

TURBO* DIAL

Create & Modify Call Queues

Define Queues:
Queues defined here will be available for use with any Inbound Number in your account

New Queue Name:

ADD

Notify These Users: **Notify All?**

Allow Queue exit on any key?: **ON**
When the caller presses any key they will exit the queue and be forwarded to the Queue Bypass Number.

Queue Bypass #:
If no Users to be Notified are logged in to turboDial the call will instead be forwarded to this number.

The "Parked Calls" queue cannot be deleted.
Queues that are assigned to an Inbound Number cannot be deleted.
Other Queues with no Users to be alerted will be deleted upon Update.

Update

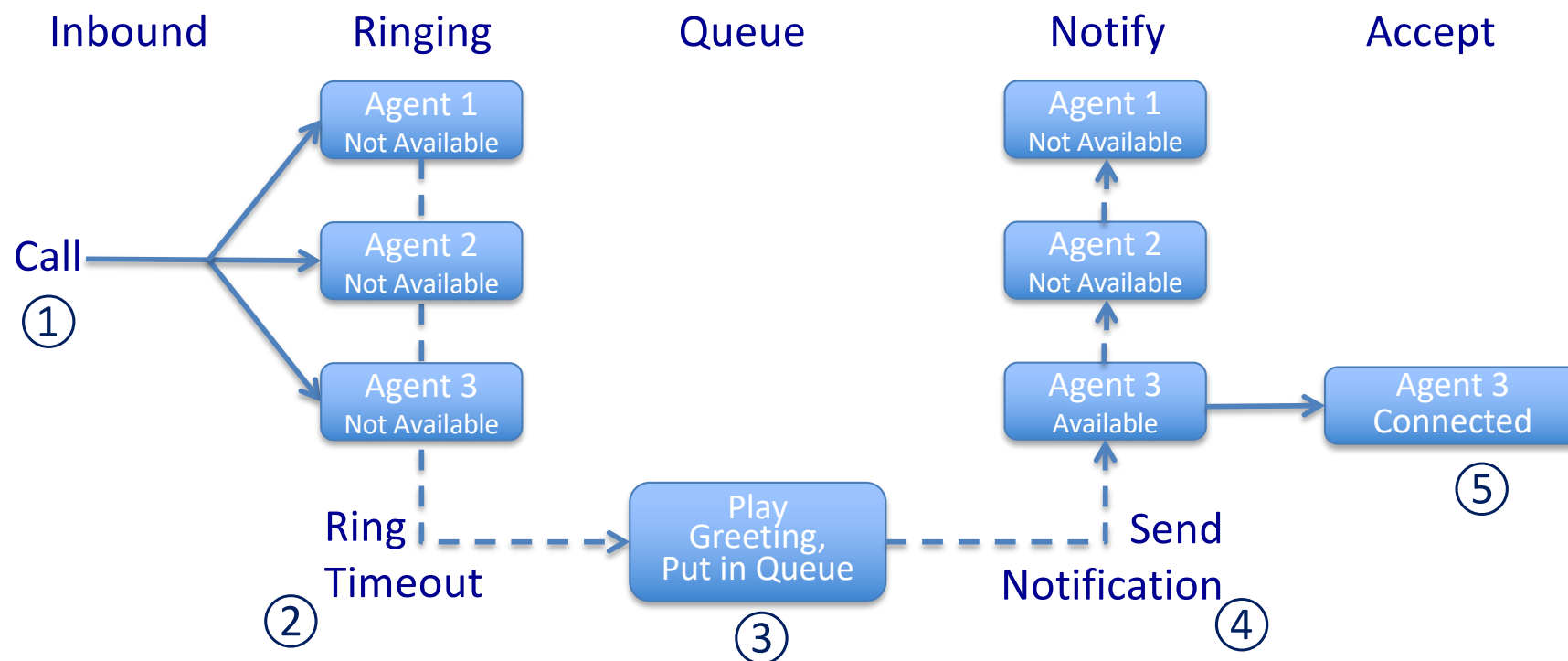
Overview & How-To Setup

Inbound Queuing

Topics

- Purpose & Features
- Creating Inbound Queues
- Queue Notifications & Bypass
- Install Queuing on a Number
- Demonstration
- Special “Parked Calls” Queue
- Dashboard Reports
- Items to Note

