

Rev up your phone sales! Mistake-proof your dialing process for speedy results

✎ Applications: ACT! Classic/2006



AT A GLANCE

Your business grows when you make hundreds of calls and enter resulting notes, but all that time you spend dialing phone numbers, creating notes and crafting follow-up activities limits your call time. With ACT!'s phone Dialer feature, ACT! does the hard work for you — so you can focus on wooing your prospects.

To use the phone Dialer to make and record calls, we'll:

- Connect your phone to your modem and test the modem's functionality.
- Configure ACT! to use your phone and modem to make calls.
- Step through the phone call and follow-up process so you can make your first call with confidence and accuracy.

There's no doubt about it — the more calls you make, the more sales you'll close. But if you've ever tried to make 20 calls in an hour, you know that the logistics of dialing the right number and creating notes makes the process slow work — even downright annoying. Why not configure ACT! to do the mundane work for you so you can concentrate on what you're really good at? To jump into automating calls, configure ACT! to work with your analog phone and computer's modem to dial a number listed on any record with just a few clicks. When complete, ACT! will automatically create a Note for you — all you to need to is work your charm and type the Note details.

Create a modem connection

The keys to working with Dialer are a working modem, an analog phone, and

ACT!. If you have a modem installed or attached to your computer already, you're ready to connect your phone and test the modem's functionality. If you don't have one installed, you need to get one.

Guarantee you're prepared

Employees in large and mid-sized businesses should check with the IT department to ensure you have the following:

- An analog phone line near your desk.
- An analog phone.
- A working modem (internal or external).
- Two RJ-11 phone cords.

That's analog, not digital

Analog phones and phone lines are common in homes. Most companies use digital, or PBX, phones because they offer greater

functionality. If you need to dial a 9 to access an outside line at your office or your phone has many more features than your home phone, you probably have a digital phone line.

Purchase the right equipment

Small business owners can often make purchases without consulting off-site IT. If your computers are under warranty, however, you may void the warranty by installing an internal modem. For warranty and ease-of-use reasons, we recommend you purchase an external modem.

Your new modem will come with instructions for installation. Check with the sales clerk to make sure you buy the proper serial cable to connect the modem to your computer. You also need to ensure you buy a modem that's compatible with



The on-going challenge of increasing productivity and decreasing inefficiencies can be overwhelming — often leaving business owners wondering where to begin. By Design Solutions helps you put together the pieces of the complex puzzle of accounting and business management systems. We not only help you evaluate and **S**elect the right version of QuickBooks, but help you **I**mplement it, **M**aximize it's use, **P**erform tasks more efficiently, **L**earn through hands on training, and then **E**nlist our help when you need support! It's just that **SIMPLE!** View our website for more information at www.ByDesignSolutions.com

your operating system (OS), so make sure you know your computer's OS and service pack before you shop.

To determine your operating system:

1. Select Start | Run, and type *winver* in the Open text box. Click OK.
2. Examine the About Windows dialog box and take note of the operating system and service pack, as shown in **Figure 1**.



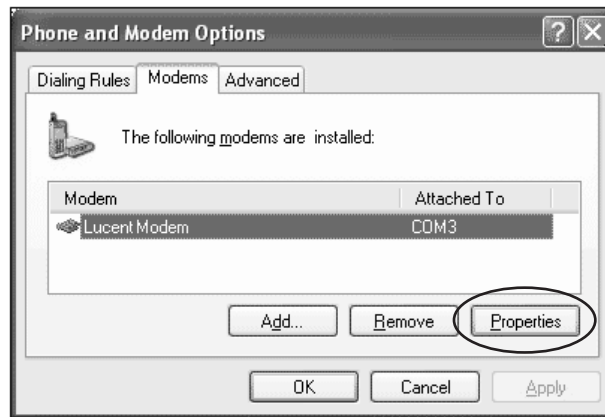
1: Gather your operating system and service pack information before buying a modem.

Don't buy cheap: Win modems — lower-end modems available at local electronics stores — may not work with ACT!, so don't buy one. Instead, go for traditional modem, which you can buy at most local electronic stores.

Test your modem installation

Once you've installed the modem, you should check that Windows recognizes it and that it functions. To do so:

1. Select Start | Settings | Control Panel | Phone And Modem Options.
2. In the Phone And Modem Options dialog box, select your modem and click the Properties button, as shown in **Figure 2**.
3. In the Modem Properties dialog box, select the Diagnostics tab and click the Query Modem button, as shown in **Figure 3**. The computer sends a series of "AT" commands to the modem.

