Every channel. Each country's rules.

Your workers and your people reach customers by website chat, email, phone, text and WhatsApp. Every contact goes out from a line or address the customer can recognise, and every one is checked at the moment it is made: by person, by channel and by country.

WHAT THIS GUIDE COVERS

Channels and languages
One conversation on every channel, in the customer's language, with the translation beside the original.

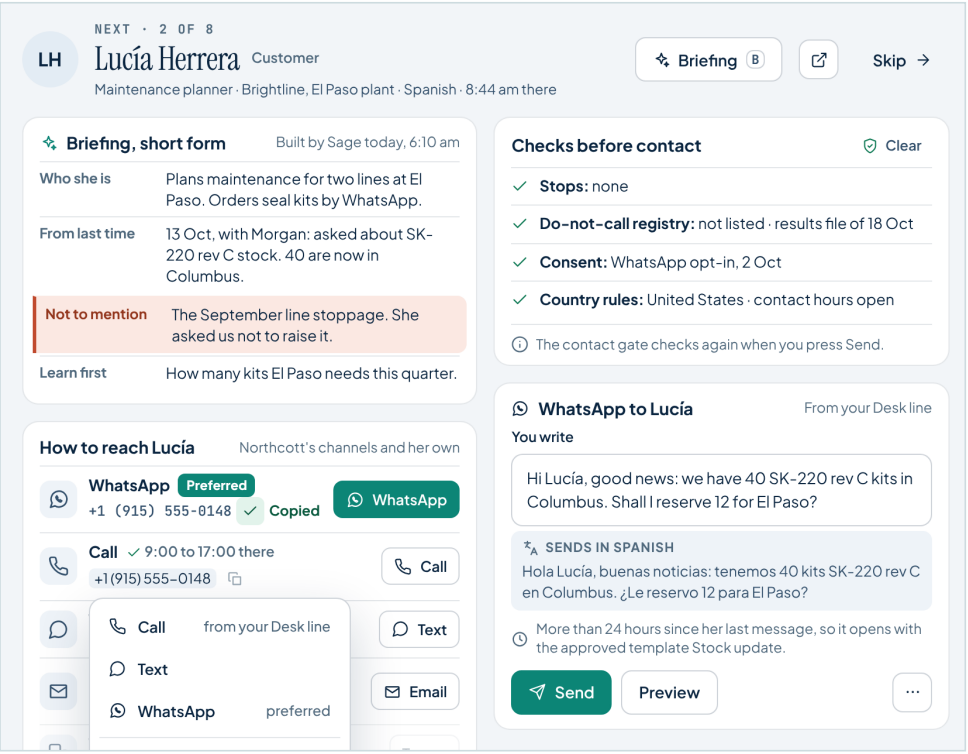
Addresses and mailboxes
An address for each worker on your own subdomain, and a mailbox for each person.

Lines and company numbers
Desk lines, worker lines and company numbers, each shown with its number.

Calls and texts
Who answers a call, voicemail and transfer, calls out, texts and WhatsApp.

Checked every time
The check before every contact, and the check when work is given to a worker.

Countries and registries
The opening each country requires, country profiles kept current, and do-not-call registries.



Outreach on the Rep Desk: the checks before contact, how to reach Lucía, and a WhatsApp message written in English and sent in Spanish, shown with the made-up Northcott example. Product design with made-up data.

THE RULE BEHIND EVERY PAGE

A contact is checked when it is made, not when it was planned. A check that cannot run counts as no.

- Each person's preferred channel, time and language come first.
- Each line and address belongs to one worker, one person or the company.
- A worker cannot contact anyone in a country with no approved profile.
- Country profiles are kept by Corvair and published by a person. They are not legal advice.

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One conversation, on every channel.