Inbound Call Queuing



When no Agents are available to accept an Inbound Call:

- Automatically answer and transfer the call to a holding queue
- Next available Agent can accept it off the queue

Inbound Queuing

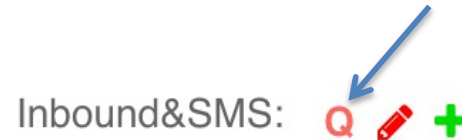
Features

- Create any number of Queues
- Assign Inbound Queuing to any turboDial Inbound Number
- Notify specified turboDial Users (Agents) when a call is queued
- Users can see and connect to any queued call
- Queue is bypassed if no Users are logged in
- Callers can exit a queue to a designated number

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

Queues

- Queues are created independently from Numbers



- A Queue defines:
 - Which Users are to be notified when a Call enters it
 - Only notified Users can accept a Call off of a Queue
 - A forwarding phone number to Bypass the Queue if the Users to be notified are not logged in to turboDial
 - Whether a caller can manually “exit” the Queue, and be forwarded to the Bypass number

- Each Queue can be assigned to more than one Number

Create & Modify Call Queues

Define Queues:
Queues defined here will be available for use with any Inbound Number in your account

New Queue Name:

ADD

Notify These Users: **Notify All?**

Allow Queue exit on any key?: **ON**

When the caller presses any key they will exit the queue and be forwarded to the Queue Bypass Number.

Queue Bypass #:

If no Users to be Notified are logged in to turboDial the call will instead be forwarded to this number.

The "Parked Calls" queue cannot be deleted. Queues that are assigned to an Inbound Number cannot be deleted. Other Queues with no Users to be alerted will be deleted upon Update.

Update

Queue Notifications

- When a call is queued Users receive a special “INQ” notification in the Calls pane of turboDial
 - Delivered to Users who are logged in and designated to be notified
- Multiple queued calls are listed as a scrolling list
- Other notifications such as calls on Hold are included in the same list

The screenshot shows the turboDial interface with the 'Calls' tab selected. On the left, there are four green buttons: HOLD, CONF, PARK, and ICOM. The main area displays a call notification with a red 'INQ' icon. The notification text is as follows:

INQ Tue, 23 Aug 2016 08:34:20 -0500
sd123 Utility Number
 From = **Jenkins William** at
+16302538502
 Lookup = **Bill Jenkins**
 Queue = **SD123 Queue**
 Holding Time = 38s

At the bottom, there is a dropdown menu showing 'Bill Jenkins: (952) 314-2997'.

Queue Bypass

- Queue notifications cannot be delivered if no Users are logged in to turboDial
- When a call is to be queued turboDial polls for logged-in Users from the "Notify These Users" list
- If no Users are logged in then the call is forwarded to the Bypass Number

Create & Modify Call Queues

Define Queues:
Queues defined here will be available for use with any Inbound Number in your account

New Queue Name:

ADD

Notify These Users: Notify All?

Allow Queue exit on any key?: ON

When the caller presses any key they will exit the queue and be forwarded to the Queue Bypass Number.

Queue Bypass #:

If no Users to be Notified are logged in to turboDial the call will instead be forwarded to this number.

The "Parked Calls" queue cannot be deleted. Queues that are assigned to an Inbound Number cannot be deleted. Other Queues with no Users to be alerted will be deleted upon Update.

Update

Close

Create/Modify an Inbound Queue

Must have turboDial Account Owner permissions:

1. Click the 'Q' button



2. For new Queues, type the Name and click "ADD"
3. Choose the Queue to modify from the List
4. Decide who should be notified
5. Enable/Disable Queue Exit option
6. Provide the Queue Bypass Number
7. Click the Update button

Create & Modify Call Queues

Define Queues:
Queues defined here will be available for use with any Inbound Number in your account

New Queue Name:

ADD

Notify These Users: **Notify All?**

Allow Queue exit on any key?: **ON**

When the caller presses any key they will exit the queue and be forwarded to the Queue Bypass Number.

Queue Bypass #:


If no Users to be Notified are logged in to turboDial the call will instead be forwarded to this number.

The "Parked Calls" queue cannot be deleted. Queues that are assigned to an Inbound Number cannot be deleted. Other Queues with no Users to be alerted will be deleted upon Update.

