



Indition Business Phone

Setup Guide

Phone administrators · September 2026



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Set up Business Phone on your site: staff extensions, routing and recording, desk phones, the call center and call campaigns. Indition sets up your phone system, connects your Twilio account and your phone numbers, and assigns numbers for calls and for texting; everything else in this guide is done in **Settings** on your site. Every settings page saves on its own and applies at once, and every saved version can be restored.

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Before setup

- Business Phone 1.8.10 must be installed on your site with its patches applied in the order the install list gives them; Indition applies them to the sites it runs. On an upgrade from 1.8.4, that adds Patch1_7_5_Usability (separate task pages, saved settings versions and human review notes), Patch1_7_8_Environments (refreshes the menus after staff work and administration were separated), Patch1_7_9_FlowDrafts (private call flow drafts), Patch1_7_9_CallCenterMenu (call center screens in the menus), Patch1_7_9_CallLists (Business Phone's own call lists), Patch1_7_9_TrainingMenu (training and recording analysis in the menus), Patch1_7_9_CampaignsMove (call campaigns move into Business Phone) and Patch1_7_9_CampaignReviewFixes (repairs a site that applied the campaign move before its fixes).
- Your site must use HTTPS with a valid certificate.
- Use staff accounts and permissions appropriate for administration or calling. Browser users need a working microphone and the site's microphone permission.
- Choose authorized pilot numbers and recipients. The browser phone and apps are not emergency phones; desk phones place emergency calls only after you turn emergency calling on (see Connect desk phones).

What Indition sets up for you

Indition runs your phone service and does these for you; none of them needs a screen on your site.

- **Your phone system.** Indition creates your phone system and connects it to your site, so your site never holds the Twilio Auth Token.

- **Twilio and phone numbers.** Indition connects your Twilio account, buys or moves your phone numbers, and connects each number for calls. You then choose where each number's calls go under **Settings > Phone numbers** (see Configure routing and recording).
- **Text messaging numbers.** Indition assigns the numbers that send and receive texts. Using a number for calls and using it for texting are set up separately, and the same number can do both. You choose who receives the texts under **Settings > Text messaging**, and staff open their conversations from My Phone.
- **Billing.** Indition meters your usage every night (seats by type from your enabled extensions, numbers, desk phones, minutes, texts and recorded minutes, net of what each seat includes, with a monthly minimum) and issues your monthly statement. Your phone administrator sees this month's estimate, your rate card and recent statements on the **Billing** card under **Advanced Settings > Phone service connection**, and your billing e-mail gets one notice a month when the estimate passes the alert threshold. If a statement stays unpaid past its due date, outbound calling can be paused until it is paid; incoming calls keep ringing.
- **Switching a phone system off.** Indition can switch a phone system off, which ends every call on it at once, training calls included, and takes every browser phone offline; callers then hear that the phone system is temporarily unavailable. Staff, numbers and settings are kept.
- **Updates.** Indition installs Business Phone updates and applies their patches to the sites it runs.

Add your staff

1. Add staff under **Settings > Staff & extensions** with **Add extension**: the staff member, display name and extension. Choose how they ring: **Browser & apps**, **Browser & apps; my phone when nothing is connected**, **Browser & apps and my phone together**, or **My phone only**. Enter their own phone in international format such as +15551234567.
2. Review Can call out and Enabled for each extension. Extensions have 3 to 6 digits, begin with 1 to 8, and cannot be reserved emergency codes.
3. Configure routing below. Business Phone must be switched on (**Business Phone Module Enabled** at the top of Settings) for calls to work.

Each staff member works from **My Phone** in the Business Phone menu, or from the Phone button at the top of any page.

Find your way around Settings

Settings in the Business Phone menu is a set of cards. Each card opens its own page; the breadcrumb at the top takes you back.