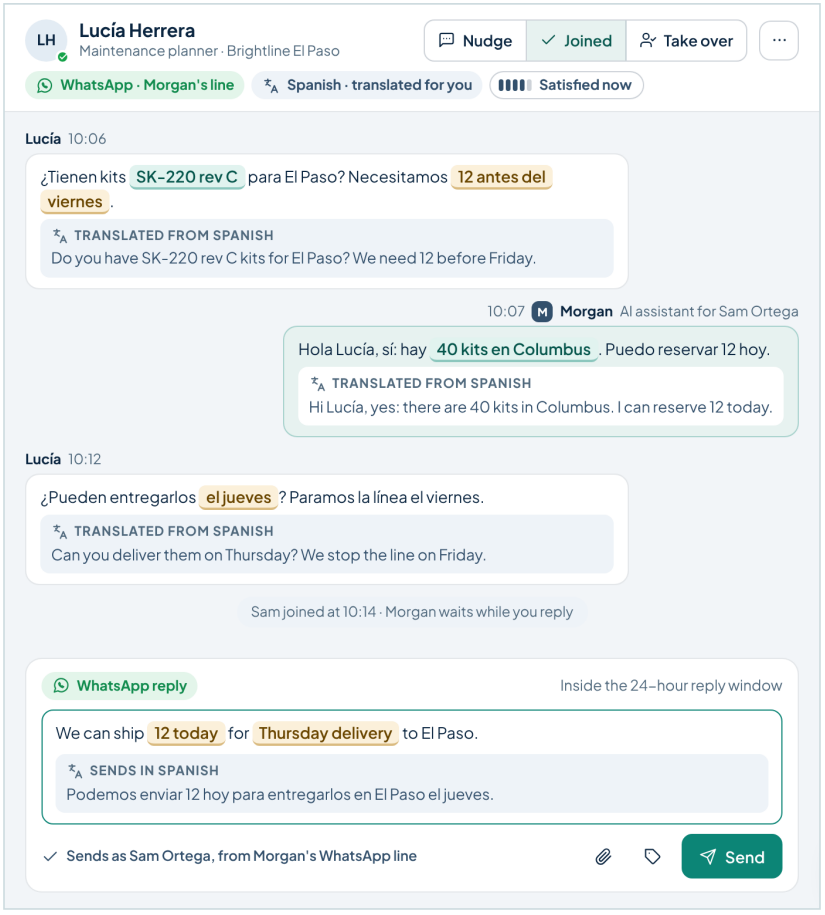
A customer can start in a website chat, call the next morning and reply to an email that afternoon. It is one conversation, with one timeline for the person, whichever channel they use.

WHERE CUSTOMERS REACH YOU

Website chat	On your site, answered at once.
Email	From the worker's own address.
Voice in the browser	From a button on your site.
Phone	A worker's line, a Desk line or the company numbers.
Text	From the same lines, with STOP, START and HELP.
WhatsApp	Where enabled, on the same provider.

IN THE CUSTOMER'S LANGUAGE

- The worker follows the customer's language, even mid-conversation. Greetings and the country's AI disclosure come in each language.
- Your team reads every message translated into its own language, shown directly below the original.
- Write in your own language and see both before it goes: what you wrote, and what the customer will read.
- Each person sets their language in Me, and can turn the translation off.



A WhatsApp conversation in Spanish: each message with its translation below it, and a reply written in English that sends in Spanish, shown with the made-up Northcott example. Product design with made-up data.

The customer changes channel

A chat in the evening, a call the next morning, an email reply that afternoon: the same conversation. They never repeat themselves, and what was promised goes with it.

Every reply says who it sends as

A reply box shows what the customer will see: "Sends as Sam Ortega, from Morgan's WhatsApp line", or an email's From line.

Every outbound message is checked

Whatever the channel, it passes the contact rules first, at the moment it goes. A channel you have not set up is never offered.

How a rep joins and replies on the Rep Desk: **The desks**

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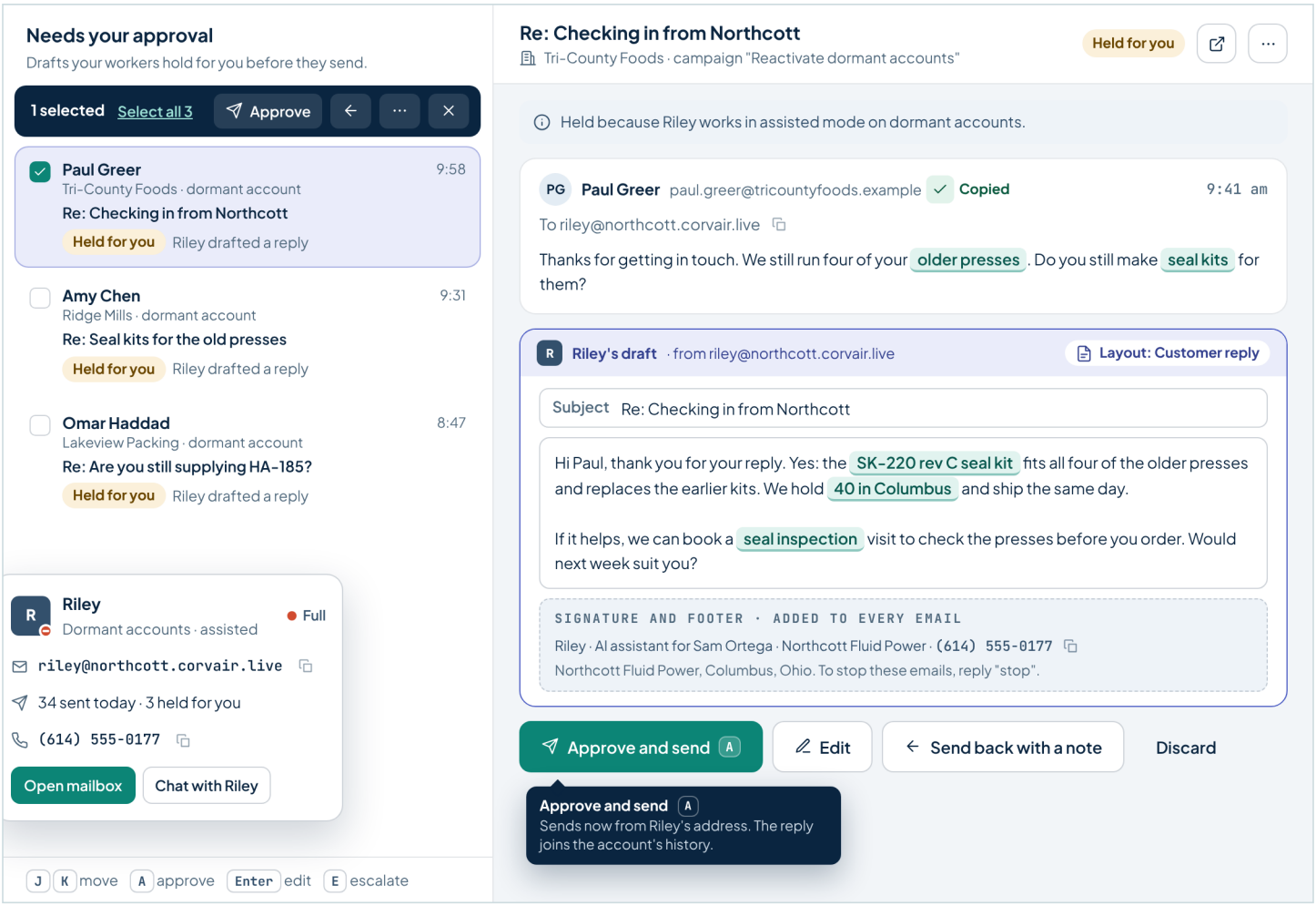
An address for each worker. A mailbox for each person.

