



# The Phone System Features Checklist

Phone systems for businesses have evolved rapidly over the last few years and they rival elaborate PBX systems that previously could only be afforded by larger companies. The availability of VoIP and hosted systems, as well as computer telephony integration have been able to make small businesses far more efficient and competitive than would have been possible without such systems.

These phone systems ensure 24x7 availability of the messaging system, even if the business itself is not available 24x7. No message is ever lost, and advanced analysis of phone usage ensures that costs are minimized while efficiency is never sacrificed.

Here are some of the key premises on which these phone systems have been developed.

- The business should not lose a phone call if a particular person is unavailable for any reason. The caller should always be able to conduct his business with your company. A missed call implies missed business.
- As far as possible, the caller should be given an option to self-service her requirements. The phone system should have a comprehensive interactive voice response (IVR) that permits the customer to be directed to the correct business application and complete her task (for example query a bill). This will reduce the need for customers to talk to a live person and will allow 24x7 operations. The IVR system can perform other functions such as making the caller select a language and / or a skill and routing the call to a person who has the qualifications required to handle the call.
- The phone system should enhance employee mobility rather than tie them down to a desk. It must improve collaboration between employees and lower the costs of such collaboration.
- Even in internal communications, a modern phone system provides company employees the benefits of unified communication - by allowing people to communicate with each other via voice, chat, voice mail and email. It monitors presence of an employee at a specific phone and reduces telephone tag by letting others know if a person is present on her table or not.

What follows below is a detailed checklist of business phone systems. While every feature may not have immediate value for your business, it is worth ensuring that you get the maximum possible number of services / features with your basic phone subscription. With time, it is quite possible that you will be able to use these features innovatively.



# The Phone System Features Checklist

Call Features	
Virtual Phone Number	If a called number is busy, the call is automatically transferred to another extension.
Permanent Call Forwarding	All calls attempting to connect to a specific number are automatically transferred to another extension (for example if a person is on leave).
Screening Calls	Allows incoming calls to be handled differently based on their caller ID. This allows differentiated handling of calls. Some calls can be connected to cellphone while others could be diverted to voice mail or even be disconnected.
Direct Inbound Dial (DID)	An external caller can dial a DID number to connect directly to a recipient without having to go through an attendant.
Do Not Disturb	Users can prevent incoming calls ringing on their extension by marking themselves as busy. Calls will be automatically diverted to voice mail or to another designated number.
Extension Assignment	Each phone has an abbreviated extension number that can be used for internal calling, call transfer or dial in by extension numbers.
Find Me/Follow Me	Users can designate several alternative phone numbers where he could be if he is not picking up his primary number. The system will ring each of these numbers sequentially before transferring the caller to voice mail.
On-Phone Presence Monitoring	Internal users can monitor the on or off telephone state of other user's lines.
Shared Line Appearances	Allows a phone to be reachable by several numbers – i.e. calls to different numbers could land on the same phone.
Time Dependent Call Handling	The system can handle incoming calls differently based on the time and/or day of the week. Users can configure choices for themselves. Calls after working hours could be transferred to cell phones etc.
Call Park	An incoming call can be put on hold and the call can be retrieved by the user or another person even from a different phone.
Hold	Pausing an ongoing telephonic conversation and retrieving it from the same phone.
Call Pickup	A call ringing on another phone can be picked up by dialing a pickup service code and the extension number where the call is ringing. This can also be achieved by use of a soft key.



# The Phone System Features Checklist

Call Features	
Call Camp - On	Informs a user whose phone is busy that another person is trying to speak with her.
On-Screen Pickup	A user can select any of the incoming calls using an on screen list.
Ring (Hunt) Groups	An incoming call can be programmed to ring on several numbers (simultaneously or in series) till any one phone is picked up.
Customizable Ring Tones	Change rings tones based on pre-decided parameters (in once case the company programmed the phones to ring differently for callers selecting Spanish or English from a menu).
900/976 Blocking	The system blocks calls to premium rate telephone numbers.

Auto Attendant Features	
Auto Attendant	Allows callers to access a menu from which they can select the extension of their choice. Does not require an operator.
Connect to Extensions	Gives callers an option to dial an extension number.
Connect by Name	Option that allows incoming callers to connect to a user by dialing the first three letters of his or her name.
Music / Messages On Hold	The system administrator can set music on hold from a selection provided by the phone vendor. Alternatively, any mp3 or a wma file can be uploaded. Many companies use this to play a promotional message while a caller is on hold.
Legacy Equipment Support	The phone system connects callers to designated legacy extension numbers. This ensures that calls are not missed while the system is being upgraded.
Automated Transfer	In case the called person does not pick up the extension, the call is automatically routed to a system that can send the call to another extension or to voice mail.
Auto Ring Back	If an internal number you call is busy, you can dial a code and the system will call you back when the line is free. If the phone is picked up, the number that was initially called will be rung.



## The Phone System Features Checklist

Calling Options	
Classes of Service	Similar to premium number blocking, can be configured for other services – long distance / international etc. on a per user basis.
Forced Conferencing Barge	A duly authorized person can join (barge into) an existing conversation between two parties.
Monitoring Barge	A duly authorized person can listen into (barge into) an existing conversation between two parties.
Call Hold Beep Timer Interval	When a call is put on hold, a timer reminds the person that the call is on hold. The time delay of this timer can be configured individually for each line.
Caller ID	The telephone number of the incoming call can be displayed.
Caller ID with Name	Caller ID displays the number and the name of the caller (if available in a listing).
Internal Caller Name Display	Displays caller ID and name of an internal caller.
Intercom Groups	Setting up internal intercom groups to communicate with ease using speakerphones.
Paging Groups	Users can use individual or groups of internal phones as pagers (one way speakerphone use).
Voice Message Broadcasting	Similar to paging groups, but where the message is broadcast to the entire organization.
Phone Alerts	On screen alerts of missed calls, voice mail etc. on the phone.
Speed Dial	Program several frequently dialed numbers in two digit shortcuts.
Announced Transfer	Transfer a calling party to another extension – involves putting the calling party on hold, speaking to the new extension and transferring the call.
Unannounced Transfer	Transfer a calling party to another extension without notifying the caller that the call is being transferred or without speaking with the person to whom the call is being transferred to.