- At the top, **Business Phone Module Enabled** with **Save settings** switches Business Phone on or off for your site. Off hides every Business Phone screen except Settings; it does not end calls in progress.
- **Configuration:** Staff & extensions, Phone numbers, Hours & holidays, Greetings & voicemail, Call handling (Call destinations, Ring groups, Call flow & keypad menus), Queues & agents, Recording & insights and Text messaging. **Check setup** sits beside the heading.

- **Advanced Settings:** Calling rules, Emergency calling, Phone service connection, Preview call routing, Call log, Phone apps and Change history (and Readiness check on the Advanced Settings page itself).
- Each page has its own **Save** and changes only that page ("Changes apply only to ..."). Save applies at once and returns to the same page with **Settings saved**. There is no separate review step.
- If something is wrong, the page comes back with the reason and **Your changes are still here**. If someone else saved first, you are asked to reload; your entries are kept so you can check them and save again.
- People see only the cards they may open. The Phone Administrator seat has every settings page; the Call Center Supervisor seat has Queues & agents, the call log, training and recording analysis.

Configure routing and recording

1. Under **Hours & holidays**, set the time zone, opening hours and holidays (MM/DD/YYYY, one per line). Under **Greetings & voicemail**, set the opening, closed and voicemail greetings.
2. Under **Call handling > Ring groups**, press **Add ring group**: name, extensions, ring order (**Ring together**, **Ring in listed order** or **Ring in random order**, which rings one person at a time in a new order for each call), seconds per attempt (5 to 60, default 20) and voicemail greeting.
3. Under **Call handling > Call destinations**, choose who answers during opening hours and after closing: a ring group, a keypad menu, a queue, forwarding or voicemail. Build menus in **Call flow & keypad menus** (see Edit, save and publish the call flow).
4. Under **Advanced Settings > Calling rules**, set the default outbound caller ID, allowed and blocked prefixes, whether call center agents may dial outside numbers, call controls ready on answer, the failover URL, the maximum call duration (60 to 14,400 seconds) and the most people on a conference (3 to 10).
5. Under **Recording & insights**, choose the recording for **Office calls** (direct calls, ring groups and ordinary outbound calls) and for **Call center queues** (all queues and their callbacks): **Off**, **On demand**, **Automatic** or **Automatic with pause / resume controls**. Office calls start Off; Call center queues start on **Use office policy**. Set the recording notice and how many days recordings are kept, and press Save.

Recording changes apply to new calls; a transferred call keeps the policy it started with, and a private transfer consultation is never recorded. **On demand** gives staff Start recording; **Automatic** records from the moment the call connects with no buttons; **Automatic with pause / resume controls** also lets them pause. Each queue keeps its own recording notice and retention; a queue callback plays that queue's notice.

To delete a ring group, open it and press **Delete ring group**. The page lists every place that sends calls to the group (opening or after-hours destination, menu keys, no-answer steps, phone numbers) and asks where those calls should go instead. If a queue falls back to the group, change the queue first. Deleting keeps the staff extensions and their voicemail; Change history can bring the group back.

Check, preview and restore settings

- **Check setup** (Readiness check) inspects the saved settings without calling anyone: calling enabled, a voice number assigned, staff extensions ready, opening hours set, open and closed destinations, and a caller greeting. Each shows Ready or Needs attention with a link to fix it.

- **Advanced Settings > Preview call routing** follows the published settings for a number, a date and time, an availability scenario (Someone answers, No answer or Nobody available) and any menu keys pressed, and shows each step a caller would take, without placing a call.
- **Advanced Settings > Change history** lists every saved version of the call settings: each settings save and each published call flow, with who saved it and when. **Restore** applies an earlier version at once as a new version, after checking the current extensions and number ownership, so a restore can itself be undone by restoring another. Staff extensions, queues and texting are not part of a version.