Each worker writes from its own email address on your own subdomain, such as morgan@northcott.corvair.live. Each person on the desk has a mailbox there too. Clones share their worker's address, and replies find their conversation by its email thread.



Mail on the Rep Desk: drafts a worker holds for the rep in assisted mode, and Riley's draft with its layout, signature and footer, shown with the made-up Northcott example. Product design with made-up data.

Its own address

On your subdomain, set up and verified for your company, with no codes added. It stays the same when a worker is renamed. Corvair's own notices and sign-in mail come from a system address, never a worker's.

A mailbox for every person

Each person has one, such as sam@northcott.corvair.live, and sees the workers' mailboxes on their accounts. In assisted mode a worker holds its drafts: Approve and send, Edit, Send back with a note, or Discard.

Email is not a chat

Every email uses a layout from a standard library, with a section for a freeform reply. The signature and footer are added to each: who the worker assists, how to reach you, and how to stop these emails, in the country's words.

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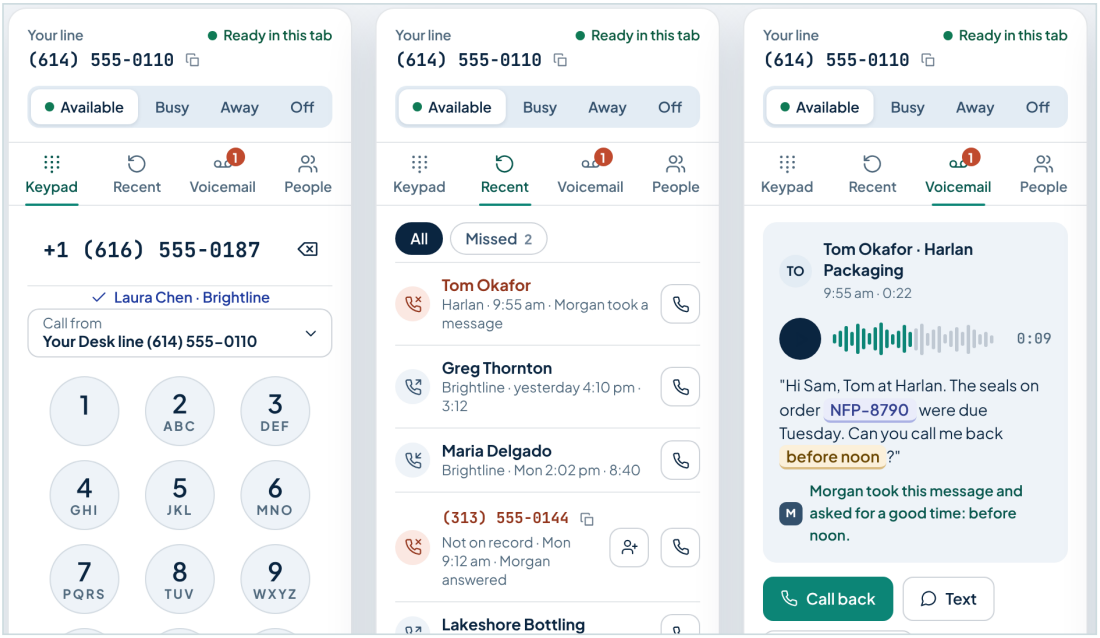
Lines you can see. The line you choose is the line you call from.

