



Indition Business Phone

Feature List

Business owners and administrators · September 2026



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Indition Business Phone provides a separate business phone system and call center for each customer site, with call campaigns, desk phones, desktop and mobile apps, AI call transcripts, agent training and recording analysis. It combines the existing Twilio number and SMS integration with browser calling, forwarding, transfers, conferences, recording, queues, agents, scripts, supervision and outbound call campaigns that call your own lists, your store's customers or the CRM.

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Wherever you see this mark, the feature uses AI: call transcripts and summaries, role play reviews and recording analysis. They work once AI is set up for your site, and each one shows what it cost.

Phone systems and administration

- Separate phone systems for each customer site with their own staff extensions, business hours, routes, caller IDs, and recording settings.
- Staff work from My Phone on their own site; phone administrators manage the phone system in Settings.
- Indition connects each phone system to the phone network (Twilio) and to its numbers, and sets up browser calling; nobody on the customer's team needs a Twilio login.
- Module enablement must be saved before setup actions run. Optional initialization can run as part of the enabling save.
- On request, Indition keeps a customer's calls and texts on a separate Twilio subaccount.
- Indition can switch a phone system off: every active call on it ends at once, training calls included, and every browser phone goes offline; staff, numbers and settings are kept.
- Call center screens (Call Center, Follow-ups, Supervisor Board, Call Center Reports, Queues & Agents) in the Business Phone menu.

Numbers and SMS

- Indition finds and buys local numbers by country, area code, and calling or texting capability, and releases numbers a customer no longer needs.



- Each number rings one phone system; texting from a number is assigned separately.
- A dedicated texting number sends and receives through the existing Messaging screens.
- Shared texting numbers are outbound-only across sites; they are not a shared two-way inbox.
- Assignment checks, repair, reassignment, revocation, relay retry, delivery receipts, and opt-out handling support SMS operations.
- Media attachment relay is available to existing Messaging workflows when the provider and number support it.
- Assignment history and voice ownership protect numbers from inappropriate movement, deletion, or release.

Calling and routing

- Browser inbound and outbound calls with staff login, microphone and speaker selection, caller ID selection, mute, hang up, and a DTMF keypad.
- Internal extension dialing; forwarding to an existing external phone; ringing per extension on browser and apps, the person's own phone, or both; desk phones ring beside them.
- Do Not Disturb and browser presence. The browser page must remain open to receive browser calls; forwarding and voicemail can operate without it.
- Business hours by day, time zone, holidays, opening and closed greetings, and after-hours forwarding or voicemail.
- Ring groups that ring together, in listed order, or in random order (a new order for each call); single-digit phone menus, personal and group voicemail routes, and validated fallback routing.
- Deleting a ring group lists every place that sends calls to it and asks for a replacement; staff extensions and voicemail recordings are kept.
- Forwarded recipients press 1 to accept. Managed-number loop checks, allowed and blocked calling prefixes, and a configurable call-duration limit (Calling rules) restrict routing.

Transfers and conferences

- Transfer directly to an available internal extension or an allowed external number. The customer stays on hold until the recipient answers.
- Consult privately before transferring, then complete the transfer, cancel and return to the customer, or merge into a three-way call.
- Add participants to a conference; mute or unmute other participants, remove them, leave the call, or end it for everyone.
- The current host manages participants. Guests can leave; remaining staff can inherit host control when the original host leaves.
- The participant limit is configurable from 3 to 10 under Calling rules. Pending invitations count toward capacity. External invitees press 1 to join.
- Transfers apply to two-party calls. Group calls use the participant controls instead.

Recording and history

- Two recording policies per phone system: Office calls (direct calls, ring groups and ordinary outbound calls, off by default) and Call center queues (every queue and its callbacks, using the office policy by default). Each is Off, On demand, Automatic, or Automatic with pause / resume controls.
- Host recording controls start, pause and resume recording when the call's policy allows them. A call keeps the policy it started with; queue callbacks play their queue's recording notice.
- Private warm-transfer consultations use a separate unrecorded room. The app pauses legacy call recording before moving staff into consultation.
- Recordings appear in call history after completion. Protected audio is available to participating staff and authorized phone administrators.
- Voicemail playback, unread indicators, and Mark read. Personal mailbox access is restricted to its owner and authorized managers.
- Paged call history with in-grid filters and Excel export. Provider call legs remain linked to one business call rather than appearing as duplicate business-call rows.

