

TURBODIAL

bill@web-lever.com

h (898) 009-0099

Alice Bradley
123 Nowhere Ave
Anywhere, Nev United St:
1196

CALL CALL SMS MSG

Enter Search

Search 'alice bradley' 1 results

CALL Mon, 31 Oct 2016 09:19:59 -0500
Spring Sale Flyer
From =
Lookup = Edward Franks

CALL Mon, 31 Oct 2016 09:19:07 -0500
Spring Sale Flyer
From =

Call Outcomes Tasks Voice Mail Calls

Mon, 31 Oct 2016 09:20:26 -0500
From:
Lookup: Edward Franks
To: Spring Sale Flyer +19526495442
Duration: 7s View & Listen

Mon, 31 Oct 2016 09:19:34 -0500
From:
Lookup: Alice Bradley
To: Spring Sale Flyer +19526495442
Duration: 8s View & Listen

Delete Clear

Overview & How-To Setup

Voice Mail

Topics

- Purpose & Features
- Voice Mail Notifications
- Setting up Voice Mail
- Demonstration
- Transcription
- Clearing and Deleting Voice Mails
- Dashboard Reports
- Assigned User's Options
- Items to Note

Inbound Voice Mail

Inbound Call to turboDial number – With turboDial Voice Mail

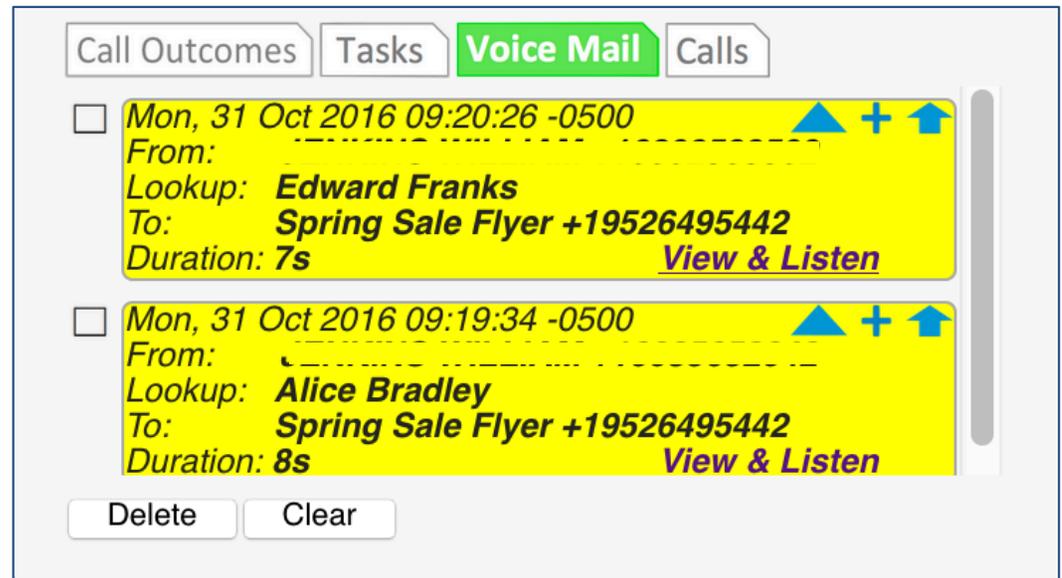


- Never miss calls to turboDial Inbound Numbers.
- No need to use another telephone system for voice mail.

Voice Mail

Features

- Create Greetings
- Record Caller's Message
- Voice Mail pane for Notifications
- Retrieve Messages by Listening or Reading



- Available only for Inbound Numbers acquired in turboDial
- Upgrade to include Add-Ons in your account at <https://sd123.customerhub.net>

Voice Mail Notifications

Three notification types:

1. Notification in a User's turboDial panel
2. Notification sent to a User's Infusionsoft ID email
3. Voice Mail Note Records in Infusionsoft

1. Voice Mail Notification in turboDial

Notification Alert in the Voice Mail pane of turboDial

The screenshot shows the 'Voice Mail' pane in turboDial with two notifications. The first notification is from JENKINS WILLIAM, duration 7s. The second notification is from JENKINS WILLIAM, duration 8s. A red box highlights the 'View & Listen' link for the second notification, with a blue arrow pointing to a 'Play Voicemail Message' popup window.