Connect desk phones

Desk phones ring with the person's browser and apps, dial out under the same caller ID and calling rules, and use their own Transfer key; hold, conference and recording are done from the browser or app. Business Phone sets up **Yealink**, **Grandstream** and **Poly** desk phones automatically: their phone line, time zone, an hourly settings check, and a staff directory of everyone's extension. Any other standards-based SIP desk phone or softphone connects with the server, username and password shown on screen. **Cisco** desk phones (those with Cisco's Multiplatform firmware) are planned and not supported yet.

1. Open **Settings > Staff & extensions**, choose the person, and open the **Desk phones** tab.
2. Enter the **Phone name** (for example Front desk), choose the **Model** (Yealink, Poly, Grandstream, or Other / softphone) and enter the phone's **MAC address (for provisioning)**. Leave the MAC blank for a softphone or a phone you set up by hand. Press **Add desk phone**.
3. A panel shows **Provisioning URL**, **SIP server**, **Username**, **Password**, the display name with the feature codes, and the **Heartbeat URL**. The password is shown only this once; **Reset password** shows the panel again.
4. Give the phone the Provisioning URL once: type it into the phone's own web page as its provisioning (auto-config) server, push it through the brand's redirect or provisioning portal (Yealink RPS, Poly ZTP or Grandstream GDMS), or hand it out with DHCP option 66 on your network. The phone must be added here with its MAC address first.
5. For a phone set up by hand, enter the SIP server (port 5061, TLS with SRTP; UDP 5060 for older handsets), username and password. Enter the Heartbeat URL as the phone's "registered" action URL if it has one.
6. Press **Ring test** to ring the phone, and place a call each way.
7. Turn on emergency calling: **Advanced Settings > Emergency calling**. Enter the business name and the street address where the desk phones are, tick the confirmation that the phones are at that address, and press **Turn emergency calling on**. The provider checks the address; a per-address fee applies. Until then, a desk phone that dials 911, 112 or 999 hears that emergency calling is not configured.

What the desk phone list shows

STATUS	MEANING
Connected	The phone checked in within the last two hours (a Yealink phone reports its registration as it happens).

STATUS	MEANING
Never connected	The phone has not fetched its settings or registered yet.
Not seen since ...	The phone has not checked in for more than two hours.
Registration failed	The phone reported a failed registration, with its reason.
Disabled	The phone is switched off here and cannot register.

Each extension can have up to 5 desk phones, and a MAC address can be used once on a site. Phones re-fetch their settings and the staff directory every hour. Feature codes on every desk phone: ***97** voicemail, ***72** plus a number to forward and ***73** to stop, ***78** and ***79** Do Not Disturb on and off. The caller's name appears on the phone's display when the caller is recognized. Use **Disable**, **Enable** and **Remove** on the list; staff can also see their own phones and get a new password in the apps.

Configure the call center

1. Give every caller an enabled staff extension and choose how they ring.
2. Open **Queues & Agents** in the Business Phone menu. Press **New queue**, name it, enable it, assign agents, and set priorities and skills. Choose round robin or longest idle, the offer timeout, wait limit, service target and wrap-up.
3. Set inherited or queue-specific hours, time zone and holidays. Choose overflow to another queue or to the final voicemail or forwarding route. Overflow loops are refused.
4. Add the queue script and any required text, yes or no, or number questions. Set callback attempts and retry delay. Set the queue's recording notice and retention; whether queue calls are recorded is the shared **Call center queues** choice under Recording & insights.
5. Save the queue, then open **Settings > Call handling > Call destinations** (or a keypad menu) and choose the queue. A saved queue alone does not take over a number.
6. Agents open **Call Center** (the agent desktop) on their site, turn the phone on and choose Ready. Agents who ring on their own phone press 1 to accept a queue offer.
7. Give supervisors the **Call Center Supervisor** seat for the Supervisor Board, Listen, Whisper and Barge, quality review and Call Center Reports. A supervisor needs their own enabled extension and a connected phone to monitor audio.
8. Check the scheduled call center job runs and its logs are clean.

