
Telemarketing with CallAssist v5

CallAssist Telemarketing Dialler software will help you maximize your telemarketing results.

This User Guide details how to setup and use CallAssist.

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1 CallAssist Introduction

CallAssist is a telemarketing tool that allows you to easily make a large number of telephone calls. You can load a list of phone numbers and by clicking one button it will dial the next number on the list. While talking, you can keep a record of your contact's responses to your telephone call. CallAssist also allows you to maintain a Do Not Call list which can be shared between users. Using CallAssist will speed up the time you take to contact everyone on your phone list. It's an excellent tool for people making a number of phone calls in one sitting.

To set up the list of phone numbers to dial you can import them or simply add one number at a time manually. You can import your numbers to a campaign's Dial List directly or in the Advanced edition you can import them to a Contact directory. Once in the Contact directory you can transfer a group of numbers from your Contact directory, to your Campaign's Dial List.

This document shows you step-by-step how you can use CallAssist to maximize your telemarketing results.

The default user for this software is "**admin**" and password "**admin**". This can be changed once logged in to CallAssist and additional users set up if required.

The modem in your computer and the telephone must share the same telephone line, to accomplish this use a splitter (double telephone adapter) plugged into the telephone line and connect both the modem and the telephone to the splitter.

Remember before you make any calls to check your telemarketing rules and regulations, and regulations regarding the recording of a conversation to ensure you use this software in accordance to the law.

2 Standard & Advanced Editions

CallAssist is available in two editions, Standard and Advanced. In this document if the section only applies to the Advanced Edition you will see an (Advanced Only). IF written text only applies to the Advanced Edition you will see a “@” symbol.

The following table compares the features in each edition:

Feature	Standard Edition	Advanced Edition
Import Dial Lists	Yes	Yes
Quick Dial	Yes	Yes
Quick Response Selection	Yes	Yes
Quick Call Back Setting	Yes	Yes
Quick Re-Queue	Yes	Yes
Optional View All Campaign Call Backs	No	Yes
Optional View All User Call Backs	No	Yes
Import FTC DNC	Yes	Yes
Export Dial Lists	Yes	Yes
Multiple Campaigns	Yes	Yes
Multiple Users	Yes	Yes
User Login Access	Yes	Yes
Auto Login Ability	Yes	Yes
Designated Fields	Telephone, Address, City, State, PostCode, Country, First Name, Last Name, Full Name, Salutation, Response, Call Back Date Time, Business Name, Industry, Credit Card details, Appointment Date, Appointment Day, Rep, Email, Web Site, Classification, Fax.	Telephone, Address, City, State, PostCode, Country, First Name, Last Name, Full Name, Salutation, Response, Call Back Date Time, Business Name, Industry, Credit Card details, Appointment Date, Appointment Day, Rep, Email, Web Site, Classification, Fax, Priority.
User Defined Fields	10 Text fields.	20 Text, 5 Yes/No, 5 Date, 5 Currency, 10 Numeric fields.
Custom Label Fields	Yes	Yes
Contact Directory	No	Yes
Create Dial List From Contact Directory	No	Yes
Custom Label Fields	No	Yes
Export Contact Directory	No	Yes
Call Statistics	Yes	Yes
Script Window	Yes	Yes
Call Duration Timer	No	Yes
Transfer Between Campaigns	No	Yes
Play Pre-recorded Message*	No	Yes*
Record Conversation*	No	Yes*
DialPad	No	Yes
Modes	Standard Only	Standard & Advanced

* Requires a voice capable

3 CallAssist Main Screen Layout

The Dial List Grid, Dial List Card, and the Contact Card



Figure 1 The CallAssist Main Screen

The Main screen is made up of three areas; the Dial List Grid, The Dial List Card, and the Contacts Card[®]. Note the Contact Card is only in the Advanced Edition.

To the right of screen is the Dial List Grid, which is your master list of phone numbers to call. It has a range of standard fields, for example “Full Name”, “Telephone”, “Call Made”, “Status”, “Response”, “Address”, “Business Name”, and a range of other customizable fields that can be set to reflect the individual’s needs.

When you click into the Dial List Grid and select a row, the row background changes from white to blue. The colour signifies that this is the current record in the list. You can move through the list by clicking into the name or telephone number column and then using the up or down arrows on your keyboard.

You can set up the Dial List by importing the details, manually setting up the list, or selecting records from the Contact Directory[®]. The top of the grid is the “Add New” row which is where you can add Dial List data manually. To add a new record to the Dial List just click into the first cell of the “Add New” row and begin typing. When finished entering in that row of data press the <Enter> key.

Across the top of the Main screen is a list of drop down menus: “File”, “Options”, “View” and “Help”. Beneath these menus on the left side is the Dial List Card and then below that is the Contacts Card[®].

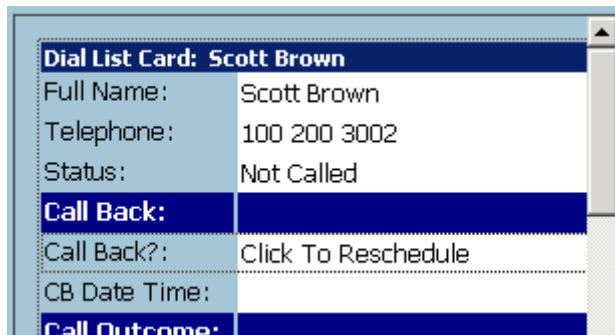
The Dial List Card is another view of the Dial List Grid. Often the Dial List Grid may be set up to display just 4 or 5 key fields and then the Dial List Card will have all the fields required for a campaign. For example, the Dial List Grid may just have the Full Name, Telephone, Call Made, and Call Back Date Time fields. You use the Dial List Grid to manage the calls you are making however while you are on a call the focus is more on the Dial List Card where you note the outcome of the call in the appropriate fields.

If the phone number in the Dial List has a matching number in the Contacts Directory the details for that contact are displayed in the Contacts Card below the Dial List Card.[®]

You can customize CallAssist and select which fields to display in the Dial List Grid, Dial List Card and Contacts Card. You can also customise the field labels to display headings that are appropriate for your campaign. Refer to Section 5 for more details.

Rescheduling Call Backs & Call Back Reminders

In the Dial List Card you will notice a section near the top of the card called “Call Back:” (Figure 2). Under the title there is a row labelled “Call Back?:”. To set a Call Back reminder just click in the white cell to the right that contains the words “Click To Reschedule”. Doing so will make a date time appear to the right of the “CB Date Time:” label. The date time will be the current time plus 30 minutes or the delay you have set under the Options menu, Settings, General Tab. You can also edit this date time by clicking into the cell.



Dial List Card: Scott Brown	
Full Name:	Scott Brown
Telephone:	100 200 3002
Status:	Not Called
Call Back:	
Call Back?:	Click To Reschedule
CB Date Time:	
Call Outcome:	

Figure 2 Scheduling a Call Back

You can cancel the Call Back reminder by clicking again into the “Call Back?:” cell where it reads “Click To Cancel Call Back” (Figure 3).

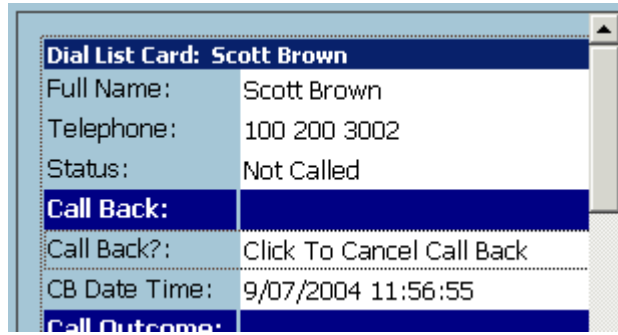


Figure 3 Cancelling a Call Back

Above the Dial List Grid on the main screen you will see a link that reads “Click to view Call Backs”, if it is flashing there are Call Backs due to make. Clicking on this link will change the Dial List Grid to display only Call Backs that have not been called. You can set an Option on the Setting’s General Tab to display all Call Backs for all Campaigns, or just the current Campaign that you are working in. Likewise if you are using the multiple user functionality you can select to view all Call Backs for all users or just your own Call Backs.

To return to the Main Dial List display click on the link again which will now read “Click to view All Dial List Numbers”. Under the “View” menu there is an option “Call Backs” which acts the same as the link and displays the Call Back numbers.

When you display the Call Backs the numbers will be grouped by Campaign and ordered in descending order of when the Call Back is due to be made. For example if a call back was scheduled for 10:30 AM on 10 November and another telephone number had a call back scheduled for 11:00 AM on 10 November then the one for 10:30 AM will be at the top of the list.

When you are viewing the Call Backs note that some will be for calls in the future and not need to be called yet. As you move through the list by clicking into the name or telephone number column and then using the up or down arrows, you will see the Dial List Card details change including the Call Back Reminder date. In addition you will see those that have overdue call backs with the word “Overdue” in red to the right of the “Call Back:” section header

The Main Toolbar and function keys explained



Figure 4 Main Toolbar and Function Keys

At the bottom of the screen is a set of buttons used to make the calls and manage the list: Dial, HangUp, Re-Queue and Dial Next, Do Not Call, Delete, Action and Response. Each button has a keyboard shortcut key assigned to it as designated by the underlined letter in the title, holding down the <Ctrl> and pressing the appropriate key will activate the relevant button.

At the very bottom of the Main screen in the status bar is a list of function keys (e.g. F2, F3, F5 etc) that allow you to perform various functions quickly. Some of these functions also have toolbar buttons that perform the same task or are shortcuts for the actions or responses on the pop menus that are displayed when clicking some of the buttons.

3.1.1 Dial Button (F11)

When you click the Dial button or press <F11> from a selected record within the Dial List, CallAssist will dial the telephone number. A message will appear in the upper right corner of the Main screen requesting you pick up the call. Pick up the telephone that is connected to the same line as your modem so you can take over the call.

When CallAssist has made the connection, it lets go of the call. A message appears: "Hanging Up" to warn you this is about to happen. If you haven't picked up your receiver, the call stops.

3.1.2 Hang Up / End Call Button (F7)

When you have picked up the call on the telephone click the Hang Up button or press <F7> and this will disconnect the modem from the call without disconnecting the telephone. The modem should only be left in the call if the play message or record message functionality is going to be used. If this isn't to be used go to the Options menu, Settings, General Tab and select "Auto Hang Up after call dial", this will automatically hang the modem up after a set time (approximately 2 sec), in which time you will need to pick up the call on the telephone.