Play Voicemail Message

0:00 0:04 **Delete**

Transcription

Yes I'm interested in your spring sale please get back to me. Thanks.

Small browser window popup for playback. Transcription is shown.

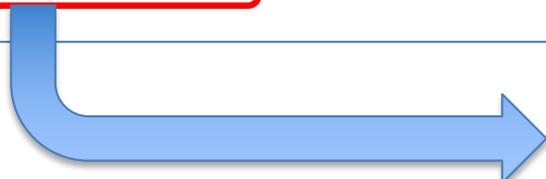
2. Voice Mail Notification in Email

Email notification of Voice Mail from turboDial

voicemail@turbodial.biz
To: Bill Jenkins
Reply-To: noreply@turbodial.biz
Voice Mail from: Ralph Strazinski +1 [REDACTED]

Tue, 09 Aug 2016 08:35:15 -0500
Voice Mail From: [REDACTED]
Lookup: **Ralph Strazinski**
Inbound Call to: **Spring Sale Flyer +19526495442**
Duration: **7s**

[Click Here to View & Listen](#)



New browser window
or tab for playback.
Transcription is shown.

apps.turbodial.biz/RC.php?enc=L2hdHxNlaDJsUyibWK0boPsdYiPh%2528

edit Most Visited TF tD eA WL AA

Play Voicemail Message

0:00 0:04 Delete

Transcription

Yes I'm interested in your spring sale please get back to me. Thanks.

3. Voice Mail in the Note Records

The screenshot displays the Turbodial interface with two main panels. The left panel, titled 'Note Summary', shows contact information for Alex B'rach, created by the system on August 24, 2016. The right panel, titled 'Call Data', contains fields for Call Outcome, Duration (8), Call Recording (http://apps.turbodial.biz/RC.php), Leave Message Recording, and Start Time. A red box highlights the 'Call Data' tab and the 'Call Recording' field, which contains a blue arrow icon. A blue arrow points from this icon to a new browser window in the foreground. The browser window shows a 'Play Voicemail Message' player with a progress bar at 0:00 of 0:04 and a 'Delete' button. Below the player is a 'Transcription' section with the text: 'Yes I'm interested in your spring sale please get back to me. Thanks.'

New browser window or tab for playback. Transcription is shown.

How-To: Setup Voice Mail

Must have turboDial Account Owner permissions:

- Choose the turboDial Inbound Number
- Decide which turboDial User in your team will be assigned Voice Mail for the number
- (User step) Compose & Record the Greeting
- Setup Voice Mail on the Number
- Create Voice Mail Dashboard Reports

Setup Voice Mail

1. Create the Greeting as a Recorded Message in turboDial
 - Give it a useful name
 - It should be public or owned by the User assigned to this number
2. Modify the Inbound Number
 - A. Move to the Inbound Call Actions screen
 - B. Choose “Voice Mail”
 - C. Choose number of rings ...
 - D. Choose the Assigned User’s Infusionsoft ID
 - Receives Voice Mail Notifications
 - Assigned ownership of the Voice Mail Note Record
 - E. Make email notification selection
 - F. Make transcription selection
 - G. Choose Greeting from step 1
 - H. Choose if enabling transfer direct to voice mail (explained later)
3. Click “Update”

Inbound Call Actions

Select Action Type for +19522223366

None
 Voice Mail
 Auto-Attendant
 Queue
 Find-Me

Number of Rings before Answer:

Assigned User

With Voice Mail you are associating this number to a single User. Ensure you have configured the previous screens for the assigned User to receive screen pop alerts and ringing at a device they can answer.

Choose the assigned User to receive voice mail notifications.

Infusionsoft ID:

Also Send Email?

Provide Transcription?

Please allow 15 minutes for transcriptions to complete.

