1. **Call Routing Based on Rules**The system receives inbound calls and checks a defined set of rules to determine which buyer to route each call to. These rules include:

* The caller’s location (ZIP code, state, or area code)
* The time and day of the call, checked against the buyer’s assigned schedule
* The campaign or phone number the call came through
* Whether the buyer has reached their daily call cap or concurrent call limit
* Ensure the buyer is eligible for the specific call – i.e. campaign has not dropped below an acceptable Billable Conversion rate. If the campaign drops below a set percentage, we automatically pause their campaign.

1. **Buyer Priority and Smart Routing**Each buyer has an automatically assigned priority ranking. When multiple buyers are eligible to receive a call, the system will route to the one with the best historical billable conversion rate by default. This is known as smart routing. Admins can override priority settings if needed. Only one buyer will ever receive a call.
2. **Fallback System**If the first eligible buyer cannot take the call because they are over their limit, unreachable, or unresponsive, the system will automatically try the next eligible buyer in the order of priority. If no backup buyer is available, the system will either route the call to voicemail or play a default message indicating that no agents are currently available. All fallback attempts are logged.
3. **Real-Time Call Monitor**The platform will include a live dashboard that displays – there will be different dashboards for system admins and buyers. These are some logical features of the dashboards.

* All active calls currently in progress
* The billable conversion rate by buyer, and by campaign
* Status counts of calls (gross, billable, connected, missed, completed, etc)
* Final call duration and routing outcome once the call ends

1. **Call Routing History**Every routed call will be stored with a full historical record of the routing process. This includes:

* The caller’s number and timestamp
* The campaign and source number
* All routing decisions made, including skipped and attempted buyers
* The final buyer the call was connected to
* How long the call lasted
* Whether it was classified as billable or not
* Disposition and reason codes (e.g., dropped, no answer, spam, rejected, completed)

1. **Campaign and Buyer Setup**Admins must be able to configure campaigns and manage buyer assignments through the admin panel. Campaign setup will include:

* Assigning one or more phone numbers to a campaign
* Assigning one or more buyers to a campaign
* Defining caps and routing rules per buyer, including daily limit, concurrent limit, geographic filters, and call schedule
* Setting routing preference (manual priority or smart routing by billable conversion rate)
* Setting a default voicemail or fallback message per campaign

1. **Ping-Post and Ping Tree Routing**The platform will include full support for ping-post (also known as ping-tree) routing. When this is enabled for a campaign:

* The system will send metadata about the call (such as caller area code, campaign ID, or time) to multiple buyers’ systems via API
* Buyers may respond with an automatic accept or a bid value
* The system will select the fastest qualified response or highest bid, depending on configuration
* The call will then be routed to the selected buyer automatically
* All pings, responses, and final decisions are logged for review
* Ping-post functionality should have the ability to check if the Buyer has agents available and if no agents are available for the call, send the call to the next available Buyer.

1. **Billing Logic**The platform will include automated billing classification for each call. By default, a call is considered billable if it meets the following conditions:

* The call was successfully connected to a buyer
* The call lasted at least 90 seconds (buffer time, adjustable per campaign)
* The call was not flagged as spam, missed, or dropped immediately  
  The system will allow the buffer threshold to be configured and will include an override mechanism for admins to manually mark or unmark a call as billable if needed.

1. **Call Recording**The system will support optional call recording, which can be turned on or off per campaign. Recordings may include:

* Pre-connect audio such as IVR prompts or buyer whisper messages
* The full call via SIP passthrough  
  Recordings will be stored securely, with access limited to authorized users. Recording settings will be disabled by default and must be explicitly enabled by the admin.

1. **Number Management**The platform will manage local and toll-free phone numbers. Admins will be able to:

* Add new numbers to the platform
* Assign phone numbers to specific campaigns
* View total calls and call outcomes per number
* Replace or deactivate numbers
* Optionally track and flag numbers with high spam/fraud rates (if supported via carrier integration)

1. **Buyer Portal (View-Only Access)**Each buyer will have access to a secure portal to view:

* Campaigns they are assigned to
* Daily call counts and performance stats
* Billable vs non-billable call summaries
* Exportable call logs for their own activity
* Downloadable invoices or billing statements  
  Buyers cannot change routing rules, add campaigns, or adjust limits. Their access is strictly informational and scoped to their account only.

1. **Notifications and Alerts**The platform will generate automated alerts when key events occur. Notifications will be sent via email or shown in the admin dashboard. Trigger examples include:

* A buyer has reached their daily or concurrent cap
* A call failed to route due to no available buyers
* A campaign receives a spike or drop in call volume
* A buyer is missing or rejecting multiple consecutive calls
* A number is flagged for spam or technical issues