If the Auto Hang Up option is set on or the Hung Up button is pressed the button will change to "End Call", clicking this button again or pressing <F7> will stop the timer on the call as displayed in the status bar, it will not disconnected the call.

Action	Response
	Call Time: 02:47 12/07

3.1.3 Re-Queue Button (F2)

The Re-Queue button or pressing <F2> causes the currently selected record on the Dial List to be sent to the end of the group of records that have not yet had calls made. Re-Queue only effects the selected record, not the whole list. Once the record has been sent to the end of the list, the first record in the Queue is selected. You can set an option under the Options menu, Settings, General Tab, to have the next record automatically dialled.

3.1.4 Dial Next Button (F6)

CallAssist is designed to dial out numbers in the default list order. The Dial Next button or pressing <F6> causes CallAssist to call the telephone number that is first in the queue **after** the current record that is at the top of the list. This will be the first telephone number in the Dial List, i.e. if you have a number selected half way down the list it is not the number directly beneath the currently selected number that is dialled.

It is recommended that the "Auto tick Call Made on Dial Next" option is used. This is set under the Options menu, Settings, General Tab. When this is the case the following events take place when you click the Dial Next button:

The currently selected record is assumed to have been completed and the Call Made box will be ticked.

The Dial List Grid will refresh causing the completed record to be filed at the start of the "Call Made" group of records and those records that have not had calls made will be regrouped at the top of the Dial List Grid.

The record that is at the top of the Dial List becomes the new current record.

The telephone number in the new current record is dialled.

A message will appear in the upper right corner of the Main screen requesting you pick up the call, the message will display the telephone number it is calling. Pick up the telephone that is connected to the same line as your modem so you can take the call. When CallAssist has made the connection, it lets go of the call. A message appears: "Hanging Up" to warn you this is about to happen. If you haven't picked up your telephone receiver, the call stops.

3.1.5 Do Not Call Button (F10)

During a call if the person you speak with requests you to not call them you can add them to the Do Not Call list. Clicking the Do Not Call button or pressing <F10> will add their number to the Do Not Call list and mark that number in the Dial List as DO NOT CALL. Next time a Dial List record becomes current that has this number in the Do Not Call list it CallAssist will show a DO NOT CALL message and prevent that number from being dialled.

3.1.6 Delete Button

Click the Delete button if you want to delete the currently selected record or use click the right mouse button to display the popup menu option to delete.

3.1.7 Action Button (Advanced Only)

Clicking the Action Button will display a popup menu with the options to play a message, record a message, stop playing/recording a message or display the Dial Pad. Note the Action button will only be enabled if you have the Advanced Edition and if you have the "Auto Hang Up after call dial" setting unchecked.

Pressing <F8> will display the Action popup menu so as to allow the selection of a message to play, multiple .wav files can be set up to be played in Options menu, Settings, Messages Tab.

Pressing <F9> will start recording the telephone conversation to a .wav file. Please note that some countries have laws prohibiting the recording of a conversation with out the prior knowledge of the called recipient, please ensure that the software is used in a manner to comply with these laws.

Once either <F8> or <F9> are pressed, pressing them again will stop the playing or recording of a message.

3.1.8 Response Button (F3)

Clicking the Response button or pressing <F3> will display the list of Responses that have been set up under the Options menu, Support Table, Responses. By default "Call Back Requested" is always displayed at the top of the list, pressing <F5> will select this response on the current Dial List card and set the Dial List card as a Call Back.

3.1.9 Contact Directory (F12) (Advanced Only)

Pressing <F12> will display the Contacts directory. When you display the Contacts directory it will search for a record that matches the Dial List's current telephone number. If it finds a match it will be display that contact in the Contacts directory. CallAssist can be set up to automatically add a new contact record if it can not find the telephone number that is currently selected in the Dial List.

4 Making Calls with CallAssist

Before you can make calls with CallAssist you need to add the numbers to the Dial List. If you have the Standard Edition then you do not have the Contact directory so you need to load the numbers into your Dial List for the Campaign. However if you have the Advanced Edition you must decide between the following two approaches:

1. You can import numbers into the Dial List and then as you make calls when you get a positive response you can add that telephone number to the Contacts directory.
2. The other approach is to import the numbers to dial into the Contacts directory and then use the <F7> function to transfer all records in the Contacts directory to the Dial List and Campaign.

The approach you take depends on your application and on the extent of the data you have on each number.

If you are using a number generator program to make your Dial List numbers then there is no point importing the numbers to the Contacts directory rather import them to the Dial List directly.

On the other hand if you have purchased a telemarketing list which contains full contact details then you may want to import the numbers to the Contacts directory and then use the <F7> function to add that contact to the Dial List.

The deciding factor on which approach is best for you could be determined by the frequency you call people. If you for example call the same people each year to promote your products to then load them into the Contacts directory. However if you usually just call the lead once then forget those that are not interested then load them into the Dial List and only add those interested leads to the Contact directory.

The following sections demonstrate how a telemarketer would use CallAssist with each of these approaches.

The Call Made Check Box

When you dial a telephone number in the Dial List the “Call Made” check box is automatically ticked and the “Status” is changed to “Called”, if during the call the number is Re-Queued or set for Call Back then the “Call Made” check box is un-ticked and the “Status” changed as appropriate.

Example Starting With the Dial List

You can import numbers into the Dial List and then as you make calls when you get a positive response you can add that contact to the Contacts directory[@]. Here is an example of this approach.

1. Setup the Do Not Call List to ensure you do not call people who have asked to be added to the Do Not Call List. Use the Import DNC Numbers to import the FTC Do Not Call Lists.
2. Import the Dial List numbers.
3. Select the first number at the top of the Dial List.
4. Click on Dial or press <F11> to dial out.
5. CallAssist will start to dial the number. Pick up the telephone that is connected to the same line as your modem.
6. If the call is answered, work through your scripts and record the responses in the Dial List Card.
7. On a positive outcome press <F12> button to have this dial list number added automatically to the Contacts directory. While in the Contacts directory ask the called person for other appropriate details and type them in to the Contacts directory fields.[@]
8. When you have all the necessary details in the Contacts directory close it by clicking the Close link at the top right corner.[@]
9. Once the call is finished, click Dial Next or press <F6> and CallAssist will tick the Call Made check box, reorder the grid, and dial the next number at the top of the list.
10. If you have made a call and not received an answer for example it was no answer or the line is busy then you can set that as a response and click on the Re-Queue button. Re-Queueing a record will send it to the end of the group of records that have not been called so you can try again later.
11. After the call is re-queued, the next call in the queue is selected, ready for you to click the Dial button again. Alternatively set up CallAssist to dial the next number automatically on a Re-Queue.

Example Starting With the Contacts Directory[@]

You can import numbers into the Contacts directory and then use the F7 function to transfer all records in the Contacts directory to the Dial List. Here is an example of this approach.

1. Setup the Do Not Call List to ensure you do not call people who have asked to be added to the Do Not Call List. Use the Import DNC Numbers to import the FTC Do Not Call Lists.
2. Import the Contacts directory.
3. Transfer the contacts to the Dial List by opening up the Contacts directory and pressing <F7>.
4. Close the Contacts directory and return to the Dial List.
5. Select the first number at the top of the Dial List.

-
6. Click on Dial or press <F11> to dial out.
 7. CallAssist will start to dial the number. Pick up the telephone that is connected to the same line as your modem.
 8. If the call is answered, work through your scripts and record the responses in the Dial List Card.
 9. Note a positive outcome by selecting the appropriate response from the drop down list or ticking a designated check box in the Dial List. Alternatively you can have the Contact Card show Yes/No fields and tick one of them to mark this contact as a positive response.
 10. Once the call is finished, click Dial Next or <F6> and CallAssist will tick the Call Made check box, reorder the grid, and dial the next number at the top of the list.
 11. If you have made a call and not received an answer for example it was no answer or the line is busy then you can set that as a response and click on the Re-Queue button. Re-Queueing a record will send it to the end of the group of records that have not been called so you can try again later.
 12. After the call is re-queued, the next call in the queue is selected, ready for you to click the Dial button again. Alternatively set up CallAssist to dial the next number automatically on a Re-Queue.

5 Customizing CallAssist

Customizing the Main Screen Layout

In the case where the Contacts directory is not used or is only used after a call has been made it may be appropriate to turn off the Contact Card on the main screen. By un-ticking the, View Menu - Show Contact Card setting the Contact Card will be hidden and the Dial List Card will fill the entire left side of the main screen (Figure 5). Doing this has the advantage of allowing more Dial List Card fields to be displayed.

