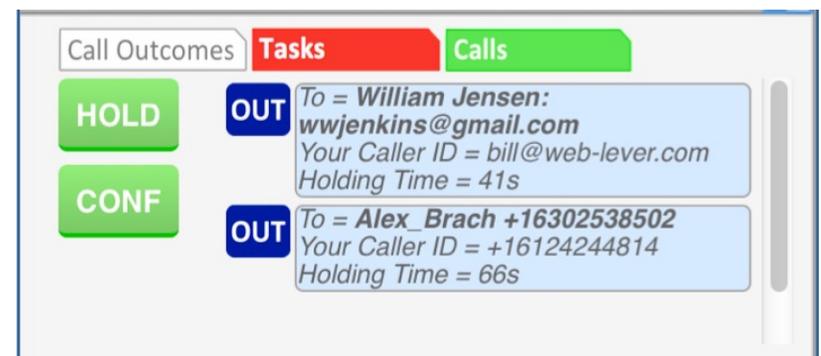
Reconnect to a Call that is Holding

Required:

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

One Click Operation:

- Click on the call in the Holding Calls list
- The call will disappear from the Holding Calls list
- 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

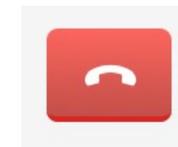
Warm Transfer a Call to a Contact

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



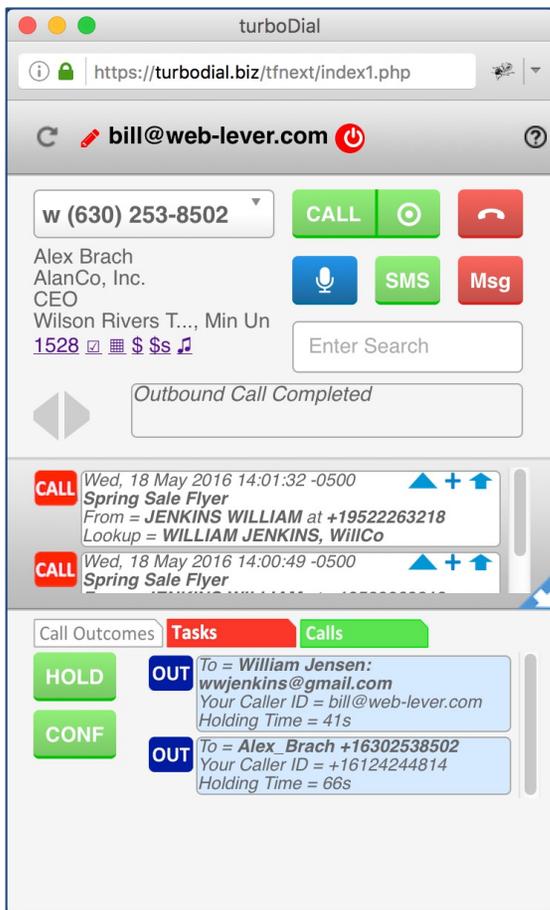
Additional Items to Know

- 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

Additional Items to Know

- Once you begin a Conference you cannot add more Calls to it.
- When you place a call on Hold or join it to a Conference you can still add a Call Outcome, apply a tag, and add some typed notes to the Call Note record.

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Enhanced Call Handling Base Features

- Call Hold
- Conference
- Warm Transfer