

# Integrated Telephony

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A full business phone system inside your browser — with AI on every call.

Spell CRM Pro's telephony module turns sales and support into a distributed contact center. Place and receive calls from inside the CRM, route inbound to the right owner, and let Spella handle the paperwork — every recording is automatically transcribed, summarized, sentiment-scored, and turned into action items. No desk phones, no separate dialer, no manual call notes.

**Under 2 sec**

to connect an outbound call from any record

**100%**

of calls logged, transcribed, and summarized automatically

**Zero**

manual notes — Spella writes the recap and the action items

## KEY FEATURES

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### One-Click Dialing From Anywhere

Every phone number in the CRM is clickable. Tap a number on a contact, lead, deal, ticket, or activity feed and the in-app softphone rings instantly. Caller ID is your business number, so personal mobiles stay private.

### Smart Inbound Call Routing

When a known customer calls, the account owner's browser rings first for 15 seconds. If they're offline or don't answer, the call cascades to the rest of the online team. Unknown callers ring everyone at once. Presence is real-time — calls never go to dead phones.

## **Automatic Call Logging & Attribution**

Every call — inbound, outbound, missed — creates a timestamped record attached to the matching contact, lead, deal, or account. Duration, recording, outcome, and disposition are captured with no manual entry.

## **AI Transcription & Call Summary**

Recordings are processed through OpenAI Whisper for an accurate transcript, then through Spella for a 3-5 sentence executive summary, sentiment score (positive / neutral / negative), and a structured list of action items. Everything lands on the call record automatically.

## **Action Items That Become Tasks**

Spella's extracted action items can be one-clicked into real CRM tasks assigned to the rep, with due dates and the call linked as the source. The follow-ups your team promised on the call don't slip through the cracks.

## **Missed Call Inbox & Auto-Lead Capture**

Unhandled calls land in a dedicated Missed Calls queue with one-click callback. Optionally auto-create a lead from unknown callers so no inbound interest is lost.

## **Bring Your Own Number**

Port existing numbers or provision new ones through Twilio in any of the supported countries. Per-org telephony config means each customer or tenant runs with their own credentials and number pool.

## **Compliance-Ready Recording**

Optional automatic or per-call recording with configurable consent prompts and per-org retention policy. Recordings live in a dedicated, access-controlled S3 bucket separate from general uploads.

## BUSINESS BENEFITS

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<b>Faster sales cycles</b>	Reps make more calls in less time, with zero app switching.
<b>Better customer experience</b>	Known customers reach their owner first, every time.
<b>AI-powered coaching</b>	Searchable transcripts, sentiment trends, and call summaries.
<b>Zero data loss</b>	Every call is logged, attributed, and auto-summarized.
<b>Lower total cost</b>	No PBX hardware, no desk phones, no per-seat dialer fees.
<b>Audit-ready</b>	Centralized recording bucket with retention controls.

## IDEAL USE CASES

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<b>Inside Sales</b>	<b>Customer Support</b>	<b>Account Management</b>	<b>Field Sales</b>
High-volume outbound dialing with auto-logging and auto-recap.	Inbound routing with sentiment tracking and SLA visibility.	Every call tied to the right customer with AI follow-ups.	Mobile-friendly dialing with central history and AI summaries.

## TECHNICAL SPECIFICATIONS

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<b>Carrier</b>	Twilio Voice (Amazon Connect on roadmap)
<b>Transcription</b>	OpenAI Whisper, stored on the call record
<b>AI summary &amp; action items</b>	Anthropic Claude via Spella engine
<b>Browser support</b>	Chrome, Edge, Firefox, Safari
<b>Audio codec</b>	Opus HD with PCMU fallback
<b>Call encryption</b>	SRTP end-to-end, TLS 1.2+ for signaling
<b>Credential storage</b>	AES-256-GCM with per-org encryption key
<b>Recording storage</b>	Dedicated S3 bucket, configurable retention
<b>Data residency</b>	US, EU, and APAC regions available
<b>Uptime SLA</b>	99.95%, aligned with Twilio infrastructure

## Ready to see Spell CRM Pro in action?

Book a 20 minute demo with the Spell Solutions team. See how a unified customer platform can streamline your sales, service, and support.

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