Every line shows its number, wherever it appears. A person chooses how they take calls in the header, and chooses the line for each call in Call from.



The phone panel: the keypad with Call from, recent calls, and a voicemail the worker took, shown with the made-up Northcott example. Product design with made-up data.

HOW YOU TAKE CALLS

A toggle in the header, beside your line. A change takes effect at once, and the team sees it with your status.

Desk line

Calls to your Desk number ring you in the desk window, and you call out from it.

Worker lines

You call and text from each account's worker line, so customers see the number they know.

Own phone

A mobile or a company line. Say you are on a call, then log it.

EVERY LINE, WITH ITS NUMBER

In Call from	Who may use it
Your Desk line · (614) 555-0110	You. A person has at most one Desk line.
Morgan's line · (614) 555-0142	A person whose accounts the worker is on, or who supervises the worker.
Company numbers	Anyone whose seat may call the contact, and workers set to use them.

Named on every call

The ring card, the call bar, the call screen and Recent name the line a call came in on or went out from, with its number: "Call to Riley's line · (614) 555-0177".

A refused choice says why

"You may not call from Morgan's line: Morgan is not on your accounts." The contact rules then run as for any call.

Each number has one owner

A worker, a person or the company. Numbers move between them on Setup › Channels, only when no call is live on them.

Texts follow the line

A text goes out from the line it was started on. A reply goes back from the number the customer wrote to.

Call backs

A worker's call back to a caller uses the number that took the call, so the customer sees the number they rang.

The phone on every screen, ring tones and the call bar: **The desks**

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Company numbers. One number for each customer.

Some numbers belong to the company, not to one worker or one person, for when a dedicated line is not right. A customer still always sees one number, and a call back reaches whoever last reached out to them.

THE FIRST CONTACT, AND EVERY ONE AFTER

First call or text
A person or a worker reaches a contact from the company numbers for the first time.

→

CVW picks one number
A live number in the contact's country, with the same area code where there is one, the least used this month.

→

It is kept for them
Every call and text to that contact from the company numbers uses the same number. No new number for every call.

→

Each use is noted
When it was last used, and by whom, a person or a worker.

WHEN THE CUSTOMER CALLS OR TEXTS BACK

Step	Who
Rings first	Whoever last called or texted the customer from that number in the last 30 days. The period is a setting, from 1 to 90 days.
Then	The account's usual route: its worker, its person rule (the account owner by default), and the wait before the worker answers.
Out of hours	The last caller rings only if they set themselves Available by hand. Otherwise the out-of-hours worker, or the rule, takes it.
A caller CVW does not know	The worker set to answer unknown callers, or the least busy worker.
A text back	The person who last reached out holds the conversation and replies from the same number. Otherwise the account's worker takes it.
A missed call	"Missed call to the company numbers from…" goes to the last caller, then the account owners, then the administrators.

WHO USES THEM

A worker
Set on Setup › Workers: "Calls and texts from its own line, or Company numbers".

A person
Company numbers in the header beside Desk line and Worker lines, or chosen in Call from for one call.

One person rings
Never everyone at once. A worker line and a Desk line route exactly as before.

No number in the country
The company numbers cannot be used for that contact. Call from shows "Company numbers · none in the United States", and a call is refused in those words.

Getting and moving numbers
On Setup › Channels, with Corvair's help: get a number for the company in a country, or move any number between a worker, a person and the company when no call is live on it.

Each number registered
Every number keeps its own sender registration for texts, where the country requires one.

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Calls in.
A rule on every number.

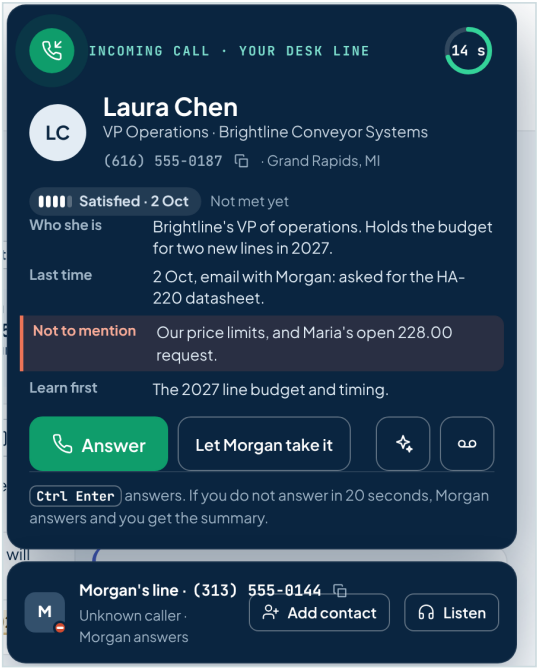
Each line has a rule that decides who answers. When a person is free, they ring first. When they are not, the worker answers, and the person gets the summary.