Set up call campaigns

Call Campaigns are part of Business Phone: outbound calling with stages, scripts, outcomes and a call queue per agent. A campaign calls the people of one contact source: **Call lists** (Business Phone's own, uploaded from a spreadsheet, for a site with no other contact system), **Customers** (the customers and Customer Lists of the store) or **CRM customers and prospects** (the Commerce Connection CRM, where it is installed).

1. Apply Business Phone patch 1.7.9 on the site that runs the campaigns: Patch1_7_9_CallLists, Patch1_7_9_CampaignsMove and Patch1_7_9_CampaignReviewFixes. On a site with the Commerce Connection CRM, apply Commerce Connection 1.13.2 (its Patch_1_13_2_CampaignsToBusinessPhone) after Business Phone's patches: it removes the old campaign screens there once Business Phone has taken over their permissions, and it refuses to run before.
2. Check the scheduled job **Run Call Campaigns** is on. It runs every 10 minutes: automated emails and texts, stale claims, the nightly list top-up, and campaign start and finish dates. There is no command-line worker: remove the old one-minute campaign line from the server crontab if the site had one.
3. Set the site setting **Call campaign time zone** (Business Phone settings group), for example America/New_York. Campaign hours, callbacks and dates are kept in it; blank uses the database time zone.
4. Give each caller the **Sales User** or **Call Center Outbound Agent** seat. Either seat opens Call Campaigns (the campaigns they are on), My Call Queue and the full call card; the inbound Call Center Agent seat has no campaign screens.
5. In **Manage Permissions**, give campaign managers the Business Phone campaign screens they need (Call Campaigns, Edit Campaign, Start or Pause Campaign, Add Campaign Members and so on) and, for anyone who manages every campaign, **See and manage every call campaign, not only the ones you are on**. Upgraded sites keep the campaign permissions people had before.
6. Open **Call Campaigns**, press **Create Campaign**, and choose **Who to call**. It cannot change once people are on the campaign.
7. Under **Setup > Agents**, add the callers, mark the **Campaign manager**, and set daily call targets if you use them. Under Calling hours, check the weekly hours (new campaigns start Monday to Friday, 9:00 to 17:00).
8. Test with a few people from a test list: add them under People, start the campaign, work two calls from My Call Queue and record outcomes, then check Results.

Emails, texts and meeting booking from a campaign need a messaging system and a meeting scheduler on the site; today these come with the Commerce Connection (its Customer Inbox and online meeting scheduler). Without them a campaign is call-only: email and text stages cannot be saved, the call card has nothing to send, there is no meeting to book, and company holidays are not skipped. Territory, call skill and language routing, pipeline stages as outcomes, follow-up tasks and manager notifications work with the CRM source only.

Assign seats and work profiles

1. Open **Settings > Staff & extensions** for the phone system. Each enabled extension is a Phone User automatically; the Seat column shows what else the person holds.
2. Open the person (Edit). Under **Job**, choose the seat: Sales User (campaign calling from the overlay, Call Campaigns and My Call Queue), Call Center Agent (queue calls, availability, wrap-up), Call Center Outbound Agent (campaign calling first, plus availability), Call Center Supervisor (live board, Listen, Whisper, Barge, queue and script configuration, training and recording analysis) or Phone Administrator (phone system settings). Leave the work profile on *Follow the seat* unless the person needs a different first screen.
3. Under **Options**, decide whether the person may move live calls to another device (default: on when their own phone number is set) and whether they may forward texts to a personal phone.

4. Under **Advanced Settings > Calling rules**, set **Call center agents may dial outside numbers** for the phone system. Off by default: agents call extensions and transfer targets only.
5. Save. Permissions follow the extension at once; the person's next page load shows the overlay for their profile. Removing their last extension removes Phone User and the seat.

