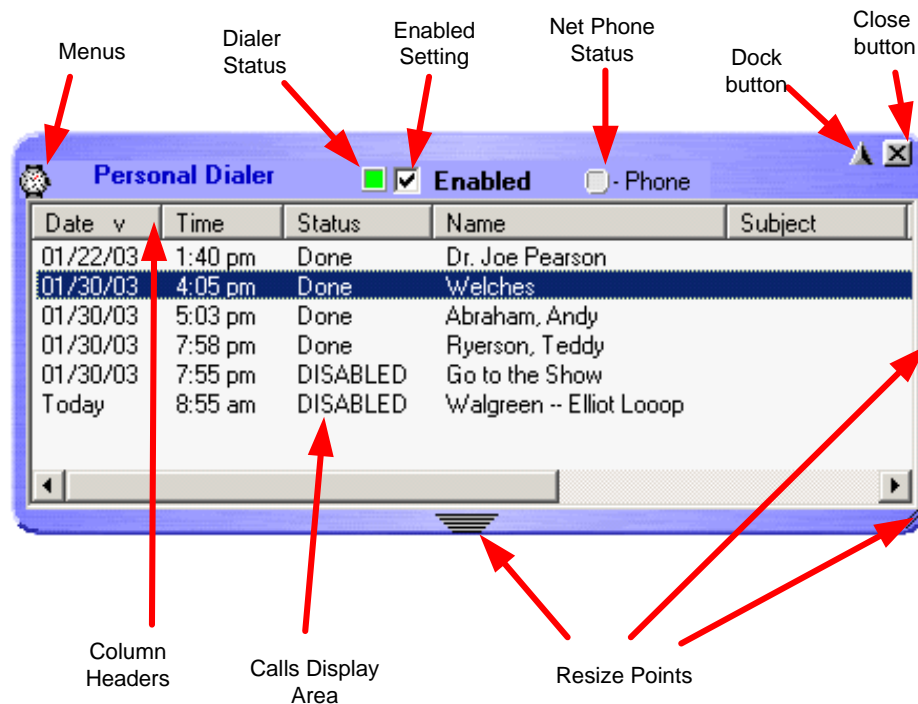


## Personal Power Dialer

The Personal Power Dialer allows Net Phone users to easily schedule phone calls to be placed later. For example, when a sales representative arrives in the morning he may know he needs to make calls to 15 of his customers, so from MS Outlook he can drag/drop the contact information of all 15 of the customers into his Personal Power Dialer. When the designated time arrives for each call to be placed the user will be presented with a pop-up screen alerting him it's time to place the call. Once the call is finished, the user will be presented with another pop-up screen requesting information about whether the call was successful and if not whether it should be called again later (for example if the party was busy).

### Overview

The Personal Power Dialer displays all calls yet to be placed as well as calls that have recently been completed, plus as the status of the dialers and the phone. This information is shown on the main screen similar to the following:



## Main Screen

- **Menus Icon** – right-click here to access the main menu options like the [“Power Dialer Setup”](#) on page 7 and Help menu.
- **Dialer Status** – this shows the present status of the power dialer. A green color indicates the dial is Enabled and no call is in progress. Other colors indicate other status values; the actual status value can be seen by hovering your mouse over this status indicator.
- **Enabled Setting** – this allows the user to easily Enable (Start) or Disable (Stop) the entire power dialer function. For example, if you need to take a break to do some paperwork, you could simply disable the power dialer until you’re ready to start making calls again.
- **Phone Status** – this shows whether the phone is idle, busy, in Do-Not-Disturb, etc.
- **Dock button** – is used dock the window back to the main screen of Net Phone or if its already docked to hide it ‘inside’ the main screen.
- **Close button** – is used to close the window.

**Note** The power dialer will continue to operate even when this window is closed, so if you want to stop the power dialer you should Disable it before closing the window.

- **Resize Points** – these can be used to change the width and the height of this window.
- **Calls Display Area** – this area shows the list of calls that have been placed or have yet to be placed (details below).
- **Column Headers** – these show what information is contained in each column. Using your mouse, you can resize and reposition these headers to customize your viewing area.

## Calls Display Area

This area shows each call that is either (1) yet to be placed or (2) that has already been completed. The available columns include:

- **Date** – this column shows the date the call is to be placed or when the call was completed. A value of “Today” is displayed if it matches today’s date.
- **Time** – this column shows the time the call is to be placed or was completed. A value of “Now” is used to designate immediately.
- **Status** – the status of the call. If this is blank the call is not due yet. Other status values include:
  - Due Now – The time has arrived for this call to be placed.
  - Overdue – This call has not yet been placed and it is overdue.
  - Done – This call has been completed.
  - DISABLED – This call has been Disabled. It will not be placed until it is enabled.
  - In Progress – This call is underway.
- **Name** – the name of the person to be called.
- **Phone** – the phone number to be dialed.
- **Account** – this shows the account code, if any, for this call. Often an account code is used to indicate something about the call like: the customer ID, the result code of the call (i.e. “order was placed”, “needs follow-up”, “unable to reach – party was busy”), etc. This account code will be attached to the call when this call is placed.
- **Subject** – this column shows the ‘subject’ of the call. This information can be added/changed up until the call is placed, at which time this information is attached to the subject field of the call.