Call center and campaign calling

- Per-instance queues with named agents, priorities, required skills, round robin or longest idle routing, offer timeout, and after-call wrap-up.
- FIFO waiting callers, spoken announcements, HTTPS hold music, queue hours and holidays, maximum wait, overflow to another queue, and voicemail or external forwarding fallback.
- Waiting callers can press 9 to request a callback to their original caller number. Assigned agents claim due callbacks; missed attempts use the configured retry delay and attempt cap.
- Agent desktop with Ready and Away, break reason, derived reserved and busy status, queue membership, current interaction, saved script, required answers, disposition, and notes.
- Shared agent capacity across inbound queues, campaign calls, manual calls, ordinary extension ringing, transfers, and supervision. A heartbeat or Ready action cannot clear an active call.
- Call campaigns are part of Business Phone (see Call campaigns below): audiences from any contact source, assignment, hours, suppression, scripts and variants, objections, outcomes and stage progression. Browser dialing uses the number re-read from the person's own record and one protected claim.
- Open campaign workspace on the Call Center page opens My Call Queue beside the phone desktop while Save and next advances work. Optional progressive calling starts one eligible claimed contact at a time after call completion and wrap-up; it starts switched off.
- Suppression and eligibility are checked again at actual campaign dial time. Callback dialing checks the instance global do-not-call list. Phone outcomes and campaign business outcomes remain distinct.

Call campaigns

- Call Campaigns and My Call Queue in the Business Phone menu: outbound calling campaigns that run on any site with Business Phone, with or without the Commerce Connection CRM.

- Choose who each campaign calls: Call lists (people uploaded from a spreadsheet into Business Phone), Customers (your store's customers and Customer Lists) or the CRM's customers and prospects. Another module can add its own contact source.
- Stages and rules: call stages with scripts, objections and A/B tests; email and text stages; rules that move people on, call back, stop as won, lost or do not call, or hand to another agent; an outcome library and a diagram.
- Add people from a list or filters with a preview, "Why isn't someone here?", spreadsheets to add or update people with import history and undo, and new matches added every night.
- My Call Queue for agents: the next due person with the script, outcome, callback, notes, meeting booking, email or text, contact details and hand to a colleague.
- Campaign results, Against the plan, needs-attention alerts, recovery queues, comparisons of up to six campaigns, templates, and Call Campaigns dashboards (Call Center Agent, Live Call Floor, Campaign Manager).
- A person their own record marks do not contact is never added; a campaign-wide do-not-call list; calling hours with recipient-local hours; every email and text re-checks the person's record before it goes.
- Emails, texts and meeting booking use the site's messaging system and online meeting scheduler where installed; without them campaigns are call-only. The Run Call Campaigns job runs every 10 minutes; nothing to install on the server.
- Worked by staff with the Sales User or Call Center Outbound Agent seat; campaign managers and the See and manage every call campaign permission control set-up.

Desk phones

- Up to five desk phones per staff extension, ringing beside the browser and apps, on the phone system's own secure SIP domain (TLS with encrypted audio offered).
- Automatic set-up for Yealink, Grandstream and Poly desk phones from the MAC address: the line, the time zone, a staff directory of every named extension, and an hourly check for changes. Point the phone at the provisioning URL or push it through the maker's own service.
- Any other standards-based SIP phone or softphone connects by hand with the server, username and password shown once.
- Cisco desk phones with Cisco's Multiplatform firmware: planned.
- Feature codes for voicemail (*97), forwarding (*72 / *73) and Do Not Disturb (*78 / *79); the Transfer key; the caller's name on the display.
- Connected, Never connected and Not seen since status, Ring test, Reset password, disable and remove; staff see their own phones in the apps.
- Emergency calling from desk phones once the emergency address is entered and switched on; until then emergency numbers play an announcement.

