



Indition Business Phone

User Manual

Staff callers, supervisors and phone administrators · September 2026

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Your phone is the **Phone** button at the top of every Indition page (or the comma key): dial, answer, see who is calling, transfer, move the call to another device, and listen to voicemail without leaving what you were doing. **My Phone** in the Business Phone menu is the same phone as a page, with the staff directory and your calls and voicemail beside it, and **Calls & Voicemail** keeps your call history and recordings. The desktop and mobile apps and a desk phone do the same away from the browser. Your phone administrator controls the connected numbers, your seat, routing and recording. Call center agents work queue calls, outbound callers work call campaigns from **My Call Queue**, and supervisors run **Training Sessions**, where staff practise customer calls and AI reviews each agent; everyone can listen back to their own role plays under **My Training**.

 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.

Contents

1. [Four ways to use your phone](#)

2. [Use the Phone button](#)

3. [Your seat](#)

4. [Understand the screens](#)

5. [Get ready for calls](#)

6. [Use a desk phone](#)

7. [Work a queue call](#)

8. [Work a campaign call](#)

9. [Run a call campaign](#)

10. [Make and answer calls](#)

11. [Transfer directly](#)
12. [Consult before transferring](#)

13. [Run a conference](#)

14. [Record a call](#)

15. [Use history and voicemail](#)

16. [Read call transcripts and summaries](#)

17. [Supervise and review calls](#)

18. [Run a training session](#)

19. [Keep a scenario library](#)

20. [Follow and listen back with My Training](#)

21. [Analyze recordings](#)

22. [Your phone bill](#)

23. [Use SMS and get help](#)

Four ways to use your phone

Your extension can ring in four places at once: the **Phone button** in your web browser, the **desktop app** on a Windows or Mac computer, the **mobile app** on an iPhone or Android phone, and a **desk phone**. When a call comes in, answer on whichever is closest; the others stop ringing. Use one of them or all four. Calls go out from the same company numbers whichever one you use.

Which to use

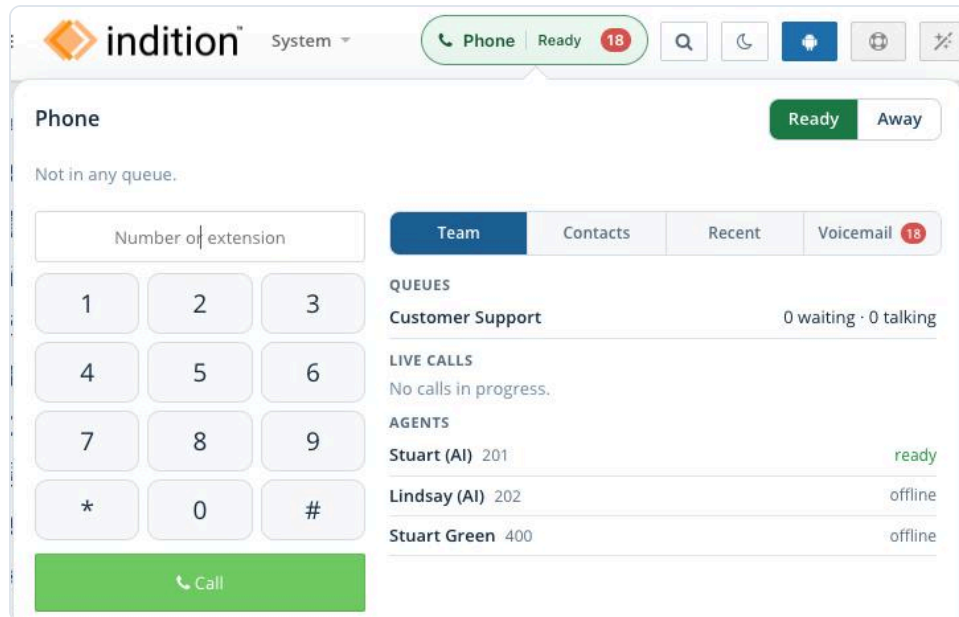
	BROWSER	DESKTOP APP	MOBILE APP	DESK PHONE
What it is	The phone built into every Indition page.	Indition Business Phone for Windows and Mac.	Indition Business Phone for iPhone and Android.	A VoIP handset on your desk.

	BROWSER	DESKTOP APP	MOBILE APP	DESK PHONE
Best for	Working in Indition all day with a headset.	Taking calls while you use other programs; it keeps running in the background.	Calls away from your desk or out of the office.	Front desks, shared phones, and people who like a handset.
How you get it	Nothing to install. Sign in to Indition.	Windows: the Microsoft Store. Mac: once Apple approves it. Connect it on Phone Apps .	The App Store and Google Play, once each approves it. Connect it on Phone Apps .	Your phone administrator adds it. Yealink, Grandstream and Poly set themselves up.
Make and answer calls	Yes	Yes	Yes	Yes
Hold, transfer, conference	Yes	Yes	Yes	The Transfer key passes the call on; hold and conference from the browser or an app.
Record a call	When your recording setting allows it	When your recording setting allows it	When your recording setting allows it	From the browser or an app
Voicemail	Voicemail tab	Voicemail	Voicemail tab	Dial *97
Who is calling	Caller card, matched record and call script	Caller card, matched record and call script	Caller card, matched record and call script	The caller's name on the display
Call center and campaigns	Ready and Away, queue calls, call cards, campaigns, supervisor board	Ready and Away, queue calls, call cards, campaigns, supervisor board	Ready and Away, queue calls, call cards, campaigns, supervisor board	Use the browser or an app for availability and call cards
Text messages	Open SMS conversations	Messages	Messages tab	No
Training calls	The session opens when you answer	The session opens when you answer	Answer; your browser offers the session	Answer; your browser offers the session

What you see in each also depends on your seat (see Your seat): a call center agent sees Ready and Away and the queues, a supervisor also sees the supervisor board, and an outbound caller sees the Campaign tab.