Add or change many extensions from a spreadsheet

1. Open **Settings > Staff & extensions** and choose **Actions > Export staff extensions**. The Excel sheet has one row per extension, in the words the screen uses: Staff email, Display name, Extension, Enabled, Rings, My phone number, Phone seat, Work profile, Move live calls, Can call out, May forward texts, Outbound caller ID and Voicemail greeting.
2. Change or add rows: one row per staff member, found by their staff email (or username). Extension is required for someone new. An empty cell keeps what is there now; **none** clears My phone number, Outbound caller ID and Voicemail greeting.
3. Choose **Actions > Import staff extensions**, choose the sheet (up to 1,000 rows) and check it. Each row shows Add, Change, No change or Fix first, with what will change.
4. Fix the rows marked Fix first in the sheet and check it again. When every row can be imported, press **Import**. Each row is saved the same way as the Add extension form; extensions that are not in the sheet stay as they are.

Screen pops and call scripts

1. Open **Queues & Agents** and press **Screen pop & caller lookup**. The page lists every module on the site that offers a caller lookup (Customers, the Commerce Connection CRM's leads and contacts, and custom site modules). Enable the ones to use and drag them into the order they should be asked.
2. Choose whether to ask every provider or stop at the first exact match, and set the lookup budget (500 to 3,000 ms, default 1,500). Calls ring on time whatever the budget; a slow provider simply arrives after the first ring.
3. Decide whether confirmed calls are written back to the matched record and after how many seconds an unconfirmed call is logged automatically.
4. Write the call script for each route and queue in **Call flow & keypad menus** (select a step, then **Call script**) or in the queue settings. Merge fields: `{{caller.name}}`, `{{caller.number}}`, `{{route}}`, `{{queue}}`, `{{agent.name}}` and any field the provider supplies; lines whose fields are all blank are dropped. Add the questions the agent must answer before the call is disposed.
5. Use **Preview** on the screen pop page with a known customer number to see exactly what an agent will see.
6. For a custom site module, copy *docs/provider-template/MySitePhoneContext.php* into the module, declare `getPhoneContextProvider()`, and run the kit test; the provider appears on the page without further configuration.

Use the phone overlay

Staff do not need the My Phone page open. The phone runs in whichever Indition tab holds it and keeps ringing as they move between pages; closing that tab hands the phone to another open tab, and the *Browser & apps; my phone when nothing is connected* ringing choice rings the person's own phone when no tab is connected.

1. Press the comma key or click **Phone** in the header. Turn the phone on once; it stays on in every tab. The button shows the phone's state: Ready, DND, Away (solid red, for agents and supervisors who chose Away), Incoming call, Calling or In call, with the unread voicemail count.
2. Dial a number or extension, or click a contact. Recent calls and Voicemail are one click away; voicemail messages play inline and can be marked read or deleted.
3. During a call: Mute, Hold, Record (when the call's recording choice allows it), Transfer/Add (type an extension or number; Consult rings them audibly, then Join calls, Transfer or Back to caller), Move to... (cell, desk phone, phone app or browser), Hang up, or End for everyone when others have joined.
4. Agents see their availability, queues with waiting counts, and must finish the call card before going Ready. Sales and outbound seats work campaigns from the Campaign tab. Supervisors watch and join calls from the Team tab.

Call controls ready on answer

Advanced Settings > Calling rules > Call controls ready the moment a call is answered. On: every answered call starts in a call room, so Hold, Transfer, Add and Move to are available at once and the call never reconnects mid-conversation. Desk phones keep their own Transfer key. Off (default): controls connect a moment after the call starts, as in earlier releases. Turn it on per phone system once a test call on that system sounds right.

Edit, save and publish the call flow

Open **Settings > Call handling > Call flow & keypad menus**. Nothing you change reaches callers until you publish: the title bar shows **Published flow**, **Unpublished changes** or **Draft saved**, with **Preview call**, **Save draft** and **Publish flow**.