Four ways to use your phone

Each staff extension rings in up to four places at once; staff answer on whichever is closest.

- **Browser.** The Phone button at the top of every Indition page (or the comma key) and the My Phone page: Make a call, a Staff directory with Find a colleague, and Calls & voicemail with the unread count. Nothing to install; a headset is all staff need.
- **Desktop app for Windows and Mac.** The same phone in its own window, running in the background with call notifications: Phone, Messages, Recent calls, Voicemail, Recordings, and the call center and supervisor board for those seats. A compact incoming call card shows the caller's record and script with Answer and Decline. Windows from the Microsoft Store; Mac once Apple approves it.
- **Mobile app for iPhone and Android.** The work extension on a staff member's own phone: calls ring like any call even when the phone is locked, and call out from the company number. Phone, Messages, Recent and Voicemail, with the caller card and script. In the App Store and Google Play once each approves it.
- **Desk phone.** Yealink, Grandstream and Poly desk phones set themselves up from their MAC address; other standards-based VoIP phones and softphones connect by hand; Cisco phones are planned. Voicemail, forwarding and Do Not Disturb by feature code, a Transfer key, the caller's name on the display, and an hourly staff directory.
- **Phone Apps.** Staff connect an app by typing the code it shows, see their connected devices, and sign out one or all of them.
- **Ringling.** Per extension: Browser & apps; Browser & apps with the person's own phone when nothing is connected; Browser & apps and their own phone together; or their own phone only. Move to... hands a live call to another device.
- The header Phone button shows Away in solid red for call center agents and supervisors who are away, in every tab at once, and the unread voicemail count.

Safer settings and call flow

- Settings as a page of cards, each opening its own page whose Save applies at once to that page only, with breadcrumbs back.
- Change history: a complete copy of the routing configuration and number destinations at every save and publish; Restore any version, checked against current extensions and number ownership.
- Check setup: a readiness check of the saved configuration (calling, voice number, extensions, hours, destinations, greeting) with links to fix each item.
- Preview call routing: follow a call by number, date and time, availability and menu keys without placing it.
- Call flow builder drafts: Save draft keeps unfinished work private to its author for that phone system and restores it on return; callers keep the published flow until Publish flow.
- Publish checks list each issue with a link to its step; removing a step changes the draft only, with Undo; numbers shown as (561) 200-1701.
- Recent problems as a grid with date, text and place filters over the full history.

Supervision and quality

- Live supervisor board with queue counts, longest waiting time, agent states, connected calls, and alerts for waiting callers or uncertain invitations.

- Separate permissions for listen, whisper to the current staff host, and barge into the main conversation. Supervision is visible in the participant list and audited.
- Starting private consultation disconnects supervisors before the private room is used.
- Explicit customer hold and resume, plus the existing transfer and conference controls.
- Completed interaction details with the saved script, answers, notes, recordings, and reviewer scorecards for accuracy, courtesy, and resolution.
- Recording notices and retention periods for new interactions, protected audio playback, authorized provider deletion, and retained deletion audit records.

Reporting and recovery

- Reports by queue, agent, or campaign with local date ranges, column filters, sorting, persistent selection, selected-only mode, pagination, and Excel export.
- Offered, answered, missed, abandoned, and overflow counts; average wait, service level, talk, hold, wrap-up, dispositions, and observed agent occupancy.
- One business interaction is counted across its provider legs. Queue transfers and conference legs do not inflate interaction counts.
- Bounded scheduled reconciliation checks provider status, expired preparations, waiting limits, campaign event delivery, and recording retention.
- Uncertain call creation remains reserved until provider evidence arrives or an authorized supervisor confirms no call was created. The application does not blindly place a replacement call.