The Phone button in your browser

The **Phone** button sits at the top of every Indition page, showing your state (Ready, Away, Do Not Disturb, Incoming call, In call) and your unread voicemail. Click it, or press the comma key, to open the phone: the keypad on the left, and **Team**, **Contacts**, **Recent** and **Voicemail** on the right. Call center agents switch between **Ready** and **Away** at the top. The first time, your browser asks to use the microphone: choose Allow. A headset gives the best sound.



The Phone button, opened from the top of any Indition page.

My Phone in the Business Phone menu is the same phone as a page: **Make a call**, the **Staff directory** (type in **Find a colleague** and click a person to fill in their extension), and **Calls & voicemail** with your unread voicemail.

Business Phone » My Phone » My phone

My phone

Stuart (AI) · Extension 201 · Stuart AI

Make a call

Ready for calls.

Phone number or extension

Call from

Call

Audio & phone options

☐ NO Do Not Disturb

Emergency calling is not configured for this browser phone. Use your existing phone for emergency calls.

Staff directory

Find a colleague

Stuart (AI)
 Extension 201

Lindsay (AI)
 Extension 202

Stuart Green
 Extension 400

Calls & voicemail

18 unread voicemail messages

[View calls and voicemail](#)

Agent desktop — set your queue availability and manage assigned calls.

My Phone: make a call, find a colleague, and get to your calls and voicemail.

The desktop app (Windows and Mac)

The desktop app is the same phone in its own window, so calls reach you while you work in other programs. It keeps running in the background when you close the window, shows a notification when a call comes in, and will not quit in the middle of a call. Down the left: **Phone**, **Messages**, **Recent calls**, **Voicemail**, **Recordings**, and, for your seat, **Call center** and **Supervisor board**. An incoming call shows who is calling, their record and the call script, with **Answer** and **Decline**.

 **indition**

Business Phone

Ready

Sign out

D

Dana Whitfield

Riverside Sewing & Quilting · Ext. 201

(614) 555-0101 · calls & texts

Phone

Messages 1

Recent calls

Voicemail

Recordings

Call center

Supervisor board

Settings

Availability: Ready

Refresh

INCOMING CALL

Margaret Holloway

Answer

Decline

Margaret Holloway (614) 555-0142 · Sales

Margaret Holloway Loyalty

Customers

Holloway Quilts · Customer since 2019

Open repair **#4821** · Ready for pickup

Last order **Sept 28** · \$214.60

Next class **Free-motion quilting** · Thu 6 pm

Open record

▼ Call script

Thank Margaret for calling Riverside. Her machine (repair #4821) is ready for pickup today; offer the 10% loyalty discount on thread and needles while she is in.

Number or extension

1

2

3

4

5

6

7

8

9

Your team

Contacts

Search names or extensions...