THE RULE ON EACH LINE

Choice	Options
Who rings first	A person, then the worker after a wait of 10 to 60 seconds, 20 by default. Or the worker answers. Or a person only.
Which person	The line's owner, the account owner, a named person, or whoever is on duty. Only a person who is Available, with the browser phone ready and no other call, rings.
Out of hours	The out-of-hours worker answers, or takes a message. One worker can answer every rep's line after hours, from 5:00 pm for example.
When the worker is full	The least busy worker, or a message.

WHEN THE PHONE RINGS

- A caller the desk knows comes up at once: who they are, their account, last time, what not to mention and what to learn.
- Answer, Let the worker take it, or send it to voicemail. If you do not answer in the set time, the worker answers and you get the summary.
- A call to a worker's line shows below it, with Listen, and Add contact when CVW does not know the number.



The ring card drops in over any screen: who is calling, last time, what not to mention and what to learn, shown with the made-up Northcott example. Product design with made-up data.

Voicemail
On a ringing call, Voicemail hands it to the worker. It says the person cannot take the call, takes a message and a good time to call back, and gives the person an ask with it.

Transfer
To the account's worker, who carries on with a summary of what was said, or to a person who is free. The customer hears "Please hold while I connect you."

The worker on the phone
It answers by voice with the greeting and the country's AI disclosure, and can be watched, listened to, joined and taken over like any conversation.

Listen and join need the notice
A call can be listened to only after the recording notice was given. A manager may listen to and join a rep's call; the rep always sees who is listening.

A missed call
Becomes an ask, "Missed call from (614) 555-0199", with the number ready to copy, for the account owners first.

Urgent calls when off
A rep who is Off can set "Ring me for urgent calls". Otherwise the after-hours worker answers, within tighter limits.

Listen and join on the Manager Desk: **The desks**

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Calls out, texts and WhatsApp.

A person calls from the line they choose. A worker calls from its own line or the company numbers, after the contact rules. Texts and WhatsApp follow the same checks, with the rules each channel adds.

CALLS OUT

A person's call

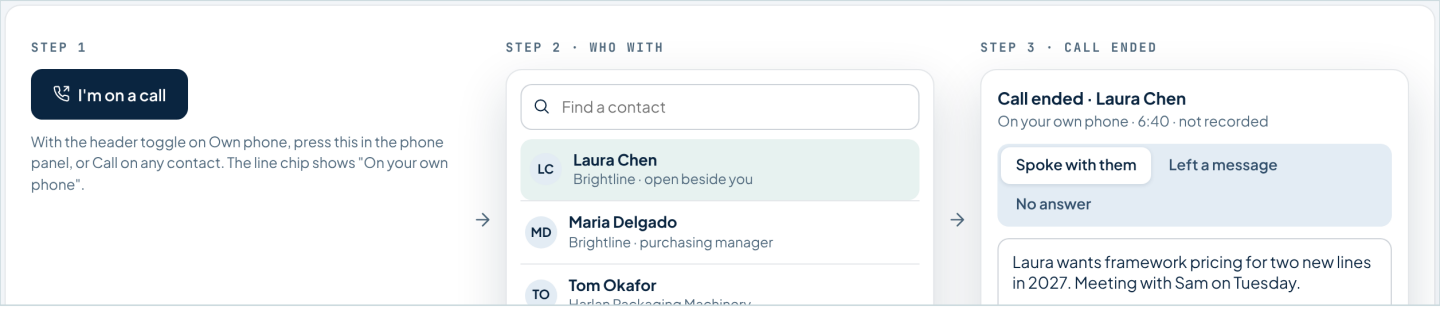
Press Call on any contact or number. The customer sees the line chosen. The call is transcribed only where the customer's country allows recording after notice, and the notice was given.

A worker's planned call

Runs the contact rules first, including the country's rules, consent for an AI voice where required, and any do-not-call registry.

Answering machines

The worker leaves one short message: who it is, with the AI disclosure, why it called, and how to reach you. A number that does not exist is not called again.



On your own phone: say you are on a call, choose who with, then log what happened, shown with the made-up Northcott example. Product design with made-up data.

A rep on their own phone keeps the team informed, but has none of the shared phone features: ringing first, the live transcript, cards brought forward, transcripts, transfer, listen and join.

TEXTS AND WHATSAPP

Texts	What happens
The first text	The worker names itself as an AI assistant in the country's words.
STOP, START, HELP	Handled by the number they were sent to. A STOP to Morgan's number stops texts from that number, unless the country requires a wider stop.
Registered senders	Texts from a US number wait until its sender registration is approved.
Replies	Go out from the number the text came to.

WhatsApp	What happens
Where enabled	On the same provider as calls and texts, from the worker's or the Desk line.
Inside 24 hours	Within 24 hours of the customer's last message, any reply can be sent.
Outside 24 hours	The message opens with an approved template, such as "Stock update", and the desk says so before it goes.
Preferred	When a person prefers WhatsApp, the desk offers it first.