Call transcripts and insights

- Recorded calls and voicemail written down word for word, customer and staff kept apart, with talk time per side, silence and talking over each other.
- A summary, the customer's mood, topics and the call's main points added to the matched customer's note.
- Suggested wrap-up (outcome and script answers) with Use suggestion in the phone overlay, the Call Center page and the apps.
- Quality scorecards per queue, each point with a quote from the call, on the call's page and in Reports.
- Summary, Mood and Topics columns in call history and its Excel export.
- A transcript stopped by AI Settings waits, says exactly what is missing (a model that can listen, or a key) and runs by itself once fixed.

Agent training

- Training sessions: ring two or more staff into one call; before each role play choose its scenario and who takes part as an agent, the customer role-player or a trainer (anyone left out observes).
- Each role play recorded per person and reviewed per agent: what went well and what to work on with quotes, scorecard points met or missed with evidence, talk time.

- Scenario library reused across sessions; 10 or 20 scenarios in one session, numbered, with a picker before each role play or a new one written on the spot.
- Discard a role play, change who played which part and review again, ring people again.
- Anyone set to run the session controls it from My Training without the supervisor seat, and can hand it over to someone on the call mid-session.
- The session opens when someone answers the training call in the browser or desktop app; answering on another device shows a card in their signed-in browser.
- My Training, live: everyone follows the session read-only; the customer and trainer see the scenario once the role play starts, agents once it ends.
- Training Sessions list with trainer, people, scenarios, role plays, reviewed count, status and average score, filters, and Duplicate to run a session again; End Training Session in the session's title bar.
- Each role play on its own page, with Human review & corrections notes beside the AI review.
- Archive sessions (and restore them) or delete them with their recordings, transcripts and reviews.
- My training for every staff member: their sessions, reviews, transcripts and recordings, playable for a set number of days; own scores only, or everyone's.

Recording analysis

- Upload up to 20 calls or voicemails recorded anywhere, 200 MB each, in ten audio and video formats.
- Per recording: transcript, summary, mood, topics, follow-up promised, optional scorecard and the AI cost.
- Report with inline playback, Excel export, delete and Human review & corrections notes.
- Its own item in the Business Phone menu, listing each analysis with Complete, Processing and Needs attention counts; Retry transcription or Retry summary and scoring reruns only the missing step.

Staff extensions in a spreadsheet

- Export every staff extension to Excel in the words the settings screen uses.
- Import a sheet to add or change many extensions at once: every row is checked first, nothing is imported until every row can be, and extensions not in the sheet stay.

Screen pops, seats and the phone overlay

- Inbound screen pops and call scripts with a pluggable provider interface: Customers, the CRM's customers and contacts, and custom site modules; match at ring within a configurable budget, first exact match wins, one-click confirmation, write-back and auto-log.
- Phone seats sold as Phone User, Phone User + Direct Number, Sales User, Call Center Agent, Call Center Outbound Agent and Call Center Supervisor; Phone Administrator included. Work profiles choose the first screen and what the phone offers.
- Phone overlay on every admin page: dialer, contacts, recent calls, voicemail with delete, caller card and script, Campaign and Team tabs, one-tab ownership with hand-over, fallback ring to a cell phone.

- Consult and add with audible ringing, join, transfer, end for everyone; move a live call to a cell phone, desk phone, phone app or browser.
- Call flow builder: unused-step count, Remove step with an impact preview, Staff & groups view.
- Failure reporting through the platform exception handler with Recent problems; the desktop and mobile apps follow the seat.
- Call log: every Twilio callback and answer, request to Twilio and answer, failed or call-changing action and browser phone error, kept whole for a set number of days, filtered in the grid and downloadable for support.

Operational boundaries

Indition Business Phone includes browser calling, forwarding, the desktop and mobile apps, desk phones, the call center and call campaigns. Emergency calling works from desk phones once the emergency address is configured; the browser phone and apps are not for emergency calls. Cisco desk phones, call parking, scheduled conferences and predictive dialing are outside this release.

Starting conference controls or on-demand conference recording briefly reconnects the call. Live audio and transfer timing still require an authorized pilot before production acceptance.