Update

Install Queuing on a Number

Must have turboDial Account Owner permissions:

1. Compose your Queue Arrival Greeting
2. Use the Recorded Msg section of turboDial to record your Greeting and give it a useful name
3. Choose the Inbound Number in the selector and modify it 
4. Move to the third screen: Inbound Call Actions
5. Select the “Queue” option
6. Choose the number of rings before the call is sent to the Queue
7. Choose your Greeting from Step 2
8. Choose the Queue
9. Click the Update button

Inbound Call Actions

Select Action Type for +19526495442

None
 Voice Mail
 Auto-Attendant
 Queue
 Find-Me

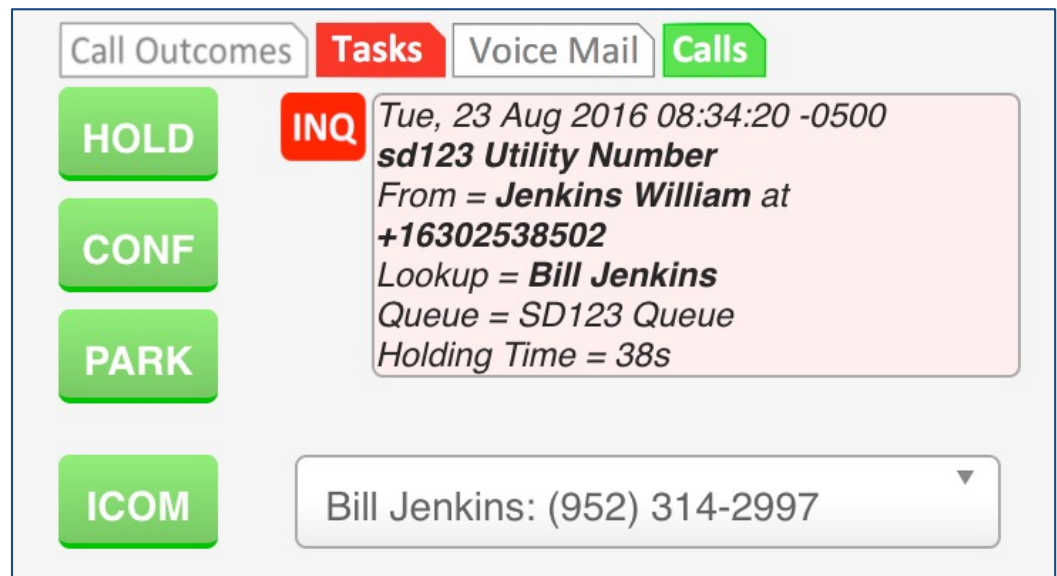
Number of Rings before Queueing:

Greeting:

Choose Queue:

Inbound Queuing Demonstration

1. Setup a new Queue
2. Assign an Inbound Number to use the new Queue
3. Make a call to the Number
4. Wait for it to be Queued
5. Observe the Notification in the Calls tab
6. Click the Notification to accept the Call
7. Log out of turboDial
8. Repeat the call in step 3
9. Notice it goes to the Bypass number



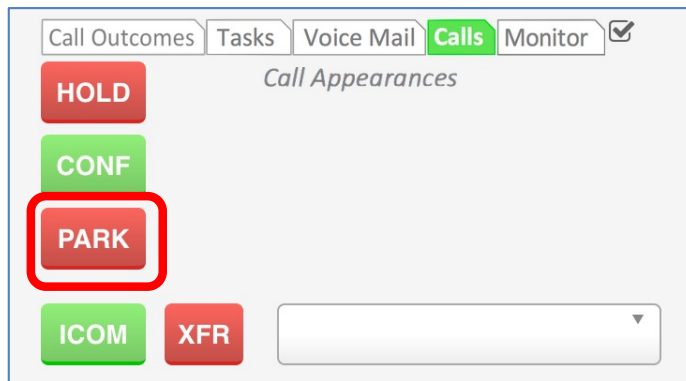
The screenshot shows the turboDial interface with the 'Calls' tab selected. On the left, there are four green buttons: HOLD, CONF, PARK, and ICOM. A red 'INQ' notification is displayed next to the call details. The call details are as follows:

- Time:** Tue, 23 Aug 2016 08:34:20 -0500
- Number:** sd123 Utility Number
- From:** Jenkins William at +16302538502
- Lookup:** Bill Jenkins
- Queue:** SD123 Queue
- Holding Time:** 38s

At the bottom right, there is a dropdown menu showing the caller's name and number: Bill Jenkins: (952) 314-2997.