Greeting to Callers

Choose Recording:

Enable Call Transfers Direct to this Voice Mail

Demonstrate Setup & Use

Voice Mail Transcription

- Optionally enabled when you configure Voice Mail
- Usually arrive in 1 minute
 - May take up to 15 minutes
- Displayed in...
 - “View & Listen” windows
 - Voice Mail Note Records in Infusionsoft
- Transcriptions are retained after the voice message recording is deleted
- Additional charge from Twilio
 - <https://www.twilio.com/voice/pricing>
 - \$0.05/minute for North American customers

Assigned User
Choose the User who should receive voice mail notifications.

Infusionsoft ID:

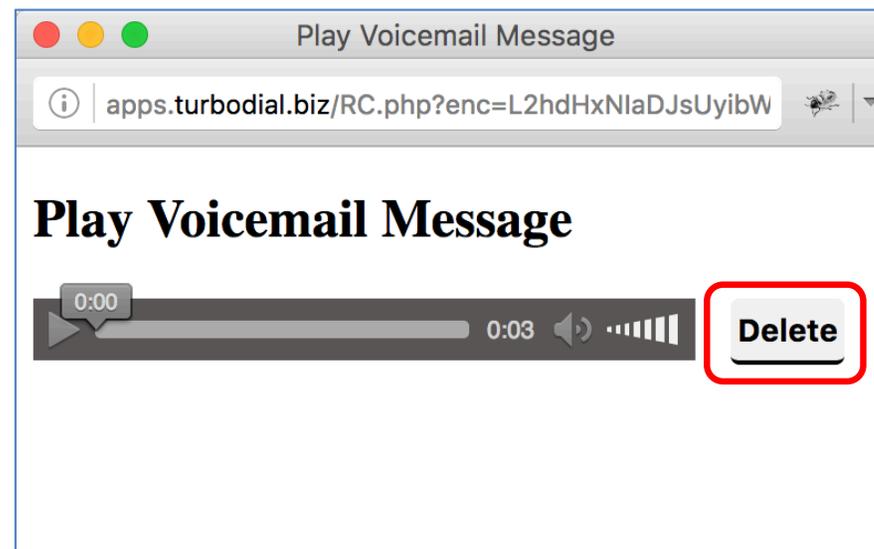
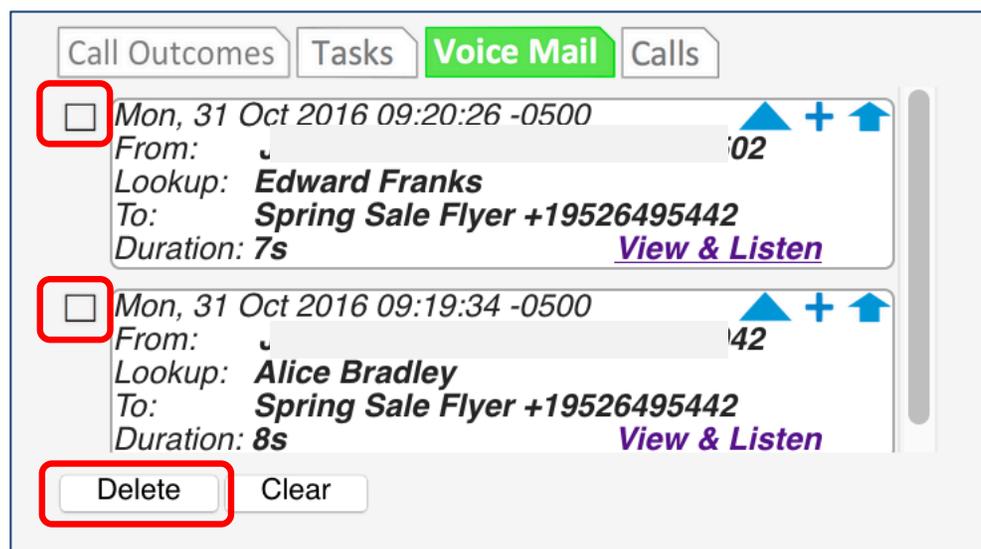
Also Send Email? ON

Provide Transcription? ON

Please allow 15 minutes for transcriptions to complete.