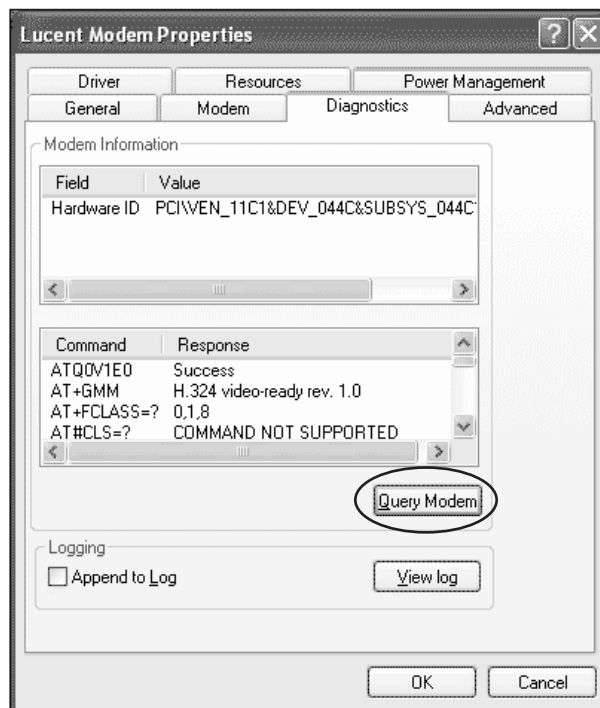


2: Review a list of each installed modem from Windows Control Panel.

Connect your modem and phone

Manuals usually start their modem installation instructions by telling you to plug one end of the modem/telephone cable into the RJ-11 plug in the back of your computer and the other end into your telephone service line wall jack socket.

Warning: Just because your phone cords will plug into the wall socket doesn't mean the socket is an analog phone line. Offices often use PBX (Private Branch Exchange) systems that are digital, not analog. Plugging your modem into a digital phone socket will destroy your modem.



3: Query the modem to make sure it works before you try it in ACT!.

Connect one RJ-11 phone cord from the Data connection to the wall's RJ-11 jack, and the second phone cord from the Phone connection to your analog phone, as illustrated in **Figure 4**. Now, pick up the phone and check for a dial tone.

Tip: You can test the modem's dialing capabilities using Windows Phone Dialer. To do so:

1. Select Start | Run, and type *dialer* in the Open text box. Click OK.
2. Click the Dial button, and enter a phone number in the Connect To text box. Click Place Call.

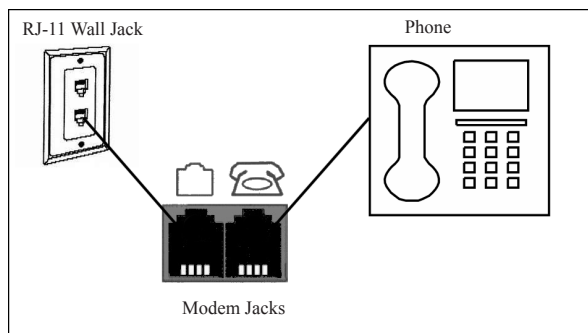
If you've connected everything properly, your modem should dial the number you entered.

Configure ACT! to make the call

With your hardware set up, it's time to configure ACT!. You'll find the ACT! Classic or 2006 configuration a snap.

To configure ACT!'s Dialer:

1. Select Tools | Edit Preferences (in Classic, select Edit | Preferences).
2. In the Preferences dialog box, select the Communication tab and click the Dialer Preferences button. (In Classic, simply select the Dialer tab.)
3. As shown in **Figure 5**, select the Use Dialer check box to enable the Dialer.
4. Select your modem from the Modem Or Line dropdown list.
5. Select the Start Time Automatically On Outgoing Calls if you want to time your calls (recommended).
6. Select the Hide Dialer After Dialing dialog box, if desired.



4: Connect the phone to the wall via the modem so that you can make regular calls and let ACT! dial calls for you.

2006 Warning: Don't hide the Dialer in 2006. Although doing so frees up space on your desktop, 2006 doesn't allow you to place additional calls until you click the Hang Up button on the Dialer. If it's hidden, you'll create more work for yourself later.

7. Click OK to complete the Dialer setup.

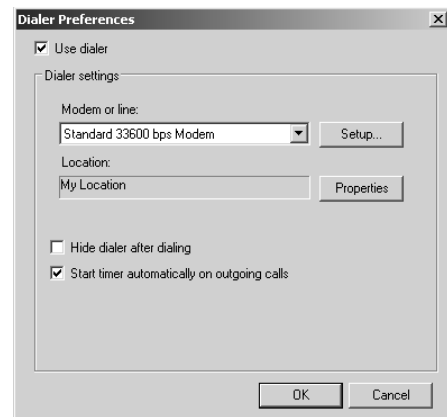
Call your first customer with Dialer

You should perform a test run with Dialer before you call an actual customer. Look up or create a record with bogus information, or use your home or cell number for your test. If you create a test record in ACT! 2006, you must leave the record and return to it before you can proceed with Dialer without getting errors.