Special Queue: Parked Calls

- “Parked Calls” Queue is for calls placed on hold using the “PARK” button



- Any notified User can accept a call off of the Parked Calls queue
- Default setup is: Notify All
- Setup Differences:
 - Bypass and Exit is not offered
 - Cannot be used for Inbound Number Queues
 - Cannot be deleted

Create & Modify Call Queues

Define Queues:
Queues defined here will be available for use with any Inbound Number in your account

New Queue Name:

Notify These Users: **Notify All?**

The "Parked Calls" queue cannot be deleted.
Queues that are assigned to an Inbound Number cannot be deleted.
Other Queues with no Users to be alerted will be deleted upon Update.

Dashboard Reports

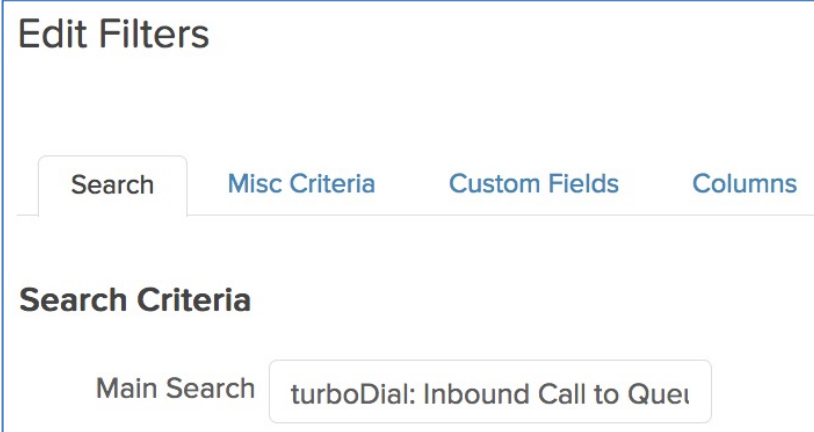
- Open the Admin->Reports window in Infusionsoft

- Create and Edit a Task-Note Report

- Two report types
Set Main Search =

turboDial: Inbound Call to Queue, or
turboDial: Inbound Call Bypassed Queue

- Adjust the other filters as needed
- Save the Report and choose “Add to User Home...”



Edit Filters

Search Misc Criteria Custom Fields Columns

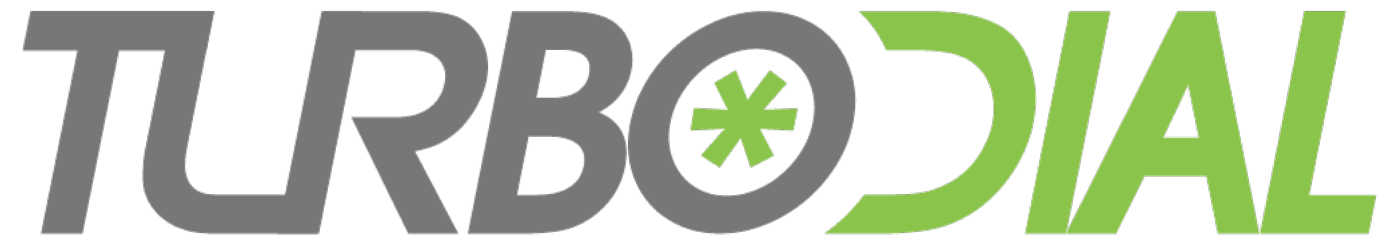
Search Criteria

Main Search turboDial: Inbound Call to Queu

Walk through a Dashboard Demo

Items to Note

- To **delete** an Inbound Queue:
 1. Click the “Q” button
 2. Choose the queue to be deleted
 3. Click the trashcan button then click the “Update” button
 - Exception: You are not permitted to delete the “Parked Calls” queue
 - Exception: You are not permitted to delete a queue in use with a Number
- You cannot modify a Recorded Msg in use by a Queue for an Inbound Number. Remove it from the Queue configuration before modifying/deleting.



Inbound Queuing

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