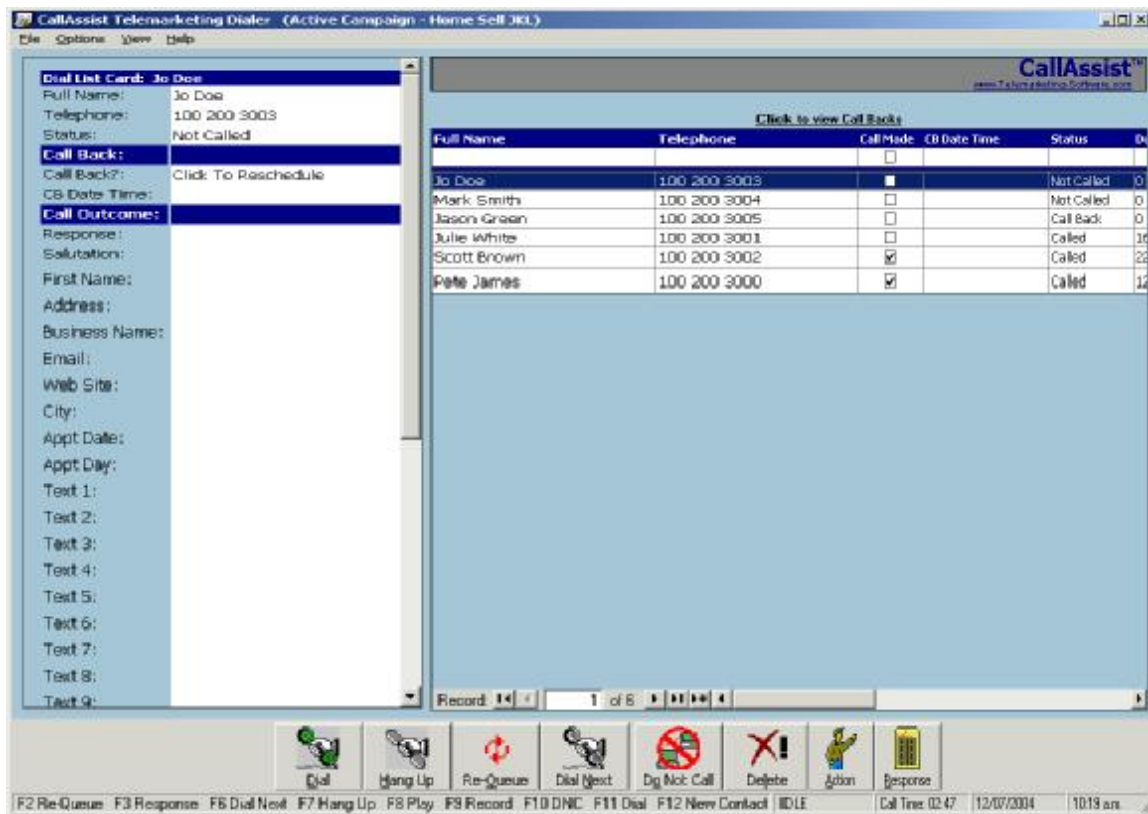


Figure 5 Left Side Full Dial List Card

The Contact Card is useful when you have added numbers to the Dial List from the Contacts directory. Tick the, View Menu - Show Contact Card setting to show the Contact Card.

In most cases you will want to show the Dial List Card on the main screen. Do so by ticking the setting, View Menu - Show Dial List Card. There may be instances where you have very few outcome fields so they can be displayed adequately by the Dial List Grid. In these cases un-tick this setting. If the Contact Card is in use then it will fill the entire left side of the main screen (Figure 6).

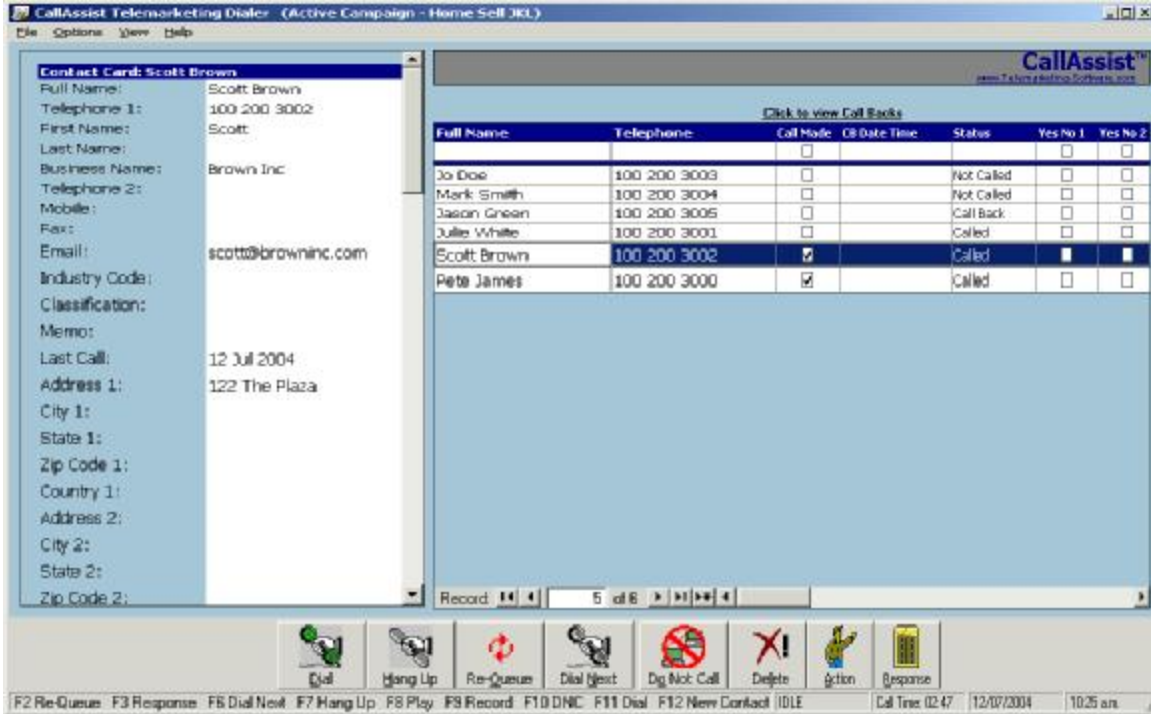


Figure 6 Left Side Full Contact card

If neither the Dial List Card nor the Contact Card are used then the Dial List Grid will fill the whole screen (Figure 7).

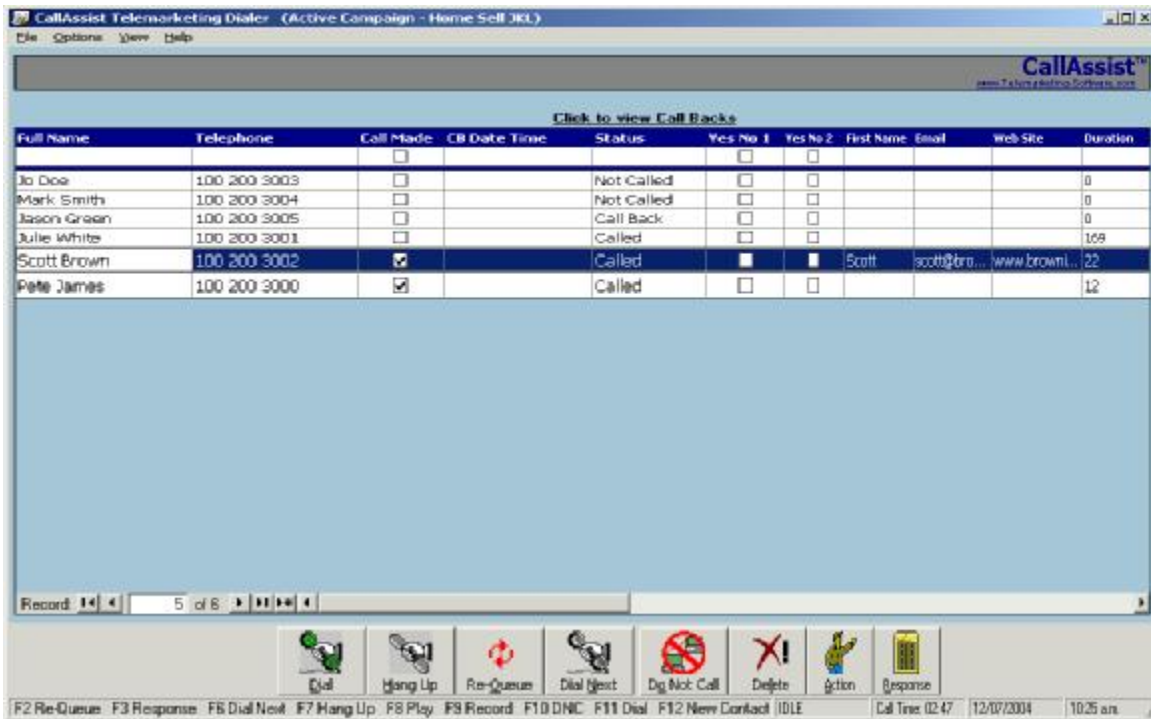


Figure 7 Main Screen Full Dial List Grid

Customizing the Dial List Grid, Dial List Card, and Contacts Card

All the fields in the Dial List Grid, Dial List Card, and Contacts Card[®] can be configured with custom labels. These are set up through the Options menu, Grid Custom Setup submenu, each grid or card can be selected individually to be set up with a custom field name and also whether to show or hide the field or display the field in a read-only state. Fields can be reordered in the grid view by simply clicking on a column header and dragging the column to a new position, the card views are changed through the Options menu, Grid Positions Setup submenu where the Dial List and Contact cards are displayed in a grid format to enable the clicking and dragging of columns. All the changes are saved between sessions. Refer to section 0 for more details.

Customizing the Dial List User Definable Fields

The Dial List has multiple user defined fields, 19 text, 5 long number format, 5 single number format, 5 currency, 5 date time, 5 Yes/No, 2 memo, 5 dropdown list fields. They can be use to enter Outcomes or to store information from the Contacts directory. You can set up which Contact directory field's data will be save into the Dial List field when Contacts are added to the Dial List. Refer to section 10.1 for more details. Please refer to section 2 for details on which fields are in the Standard and Advanced Editions.

Customizing Drop Down Lists

The 5 drop down lists are used in places rather than free text boxes so that the user is forced to select from the given options. Drop down lists are set up through the Options menu, Support Tables, List 1 to List 5. Refer to section 0 for more details.

6 Importing the Dial List, Contacts and DNC List.

You can import the Dial List, Contacts[@], and Do Not Call data from text files in the CSV format.

! Note that after Importing it is advisable to use the Database Maintenance Utility. (refer section 10.7)

Importing the Dial List

To import to the Dial List, follow these steps:

1. Prepare your file to import: Save it as a text file in CSV format. See example files in the main program folder (egDialListNameTelephone.txt).
2. Click on the File Menu, then Import, and Import Dial List.

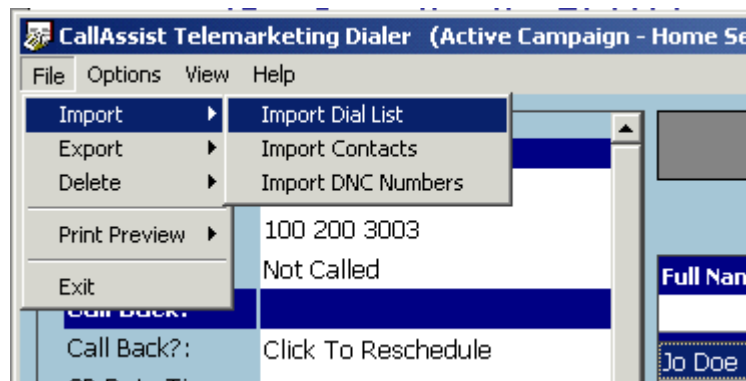


Figure 8 File Import Main Menu

3. Select the text file that you wish to import. Each row in this file should have a telephone number and any other data you require. The Telephone Number can be up to 50 characters long and can include formatting e.g. 1234567891 can be entered as 123-456-7891 in your file. However CallAssist will strip all the formatting from the number before adding it to the Dial List.