M

Marcus Reyes

Extension 202

↗

P

Priya Natarajan

Extension 203 · Do not disturb

↗

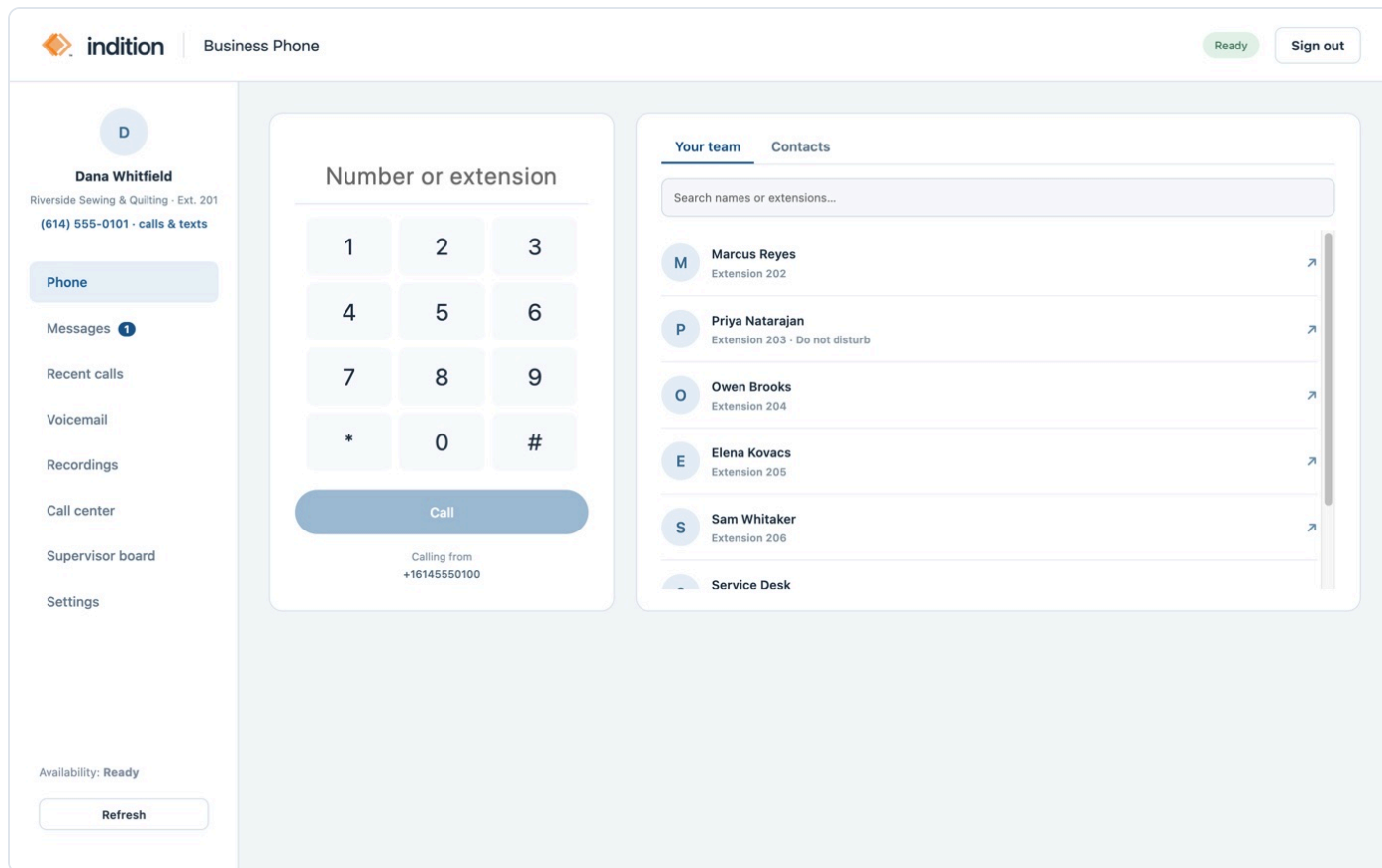
O

Owen Brooks

Extension 204

↗

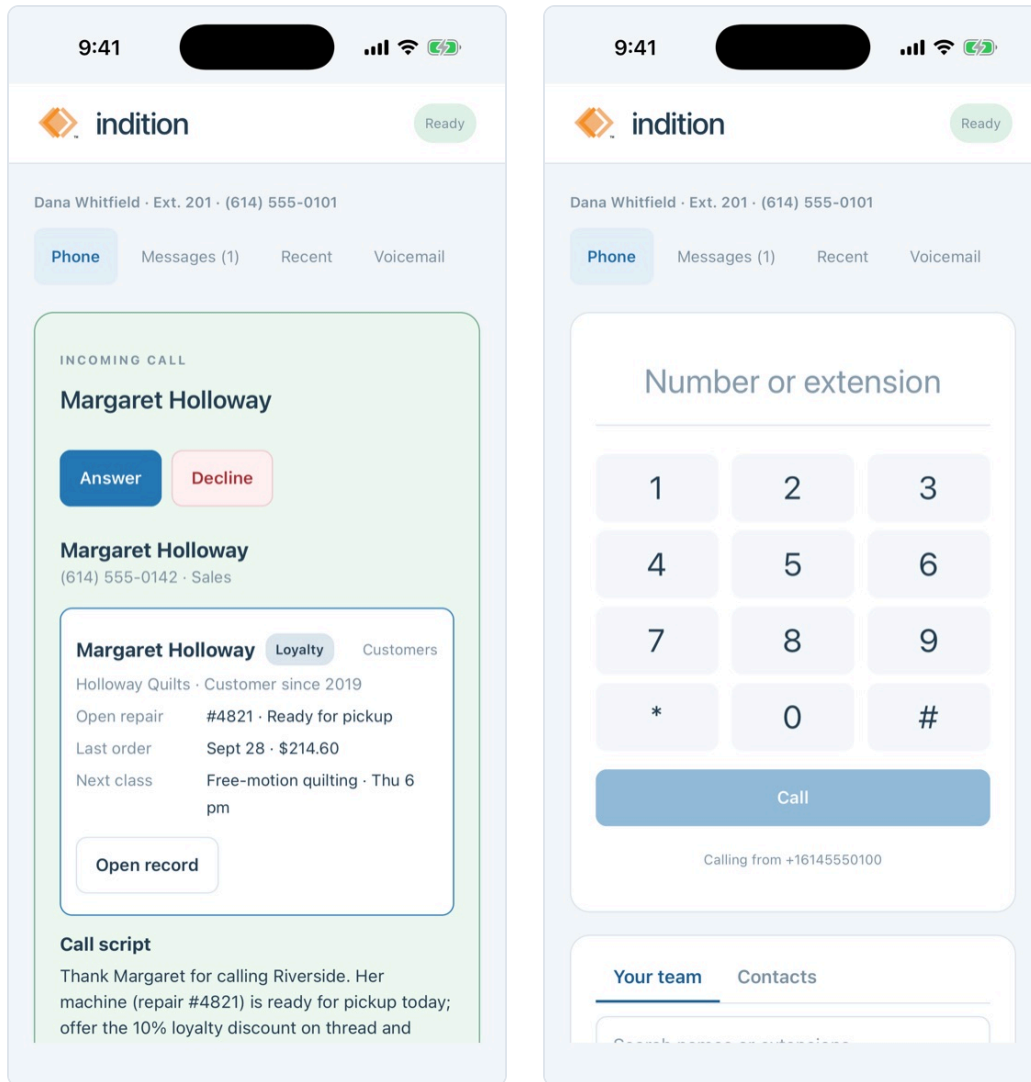
The desktop app: an incoming call with the caller's record and call script.



The desktop app's Phone screen: keypad, your team and your contacts.

The mobile app (iPhone and Android)

The mobile app turns your own phone into your work extension. Calls ring like any other call, even when the phone is locked, and you call out from your company number rather than your personal one. Along the top: **Phone**, **Messages**, **Recent** and **Voicemail**, with the same caller card and call script as the browser.



The mobile app: an incoming call, and the Phone tab with the keypad and your team.

Connect an app

1. Install Indition Business Phone and open it. It shows a code, for example ABCDE-12345.
2. In Indition, open **Phone Apps** in the Business Phone menu. The store buttons under **Get Indition Business Phone** link to each store where the app is available.
3. Type the code under **Device code** and press **Connect device**. Only type a code shown on your own device, never one someone sent you.
4. The app signs in as you. It appears under **Your connected devices**, where **Sign out** disconnects it (for example, a lost phone) and **Sign out all devices** disconnects every one.

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: get the app, connect it with its code, and see or sign out your devices.

A desk phone

A desk phone rings with your browser and apps and calls out under the same company number. Your phone administrator adds it to your extension; Yealink, Grandstream and Poly phones then set themselves up, including the time and a staff directory. Other standard VoIP phones and softphone programs can be connected by entering their details by hand. Cisco phones are planned. See Use a desk phone for the feature codes and what the handset can do.

Phone name

Model

Yealink

MAC address (for provisioning)

[Add desk phone](#)

Leave the MAC blank for a softphone; it connects with the username and password shown after you add it.

Your phone administrator adds a desk phone on your extension's Desk phones tab.