Calls, texts and WhatsApp run on Telnyx. Each number has its own messaging setup, so a STOP reaches only that number.

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Checked before every contact.

Before any outbound message or call, by a worker or through the desk, a check runs at that moment, not when the item was planned. A check that cannot run counts as no.

THE CHECK BEFORE EVERY OUTBOUND CONTACT

1. **Do not contact**
   The person, their company or the channel. Stops are kept with their words.
2. **Basis and consent**
   A recorded basis for this purpose, and consent for this channel.
3. **Hours and holidays**
   The contact's time zone, region and the country's permitted hours.
4. **How often**
   Within the limits. One campaign message a week to one person.
5. **Your own people**
   No clash with recent contact by your team, or another campaign.
6. **Registries**
   A fresh do-not-call check, where the country requires one.

- All pass: the contact is made.
- Any fails: it waits for the next allowed time, or goes to a person with the reason in plain words.

BY PERSON AND BY CHANNEL

Consent by channel

A yes on one channel is a basis for that channel only. A withdrawal on one channel withdraws that channel. An opt-out file can stop phone or texts alone.

Their preferences first

Each person's preferred channel, time and language come first, and "Prefers a person" when they said so.

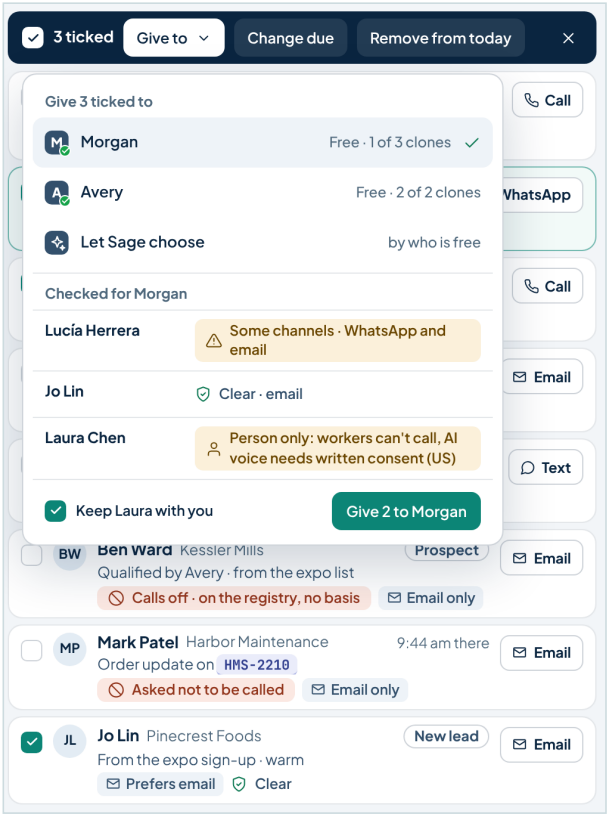
Every basis has a source

An opt-in list, an event, an enquiry, a customer, a referral or a warm contact, each with its date. "Where did you get my details?" is answered from the record.

Each phone number's type and use

Mobile or landline, checked with the phone provider; business, personal or not known, set by the account team or loaded. Not known is never treated as business.

The words a person sees for a refusal are written for its channel: "This number is on the do-not-call register for calls.", "An AI call to this number needs the person's consent first.", "They said no on the last call."



To contact today, with each person's preferred channel and the result of the checks, shown with the made-up Northcott example. Product design with made-up data.

Lists, campaigns and who is worth contacting: **Intelligence and prospecting**

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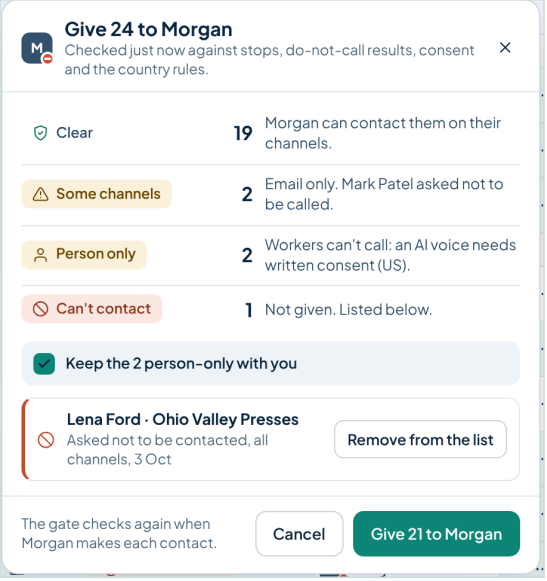
Checked when work is given, and again at each contact.

Before work goes to a worker, the desk checks every person on it: stops, do-not-call results, consent and the country's rules. Only what passes is given. Nothing is dropped without a word.