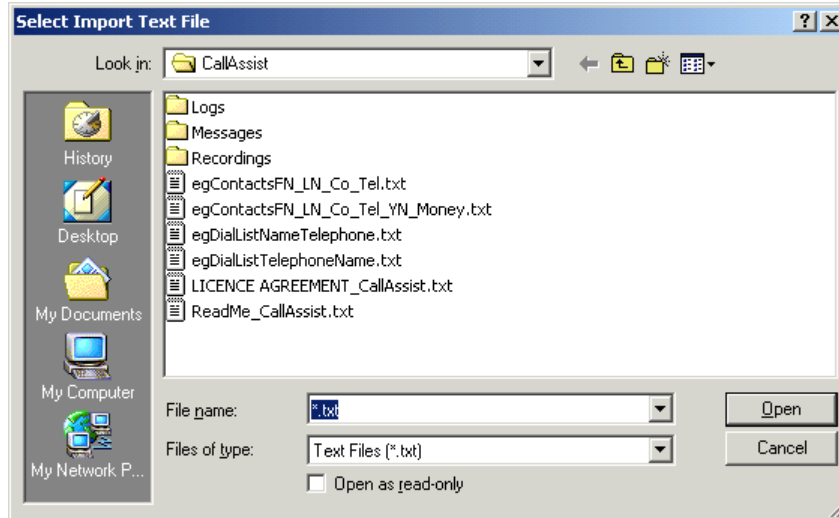


Figure 9 Select Import Text File Dialog

4. The Import Dial List Fields dialog box will appear. There are four options that can be selected depending on the number of fields that appear in your import file. The Import File Preview shows the first 3 lines of your file data to assist in selecting which option to choose.

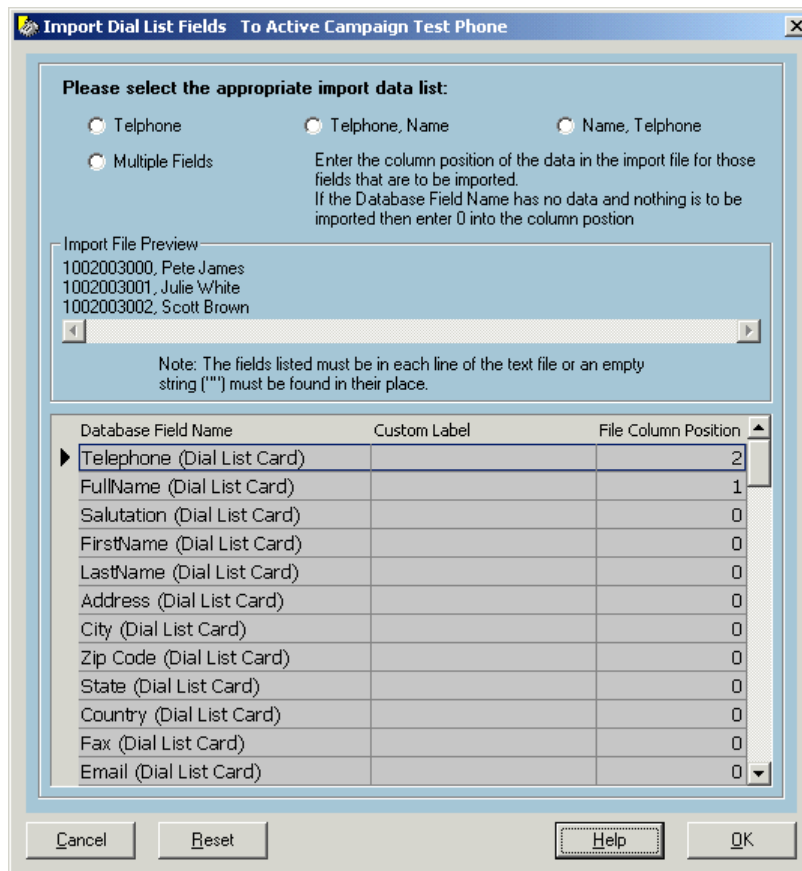


Figure 10 Import Dial List Fields

For example if your data contains only the telephone number then select the option “Telephone”, if it contains telephone number and name select the option “Telephone, Name”. Click the OK button to start the import. When the import is finished the number of records imported will be displayed.

If your data contains more fields than telephone and name then the option Multiple Fields can be used which allows you to map the data in the import files to and specific field in the Dial List and to ignore some data so as to remove the need to manually manipulate the file before import.

The possible import fields are listed in the grid to the left along with the custom name that has been set. On the right is the File Column Position. This is the position in the import file where the data is located. For example the import file may have 4 or 5 columns of data; say column 1 is the Name, column 2 the telephone, column 3 the City and column 4 may be an industry classification. The Multiple Fields option can be used to pull out columns 1, 2, and 4 while ignoring the others. To use column 1’s data for the name just enter a 1 in the File Column Position to the right of “Full Name”. To use column 2’s data for the telephone number just enter a 2 in the File Column Position to the right of “Telephone”. To use column 4’s data just enter a 4 in the File Column Position to the right of “Text1”. If there is no data to be imported for a database field then enter a 0 in the File Column Position. To begin the import, click the OK button. All column positions can be reset to 0 by clicking the Reset button.

Importing Contacts (Advanced Only)

To import to the Contacts, follow these steps:

1. Prepare your file to import: Save it as a text file in CSV format. See example files in the main program folder. (egContactsFN_LN_Co_Tel.txt).
2. Click on the File menu, Import, and Import Contacts.
3. Select the text file that you wish to import. Each row in this file should have a telephone number and any other data you require.
4. The Import Contact Fields dialog box will appear. CallAssist’s import screen allows you to import from complex files without the need to first manually manipulate the data to remove unwanted fields. The possible import fields are listed in the grid to the left along with the custom name that has been set. On the right is the File Column Position. This is the position in the import file where the data is located. For example the import file may have 12 columns of data; say column 1 is the First Name, column 2 the Last Name, column 3 the Telephone and column 10 may be an Address. The import can be used to pull out columns 1, 2, and 4 while ignoring the others. To use column 1’s data for the first name just enter a 1 in the File Column Position to the right of “First Name”. To use column 2’s data for the last name just enter a 2 in the File Column Position to the right of “Last Name” and so on. If there is no data to be imported for a database field then enter a 0 in the File Column Position. To begin the import, click the OK button. All column positions can be reset to 0 by clicking the Reset button.

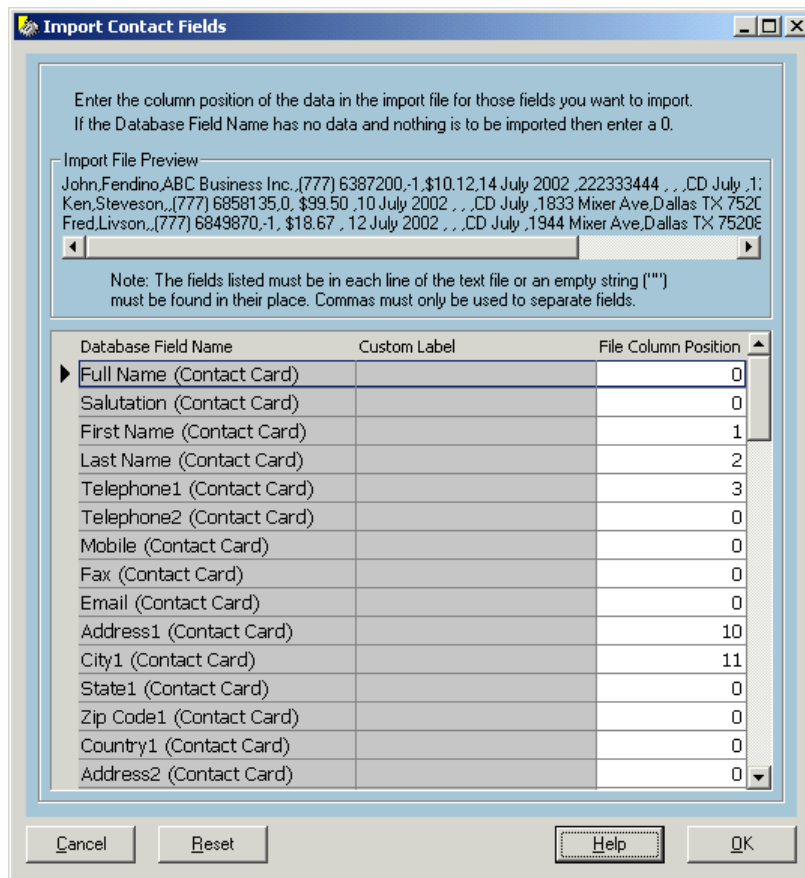


Figure 11 Import Contact Fields

Import the Do Not Call List

You can import a Do Not Call List directly from other packages. You must not have chosen to use the ForbiddenCalls DNC Manager, as the list you import is added to the Inbuilt DNC list.

Follow these steps:

1. Prepare your file to import: Save it as a text file in CSV format. Your file can include a telephone number and comment or just a telephone number, no other fields are acceptable. If you are unsure what program can save a file to .CSV format, use Microsoft Excel.

! Note that the DNC text file downloaded from the FTC website contains carriage return characters that may cause the import to fail. To remove the possibility of this happening after downloading the file open the file in WordPad and choose Save As..., this will correctly format the file so that each new DNC number is on its own individual line.

Do not use Notepad as it will not correctly format the numbers.

-
2. Click on the File menu, Import, and Import DNC Numbers.
 3. The Import Fields dialog will appear, select the appropriate option for your data. A "Source Note:" field is available to enter in an identifier that enables the easy reconciling of what source the DNC numbers came from at a later time and is referenced when deleting DNC numbers. Click the OK Button to start the import.