How your calls ring

Your phone administrator chooses how your extension rings:

SETTING	WHAT HAPPENS
Browser & apps	Your browser, desktop app, mobile app and desk phone ring together.
Browser & apps; my phone when nothing is connected	The same, and when none of them is connected the call goes to your own phone number (for example your cell phone).
Browser & apps and my phone together	Your own phone number rings at the same time as the others.
My phone only	Calls go straight to your own phone number.

When a call is forwarded to your own number, you press 1 to accept it, so a call is never left in your personal voicemail.

Move a call to another device

During a call, choose **Move to...** and pick your cell phone, desk phone, an app or the browser. That device rings; when you answer there, the first one drops. Press **Cancel** while it rings to keep the call where it is. Use it to walk away from your desk without hanging up.

Use the Phone button

1. Click **Phone** in the header or press the comma key. The first time, choose **Turn the phone on** and allow the microphone; after that the phone stays on in every Indition tab and keeps ringing while you move between pages. If you close the tab that holds it, another open tab takes over; when none is open, your calls follow your ring setting (for example your cell phone) and then voicemail.
2. Type a number or extension and press Call, or click a name under **Contacts**. **Recent** lists your calls with a Call button; **Voicemail** shows unread messages with Play, Call back, Mark read and Delete. Choose your microphone and speaker at the bottom; the choice is remembered. If the lists show no device names, press **Allow microphone** where the microphone list would be and allow it once; both lists then show your devices.
3. When a call rings, the ringing card shows **Answer** and **Decline**, and the desktop alert answers with one click. While the phone window is closed, a banner at the bottom right shows the caller with **Answer**, and during a call **Return to call** with the call timer. If a customer record was found you see their name, the call script and any questions to ask on the **Caller** tab; several possible matches become a one-click choice. Open or create the record from there.
4. In a call: **Mute**, **Hold**, **Record** (when the recording setting for this call allows it; see Record a call), **Transfer/Add** and **Move to...** The keypad sends digits to phone menus. **Hang up** ends your leg; **End for everyone** appears once others have joined.
5. **Transfer/Add**: type an extension or number, or click a contact. *Consult* rings them while the caller waits on hold; you hear it ring. Then *Join calls* to bring everyone together, *Transfer to...* to hand the caller over and drop out, or *Back to caller*. *Direct transfer* sends the caller straight on.

6. **Move to...:** hand the live call to your cell phone, desk phone, phone app or browser phone. The other device rings; when you answer there, this one drops. Cancel while it is ringing to keep the call here.
7. **Do Not Disturb** (top right) sends your calls to your ring fallback and voicemail. Call center agents and supervisors see **Ready / Away** instead, because a queue decides when they ring; choosing Away asks for a reason (shown to your supervisor, Break by default).

What the Phone button shows

THE BUTTON READS	LOOKS LIKE	MEANS
Ready	Light green	The phone is on and can ring.
DND	Light red, dark red text	Do Not Disturb is on: your calls go to your ring fallback and voicemail.
Away	Solid red, white text	You are an agent set to Away: you get no queue calls until you choose Ready. Point at it to see the reason. Changing it in one tab changes every tab at once.
Incoming call	Solid green with a pulsing outline	A call is ringing for you.
Calling / In call	Solid blue	You are placing a call or on one. Ringing and calls always show their own state, even while you are Away.
Offline, Connecting, Reconnecting, Unavailable	White, navy text	The phone is off, starting, recovering its connection, or cannot be used here.

A red count on the button is your unread voicemail (white with a red number while you are Away). Click it to open the phone on the Voicemail tab.

In the desktop app an incoming call is one compact card: who is calling (the matched record, "Who is calling?" when the match needs confirming, "Withheld number" or "Unknown caller"), the number and the queue, any create-record buttons, and **Answer** and **Decline**. Possible matches and the call script follow below it. A call already ringing your desk phone is not shown twice.

Your seat

What the Phone button and the Business Phone menu offer depends on the seat your phone administrator gave your extension.

- **Phone User:** everything above, Contacts, Recent, Voicemail, history and recordings of your own calls, and My Training.

- **Sales User:** adds call campaigns: the **Campaign** tab on the Phone button, plus **Call Campaigns** (the campaigns you are on) and **My Call Queue** with the full call card. On the Campaign tab, choose a campaign, press *Next call*, read the script and objections, call with one click, record the outcome, notes and an optional callback time. *Progressive* starts the next contact after each outcome.
- **Call Center Agent:** availability (Ready / Away) instead of Do Not Disturb, your queues with waiting counts, queue calls that arrive with the caller card and script, and a call card you must finish before going Ready again. Outside numbers are available only when your administrator allows them. This seat has no call campaigns.
- **Call Center Outbound Agent:** the Campaign tab first, Call Campaigns and My Call Queue as for the Sales User, plus availability and wrap-up.
- **Call Center Supervisor:** the **Team** tab with queues, live calls and every agent's state. On a live call choose *Listen* (silent), *Whisper* (only the agent hears you) or *Barge* (everyone hears you), switch between them, and *Stop*. Supervisors also open Supervisor Board, Call Center Reports, Queues & Agents, the call log, **Training Sessions** and **Recording Analysis**.
- **Phone Administrator:** the phone system's **Settings** (Staff & extensions, Phone numbers, Hours & holidays, Greetings & voicemail, Call handling, Queues & agents, Recording & insights, Text messaging and Advanced Settings), plus Training Sessions and Recording Analysis.
- **Everyone with an extension: My Training**, the training sessions you take part in.

Creating and managing call campaigns is not part of a seat: your administrator grants it to the people who run campaigns. A campaign manager can change a campaign they are named on; managing every campaign, templates and comparisons is a separate permission.

Understand the screens

The Business Phone menu on the left is the only menu; each screen below is an item in it, and breadcrumbs at the top of every page lead back to the page above. What you see depends on your seat.

MENU ITEM	WHAT IT IS FOR
My Phone	Your working phone: Make a call, the Staff directory ("Find a colleague") and Calls & voicemail, with Audio & phone options folded away.
Calls & Voicemail	Call history: every call with its recordings and voicemail, filters, and Excel export.
Phone Apps	Get the desktop and mobile apps and approve your devices (when the apps are offered).
Settings	For phone administrators: every phone system setting, one page per card (see the Setup Guide).
Call Center, Follow-ups, Supervisor Board, Call Center Reports, Queues & Agents	The agent desktop, the follow-up inbox, live supervision, reports, and queue setup.