Deleting Voice Mails

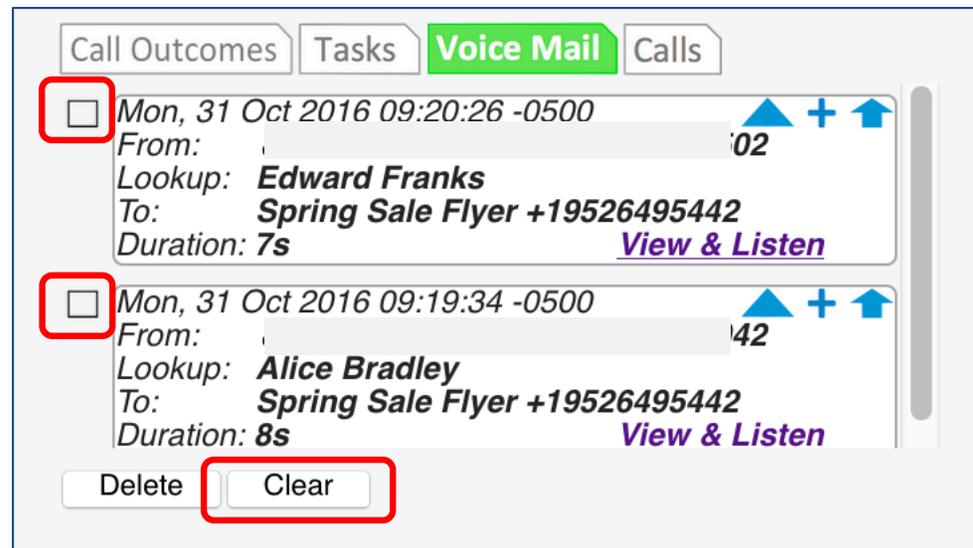
- Option 1: turboDial Voice Mail pane:
 - Select the desired voice mails and click “Delete”
- Option 2: “View & Listen” windows:
 - Click “Delete”



- Deletes the notification in turboDial, the recording link in the Infusionsoft Note record, and the recording in Twilio

Clearing Voice Mail Notifications

- turboDial Voice Mail pane:
 - Select the desired voice mails and click “Clear”



- This will remove the notification in the turboDial Voice Mail pane, but retain the recording in Twilio and link in the Note Record.

Voice Mail Note Records

- Attached to the Contact found for the phone number
 - Or remains unattached if no Contact found

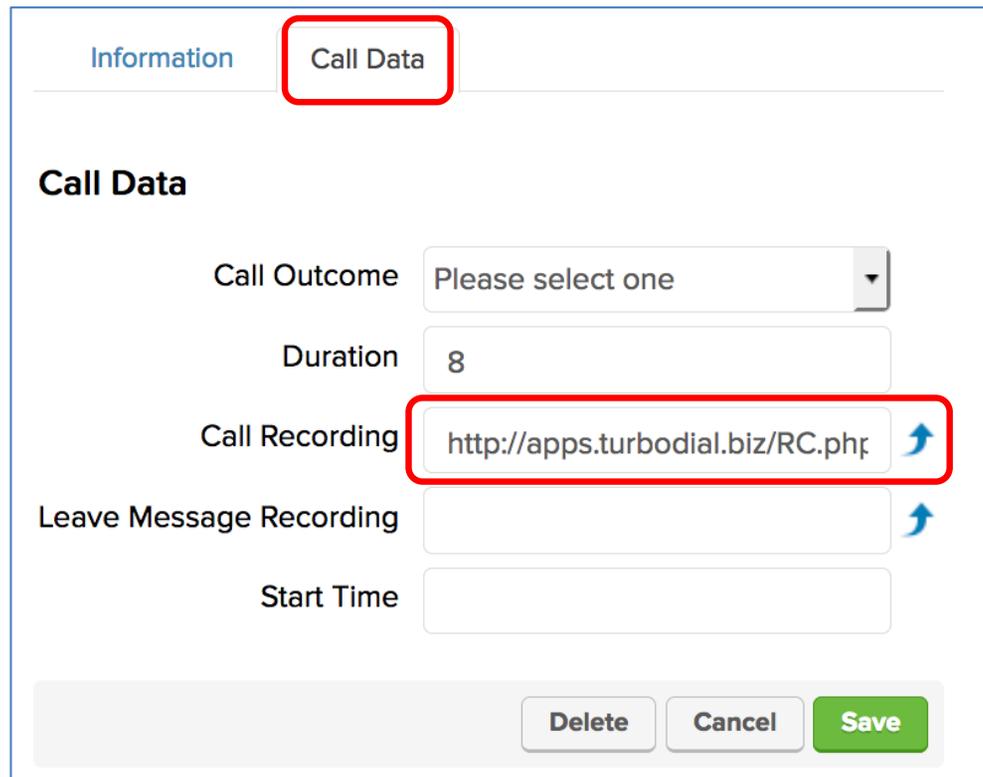
The screenshot displays the contact profile for Alice Bradley. The contact's name is highlighted with a red box. Below the name, there are fields for ID, Email, and four phone numbers. To the right, there are fields for Phone 5, turboDial URL, First Name, Last Name, OwnerID, and Owner. Below the contact details is a toolbar with various icons. Underneath the toolbar is a 'Notes' section with an 'Add Note' button. A table of notes is shown below, with the 'Assigned User' column containing 'Bill Jenkins', which is also highlighted with a red box. The note description includes transcription details.

