

CallAssist v5 Quick Tips Guide

This is a quick guide to detail how to make calls with CallAssist

Novemeber 2004, Document v1.1

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1 The Dial List Card

In CallAssist the main Dial Card Grid displays all the telephone numbers that have been imported and setup for you to call. CallAssist is optimised for you to work with the telephone number at the top of the Dial Card Grid. It is of course possible to select another telephone number in the list and then click the 'Dial' button on the toolbar to call it however the most appropriate way is to always work with the top record in the Dial Card Grid. The Dial Card Grid is a summary list of all numbers but the currently selected record can be displayed in more detail in the Dial List Card on the left side of the screen. It's the Dial List Card that you would usually edit and update as a result of the call.

Note the Dial List Grid displays those records that have not been called first. These are the records with the 'Call Made' box unticked. After that in the list will be those records that have been called. When you click the 'Re-Queue' button it shifts that record to the end of the list of those records that have not been called so you can try again later.

2 The Dialing Process

A common question is "what is the difference between the 'Dial' button and the 'DialNext' button? The 'Dial' button is usually only used for the first call you make. The process is as follows:

1. Select the first number at the top of the Dial List.
2. Click on the 'Dial' button or press <F11> to dial out.
3. CallAssist will start to dial the number. Pick up the telephone that is connected to the same line as your modem.
4. If the call is answered, work through your scripts and record the responses in the Dial List Card. Click on the 'Response' button or press <F3> to select a Response or set a Call Back.
5. 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.
6. 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 or just click the 'Re-Queue' button without selecting a Response. Usually you only select a Response once you have spoken to the person and then the Response is the final outcome of the call.
7. 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. To do so click menu Options then menu Settings. In the General Tab tick the box that reads 'Auto Dial Next after Re-Queuing'.

Note the 'Call Made' check box is ticked automatically when the record is dialled so you do not need to edit it. If you click the 'Re-Queue' button then the 'Call Made' is automatically unticked.

3 Call Duration & Settings

CallAssist can time the duration of calls. When you click the 'Dial Next' button the timer starts and when you have finished the call and click the 'Dial Next' button again the last call timer stops and the new call timer starts.

The procedure for making a call can vary depending on what settings you have. You can modify settings via menu Options, then menu Settings. There are really three approaches:

i) Don't worry about timing the calls so use auto hang up.

Tick - "Auto 'Hang Up' after call dial"

Tick - "Auto 'End Call' after 'Hang Up'"

In this case the timing information should be ignored. The device will hang up a few seconds after dialing and the timer will stop then. The caller has less buttons to click with this option.

ii) Time the calls with auto hang up.

Tick - "Auto 'Hang Up' after call dial"

UnTick - "Auto 'End Call' after 'Hang Up'"

In this case the timer stops either when the 'End Call' button is pressed or when the 'Next Dial' button is pressed. Just as in the first option you can not use the play or record message ability when using auto hang up.

iii). Stop timing the call after the manual hang up of the modem

UnTick - "Auto 'Hang Up' after call dial"

Tick - "Auto 'End Call' after 'Hang Up'"

In this case the timer stops either when the 'Hang Up' button is pressed or when the 'Next Dial' button is pressed. This approach is best for those who do not want to include the time it takes to make any notes after the call has been disconnected with the person you called.

iv). Stop timing the call after the manual End Call press

UnTick - "Auto 'Hang Up' after call dial"

UnTick - "Auto 'End Call' after 'Hang Up'"

In this case the timer stops either when the 'End Call' button is pressed or when the 'Next Dial' button is pressed. Before you have the option to press 'End Call' you must press the Hang Up button. This approach is best for those who want to include the time it takes to make notes after the call has been disconnected with the person you called.

Please note in most cases you should **have the following settings ticked:**

Tick - "Auto 'Dial Next' after Re-Queueing"

Tick - "Auto Hang Up after play message"

Tick - "Auto tick Call Made on 'Dial Next'"

You only need to click the 'End Dial' button at the end of a call when you do not want to automatically have the next number dialed.