Giving 24 pieces of work to Morgan on the Rep Desk: each person gets one result, shown with the made-up Northcott example. Product design with made-up data.

ONE RESULT FOR EACH PERSON

Result	What it means	What happens
Clear	The worker can contact them on their channels.	Given to the worker.
Some channels	Only some channels are allowed, for example email only: Mark Patel asked not to be called.	Given, for the allowed channels only.
Person only	A person may contact them, a worker may not. For example, an AI voice call needs written consent in the US.	"Keep the person-only ones with you."
Can't contact	Asked not to be contacted on any channel, or no basis at all.	Listed by name, with Remove from the list.
Waiting for a check	A do-not-call check is due for this number.	Waits, and goes ahead when the result is in.

● Clear ● Some channels ● Person only ● Can't contact ● Waiting for a check

WHEREVER WORK IS GIVEN

On the Rep Desk

In Plan › Work and Outreach: tick many rows, or drag them onto a worker's name. The check runs for all of them at once and shows its counts by result.

On the Manager Desk

In Capacity › Work, when a manager gives a rep's work to another rep or a worker. Each item keeps its due time.

Let Sage choose

Sage gives each item to a worker that is free, from those the check allows.

The gate checks again when the worker makes each contact.

The check when work is given tells you now what can be done. The check before every contact still runs at the moment of each call or message, because a stop, a withdrawal or a new register result can arrive in between.

Plan, Outreach and Capacity: **The desks**

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The opening, and the rules by country.

Every chat, call and text opens the way the contact's country requires, in the contact's language. Country by country, the rules decide who may be contacted, how and when.

HOW THE OPENING IS PUT TOGETHER, ON EVERY CHANNEL

The greeting
Yours, for the channel and direction, in the conversation's language.

→

The AI disclosure
From the country's approved profile, naming your company: "I'm Morgan, an AI assistant for Northcott Fluid Power."

→

Who is calling, and why
Where a country requires it: "calling for Northcott Fluid Power about your order."

→

Ask to continue
Where required: "Is now a good time to continue?" A no is recorded as a decline.

Without a greeting in the customer's language, CVW uses your team's language with the country's disclosure, and notes it. An opening without the disclosure is never sent.

WHAT A COUNTRY PROFILE CAN REQUIRE, FOR EXAMPLE

Country	Examples of the rules a worker follows
United States	An AI voice counts as an artificial voice, so a worker's marketing call needs the person's prior express written consent, and a service call prior express consent; a business landline can be exempt, a mobile never. The National Do Not Call Registry, with each result good for 31 days and business numbers outside it. The caller names itself, your company and the reason for the call. Texts only from a registered sender.
Singapore	The Do Not Call Registry, checked before marketing calls and messages, with each result good for 21 days. Messages to an organisation for its own purposes are outside the rules. The disclosure in English and in Chinese.
Australia	The Do Not Call Register for calls, checked through the register's own service, with business numbers outside it. Calls on weekdays from 9:00 am to 8:00 pm and on Saturdays from 9:00 am to 5:00 pm. Texts follow the consent rules for commercial messages.
United Arab Emirates	Marketing calls to consumers only in the permitted hours, the Do Not Call Registry, and no second call after a no. The caller names the company and the purpose, asks whether to continue, and the call is recorded only after notice. The disclosure in English and in Arabic.

An AI voice needs consent where the law says so
A worker's call waits for the consent the country requires for an AI voice. A person's own call is not an AI voice.

No second call after a no
Where a country requires it, a person who said no on a marketing call is not called again for marketing, by any worker.

Profiles are not legal advice
Corvair keeps each country's profile and a person publishes it. Your company can add stricter rules, and your own advisers decide what applies to you.

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Country profiles, drafted from official pages.

CVW researches each country's contact rules and public holidays from the regulators' and government's own pages. A Corvair operator reviews every rule and publishes the profile. No approved profile, no contact.

FROM OFFICIAL WORDS TO A PUBLISHED PROFILE

Find the official pages
The country's government and regulators first, and other official sites a regulator uses, such as a data protection authority's own site.

Read them
Each page in full. A page CVW's own reader cannot open is read through a search service from its official address.

Ground every rule
Each value with the page it came from and that page's own words, checked in code against the text that was read.

Check what is not word for word
Where the words do not state the value literally, a decision model checks them: "Checked against the official words".

A person publishes
Rules still in doubt come first under Needs you, at their safe setting. An operator changes any rule, then publishes.

SAFE UNTIL A PERSON DECIDES

Rule	Safe setting
Phone, texts and WhatsApp out	Off
Email out	Only on the bases the grounded rules allow
Website chat and voice	Only when the customer starts them
Contact hours	9:00 am to 5:00 pm, Monday to Friday, in the contact's time zone
Holidays	No contact
Recording	Not allowed

KEPT CURRENT

- A yearly review drafts the country again and shows only what changed.
- A company that needs a new country asks for it, and its draft starts at once.
- Outbound phone and texts stay off until a person switches them on.
- Every page read and every search asked is listed with the draft.