Updated	Assigned User	Description
8/9/2016	Bill Jenkins	turboDial: Voice Mail from +163... TRANSCRIPTION I'd like to hear more about your spring sale please get back to me. Thanks. Voice Mail from . Lookup: Alice Bradley Duration: 8 Inbound Call to: +19526495...

- Assigned to the turboDial User assigned to be notified

Voice Mail Note Records

- Recording Link is included in the Call Recording custom field of the Voice Mail Note Record



Information **Call Data**

Call Data

Call Outcome

Duration

Call Recording

Leave Message Recording

Start Time

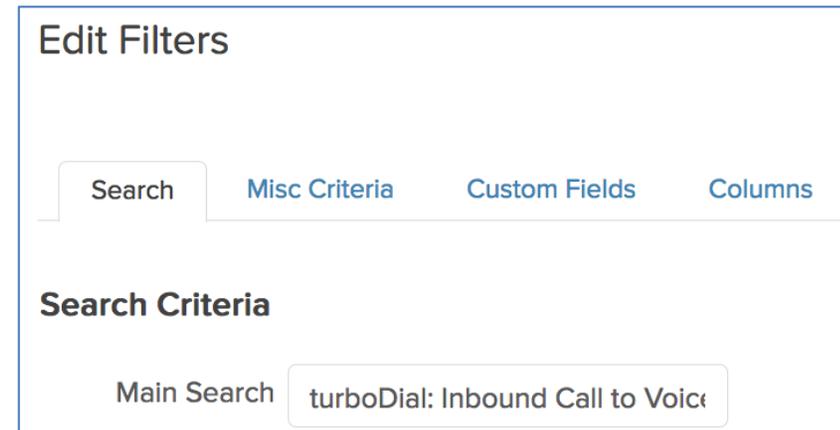
Delete Cancel Save

- This Link is deleted when you delete the Voice Mail Recording
- The Voice Mail Note Record is never deleted

Dashboard Reports

- Open the Admin->Reports window

- Create and Edit a Task-Note Report



- Set Main Search = **turboDial: Inbound Call to Voice Mail**
- Adjust the other filters as needed
- Save the Report and choose “Add to User Home...”

Assigned User's Options

- The Account Owner always provides the initial full configuration of voice mail on a number.
- That initial config includes the Infusionsoft email ID of the Assigned User.
- The Assigned User can choose the number in the Inbound&SMS selector and see the red config button.
- The Assigned User can optionally modify:
 - Number of rings
 - Greeting
 - Turn on/off email notification

Inbound&SMS: 

wl116 22223 n...