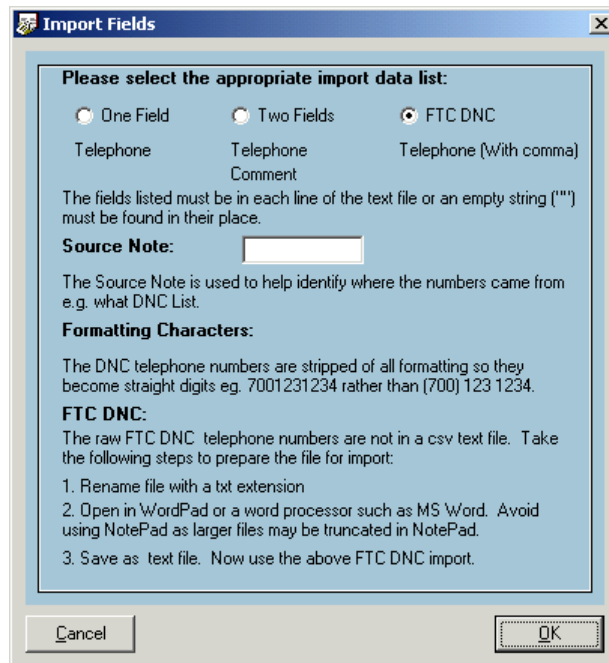


Figure 12 Import DNC List

7 Exporting the Dial List and Contacts

You can export the Dial List, the Contacts[®], or the Dial List with Contacts[®]. After exporting you may want to open the file in another program such as Microsoft Excel. Please refer to the appropriate topic on exporting to a text file. To open the text file in Microsoft Excel take the following steps:

1. Open Microsoft Excel
2. In Excel, click on the File menu, then select Open.
3. In the lower left of the Open dialog change the File type to Text Files.
4. Find the CallAssist exported file by navigating through the folders and files.
5. Select the exported file and click Open.
6. Format the columns in Excel to allow the entire contents to be viewed.

Exporting the Dial List, Dial List & Contacts, Contacts

You can export the Dial List, Contacts or a combination of Dial List & Contacts and the results of your telephone calls at any time by selecting from the File Menu, then Export submenu.

Follow these steps:

1. Click on the File menu, Export and select either Export Dial List, Export Dial List & Contacts or Export Contacts.
2. The Save Export File Name dialog box appears where you can select a name and directory for the exported file.
3. Next the Export Selection Field dialog box will be shown (Figure 13). There are four columns in the table, the left is headed "Database Field Name", then "Custom Label" the next is "Include", and then "File Column Position".
4. Select the fields you want to export by clicking in the "Include" column to the right of the database field name.
5. If you want the data to be exported in an order other than the default order then enter the position in the "File Column Position". Note if you enter any column positions then you must enter all positions or those left with a 0 will be ordered before others with a non zero.

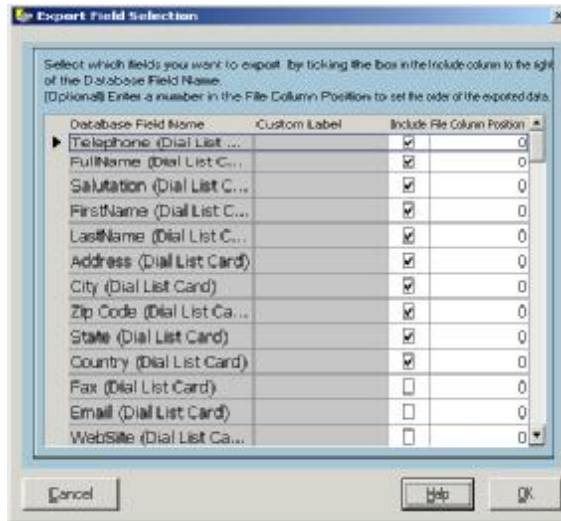


Figure 13 Export Field Selections

8 The Contacts Directory (Advanced Only)

Overview

When you select Contacts from the View drop down menu, the Contacts directory is displayed. This also appears when you add a contact by pressing <F12> from the CallAssist Main screen. While the Dial List is the master list of numbers for a particular campaign, the Contacts screen is the master list of all contacts. The Contacts information includes typical fields such as first name, last name, company, two telephone fields, fax, industry (SIC), and two sets of address details. In addition it contains a number of user definable text, date, number and yes/no fields.

A special field called 'Classification' allows contacts to be classified into groups. It is possible to add all contacts of a certain classification group to the Dial List.

There are two views for the Contacts directory: Grid View and Card View. The Grid View displays a list of Contacts in a spreadsheet-like list whereas the Card View shows the Contacts in a business card-like display. In Card View only one contact can be viewed at a time. You can change between views by clicking on the "Card View" or "Grid View" links at the top right of the Contacts screen.

Full Name	First Name	Last Name	Business Name	Telephone 1	Tele
			Bus Name	100 200 3006	
Scott Brown	Scott		Brown Inc	100 200 3002	
Pete Blue	Pete	Blue		100 200 3030	
Some Body	Some	Body	ABusiness	1234	151
New Contact	New	Contatc	BusinessNAME	123 456 7890	987
Jo Doe	Jo	Doe		100 200 3003	
	John	Fendino			
	John	Fendino			
	Fred	Livson			
	Fred	Livson			
Michael Savage	Michael J	Savage	Acarda	647 577 6911	
Megan Smith	Megan	Smith		100 200 3040	
Bob Smith	Bob	Smith	Business Name...	100 200 3010	
	Ken	Steveson			
	Ken	Steveson			

Record: 6 of 15

F1 Help F5 Current To Dial List F6 Classification To Dial List F7 All To Dial List F11 Dial

Figure 14 Contacts Directory Grid View

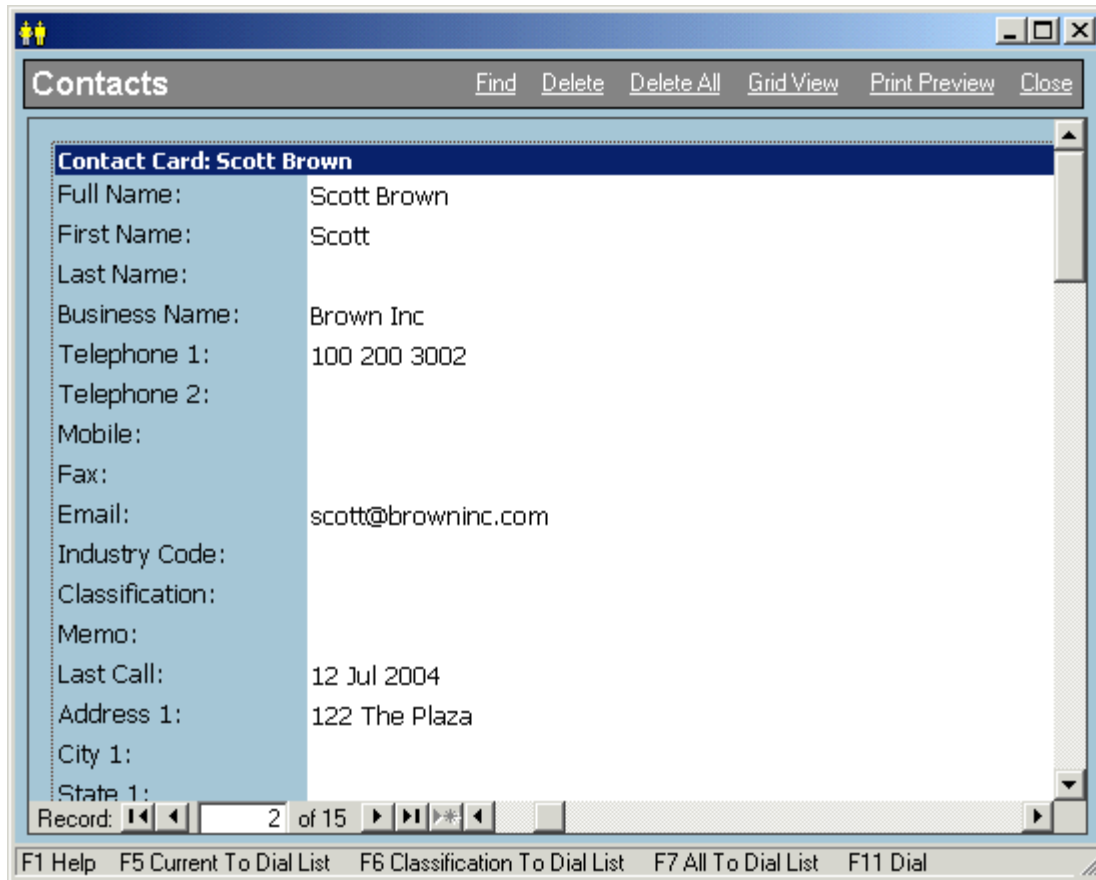


Figure 15 Contacts Directory Card View

Moving Through and Sorting the Contacts

You can move through the Contacts by using the scroll bars or you can use the small buttons underneath the table. The button with arrow pointing left to a solid line will move the cursor to the first record on the table, the button next to it with just the arrow pointing left will move to the previous record. Next to the box which tells you what record number you're cursor is on are three more buttons. The arrow pointing right moves to the next record, the arrow pointing right to a solid line will move to the last record of the table, and the arrow pointing right to the asterisk will add a new record and put your cursor in the add new record fields at the top of the table.

Records are sorted by default by last name then first name. You can also resort the table yourself by clicking on any of the field titles at the top of the grid, e.g. Business Name, Telephone1 etc. Once one of these titles is clicked the table will automatically resort all records by that field.

Adding and Changing Records Manually

You can add records manually by typing directly in the 'Add New' row located at the top of the table. Once you've finished typing, press the <Enter> key to exit or click the arrow

pointing right to the asterisk at the bottom of the table and your record will be saved. If you do not want to save your changes, press the <Esc> on your keyboard. You may need to press it a few times to escape from each field one at a time. You can also change a single record by clicking in the field with your mouse and making the required change.

Deleting Records

You can delete individual records from the table by selecting the entire row and clicking the “Delete” link at the top of the grid or pressing the <Delete> on your keyboard.

To delete the entire list, click on the “Delete All” link at the top of the screen and all contacts will be deleted.

Updating the Contacts Directory From the Dial List

When you set up your Dial List by importing a list of numbers, or by entering in details manually, you may like to have a record created in the Contacts directory as well, if it isn't already entered. You can set CallAssist to automatically create a new record when a number in the Dial List is selected that is not in Contacts directory. Do this through the Options menu, Settings, General Tab by ticking the “Auto add new contact details when unknown” option.