MENU ITEM	WHAT IT IS FOR
Call Campaigns, My Call Queue	Outbound call campaigns and the calls waiting for you.
Training Sessions, My Training, Recording Analysis	Role play training run by supervisors, your own sessions, and AI review of recordings made anywhere.
Dashboards	Phone and campaign dashboards, when they are switched on.

A phone system is your company's voice system. Using a number for calls and using it for texting are set up separately.

Get ready for calls

1. Sign in with the staff login assigned to your extension and open **My Phone** in the Business Phone menu. The top line shows your name, extension and phone system.
2. Under **Make a call**, select **Enable browser phone**. Allow the site to use your microphone when prompted and wait for Ready for calls.
3. Open **Audio & phone options** to choose the microphone and speaker, enable desktop alerts or disconnect the phone. Use a headset when possible to reduce echo.
4. Keep the page (or any Indition page with the Phone button) open while you are available for browser calls. Use Do Not Disturb when you should not receive extension calls.

Staff directory: type a name or extension under **Find a colleague**; the list narrows as you type, and clicking a colleague fills the number to call. **Calls & voicemail** shows how many voicemails are unread and opens your call history. Agents also get a link to the **Agent desktop**, and **Open SMS conversations** appears when texting is set up.

If the page says "This phone is not ready for calls" or "No staff extension is assigned to your account", ask your phone administrator to finish the phone system setup and assign you an enabled extension. The browser phone is not set up for emergency calls; use your existing phone for those.

Use a desk phone

What it is. A desk phone on your desk rings with your browser phone and apps and dials out under the same caller ID and calling rules. Your phone administrator adds it to your extension (up to five phones each).

Which phones. Yealink, Grandstream and Poly desk phones are set up automatically: once your administrator enters the phone's MAC address and the phone has the provisioning address, it collects its line, time zone and staff directory by itself and checks for changes every hour. Any other standards-based SIP phone, or a softphone on a computer, can be connected by hand with the server, username and password your administrator is shown. Cisco desk phones are planned (Cisco phones with Multiplatform firmware); they are not supported yet.

On the phone

PRESS	WHAT IT DOES
*97	Your voicemail.
*72 then a number	Forwards your calls to that number. *73 turns forwarding off.
*78 / *79	Do Not Disturb on / off.
The Transfer key	Sends the caller straight on to the number or extension you enter (a direct transfer, no consulting first).
Directory	The staff directory: every colleague with an extension, by name, refreshed every hour (Yealink, Grandstream and Poly).

When a call comes in, the phone shows the caller's name when the number matches a record. Hold, conference and recording are done from the browser phone or the apps: use **Move to...** there, or answer on the computer, when you need them.

Good to know. Emergency numbers (911, 112, 999) work from a desk phone only after your administrator turns on **Emergency calling** with the address of the phones; until then, dialing one plays an announcement, so keep another phone for emergencies. You can see your own desk phones and get a new password for one in the desktop and mobile apps; the password is shown once.

Work a queue call

1. Open **Call Center** (the agent desktop) and enable your browser phone. Choose Ready, or choose Away and enter a break reason when you are unavailable; the Phone button turns solid red while you are Away.
2. Answer an incoming queue offer. If it rings your forwarding phone, press 1. The caller connects only to the agent assigned to that interaction.
3. Use the current interaction script and complete the questions. Notes and unsaved answers stay in this browser session while you work.
4. Use Connect call controls to hold or resume the customer, transfer, conference, or record when the queue's recording setting allows it.
5. After the call ends, save a disposition and required answers. The system holds after-call capacity until the outcome is saved and any timed wrap-up ends.
6. Claim a due callback from Callback requests when you are ready. The number comes from the original caller; a missed call can reappear after its configured retry delay. The person you call back hears the queue's recording notice.

Follow-ups. **Follow-ups** in the menu is one list of the voicemails, callback requests and missed calls waiting for someone to call back: Kind, Caller, Queue, Called, Due, Assigned to and Status. Filter it in the header row (Due: Overdue; Assigned to: Me or Unassigned; Status: Needs follow-up or Completed) and press **Clear** to see everything. **Open** on a row shows its recording and the follow-up form; press **Save follow-up** when you have dealt with it.

Work a campaign call

Campaign calls come from **My Call Queue** in the Business Phone menu. You can also reach it from the Call Center desktop (the **Call Campaigns** card: pick a campaign or All my campaigns and press **Open campaign workspace**) or work it from the **Campaign** tab on the Phone button.

1. Set your status to **Ready**. Choose the **Campaign to work**, or leave it on Any campaign I am on. *Why people are waiting* and *Next up* show what is due: callbacks first, then the longest overdue.
2. Press **Start the next call**. The call card opens with the person, the call script and the objections. The phone dials the number the system gives you; do not dial a different one.
3. Talk, then record **How did the call go?** with notes. Promise a callback with **Requested callback** (**Find slots** suggests times), book a meeting with **Book a meeting**, or send an email or text with **Send email or SMS** when your campaign offers them.
4. Press **Save and next** to move on, or **Save and stop**. **Skip for now** puts the person back for 15 minutes without counting an attempt; **Hand to a colleague** passes them on.
5. Use **Contact details** to add or correct an email or phone when the campaign's contact source allows it.
6. Queue, campaign, manual and transfer calls share one capacity slot, so you cannot start a campaign call while another call is active. If a call failed before it started, use **Cancel prepared call**; a started or uncertain call must be settled rather than cleared with Ready.

Progressive dialing starts off. Switch it on to dial the next person automatically after each outcome; switch it off to review and dial each person yourself.

Run a call campaign

What it is. A call campaign works through a list of people to call, stage by stage, with a script, outcomes and rules that decide what happens next: call again, send an email or text, book a meeting, or stop.

