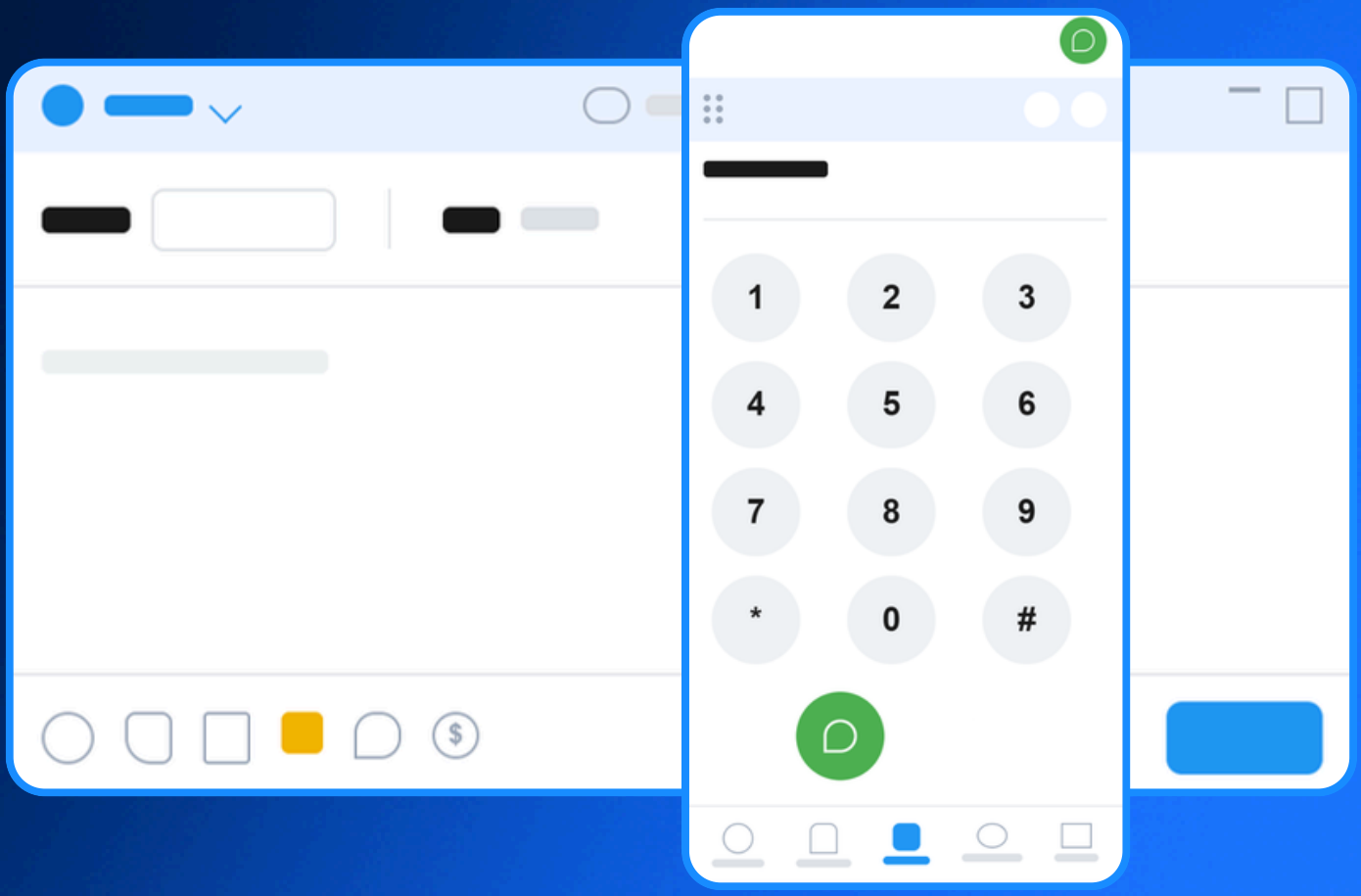
REFERENCE GUIDE

Phone, Voice & Texting

Calls, texts, and numbers made simple



Phone Numbers: Tour and Buying

What It Is

Search for Phone Numbers to see your business numbers. Each row is one number. You buy new ones with + Add Number, then Add Phone Number.

How It Works For Your Business

- Search for Phone Numbers. The list shows each number, its name, and what it can do.
- Search for Trust Center to register your business so carriers deliver texts.
- Pick a Country, click Filter, and narrow by digits, Voice, SMS, MMS, and Local or Toll-Free.
- Click Proceed to Buy, read what the number can do, and confirm. Some numbers ask for identity or address proof.
- The three-dot menu on a number shows Edit Configuration, Move, and Delete.

Phone Numbers: Tour and Buying - Tips & Guidelines

Tips

- Keep Voice and SMS checked if you want to call and text from one number.
- Read the monthly cost on the buy screen before you confirm.
- Call and text your new number right away to test it.
- If you delete a number by mistake, contact support fast. Restoring is not guaranteed.