1. **Save draft** keeps an unfinished flow for you and this phone system only; nobody else sees it, it may still have problems, and live calls keep using the published flow. Open the builder later, from any browser, and the draft is loaded ("Saved draft loaded. Live call routing is unchanged.").
2. Every change is also kept in this browser. If you leave without saving, the builder offers **Restore draft** or **Dismiss draft** next time. If the published flow changed since your draft, the published flow is shown and an older draft cannot be restored.
3. **Remove step** on a selected step (**Remove from diagram** for staff, ring group, main and voicemail destinations, which are hidden and never deleted) lists the branches that lead to it and lets you choose where they go instead (Voicemail by default). It changes your draft only: Undo brings it back, and live calls are unchanged until you publish. A step a phone number or a queue fallback uses outside the diagram cannot be removed; change it in phone settings first.

4. **Unused steps (N)** counts the steps you added that no caller can reach. Press it to highlight and list them; remove each with its x or **Remove all unused steps**.
5. Press **Publish flow**. If anything must be fixed, **Cannot publish yet** lists each issue as a link that opens its step, with **Save draft** to keep your work. Otherwise **Publish this call flow?** shows how many active numbers and steps it covers; new incoming calls follow it, calls already in progress keep their routing. Publishing saves a version in Change history and clears your draft.

Phone numbers in the flow are shown as (561) 200-1701. **Staff & groups** lists staff extensions and ring groups that no branch connects to; they stay reachable by dialing and are managed under Staff & extensions and Ring groups. Starter templates and earlier versions in the version history open as drafts too.

Desktop and mobile apps

Staff can use four kinds of phone on one extension, and most use more than one: the **browser** (the Phone button and My Phone, nothing to install), the **desktop app** for Windows and Mac, the **mobile app** for iPhone and Android, and a **desk phone** (see Connect desk phones). The User Manual chapter Four ways to use your phone compares them for staff. The ringing choice on each extension decides where calls ring: Browser & apps (browser, apps and desk phones together), with the person's own number when nothing is connected, with their own number at the same time, or their own number only.

Connect your phone app

Get Indition Business Phone: [Windows \(Microsoft Store\)](#)

Type the code displayed in Indition Business Phone on your own device. Never use a code someone else sent you.

Device code

Connect device

Your connected devices

[Sign out all devices](#)

Displaying 1–2 of 2 results Page Size 50

Device	Platform	Connected	Last used	
My iPhone	iOS	10/17/2026 2:55 PM	10/19/2026 7:44 PM	Sign out
Stuart Green	macOS	10/17/2026 4:30 PM	10/17/2026 8:06 PM	Sign out

Displaying 1–2 of 2 results Page Size 50

Phone Apps, where each staff member connects the desktop and mobile apps.

The desktop app (Windows and macOS) and the mobile app (iPhone and Android) pair with a staff member's extension and follow the same seat and work profile. Staff connect a device under **Phone Apps** (or Advanced Settings > Phone apps) by typing the code the app shows. Indition sets up the iPhone and Android notifications the mobile app needs to ring.

Connect your phone app on Phone Apps offers a button for each app store where Indition Business Phone is published. Today that is **Windows (Microsoft Store)**; iPhone (App Store), Android (Google Play) and Mac (Mac App Store) buttons appear once those stores approve the app.

Set up training and recording analysis

Agent training lets supervisors run recorded role plays with their team and get an AI review of every agent; recording analysis reviews calls and voicemails uploaded from anywhere. Both run on your site.