1. Open **Call Campaigns** in the Business Phone menu and choose **Create Campaign**.
2. Name it and choose **Who to call**: the contact source the campaign calls people from. **Call lists** are spreadsheets of people you upload to Business Phone; **Customers** are your store's customers and customer lists; the **CRM customers and prospects** of Commerce Connection appear when it is installed. Who to call cannot change once people are on the campaign.
3. Set the stages and rules, the calling hours and the agents, add people under **People**, and press **Start calling** on the Overview when its checklist is complete.

Emails, texts and meeting booking need a messaging system and an online meeting scheduler on the website; without them a campaign is calls only. Someone their own record marks do not contact is never added. The full guide is the **Indition Business Phone Call Campaigns User Manual**.

Make and answer calls

1. To call from **My Phone**, enter a phone number or an internal extension in **Phone number or extension**, or click a colleague in the staff directory. For external calls, use the full international number when possible, for example +15551234567.

2. Choose the permitted **Call from** number and select Call. Your account may restrict countries or external calling.
3. For an incoming browser call, select Answer or Decline. A forwarded call on an existing phone prompts you to press 1 to accept.
4. Use Mute to silence your microphone, the keypad to send digits, and Hang up to disconnect your call.

Directory entries fill the number to call; they do not place the call until you select Call. The browser phone is not configured for emergency calling; use your established emergency-capable phone.

Transfer directly

1. During a connected two-party call, select Connect call controls if the controls are not already connected. Expect a brief reconnection while both parties remain on the line.
2. Enter an available extension or an allowed external number in Extension or external number.
3. Select Transfer directly. The customer stays on hold while the recipient is called; an external recipient must press 1 to join.
4. When the recipient joins, the transfer completes and your leg disconnects. If no one answers, the system returns to the original call. Use Cancel transfer while waiting if you want to stop the attempt.

This direct transfer has no private conversation with the recipient. Transfers are available for a two-party call; use the participant controls to manage an existing group call.

Consult before transferring

1. Connect call controls, enter the target extension or external number, and select Consult then transfer.
2. The customer is placed on hold. You and the recipient join a separate private consultation room; the customer cannot hear that conversation.
3. Wait until the recipient answers. Complete transfer and Merge into conference appear when the recipient is ready.
4. Choose Complete transfer to connect the recipient to the customer and leave the call; choose Merge into conference for a three-way call; or choose Cancel transfer to return to the customer.

The app excludes the private consultation from recording. If an earlier recording start has an uncertain outcome, private transfer is blocked until its recording status can be confirmed. Do not work around that protection by changing provider recording settings during the call.

Run a conference

1. During a connected call with controls active, enter a participant and select Add to conference. Invitees join the main conversation, without a private consultation.
2. Review the participant list for connected, ringing, held, or muted status. External invitees press 1 to join.
3. As host, use a participant's Mute or Unmute control to manage that participant's audio, or Remove to disconnect them.

4. Choose Leave call to disconnect yourself. If at least two participants remain, the call can continue and remaining staff can inherit host control.
5. Choose End for everyone only when you intend to disconnect the whole conference. Confirm the action.

Only the current host manages participants or ends everyone's call. Guests can leave. The configured limit is between 3 and 10 participants, including pending invitations. Do not repeatedly invite the same person while an invitation outcome is uncertain.

Record a call

Your phone administrator sets two recording policies under **Settings > Recording & insights**: one for **Office calls** (direct calls, ring groups and ordinary outbound calls) and one for **Call center queues** (every queue call and its callbacks). Each is one of four choices.

CHOICE	WHAT HAPPENS
Off	Calls are not recorded. This is the office default.
On demand	You start recording during a connected call with Start recording, and can pause and resume it.
Automatic	Recording starts when the call connects, without anyone pressing Record. There are no Record or Pause buttons on the call.
Automatic with pause / resume controls	Recording starts when the call connects, and you can pause and resume it.

Queues can also **Use office policy**, their default, so they record exactly like office calls. A call keeps the policy that applied when it began, and a transfer keeps the call's policy.

1. When your call allows it, connect call controls and select **Start recording** as host. Starting the first conference recording briefly reconnects participants.
2. Wait for the Recording indicator. Starting recording means confirmation is still pending; do not treat it as proof that audio has been captured.
3. Use **Pause recording** to leave out the next part of the conversation, and **Resume recording** to continue.
4. After the call and recording finish processing, open **Calls & Voicemail** to play the audio.

Private transfer consultations are never recorded. The interface offers pause and resume, not an independent stop-and-finalize button for a live conference recording. Follow your company's approved announcement and consent process before recording; each queue plays its own recording notice.

Use history and voicemail

1. Open **Calls & Voicemail**. The **Call history** grid lists every call, newest first, with times in the phone system's time zone. A link at the top shows how many voicemails are new and lists them.

2. Filter in the grid's header row by date, direction, number, status, whether staff answered, or whether the call has a recording, and press Clear at the end of the filter row to start again.
3. The **Media** column counts each call's recordings and voicemail; click it to open the call. Play a voicemail there and select **Mark read**, or **Delete** it. Personal voicemail is available to its owner and authorized managers; shared mailbox access follows the phone permissions.
4. Play a completed call recording when available. Participating staff and authorized phone administrators can access the relevant audio.
5. Use **Actions > Export filtered calls to Excel** for the calls the filters show. Narrow the date range if the result exceeds the export limit.

Recordings may take time to finish processing. Transfers and conference legs are linked to the original call, so one conversation is one row however many phones joined it. Several recording segments can be listed when a call changes from ordinary calling to a recorded conference.

Read call transcripts and summaries

What it is. With transcripts switched on for your phone system, every recorded call and voicemail is written down word for word, the customer and the staff member kept apart, and AI adds a short summary, the customer's mood, the topics, and the suggested wrap-up.

Why you need it. You can see what a call was about without listening to it, and fill in the wrap-up with one click.