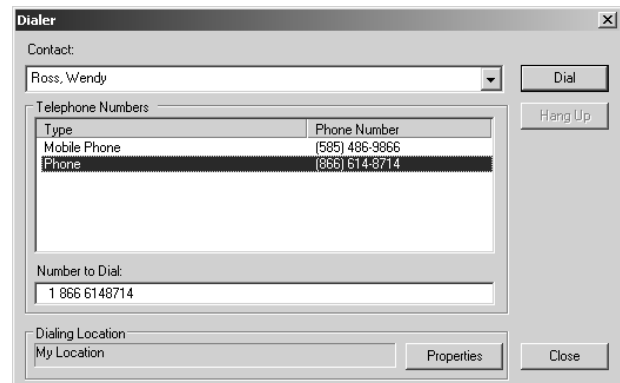
ACT! fast! In order for the call to go through, you must step through the instructions below quite quickly. Read through them carefully before stepping through the process yourself.

To use Dialer to place a call and record its history:

1. Perform a lookup of the person you want to call.
2. Click the Phone Contact **PHONE CONTACT** button on the 2006 toolbar, or the Dial Phone **DIAL PHONE** button on the Classic toolbar. The Dialer dialog box opens.
3. In the Telephone Numbers list box, select the number you want to call, as shown in **Figure 6**.
4. Click Dial to dial the call and to open the Call Status dialog box shown in **Figure 7**.



5: Enable the Dialer and desired Dialer features using the Dialer Preferences dialog box.



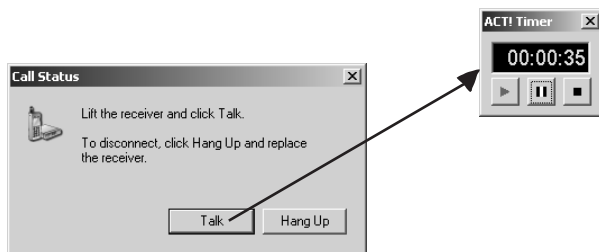
6: Select any phone number for the contact you've selected and click Dial.

5. Immediately after the modem dials the number, pick up your phone's handset and click the Talk button. If you enabled the ACT! Timer, it displays as shown in **Figure 7**.
6. When you're finished with the call, click the Stop button on the ACT! Timer. 2006 users must also return to the Dialer dialog box and click the Hang Up button.
7. The Record History dialog box opens. Enter your description and

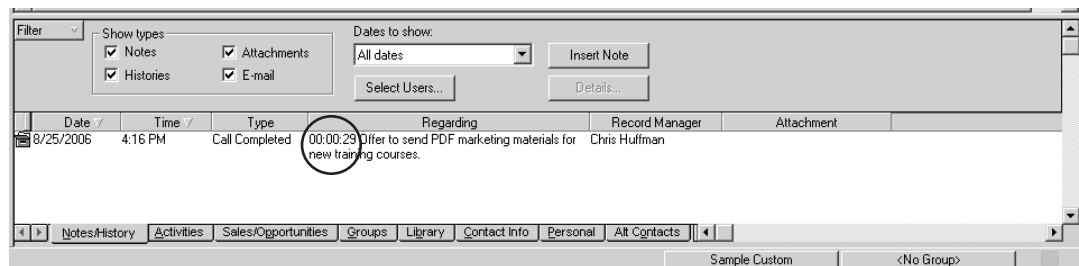
create necessary follow-up activities as usual. Click OK.

Remember, it's essential to create follow-up activities to ensure you make the sale and track your time. For more on making the most of activities, see our April 2006 article, "One giant step to streamlined activities," and our May 2006 article "Seize control of your calendar with a clear shortcut."

As shown in **Figure 8**, your ACT! Classic history note displays the exact amount of time you spent making this call. You can use this information casually, or generate reports based on call data. For 2006 users, you can view this same data (rounded to the nearest minute), by adding the Duration column to the History tab. To learn how, see the article "Don't settle for ACT!'s defaults — display all the details you need" in this issue.



7: Click the Talk button as soon as you lift the telephone receiver. The ACT! Timer displays.



8: ACT! Classic automatically adds each call's exact duration when you complete the history note.