Modify Voice Mail Settings

Voice Mail settings for +19522223366

Number of Rings before Answer: 2

Greeting: wwjenkins.sem greeti

Notify via Email? ON

Update

Close

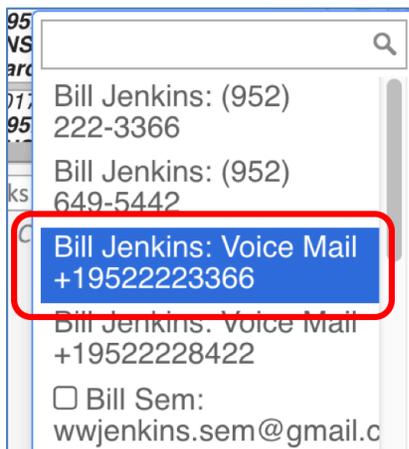
Transfer a Call Direct to Voice Mail

- Your turboDial account includes the capability to ring the phone or softphone of other Users in your account, by:
 - Transferring a call to them
 - Starting an Intercom Call to them
- If a User is assigned to Voice Mail on an inbound number then you can avoid ringing their phone or softphone, by:
 - Transferring a call directly to their voice mail
 - Use an Intercom Call to leave a message directly on their voice mail



Transfer a Call Direct to Voice Mail, cont

- To enable this feature for an Inbound Number – check the box found at the bottom of the Voice Mail setup screen
- A “Voice Mail” entry for this assigned user will now appear in the Intercom Selector for all Users in the account:



A screenshot of the 'Inbound Call Actions' configuration screen for the number +19522223366. The 'Voice Mail' option is selected under 'Select Action Type for +19522223366'. The 'Number of Rings before Answer' is set to 3. The 'Assigned User' is 'bill@web-lever.com'. The 'Also Send Email?' and 'Provide Transcription?' options are turned ON. The 'Greeting to Callers' is set to 'Voice Mail Greeting'. The 'Enable Call Transfers Direct to this Voice Mail' checkbox is checked and highlighted with a red box. A blue arrow points from the text in the first bullet point to this checkbox. At the bottom, there are 'Close' and 'Update' buttons.

Items to Note

Assigning an Inbound Number to 1 User

Choose consistent values across all 3 screens when configuring the Inbound Number

Config Screen 1

Configure Inbound Number

Current Settings for +19522223366
Capabilities: Voice and SMS

Use as an SMS From ID? ON

Backup email for forwarding SMSs:

Optional label in selector:
Example: Dana's Office

Inbound Call Screen Pops

Send to These Users: Send to All?

Config Screen 2

Destinations for Inbound Calls

Simultaneous Ringing for +19522223366
-Numbers require + and country code. Extension is optional.
 -Emails must be Infusionsoft IDs for turboDial Users.
 -E.g.: Number: +19521234567 123 Email: bill@example.com

Phone # or Email	Ext.
<input type="text" value="bill@web-lever.com"/>	<input type="text"/>
+15072370108	<input type="text"/>
optional	<input type="text"/>

Optional Name for Screen Pop Alert:

Required Backup Forwarding Number:

Used in cases of network or system failures as a last resort destination for the inbound call. Extensions are not allowed.

Config Screen 3

Inbound Call Actions

Select Action Type for +19522223366

None
 Voice Mail
 Auto-Attendant
 Queue
 Find-Me

Number of Rings before Answer:

Assigned User

With Voice Mail you are associating this number to a single User. Ensure you have configured the previous screens for the assigned User to receive screen pop alerts and ringing at a device they can answer.

Choose the assigned User to receive voice mail notifications.

Infusionsoft ID:

Also Send Email? ON

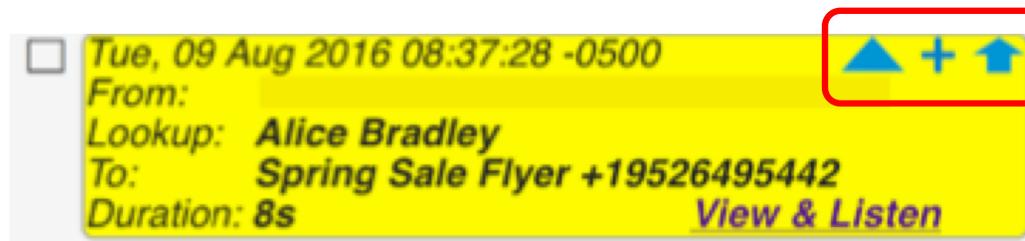
Provide Transcription? ON
Please allow 15 minutes for transcriptions to complete.