1. Open **Calls & Voicemail**. Calls with a transcript show **Summary**, **Mood** (the customer's mood at the start and, when it changed, at the end) and **Topics**.
2. Open a call to read its transcript and talk time (each side, silence, talking over each other). Where the call's queue has a scorecard, its points show with a quote from the call for each.
3. Use **Export filtered calls to Excel**; the export includes Summary, Mood and Topics.
4. After a queue call, press **Use suggestion** on the call card to fill the outcome and script answers the AI suggests, then check them and save.

Good to know. Transcripts are switched on per phone system under **Settings > Recording & insights** and are off by default. A call that was not recorded has no transcript. A transcript appears shortly after its recording finishes. If it says **Waiting for AI Settings**, the message names what is missing (for example no model that can listen, or a missing key); it is transcribed by itself once that is fixed, or press Try again.

Supervise and review calls

1. Open **Supervisor Board**. Review queues, agent status, active calls, and alerts. Enable your own browser phone before using audio monitoring. A call left ringing with no answer for 10 minutes no longer holds its agent.
2. Choose Listen for muted monitoring, Whisper to speak to the current staff host, or Barge to join the customer conversation. Only granted controls appear.

3. Supervisors appear in the participant list. Starting private consultation disconnects supervisors. Stop supervision to leave the monitored call.
4. Open a completed interaction to review its saved script, notes, answers, and authorized recordings. Submit the quality ratings and notes if you have Review permission.
5. Where AI reviewed the call, add your own judgment under **Human review & corrections**: choose the **Review outcome** (Needs review, Reviewed and confirmed, or Correction or disagreement), write the evidence or correction, and press **Add review note**. The AI text stays as it was; your note keeps your name and the date and cannot be changed afterwards.
6. Use **Call Center Reports** to choose queue, agent, or campaign and a local date range. Filter or select rows, then export to Excel. Observed occupancy reflects sampled availability intervals.
7. Only confirm an uncertain invitation created no call after checking the provider log. This releases held capacity and is audited.

Run a training session

What it is. A training session is a phone call between your staff for practice. You ring two or more people into one call; for each role play you choose who plays the customer and who answers as an agent. Each role play is recorded, one recording per person, and when it ends AI reviews every agent: what went well, what to work on, and the scorecard if you chose one.

Why you need it. Agents practise difficult calls (a refund outside the policy, a late delivery, an angry repeat caller) before they meet them for real, and each one gets the same specific, quoted feedback. Run 10 or 20 role plays in one session, swapping the parts between them.

1. Open **Training Sessions** in the Business Phone menu and choose **New training session**.
2. Name the session. Optionally write a **Default scenario**. Under **Scenarios to run**, switch on **Run** for each scenario to practise; each takes the next number in **Order**, and you can change the numbers.
3. Under **Who takes part**, switch on **Takes part** for each person: at least two, and no more than the limit shown at the top of the page (10 unless your administrator lowered it). Switch on **Runs the session** for anyone who should run it from My Training without the supervisor seat. You do not choose parts here: they are chosen for each role play.
4. Under **Scorecard**, choose what to judge the agents on: No scorecard, Standard points, Your own points (type them below) or a call queue's scorecard. Under **Afterwards**, choose how many days people can play the recordings (30 by default; 0 keeps them playable) and whether each agent sees only their own scores. Press **Create session**; nobody is rung yet.
5. Press **Start call**. Everyone is rung on their usual phone and, on answering, hears the session name and that their part is chosen before each role play. The People list shows who is on the call and on which phone; **Ring everyone not on the call** rings the rest.
6. Before each role play, choose the **Scenario for this role play**: one of this session's (numbered, with ✓ when played), any from the scenario library, the default scenario, or **Write a new one....** Nothing is chosen for you.

7. Under **Participants and roles for this role play**, switch on **Take part** for at least two people on the call and choose each one's **Role**: Agent (scored), Customer (role-player) or Trainer (not scored). At least one must be an agent. Anyone left out is Observing and is not recorded. Press **Start role play**.
8. Press **End role play** when it is done. The call stays connected; the role play appears in the list as **Role play 1**, **2** and so on, and its review is ready in a minute or two. Choose the scenario and parts again for the next one.
9. When the session is over, press the red **End Training Session** button at the top. It hangs everyone up at once, without asking first; a role play still recording is ended and reviewed.

What a review shows

Open **Role play N** in the session's list. The page says the AI feedback is a draft assessment, then shows:

- A summary, the customer's mood from start to end, the topics, and each person's talk time.
- For each agent: how they did, up to three things they did well (with a quote), up to three things to do differently, and the scorecard points met or missed with the evidence.
- The transcript, by name, the recording (everyone's voices together) and what the review cost.
- **Human review & corrections**: choose a Review outcome (Needs review, Reviewed and confirmed, or Correction or disagreement), write the evidence or correction (up to 4,000 characters) and press **Add review note**. Notes cannot be changed or removed; people in the session see their own notes, supervisors see everyone's.

The Training Sessions list

Each session shows its Trainer, Created date, People, Scenarios, Role plays, Reviewed, Status (Not started, On the call, Ended) and **Average score** (the agents' average from completed reviews; unscored reviews are left out). Filter any column in the header row; page through 25 to 1,000 at a time. A session opens in a new tab.

Operations

BUTTON	WHERE	WHAT IT DOES
Discard this role play	Session screen, while recording	Stops the recording (the call stays on) and nothing is reviewed.
Discard	Role play page	Deletes that role play's recordings, transcript and review; it stays in the list as Discarded.

BUTTON	WHERE	WHAT IT DOES
Change roles, then Review again	Role play page	For a role play where people swapped phones or parts: choose who played which part and review it again. The transcript is kept; only the review runs again (about a cent), and it replaces the earlier review.
Ring again	People	Rings someone who left the call or did not answer.
Hand over / Take back	People	Lets that person run the session from My Training, so the training can go on if you have to leave; Take back undoes it.
Duplicate training session	List (copy icon)	Makes a new session with the same name plus "(copy)", scenarios, people, scorecard and settings, and opens it. Role plays and reviews are not copied. Use it to run an ended session again.
End call	List	Ends a session's call for everyone, after asking.
Archive / Restore	List	Moves a session to Archived sessions (in Actions) and back; nothing is deleted and its people keep it in My Training. Not while its call is on.
Delete training session	Foot of the session screen	After "Yes, delete session", deletes the session for good, with every role play's recordings, transcripts, reviews and review notes. Training calls stay in Call history; the scenario library keeps its scenarios.