1. Business Phone patches 1.7.4 (Patch1_7_4_ExtensionSheets, Patch1_7_4_AgentTraining, Patch1_7_4_TrainingRunner, Patch1_7_4_TrainingArchive, Patch1_7_4_CallLog, then Patch1_7_4_MyTrainingAccess), 1.7.5 (Patch1_7_5_Usability: the role play and scenario pages, analysis retry and review notes) and 1.7.9 (Patch1_7_9_TrainingMenu) must be applied on your site; Indition applies them to the sites it runs.
2. In AI Settings (AiCore 1.2.5 or later), switch on **Transcribing recorded calls and voicemail** and **Call summaries, customer notes, suggested wrap-up and quality scores**, allow **Phone call recordings and transcripts** under Customer data AI may see, and save a Google Gemini key (the model that listens to recordings); the reviews use the model AI Settings chooses for reviews. If anything is missing, the screens name the AI Settings, the model or the key involved, and a transcript waiting for it runs by itself once it is fixed.
3. Make sure ffmpeg is installed on the web servers. It lines up each person's recording in a role play and builds the recording people play back.
4. Give supervisors the **Call Center Supervisor** seat (or Phone Administrator) for Training Sessions and Recording Analysis. Everyone with an enabled extension has My Training, and can run a session themselves when the session switches on Runs the session for them.
5. Open **Training Sessions** in the Business Phone menu, choose the **Scenario library** tab, and add the scenarios your team should practise.
6. Create a short test session with two staff and start the call. Before the role play, choose its scenario and switch on both people with their roles (at least one Agent), run it, and check that its review appears on its role play page and its recording plays.

Reviews run while the session screen is open, and the scheduled job **Business Phone call transcripts** finishes any that are left; run it every minute from the server crontab for quick results. Choose on each session how many days people can play the recordings (30 by default) and whether agents see only their own scores. **Recording Analysis** is its own Business Phone menu item.

Turn Business Phone off

Business Phone Module Enabled at the top of Settings, then **Save settings**, switches Business Phone off for your site. Off hides every Business Phone screen except Settings; it does not end calls in progress. To stop every call on a phone system at once, ask Indition to switch the phone system off (see What Indition sets up for you).

Find out what happened on a call

Your site keeps a detailed call log: the call events it received and what it answered, its requests to Twilio and Twilio's answers, its actions, and your staff's browser phones.

1. Open **Advanced Settings > Call log**, or the call log link above Recent problems.
2. Filter in the grid by time (in the phone system's time zone), kind, what happened (text such as *callControl*), the call (its Twilio SID), a phone number in any format, or Result = Failed. **Clear** is in the filter row.
3. Open an entry for the full request and response: the fields Twilio sent and the answer your site gave, the request sent to Twilio and Twilio's answer or error code, or the refusal an action got. **Everything on this call** lists every entry for the same call. **Actions > Download** (or Download this call) saves what is filtered, every request and response whole, as one file to send to support.
4. Set **Keep the call log for (days)** (1 to 365, 30 by default) at the foot of the page; the scheduled Business Phone run removes older entries.

Passwords, secrets, tokens and signatures are removed before an entry is stored; recording audio is never logged. Polls and screen refreshes are logged only when they fail. **Recent problems** (under Advanced Settings > Phone service connection) lists every recorded failure, newest first, filterable by when, what failed and where.

Accept the pilot and launch

1. Sign in as an assigned staff member and open **My Phone**. Press **Enable browser phone**, grant microphone permission for this site, and confirm the phone is ready for calls.
2. Run **Check setup** and **Preview call routing** for each number, opening hours and closed hours.
3. Test inbound and outbound calling, correct caller ID, press-1 acceptance on an own phone, menu choices, hours, Do Not Disturb, and voicemail playback.
4. During a connected call, test direct transfer, private consultation, cancel, complete, merge, add participant, mute, remove, leave, and end for everyone.
5. Test recording off, automatic recording on a new call, on-demand start, pause and resume, protected playback after completion, and that consultation audio is not recorded. Repeat for a queue call if queues record differently.
6. Ring each desk phone with Ring test, call out from it, and check its time and staff directory.
7. Publish a small call flow change and check it in Change history; restore the previous version.
8. Confirm the scheduled SMS relay, assignment health check, Run Call Campaigns, and usage or call-recovery services run. Record the pilot result before adding more numbers.

An authorized live Twilio pilot is required for production acceptance; automated checks do not measure audio quality or carrier timing.