Greeting to Callers
 Choose Recording:

Enable Call Transfers Direct to this Voice Mail

Items to Note, continued

Using the Assign Buttons in Voice Mail Notifications



View the Contact, if one has been assigned.



Contact not assigned or assigned incorrectly.
Add a new Contact and assign.

Reassign yourself as the Voice Mail Note owner

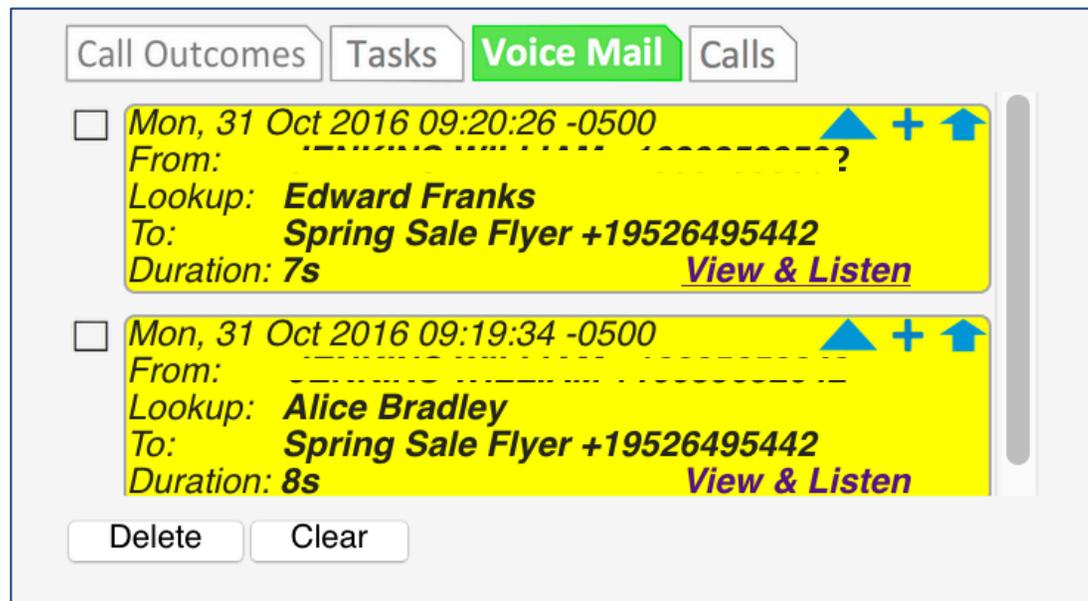


Contact not assigned or assigned incorrectly.
(Re)Assign to the currently viewed Contact.

Reassign yourself as the Voice Mail Note owner

Items to Note, continued

- Expiration of Notifications in the Voice Mail pane
 - Notifications are retained for at least 10 days and then expire and no longer appear in the Voice Mails pane in turboDial
 - When the Notification expires the Voice Mail recording is not deleted and remains accessible in the Note on the Contact Record until you delete it.



Items to Note, continued

- You cannot modify a Recorded Msg in use by Voice Mail.
 - Remove it from the Voice Mail configuration before modifying/deleting.

Recorded Msg:   

Connect to La... 



- Lookup Failure Greeting
- Lookup Success Greeting
- Snowy Day Special
- Spring Special
- Summer Special
- Voicemail Greeting**

Inbound Call Actions

Select Action Type for +19526495442

None
 Voice Mail
 Auto-Attendant

 Queue

Number of Rings before Answer:

Greeting:





Voice Mail

- Available only for Inbound Numbers acquired in turboDial
- Upgrade to include Add-Ons in your account at <https://sd123.customerhub.net>