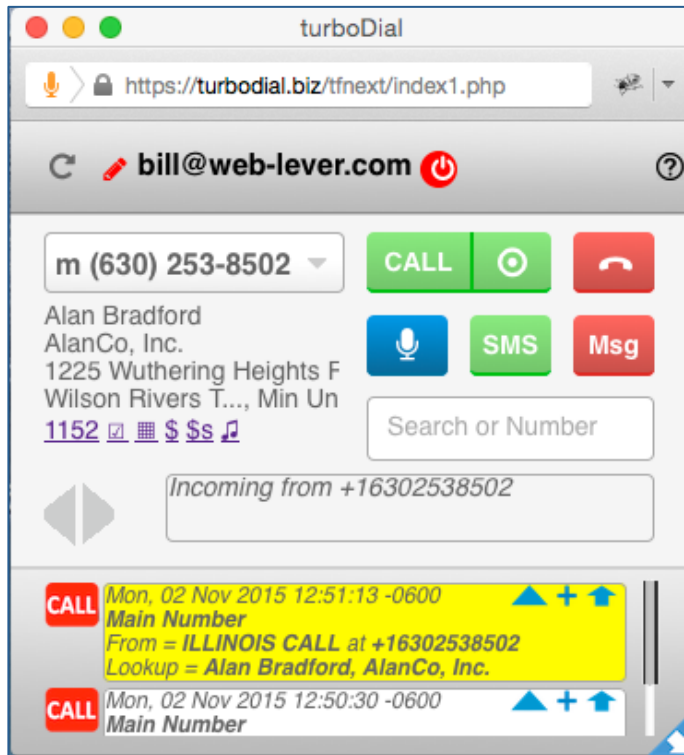


# TURBODIAL



## Feature Overview

# Enhanced Inbound Calling

# Enhanced Inbound: Topics

- Compare: Standard vs Enhanced Inbound
- Demo: Acquire, Configure & Modify a Number
- Demo: Inbound Call to Softphone
- Screen Pops in Detail
- Voicemail Coverage

# Standard vs Enhanced Inbound

- Standard Inbound (part of turboDial Sales Pro)
  - Acquire a Number for Inbound Voice & 2-way SMS
  - Configure it to forward voice calls to your chosen phone
- Enhanced Inbound (upgrade for turboDial Sales Pro)
  - Forward voice calls to 10 devices
    - Any combination of phones and turboDial softphone clients on PCs
    - All available devices will simultaneously ring
    - Inbound call connects to the first answered device
  - Record Inbound Calls
  - Receive Inbound Call Alerts (Screen Pops)
  - Document each Call with Automatic Call Notes
  - Track Activity with Dashboard Reports

# Demo – Buy & Initial Config a Number

# Inbound Number: Modify Settings

## Standard Inbound One Screen

**Configure Inbound Number**

Current Settings for +19523146150  
Capabilities: Voice and SMS

Use as an SMS From ID?

Forward-to number for inbound calls:  
Include + and country code, and optional extension.  
Example:  
+19521234567 123

Backup email for forwarding SMSs:

Optional label in selector:  
Example:  
Dana's Office

*(Upgrade to "Enhanced Inbound" for Screen Pops and Inbound Call Recording)*

Delete this number from your account?

## Enhanced Inbound Screen 1

**Configure Inbound Number**

Current Settings for +19523146150  
Capabilities: Voice and SMS

Use as an SMS From ID?

Backup email for forwarding SMSs:

Optional label in selector:  
Example:  
Dana's Office

Users to Alert:  Alert All?

Record inbound calls to this number?

Delete this number from your account?

## Screen 2

**Forwarding Destinations for Inbound Calls**

Forwarding for +19523146150  
-Numbers require + and country code. Extension is optional.  
-Emails must be Infusionsoft IDs for turboDial Users.  
-Examples:  
Phone Number: +19521234567 123 Email: bill@example.com

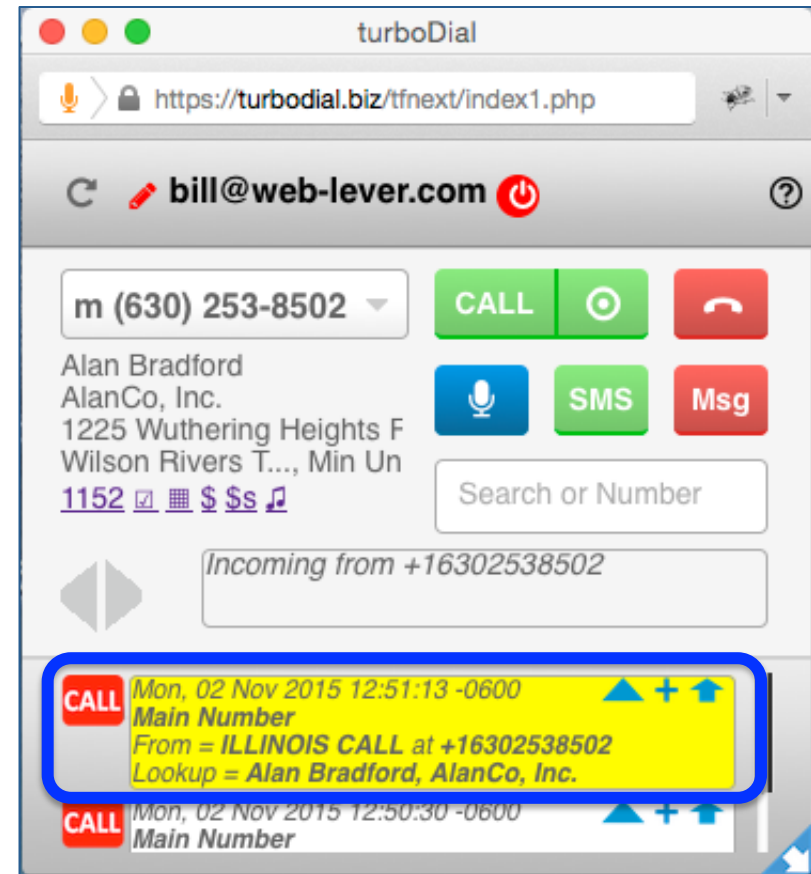
Number or Email	Ext.
<input type="text" value="+16085652042"/>	<input type="text"/>
<input type="text" value="bill@web-lever.com"/>	<input type="text"/>
<input type="text" value="wwjenkins@gmail.com"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Optional Name for Screen Pop Alert:

# Demo – Modify the Number

# Screen Pop Elements

- “Call” Label
- Date & Time
- Inbound Number Label
- Telephone company lookup of Calling Name
- Calling Phone Number
- Infusionsoft lookup of Contact Name & Company
- View & Assign Buttons



## What about Calls when Not Logged In?

- No Call Alerts/Screen Pops
- Other features remain active
  - Record Inbound Calls
  - Document each Call with Automatic Call Notes
  - Track Activity with Dashboard Reports
- Use a Dashboard report to access the recording for a call that was not assigned to a Contact



# Voicemail Coverage

- Choose at least one forwarding destination to be a phone with voicemail coverage
  - Mobile phone, Landline, PBX ...
- Unanswered calls will be picked up by that phone's voicemail service

## More User Guides

Also see these videos for more setup instructions:

- [Inbound Call Assign Buttons](#)
- [Inbound Call Dashboard Reports](#)

# Upgrade to Enhanced Inbound

- Login to your turboDial Management Account
  - <https://sd123.customerhub.net>
- Find “Enhanced Inbound” on the Upgrade menu
- Click the Upgrade Button
- Downgrade at any time