DO

- Check capabilities before buying
- Test every new number
- Use Local for a familiar area code
- Name each number clearly

DON'T

- Buy numbers you will not use
- Click Delete casually
- Skip the buy screen details
- Pick a voice-only number for texting

Inbound Call Settings

What It Is

Edit Configuration decides who answers a number, what rings, and what happens if nobody picks up. It is like a receptionist who follows your rules every time.

How It Works For Your Business

- Open the three dots on a number, then Edit Configuration, and start on Basic Details.
- Set a Friendly Name, who Calls Go To, and Ring Options: Web App, Mobile App, Phone Number, or VoIP.
- On Call Forwarding, calls try a main teammate, then an external number, then Voice AI if you use it.
- Set the Incoming Call Timeout near 20 seconds and choose Voicemail or Voice AI as the backup.
- Look for Whisper Message, Call Connect, and the verified caller ID option. Click Save.

Inbound Call Settings – Tips & Guidelines

Tips

- Ask three questions: who rings first, who next, and what if nobody answers?
- A very long timeout can send calls to the carrier's voicemail.
- Check how the software handles recording rules in your area before turning it on.
- Look for the option that rings more teammates at once for a shared line.

DO

- Pick a backup for every number
- Use clear Friendly Names
- Test by calling from your cell
- Click Save when done

DON'T

- Leave the timeout very long
- Skip the backup choice
- Turn on recording unchecked
- Forget to save changes

The Web Dialer

What It Is

The dialer is a phone that runs in your browser. Click the phone icon in the top bar to place calls, answer calls, and manage them without leaving what you are doing.

How It Works For Your Business

- Click the phone icon in the top bar. Allow microphone access when your browser asks.
- Pick someone with the Keypad, Contacts, or Recents, then check Calling From before you dial.
- In a call, use Mute, Hold, the keypad, notes, and Transfer. Notes save to the contact.
- A warm transfer introduces the caller first. A blind transfer sends them straight over.
- Use the gear icon to choose your speaker and microphone. Pin, drag, or minimize the window.

The Web Dialer – Tips & Guidelines

Tips

- If audio sounds odd, try turning off a VPN or browser extension for a minute.
- Audio device choices only stick in the browser you set them in.
- Keep the outgoing call timeout at 20 seconds or more so calls can connect.
- Use Recents to call someone back quickly.

DO

- Allow the microphone
- Test audio in the gear panel
- Check Calling From
- Use warm transfer for key calls

DON'T

- Click block on the mic prompt
- Dial without checking the number
- Ignore the notes box
- Assume the dialer is broken first

Texting in Conversations

What It Is

Conversations is where you send and receive texts. Each contact has one thread that holds texts and calls together, so your whole team sees the full story.

How It Works For Your Business

- Open a contact's conversation and pick SMS at the bottom.
- Use the From dropdown to pick the business number, and the To dropdown if the contact has several numbers.
- Click the attachment icon to add media. The text then becomes an MMS.
- Replies land in the thread with an unread indicator in the conversation list.
- Assign numbers: search for Users, Edit, Call & Voicemail Settings, then the Inbound Number dropdown.

Texting in Conversations - Tips & Guidelines

Tips

- Check the From number right before you send. A sent text cannot be taken back.
- MMS has no 160-character limit, but big files can fail.
- Test pictures on your own phone first, since iPhone and Android differ.
- Without a pick, the software uses your assigned number, then the conversation's, then your default.

DO

- Confirm SMS is selected
- Check From and To
- Say who you are up front
- Assign numbers to users

DON'T

- Send from the wrong number
- Send huge image files
- Guess which channel is on
- Ignore the unread indicator

A2P Texting Registration

What It Is

A2P registration tells carriers who you are and why you text, so your messages are delivered. You do it in the Trust Center under the A2P Messaging card, in two parts: Brand and Campaign.

How It Works For Your Business

- Search for Trust Center and find the A2P Messaging card for Brand & Campaigns.
- Fill in the Brand registration form with your real business details.
- For the Campaign, enter your volume, choose Chat Widget or Manual setup, a use case, and your website URL.
- Add sample messages and your opt-in method, finish the compliance checklist, and submit.
- Check status in the same area, then link your number to the approved campaign.

A2P Texting Registration – Tips & Guidelines

Tips

- Make your details match your website and public business records.
- Sample messages should look like the real texts you will send.
- If a campaign is rejected, read the reason, fix that item, and resubmit.
- Your software may offer an AI compliance review before you submit. Use it.

DO

- Use real business details
- Show how people opt in
- Write realistic samples
- Link your number after approval

DON'T

- Guess at form fields
- Use vague sample texts
- Skip the compliance checklist
- Text before you are approved

Voicemail and Missed Call Text Back

What It Is

Voicemail catches calls nobody answers. Missed Call Text Back sends an automatic text to a caller you missed, so they hear from you right away.