HOLIDAYS AND REQUIREMENTS

Public holidays, loaded with their sources
This year and next, read from the official pages the profile lists. Dates a source calls estimated show as Expected, and count as holidays. A change is applied and the operators are told; company closures follow it.

Or loaded from a file
A year loaded from a file is kept as it is until someone presses Check now.

What each country requires, in one place
Registry accounts, sender registration for texts, telemarketing permits and the documents a phone number needs: who must act, Corvair or your company, what it affects, the official page and its state. Your administrator sees "What the United States needs from you". A requirement informs; it switches nothing off.

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Do-not-call registries, checked before the call.

Where a country lists a registry for calls or texts, a worker's contact waits for a fresh check of the number. Your administrator sees each registry, how it is checked, and the numbers waiting.

HOW A NUMBER IS CHECKED

A call or text is planned
For a number in a country whose profile lists a registry.

→

No fresh check yet
The work shows "Waiting for a do-not-call check", and the check is queued.

→

Checked
Download the numbers to check, numbers only with no names, check them on the registry's own site and upload the results. Or through the register's own service, where it has one.

→

Good for its period
Each result lasts the registry's period, for example 31 days in the US and 21 in Singapore. Planned work is checked again before it runs out.

WHAT A RESULT DOES

Result	What happens
Not on the register	"Not on the register, checked 15 Oct, good to 5 Nov." The contact goes ahead, if every other rule passes.
On the register	"On the register for calls", shown on the person's card. No worker calls that number.
Still no check after 48 hours	The work goes to a person, with the reason.
A business number	Outside the registry where the country's rules say so, when the number's use is business. A number whose use is not known is never exempt.

EACH PHONE NUMBER'S TYPE AND USE

	What it is	What it changes
Line type	Mobile, landline, internet or toll-free. Checked with the phone provider when the number is added, and again when a rule needs it and the check is old.	An AI voice call to a mobile always needs the consent its country requires.
Line use	Business, personal, mixed or not known. Set by the account team on the person's card, or loaded with the contacts.	Only a business number can fall outside a registry or a consent rule, and only where the country says so.

Numbers never kept in clear
Registry results are kept against a fingerprint of the number that only your company's records can match, never the number itself.

Each registry in one panel
Setup › Safety and privacy › Contact rules lists, for each country you picked, its registry, how it is checked, the numbers waiting and the numbers checked and good.

Your registry accounts
Your company's registry account for each country is listed with the country's requirements, with its state.

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A stop covers where it was given. Privacy comes with it.

A stop covers the context it was given in, and no more, unless the words say otherwise or the country requires more. The words and the scope are kept, and a person can change the scope.

Where it is said	What it stops
In a call or a chat	This call or chat.
On an action, or in reply to one message	This action. In reply to a campaign message, that campaign's messages to this person.
On an account, or on a worker	Contact on this account, or from this worker.
A STOP texted to a number	Texts from that number, unless the country requires a wider stop.
With wider words: "never contact me again"	What the words say, up to every list, channel and worker.
With narrower words: "don't call me, email is fine"	That channel, or that period.

A stop is always honoured

Every worker and every person applies it, on every channel it covers, whether it came from a customer or from someone on your team. Promises already made to that person go to their owner.

Asked to be forgotten

The person goes on the forget list. It is checked before any research, list or contact, so they are not researched, added to a list or contacted again.

Only what the customer was told

A transcript is kept only after the recording notice, and used only for the purposes the customer was told.

WHAT IS KEPT, AND WHO SEES IT

Record	What is kept	Who sees it
A stop	The words, the scope applied, the channel, and when and where it was said. A change of scope is kept with who made it.	Anyone who can open the person's record. The account team can change the scope.
Consent	Each yes or withdrawal by person, channel and purpose, with its source and date. It cannot be edited, only withdrawn.	The account team, on the person's record.
A registry result	The result and the date it runs out, against a fingerprint of the number.	Your administrators, on the Registries panel.

THE CVW GUIDES

Product overview

What CVW is and is worth, the workers, Sage and Tess, the desks, trust, and how to start.

The desks

Working beside the workers: the Rep, Manager and Client operator desks and the phone.

Intelligence and prospecting

Sourced profiles, news, ideal customers, list building, competitors and supply chains.

Channels and compliance

Addresses, lines and company numbers, calls and texts, contact rules and countries.

Quality and the learning loop

Scores, debriefs, the coach, review, lessons, tests, the live watch and measured decisions.

Technical architecture

For IT, security and architecture teams: how CVW is built and run.

Industrial sales

The made-up Northcott Fluid Power example: a manufacturer and its distributors.

B2B inside sales

The made-up Veridane example: a software company selling to banks and insurers.

Every guide is at **corvair.ai/cvw**. Screens are product designs with made-up data.

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