The Dial List usually only has a full name and not separate first and last names so when you add a record to the Contacts directory the full name is automatically split into the first and last names. In most cases this split will be correct but do check in case you have a full name with more than two words.

Updating the Dial List from the Contacts Directory

At the bottom of the Contacts directory Screen is a list of three function keys you can use to transfer names and phone numbers to the Dial List.

- F5 If you press <F5>, the Full Name, Telephone1, Address1, City1, ZipCode1, State1, Country1, Email, Fax, Web Site, Business Name, Industry Code, Industry Desc, Salutation, Source of the currently selected record will be added to the Dial List by default and any other fields that have been selected in the Options menu, Settings, Custom Tab.
- F6 When you press <F6>, all the records with the same entry in the Classification field of the currently selected record will be add to the Dial List.
- F7 Press <F7> to transfer all records in the Contacts directory to the Dial List.

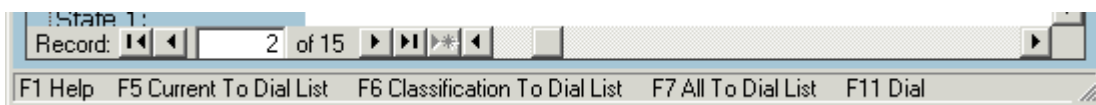


Figure 16 Contacts Directory Function Key List

9 The Dial List Report

The Dial List Report is a grid like report that allows you to apply filters and groupings to the Dial List records. At the top of the screen is a check box “Exclude Not Called” which can be ticked to show only those records that have been called. To apply a filter tick the “Response of” check box and enter into the box to the right of it the desired response. For example to find those records that have a response of “Interested” type in the word “Interested”.

To sort the records in the table, click on the field or column header that you want the table to be sorted by. To Group records by a certain field, drag the title of that field (or column header) with your mouse into the area directly above the table. To ungroup the table, drag the column header back onto the table.

Once you have the table setup as you require, you can print it by clicking on the Print Preview link to the top right of the screen. From the Print Preview screen you can print the report by clicking on the Print button at the top of the screen. If you right click the mouse over the grid you will see quick shortcuts to group the records. Close the Report box by clicking on the small cross at the top right corner.

Full Name	Telephone	Call Made	CB Date Time	Response	Time Stamp	Yes N
Jo Doe	100 200 3003	<input checked="" type="checkbox"/>			9/07/2004 10:44...	<input checked="" type="checkbox"/>
Mark Smith	100 200 3004	<input type="checkbox"/>			9/07/2004 10:44...	<input type="checkbox"/>
Jason Green	100 200 3005	<input type="checkbox"/>			9/07/2004 10:44...	<input type="checkbox"/>
Julie White	100 200 3001	<input type="checkbox"/>			12/07/2004 09:2...	<input type="checkbox"/>
Scott Brown	100 200 3002	<input checked="" type="checkbox"/>			9/07/2004 10:39...	<input type="checkbox"/>
Pete James	100 200 3000	<input checked="" type="checkbox"/>			9/07/2004 10:44...	<input type="checkbox"/>

Figure 17 Dial List Report Ungrouped

Reports - Home Sell JKL

Reports Exclude Not Called Response of Print Preview Close

Call Made ▾

Full Name	Telephone	Call Made	CB Date Time	Response	Time Stamp	Ye
True						
Scott Brown	100 200 3002	<input checked="" type="checkbox"/>			9/07/2004 10:39...	
Pete James	100 200 3000	<input checked="" type="checkbox"/>			9/07/2004 10:44...	
False						
Julie White	100 200 3001	<input type="checkbox"/>			12/07/2004 09:2...	
Jo Doe	100 200 3003	<input type="checkbox"/>			9/07/2004 10:44...	
Mark Smith	100 200 3004	<input type="checkbox"/>			9/07/2004 10:44...	
Jason Green	100 200 3005	<input type="checkbox"/>			9/07/2004 10:44...	

Record: 4 of 6

Figure 18 Dial List Report Grouped By Call Made

10 Do Not Call List

You can have a Do Not Call list within CallAssist. Any number on this list will not be able to be dialled even if it is in the Dial List. This feature allows you to adhere to FTC regulations regarding maintaining Do Not Call lists. There are two different sets of Do Not Call lists that you can choose from within Call Assist:

1. The inbuilt Do Not Call List
2. The ForbiddenCalls external Do Not Call Manager

As well as the numbers already in the list, you can add to the list as you make calls. If you call someone and they ask to be added to the Do Not Call list, you simply click on the Do Not Call button on the Main Screen. The number will be added to the Do Not Call list (either the inbuilt list or the ForbiddenCalls list), and either marked as Do Not Call in the Dial List or deleted from the Dial List straight away, depending on how you have set the “Auto Delete DNC numbers after being added to the DNC list” option (Section 10.1). If it is not automatically deleted, you can remove it later by selecting it in the Dial List, then clicking on the Delete button on the Main Screen.

The Inbuilt Do Not Call List

You can set up the Inbuilt Do Not Call list manually through the View menu, Do Not Calls or import a list. You can also select which database you will use as your Do Not Call list – this allows different users of the software on different computers to share the same DNC list.

To use the Inbuilt Do Not Call list, you need to select it rather than the ForbiddenCalls list. To do this, click on the Options menu, Database Locations submenu, and select “CallAssist DNC database”. You can then click the select button and choose the Do Not Call database you wish to use. You must either use the default Do Not Call database that was installed with your version of CallAssist on your workstation; or the default Do Not Call database that is installed on another workstation. The default database is called: DoNotCall.mdb and is located in the main application folder, e.g. C:\Program Files\Acarda\CallAssist.

If you had previously selected to use ForbiddenCalls, you won’t be able to choose a database without first clicking on the Options menu, Settings, then the Do Not Call tab. After that you’ll need to un-tick the check box named: “Use external DNC Manager ForbiddenCalls”.

11 Setting up CallAssist Options

Under the Options menu you find submenus “Settings”, “Support Tables”, “Setup Grid” and “Database Locations”

Settings

The Settings screen is where you set up how you want CallAssist to function. It has seven tabs:

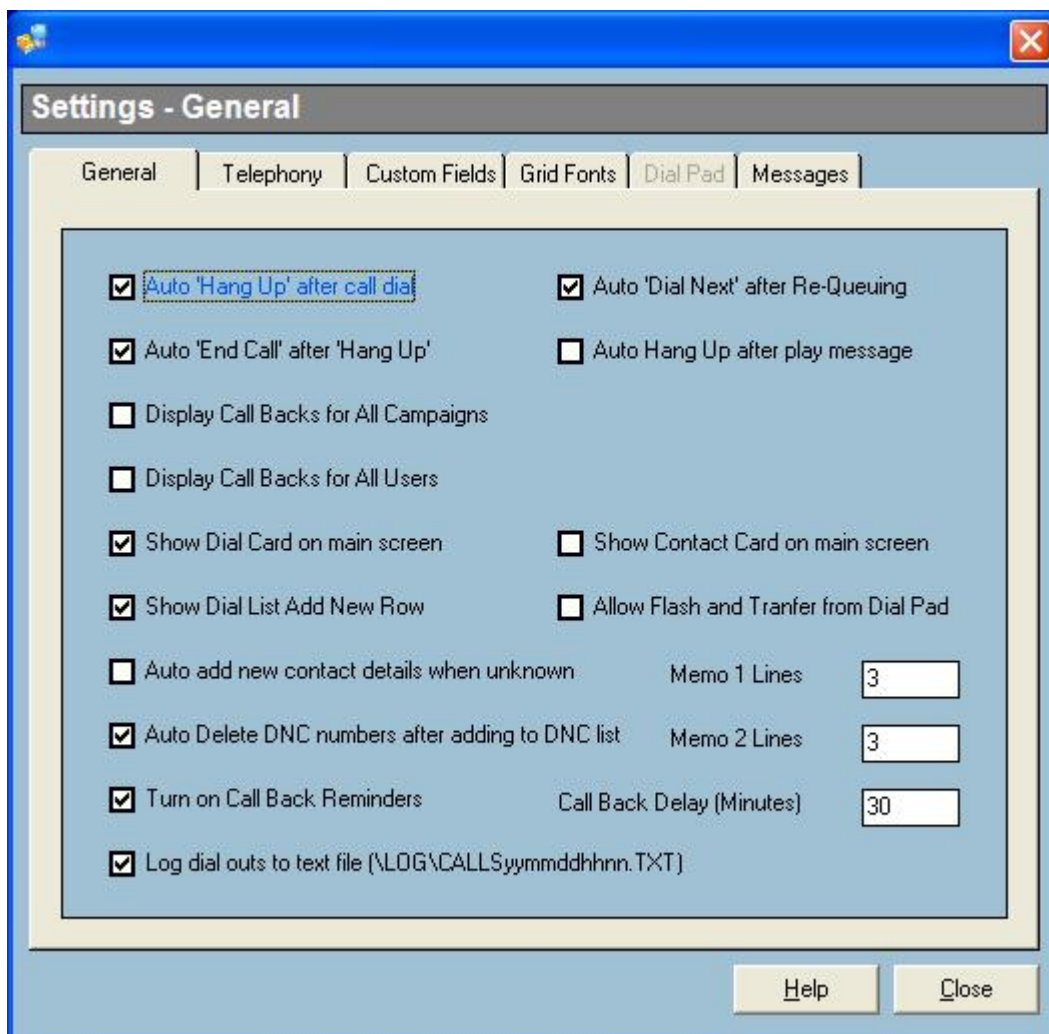


Figure 19 Settings Dialog – General Tab

General Tab: Setup how you want CallAssist to be displayed and whether you require log files to be kept or not.

-
- Telephony Tab: Select modem to use plus how to treat numbers in the Dial List when you want to make outgoing calls.
- Custom Fields Tab: Setup which Contacts directory fields are to be saved in the Dial List user defined text fields.
- Grid Fonts: Set the font and font size to be displayed in the grids and card views and the script window.
- Dial Pad:@ Set the behaviour of the Dial Pad if call transfer is enabled.
- Messages:@ Set the location and number of available pre-recorded messages that can be played through the modem.