How It Works For Your Business

- Search for Phone Numbers, open Voice, then Voicemail & Missed Call Text Back.
- Upload your company voicemail greeting as an MP3 or WAV file at 64 kbps.
- Use the Incoming Call Timeout slider to set how long a call rings before voicemail.
- Turn on Missed Call Text Back, then customize the message with custom values and use Test Message.
- For one person's own voicemail, search for Users, then open Call & Voicemail Settings.

Voicemail and Missed Call Text Back - Tips & Guidelines

Tips

- Keep the greeting short and say the business name.
- Use Test Message to see exactly what a caller will receive.
- Custom values can add the contact's name to your text.
- Match your timeout to the one on your number settings.

DO

- Record a clear greeting
- Test the missed call text
- Use custom values
- Set a timeout that fits

DON'T

- Upload the wrong file type
- Send a long missed call text
- Skip Test Message
- Forget per-user voicemail

Recording, Transcripts, Dispositions

What It Is

Recording saves a call so you can play it back. Transcripts turn a recorded call into text. Dispositions are labels you pick at the end of a call to say how it went.

How It Works For Your Business

- Turn on Call Recording on a number and add the recording disclosure message if you want callers told.
- Play recorded calls right in the Conversations timeline for that contact.
- Enable call transcriptions for recorded calls, then open a call to read its transcript.
- Create custom call dispositions in your settings, such as the outcomes your team uses.
- Log one at the end of each call so your team can sort calls later.

Recording, Transcripts, Dispositions - Tips & Guidelines

Tips

- Recording laws differ by place, so check yours before you turn it on.
- Transcripts only exist for calls that were recorded.
- Keep disposition names short and clear for the whole team.
- Recording may add a small per-minute charge, so confirm first.

DO

- Check local recording laws
- Use the disclosure message
- Keep dispositions simple
- Log one after each call

DON'T

- Record without checking rules
- Make too many dispositions
- Expect transcripts for unrecorded calls
- Skip the end-of-call label

Caller ID and Number Reputation

What It Is

Caller ID is what people see when you call. You can show a verified number you already own, and you can check settings that help your calls look trusted and not like spam.

How It Works For Your Business

- Set up Verified Caller ID to use a number you already own for outbound voice calls.
- Check the CNAM and SHAKEN/STIR status on a number to see how it is identified.
- Look in the number settings for Number Intelligence, which covers spam detection and SMS validation.
- Look for Voice Integrity in the number settings to protect call reputation.
- If a call shows Spam Likely, use the free caller registry to ask for it to be fixed.

Caller ID and Number Reputation - Tips & Guidelines

Tips

- A verified number is one you proved you own.
- Check status labels before launching a big calling day.
- Fixes for a Spam Likely label can take time to show up.
- Use the same number consistently so callers learn to trust it.

DO

- Verify a number you own
- Review CNAM status
- Check for spam labels
- Use one steady number

DON'T

- Show a number you do not own
- Ignore Spam Likely labels
- Change numbers constantly
- Skip the status checks

Reporting, Automation, Troubleshooting

What It Is

Call Reporting shows how calls are going. Workflows can drop voicemails and react to calls. When something fails, error codes and settings help you find out why.

How It Works For Your Business

- Search for Call Reporting to see Incoming Calls: answered, missed, and busy, plus first-time callers and sources.
- Filter by number and date, review the history table, play recordings, customize columns, and export a CSV.
- In Workflows, a Voicemail action drops a voicemail with no ring. Use an MP3 or WAV at 64 kbps.
- The Call Details trigger can start a workflow when a call is answered or missed.
- For texts that fail, check the SMS error codes, such as 30007 for filtering and 21610 for a STOP reply.

Reporting, Automation, Troubleshooting – Tips & Guidelines

Tips

- Messaging Analytics is the matching view for texts.
- Check compliance settings such as opt-out keywords and quiet hours.
- For bad call quality, look for a VPN or extension first.
- Avoid forwarding to an internal number that forwards back, which can create a call loop.

DO

- Review reports on a schedule
- Read the error code
- Keep opt-outs honored
- Check quiet hours settings

DON'T

- Text people who said STOP
- Ignore missed call trends
- Forward calls in a loop
- Send forbidden content

Key Terms Glossary

Phone Numbers

Settings area for your numbers and call options.

Trust Center

Page for registering your business with carriers.

Edit Configuration

Menu choice that controls how a number behaves.

Friendly Name

A label you give a number, like Main Line.

Ring Options

Where a call rings: web app, mobile, phone, or VoIP.

Incoming Call Timeout

How long a call rings before moving to the backup.

Whisper Message

Greeting only the person answering hears.

Warm Transfer

You introduce the caller before connecting them.

MMS

A text that includes a picture or video.

A2P

Business-to-person texting that carriers require you to register.

Disposition

A label you pick at the end of a call.

Verified Caller ID

A number you own, shown on your outbound calls.

Getting Help

Your software changes over time, so a button, tab, or menu name may look a little different from what you see here. If something does not match, check the in-app help for the phone system or look for the option with the closest name.