Run your own session. If the session was set up or handed to you to run, press **Run session** beside it in **My Training**, or simply answer the training call in the browser or desktop app: the session screen opens by itself. You get Start call, Ring again, the scenario picker (a scenario you write is used for that role play only), the participants and roles, Start role play, End role play, Discard this role play, Hand over and End Training Session, while you play your part on the call. When you answer, you also hear that you run the session. Deleting the session, changing roles afterwards, discarding a finished role play and adding scenarios to the library stay with supervisors, and you see scores the way the session shares them. The Trainer part in a role play does not by itself give these controls.

Good to know. Answering a training call in the browser or desktop app opens the session for you: the session screen if you run it, otherwise your My Training page. If your browser blocks it, a card offers **Open training session**. Answer on the mobile app, a desk phone or your own phone and every Indition tab you have open shows “You answered the training call” with **Open training session**. During a training call the usual transfer, conference and recording buttons are off; use the session screen. A role play where nobody could be heard says so and is not reviewed: check that each person’s microphone is the one they are speaking into. A session left on the call with nobody on it ends by itself after 10 minutes. An ended session cannot be started again; duplicate it instead. Training calls are ordinary calls on your phone system and appear in Call history.

Keep a scenario library

What it is. A scenario is the situation a role play acts out: what the customer calls about, what they want and how they behave. The scenario library keeps them for every training session, so you write each one once.

1. Open **Training Sessions** and choose the **Scenario library** tab (or Actions > Scenario library).
2. Choose **Add scenario**, give it a **Title**, describe **The situation**, and press **Add scenario**. The review judges the agents against it.
3. Click a scenario’s title to change it and press **Save scenario**. **Archive** takes it out of the lists; role plays that ran it keep it. **Archived scenarios** in Actions lists them, with **Restore**.

The library shows each scenario’s situation and how many sessions and role plays used it. During a session, the **Scenario for this role play** picker lists **This session** (numbered, with ✓ played), then the **Scenario library**, then **Write a new one....** A supervisor writing a new one can switch on **Keep it in the scenario library** (on by default) and give it a title to use it again.

The person playing the customer and the trainer see the scenario in My Training once the role play starts; agents hear what the customer wants on the call, as they would for real, and see the scenario with the review afterwards.

Follow and listen back with My Training

What it is. Everyone in a training session follows it in **My Training** while it runs, and looks back at it afterwards: each role play’s review and transcript, and the recording to listen to themselves again.

1. Open **My Training** in the Business Phone menu. It lists the sessions you take part in, with when they were created, **Your part** (chosen per role play, or the part you played), the role plays reviewed and the status; On the call means the session is on now. If you run a session, **Run session** is beside it.

2. Open a session. While it runs the page keeps itself up to date: where it stands (not started, on the call, recording role play 2), who is on the call, the session's scenarios and, for each role play, your part ("For this role play you play the agent").
3. If you play the customer or the trainer, the scenario being played is shown once the role play starts. If you play the agent, it is not: like a real call, you hear what the customer wants on the call.
4. When a role play has been reviewed it shows its scenario, who played which part, the recording (everyone's voices together), the review and the transcript. Add your own view under **Human review & corrections**. The recording can be played for the number of days the session allows, counted from each role play; after that the review and transcript stay.

Good to know. My Training only shows the session; the people chosen to run it control it from the session screen. Unless the session shares everyone's scores, an agent sees only their own scores, and the customer and trainer see the summary and transcript. Supervisors who are not in the session see every agent's scores and can always play the recordings on each role play's page.

Analyze recordings

What it is. Upload calls or voicemails recorded anywhere (another phone system, a cell phone, a meeting app) and get the same review as a recorded call: a transcript, summary, mood, topics, any follow-up promised and, if you choose one, a scorecard, with the AI cost of each.

1. Open **Recording Analysis** in the Business Phone menu and choose **Analyze recordings**.
2. Name the batch and choose what the recordings are: **Calls (two or more people)** or **Voicemails (one caller)**. Optionally choose a scorecard.
3. Drag up to 20 recordings onto the drop zone, or click it to choose them (MP3, WAV, M4A, MP4, AAC, OGG, OGA, OPUS, WEBM or FLAC, up to 200 MB each), and press **Analyze recordings**.
4. The report fills in as each recording is analyzed. Keep the page open; if you leave, it carries on when you open the report again.
5. Each row has the summary, mood, topics, follow-up, score, AI cost and transcript, and the recording plays inline. A recording that failed offers **Retry transcription** or **Retry summary and scoring**, which runs only the step that is missing. Add your own view under **Human review & corrections**.
6. **Actions > Export to Excel** downloads the report; **Delete this analysis** removes the recordings, transcripts, notes and report for good.

The Recording Analysis list shows each batch with when it was uploaded, its type, and its **Complete**, **Processing** and **Needs attention** counts. A recording is complete when both its transcript and its review are done.

Your phone bill

Phone administrators see the running month on the **Billing** card under **Settings > Advanced Settings > Phone service connection**: each seat, number and usage line, what the seats included, the monthly minimum, and the statements Indition has issued with their due and paid dates. Seats follow the extensions in **Settings > Staff & extensions**, so removing an extension stops its seat from the next day.

Use SMS and get help

Use **Open SMS conversations** on My Phone to reach the Messaging screens. Your SMS sender must be assigned separately from voice. Dedicated numbers can receive replies; shared outbound SMS numbers do not provide a two-way shared inbox.

For help, provide the phone system name, approximate time and time zone, call direction, the visible error, and the action you were taking. Share customer numbers and recording audio only through approved support channels. Never send an Auth Token, API secret, connection key, or browser token.

If an invitation or send outcome is uncertain, check the existing participant or receipt before retrying. For a setup problem, ask your phone administrator to use the FAQ and Setup Guide rather than changing live number routing without review.