11.1.1 General Tab

11.1.1.1 Auto 'Hang Up' after Call Dial (usual setting is ticked)

This setting would usually be ticked, as once the modem has dialled a number you would want the modem to release the call (hangup) so you could take it on your phone. In some circumstances, for example if your headset is connected via your modem, you will not want CallAssist to hangup the modem automatically. In cases such as this, you can turn off auto hangup by un-ticking the Auto Hangup after Call Dial check box. When the Auto Hangup tick box is ticked, the End Call button on the Main Screen is available. When it is un-ticked (Auto Hangup turned off) the Hangup button on the Main Screen is available.

11.1.1.2 Auto 'Dial Next' after Re-Queuing

Tick this setting to have the next number dialled automatically after the current number has been re-queued.

11.1.1.3 Auto 'End Call' after 'Hang Up'

Tick this setting to have the call timer stop as soon as Hang Up occurs. Leave unticked if you want to go on timing the call after your have hang up for example while you make notes.

11.1.1.4 Auto Hang Up after play message@

When this option is selected and a message is played then at completion of playing the message and the stop message is pressed the modem will drop out of the call.

11.1.1.5 Display Call Backs for All Campaigns[@]

When this option is ticked then going in to view Call Backs will display all Call Backs for All Campaigns, not just the current Campaign.

11.1.1.6 Display Call Backs for All Users[@]

When this option is ticked then going in to view Call Backs will display all Call Backs for All User, not just for the current logged on user.

11.1.1.7 Show Dial Card on main screen

In most cases you will want to show the Dial List Card on the main screen. Do so by ticking this setting.

There may be instances where you have very few outcome fields so they can be displayed adequately by the Dial List Grid. In these cases un-tick this setting. If the Contact Card is in use then it will fill the entire left side of the main screen. If neither the Dial List Card nor the Contact Card are used then the Dial List Grid will fill the whole screen.

11.1.1.8 Show Contact Card on main screen[@]

In the case where the Contacts directory is not used or is only used after a call has been made it may be appropriate to turn off the Contact Card on the main screen. By un-ticking this setting the Contact Card will be hidden and the Dial List Card will fill the entire left side of the main screen. Doing this has the advantage of allowing more Dial List Card fields to be displayed.

The Contact Card is useful when you have added numbers to the Dial List from the Contacts directory. Tick this setting to show the Contact Card.

11.1.1.9 Show Dial List Add New Row

When this is ticked it allows for new Dial List numbers to be added manually into the Dial List Grid through the new row displayed at the top of the grid. Un-ticking this option hides the "Add New" row.

11.1.1.10 Allow Flash and Transfer from Dial Pad

This option enables the Dial Pad to be used to Flash and Transfer calls, ticking this option enables the Dial Pad Tab to set the Dial Pad up.

11.1.1.11 Auto add new Contact Details when unknown[@]

If selected, CallAssist will automatically create a new record in the Contact Directory when a number in the Dial List is selected that is not in the Contact Directory. As you are talking to the person you have phoned you can press F12 to display the Contacts directory and the new record will be shown. The record will have the phone number from the Dial List entered in the Telephone 1 field, and the Name will be split between the First Name and Last Name field. You can then enter in the details for the rest of the fields as you are talking to the person.

If you don't have this option selected, when a call is made that isn't in the Contact Directory, and you open the Contacts directory to update it, you will have to select New from the Navigation buttons and enter the phone number as well as the other details manually.

For this feature to work properly, it is important that phone numbers in the Dial List have the same number of digits as in the Contact Directory e.g. local numbers need to be treated the same in both places - either they both have the area code displayed or they both leave the area code off.

11.1.1.12 Memo 1 Lines / Memo 2 Lines

These two options allows you to set the number of lines that are displayed in the Dial List Card against the Memo 1 & 2 fields.

11.1.1.13 Auto Delete DNC numbers after being added to the DNC list

When you are requested to add a phone number to the Do Not Call List, you press the Do Not Call button on the main screen. If you want that number to automatically be deleted from the Dial List at the same time, tick this option's check box.

11.1.1.14 Turn on Call Back Reminders

When calls are overdue and require call backs the main screen can flash a message that reads "Click to view Call Backs". To enable this, tick the "Turn on Call Back Reminders".

11.1.1.15 Call Back Delay (Minutes)

Set the number of minutes in this option for the interval that a Call Back is set to be rescheduled.

11.1.1.16 Log dial outs to text file

CallAssist can log all calls you make to a text file. When the Dial List is cleared, the text log file will not be cleared, so you can keep a backup record of call details. The text file is stored in the CallAssist application directory in a sub-folder called LOG, and with a filename format of: CALLSyymmddhhnn.txt where "yymmdd" stand for year, month and day, and "hhnn" stands for hour and minutes (e.g. time) of the first call out in the log file.

If you want to keep a record of call responses, after you have finished making your calls, export the Dial List results.

11.1.2 Telephony Tab

The Telephony Tab is where you select your modem, and set number options for outgoing calls, plus set up default delay time for call backs.

11.1.2.1 Telephony Device Selection

Click on the down-arrow to the right of the Modem Device box and select the modem CallAssist is to use. This list is taken from installed modems on your computer.

To setup CallAssist to make calls, you must connect the voice modem and the telephone you will be using to speak to the called person into the same telephone line.

11.1.2.2 Dialling Prefix Settings

When using CallAssist, you may want to adjust numbers before they are dialled. For example, a number may have area code digits when you don't need them for local outbound calls, or it doesn't include the number required to reach an outside line.

11.1.2.3 Dial-Prefix

Enter in this box any prefix you may want added to the phone number before it is dialled, e.g. the number to get an outside line. This is only added to phone numbers that don't fall into the Not To Dial category, i.e. their beginning digits don't match those in the Not to Dial box. To add a prefix to Not to Dial numbers, use the NTDial-Prefix box.

11.1.2.4 Not to Dial

In the Not to Dial box, enter any digits at the start of the phone number that you want CallAssist NOT to dial, e.g. your Dial List may list all numbers with the area code at the beginning of the number. By entering in the local area code in the Not To Dial box, CallAssist will strip these digits from the beginning of the number before dialling it.

11.1.2.5 NTDial-Prefix

CallAssist can add numbers to the beginning of a number that has had the first digits removed (as set in the Not to Dial box). You can use this for example, to add the number to get an outside line, e.g. you may enter the number 1, which is used to get an outside line.

For prefixes for all other numbers, e.g. those that haven't been subject to the Not to Dial number criteria, use the Dial-Prefix box to set a prefix.

11.1.3 Custom Fields Tab[®]

11.1.3.1 Dial List User Defined Text Fields

By default when creating a Dial List from the Contacts Directory the following fields are automatically populated to the Dial List, Full Name, Telephone1, Address1, City1, ZipCode1, State1, Country1, Email, Fax, Web Site, Business Name, Industry Code, Industry Desc, Salutation, Source, in addition you can populate other fields into the user definable text fields on the Dial List. On the left side of this grid you will see the Dial List Text fields, Dial List Text1 through to Dial List Text19. These are special user definable fields in the Dial List. They can be use to enter Outcomes or to store information from the Contacts directory. To the right of this list you can select a drop down list which lists Contacts directory fields whose data can be saved into the Dial List field when Contacts are added to the Dial List. To not auto fill the Dial List field set the drop down list's value as '<Empty>'.

11.1.3.2 Export Date, Time, Boolean, and Numbers as Text

Tick this setting to export data as text. If un-ticked, Date, Time Boolean, Numbers will have a “#” symbol before and after the data. In most cases have this setting ticked.

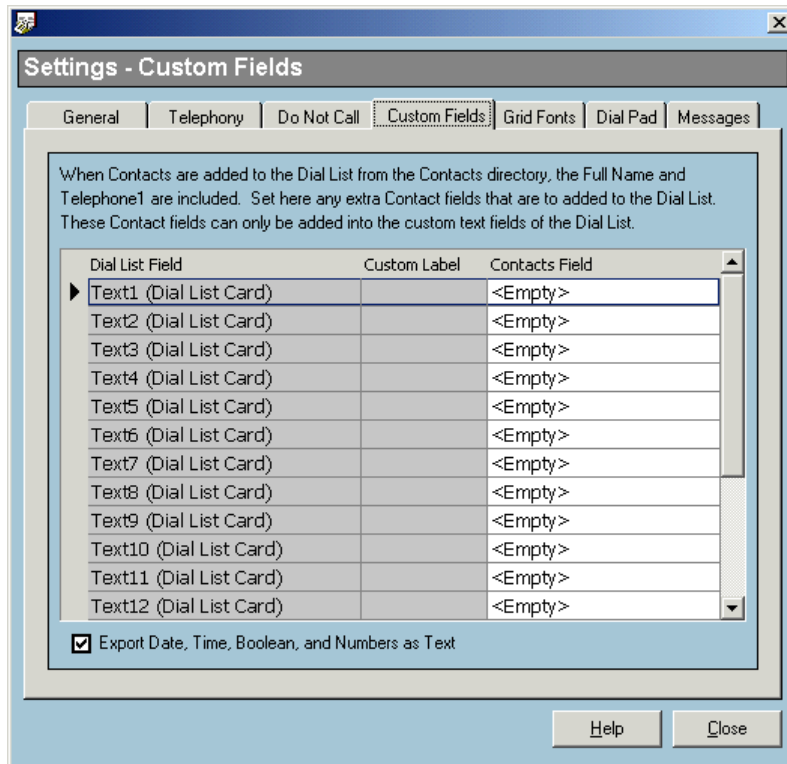


Figure 20 Settings Dialog – Custom Export Tab

11.1.4 Grid Fonts Tab

On the Grid Fonts Tab you can set the Font and Font Size for the grid headers, grid rows and the script window, if at anytime you wish to return the fonts to their defaults click the Reset button.

11.1.5 Dial Pad Tab[@]

If the “Allow Flash and Transfer from Dial Pad” is ticked on the General Tab then this Tab is enabled. Note that Flash and Transfer are dependant on the capabilities of your modem so will need to be tested first before using in a live campaign.

11.1.5.1 Flash Button

This allows you to set the symbol to appear on the Flash key, by default “!” is the Flash symbol.

11.1.5.2 Preset Buttons

You set up in here the telephone numbers that the user definable Dial Pad transfer buttons are to be set to.

11.1.6 Messages Tab[®]

On this Tab you set up the pre-recorded messages that you want to be available to be played during a call. When a message(s) is set up in here the Display Name shows in the Action popup menu.