# The Phone System Features Checklist

Business Intelligence Support	
Computer Telephony Integration	The system has the capability to integrate with various enterprise wide computer applications. Click to dial, screen pop up, call records and note taking while in conversation are available.
Call Detail Reports -Inbound/ Outbound	Detailed and summary reports about the call traffic – both inbound and outbound.
Click-to-Dial	Dialing a number by clicking an entry in MS Outlook or a phone number in a browser entry.
Client Matter Codes (Billing Codes)	A person receiving an inbound call can press a soft key and provide a billing / accounting code to classify the call - even while it is in progress.
Door Phone Entry Buzzer Integration	Can integrate with security devices such as analog door phones. The user can speak to the visitor and unlock the door using her phone.
Integration with Paging System	Integration with third party paging systems.
Phone Assistant	Features allowing users to monitor and handle several telephone lines simultaneously. Often used by receptionists and assistants to executives.
View/Add Service Requests	Create service requests and monitor progress online.
Phone System Portal	The administration portal allows administrators to manage and configure the entire system. It also gives common users the capability to make personalized configuration changes.

Conferencing	
Ad Hoc Conferencing	Conference calls can be set up by users themselves.
Conferencing Floor Control/ Moderator	More elaborate conferences can be set up where one user is designated as Control or Moderator. This user can manage the entire conference including muting speakers.
On-Screen Moderator Conference Controls	Conference calls can be managed from an on-screen menu.



## The Phone System Features Checklist

Voicemail and Messaging	
General Voice Mailbox	The auto attendant can guide users to a general voice mail box that is accessible by a designated person.
Interactive Voice Response (IVR) Voice Mail Access	Use of an interactive voice response (IVR) system to handle the voice mail system. Users can access voice mail from internal or external phones.
Message Envelope Data	Voice mail messages are tagged with metadata such as caller ID, date, duration and time.
Message Waiting	A visual indication is provided to users in case there is a voice mail waiting for them.
Multiple Voice Mailbox Access	Users can access multiple voice mailboxes from the same phone depending on their authorization.
On-Screen Voicemail Intimation	User can use the on-screen display to handle her voice mail.
Reply Voicemail by Calling	The user can automatically call back the party that has left voice mail if Caller ID is available.
Voicemail Broadcast/ Distribution to all users	The recipient of a voice mail can forward it to some or all users of the company phone system - typical uses - spread a 'good show' message from a client or send a complaint to the people responsible to correct an issue.
Keep Voicemail On Phone	Voice mail can be retained on the phone or deleted as required after it has been forwarded to a user's email account.
Email Group Notification of Voicemail	A voicemail notification can be sent to several selected email IDs.
Voicemail to Email - WAV file forwarding	A voicemail can be converted to a WAV file and forwarded to several selected email IDs.
Customize mail box greeting messages	Create different greetings for internal / external callers or based on caller ID.



# The Phone System Features Checklist

Instant Messaging, File Sharing, Presence Management and Video Conferencing	
Instant Messaging	Conduct a secure chat with co-workers regardless of their physical location.
Presence	Indicate if a co-worker is available at her desk before initiating a chat session.
Peer-to-Peer Video Chat	Allows video calls to co-workers, regardless of geography.
Desktop Sharing	Allows users to share desktops during a call or a chat session to enable problems to be discussed and understood better.
File Transfer	Transfer files during chat sessions.

Phone Administration	
311	Permit users to dial local, non-emergency numbers.
800 Numbers / Toll Free Numbers	Work with toll free numbers to allow customers to call free of charge.
Enhanced 911 Service	Use of enhanced 911 services to ensure that geographic information is sent over VoIP lines to enable Public Service Answering Points to direct emergency services.
Direct Inward System Access	Allows authorized persons to access the internal features of the phone system from an external line.
Authorization Codes	Use of authorization codes to permit billed calls such as long distance or international calls.
Customer Logos	Allow customer logos to appear on screens and other supported systems.
Fraud Monitoring	Vendor monitors phone usage trends to detect fraud or abuse.
Hardware Reassignment	Users can log out of phones and log in from a different location.
Line Management	Detailed user management features for administrators.
Outbound Caller ID	When an outbound call is made, a specified caller ID (say the company's main number) can be sent out. Caller ID can also be blocked completely.



## The Phone System Features Checklist

Phone Administration	
Password Administration	Administrators can reset individual users' passwords for phones and voice mail.
Privacy Settings	Privacy and security can be configured differently for different users. For example the system can ensure that senior executives' phone calls cannot be barged into or picked up.
Hot Desking	Supporting ad-hoc seating in offices by rapid configuration of phones to users preferences and rights once she logs in.

Phonebooks, Directories, Call Logs	
Company Phonebook	Create a companywide phone book available on a website with click to dial capability.
Personal Phonebook	Creation of personalized phone books.
Personal Phone Book-Import	Importing of previously created personal phone books.
On Phone Call Logs	Detailed call logs available on the phone itself.