To create a message, the message needs to be recorded in a .wav file format, the optimum setting for the .wav file is 8000Hz, 16 bit, mono, this will be suitable for most modems. The file can be created in any .wav recorder e.g. Microsoft[®] Sound Recorder or Acarda WavRecorder available from www.Acarda.com.

Save the message to the application install directory's Messages subfolder, on the Messages Tab enter a Display Name that will show on the Action popup menu, click into the File Full Path and click on the button at the end of the field which will open the Windows file browse dialog to select the location of the file, in the List Order enter a number to order the messages on the Actions popup menu.

Support Tables

A support table contains information that is used elsewhere in the software. Usually wherever there is a drop down list in the software you will find a support table that contains the information that is displayed in the list. A drop down list is used in many places rather than free text boxes so that the user is forced to select from the given options. This makes it faster for the user and also forces a consistency in the way words are spelt or items are classified. CallAssist has the following support tables that need to be set up so that user can select from drop down lists: Responses, Classifications, Industry (SIC), States, Country, and City.

When editing support tables you can add a new record by clicking into the "Add New" row at the top of the grid. To delete a record select the entire row and then click the delete key. You can select multiple records by holding the <Ctrl> key on the keyboard while clicking the mouse on the records you want to select.

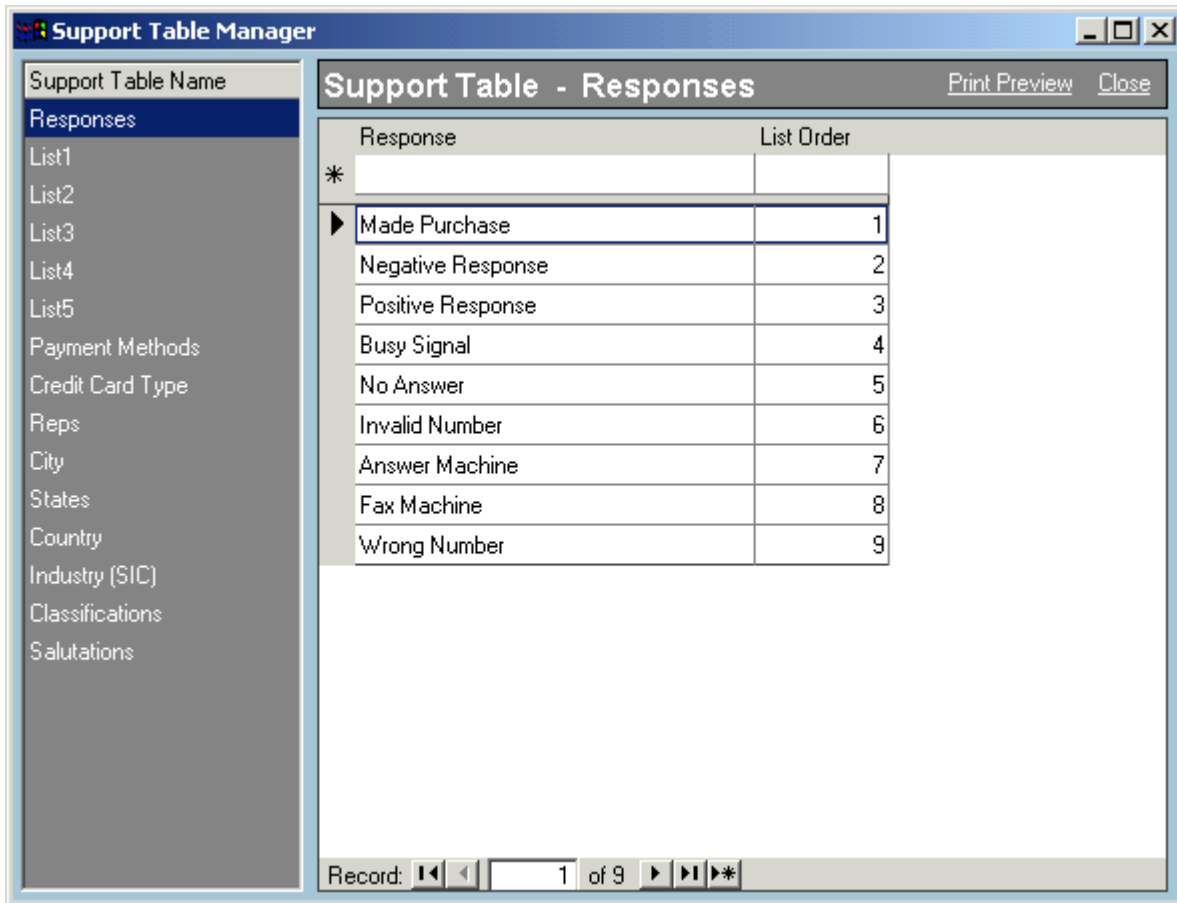


Figure 21 Support Table Setup

Grid Custom Setup

Most fields in the various grids and card views can be configured with custom labels. Under Grid Custom Setup submenu you have the option to set up custom labels for each of the Dial List grid/card and Contacts grid/card. Clicking on one of these options will open a dialog where you will see listed the field name and in brackets the grid name of each configurable field. To the right of the field name is a column headed "Label" Type in here any custom labels. If nothing is found then the default label will be used. The next column headed "Show" is used to hide or show the field in the grid. Tick the check box to show the field or have it un-ticked to hide it. The next column is "Read Only", this is used if you want the field not to be able to be edited.

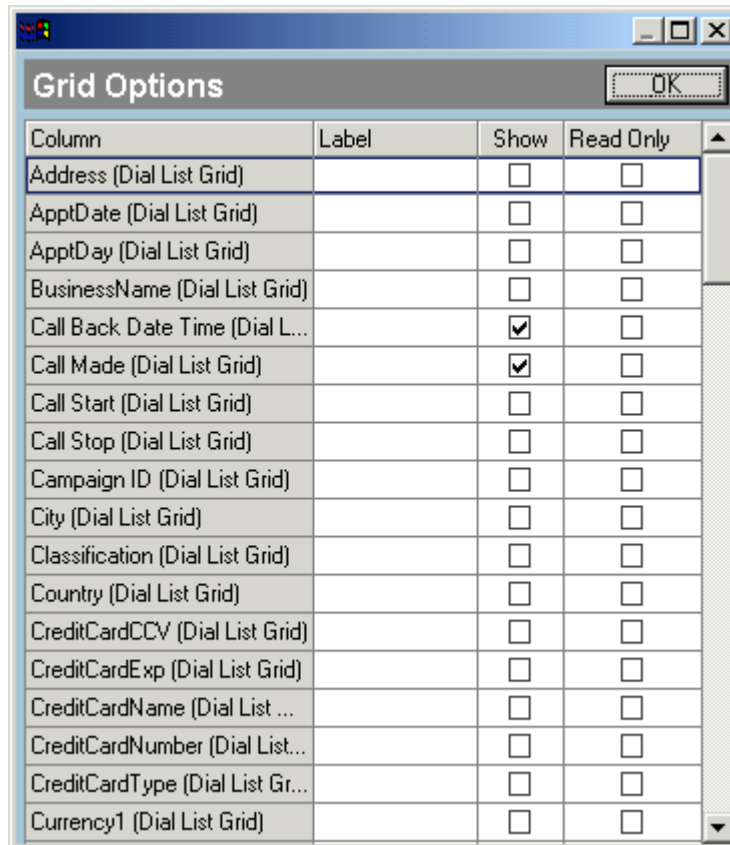


Figure 22 Grid Options

Grid Position Setup

This option allows you to set the positions of the columns in the Dial List and Contacts cards that are displayed on the left of the main screen. To change the column positions click on to the column title and drag to the new position. These changes are saved between sessions.

User Setup

This option allows you to set up multiple users and can also set the access level that a user has. The options are Read/Write, Limited, Read Only and Deny. The most common access level is Read/Write which gives the user total control, the Admin user should always use this access level. Limited access lets the user dial telephone numbers and record responses but doesn't let them change any Option menu settings or import, export and delete options under the File menu. Read Only access only lets the user view the dial list but does not give them access to dial numbers or change recorded information. Deny access will exclude the user from accessing the application.

If there is no requirement to use a login you can set CallAssist to “Auto Login”. Go to the Desktop or Start Menu shortcut to CallAssist and right click and select Properties, edit the Target to include at the end the user name and password.

For example the default target will be "C:\Program Files\Acarda\CallAssist\CallAssist.exe" Change this to be "C:\Program Files\Acarda\CallAssist\CallAssist.exe" admin,admin This will then log you on automatically as the user “admin”, password “admin”

The Change Password menu item in the Options menu allows you to change your password if required.

Database Locations

The option Database Locations allows the user to change the location of the databases from their default location. This may be of use if you have all your data in a particular location on your computer for ease of backing up, normally these locations should not need changing.

Database Maintenance Utility

The Database Maintenance Utility is a separate application that can be started from CallAssist to enable the compact and repair of the CallAssist databases. It is advisable to run this application periodically to maintain the databases in the optimum state. When you click on this menu option you will be warned that CallAssist will be closed, this is necessary to unlock the database. CallAssist will close and the Utility will open (Figure 23) , you should select the database by clicking on the button at the right of the dialog, the default location for the databases is normally C:\Program Files\Acarda\CallAssist. Select a database then click the “Repair & Compact” button. The two main databases to use the Utility on is Dialer.mdb and DoNotCall.mdb. The Utility should be used after each import of numbers into the database.

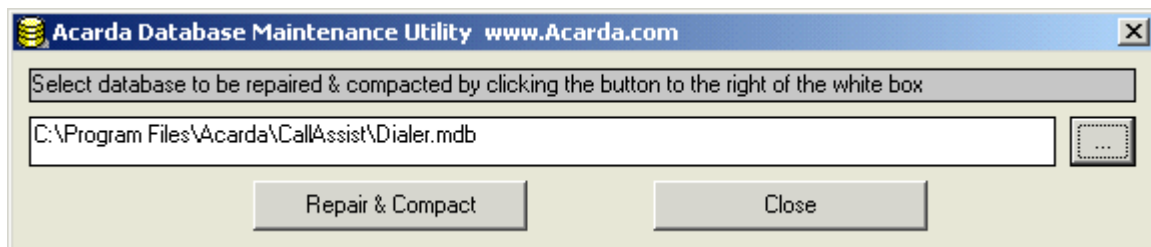


Figure 23 Database Maintenance Utility