- **Last Result** – If the call has been placed and it is either successfully completed or will try again later, this field shows what happened on the last attempt. The user chooses these result values after each call is completed:
  - Completed
  - Busy
  - Left a Message
  - No Answer
  - Wrong Number

## Functions

When you have selected an entry in the Calls you can change the entry by simply double-clicking on the desired entry.

However, if you right-click on the entry, additional menu options will appear to show other functions you may want to perform:

- **Call Now** – immediately place this call. This can be used even if the power dialer has been disabled.
- **Edit** – Allows you to Add, Change, Delete, and Copy individual entries. Entries can also be added using drag-and-drop and/or importing as described in the [“Adding Calls to the Dialer” on page 5](#) .
- **Lookup in Outlook** – lookup this number in Microsoft Outlook and open the matching contact.
- **Print Listing** – print a listing of all entries shown in the calls window. The position and width of the columns can be changed to format the printout as desired.

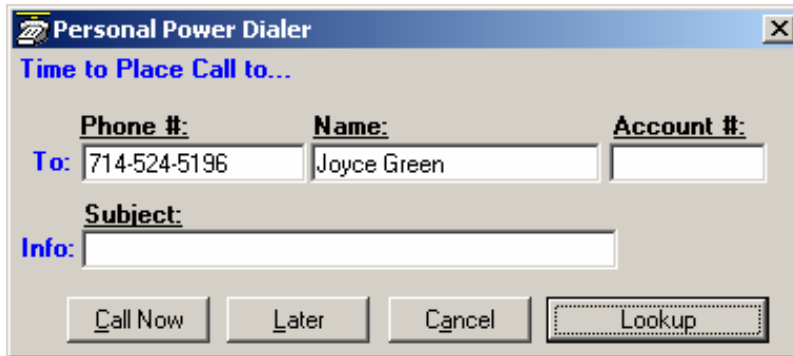
## Sorting Entries

To sort the entries simply click on the column header by which you desire the sort to occur. Click the same column header again and it will switch the sort from ascending to descending (or vice versa). Thus if you want to sort-by-name click the “Name” column header, to sort by phone number click the “Phone” column header, and so forth.

# Power Dialer Operation

## Ready to Dial

Calls in the list that are enabled will automatically pop up a screen for the user indicating that it is time to place the call. This screen is "Ready to Dial" screen. The screen will contain the information entered into the list about the caller and if the optional "User-defined" Action button is enabled, then pressing this key can cause more information to be available about the party or trigger one of a number of other functions. The user has the choice of Call Now or Later. If later is chosen, then you will be asked for a new time after which the call will return to the list. Pressing Cancel will disable the call before returning the call to the list.



**Personal Power Dialer** [X]

Time to Place Call to...

**Phone #:**  **Name:**  **Account #:**

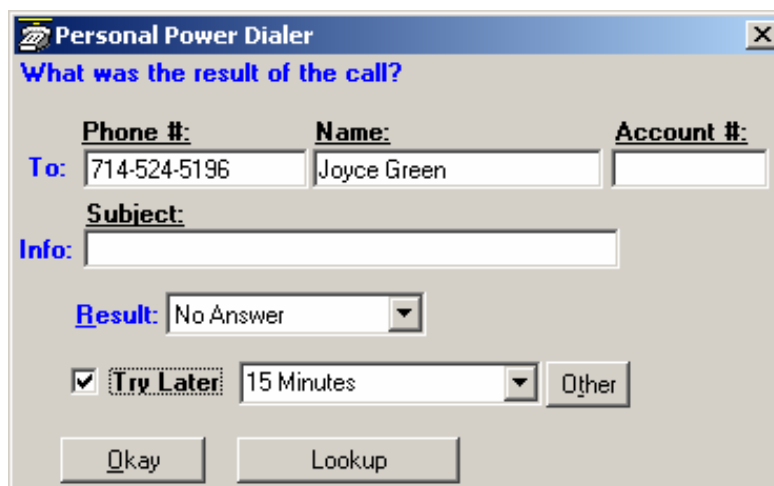
**Subject:**

**Info:**

## Results

When the call is completed, a Results dialog box appears. The status of the call can be changed, by default it is marked as "completed". If the call needs to be placed again, checking the Try Again box will open a time frame for the retry. Setting the time (an actual time or an elapsed time) and pressing Okay will place the call back into the list.

As was done in the Ready to Dial screen, an optional "User-defined" button can be provided with an action to be performed at the end of the call. This action could be anything, but typical uses would probably be to open a Journal entry or pop up an after-call survey form to take notes on the call.



**Personal Power Dialer** [X]

What was the result of the call?

**Phone #:**  **Name:**  **Account #:**

**Subject:**

**Info:**

**Result:**

**Try Later:**

# Adding Calls to the Dialer

## Adding/Changing a Call Record

Calls can be added manually, imported or use drag-and-drop techniques as explained below. First, a call can be manually added or changed at any time by double clicking on a call in the dialer list. The telephone number must be entered a name being called and optionally an Account Number and any Subject as needed. The call can be scheduled by date or elapsed time. The default date is "Today", but any date can be entered or a Calendar button is provided to pick a date for the call. Any time can be entered or any elapsed time frame can be entered. The pull down list shows some common elapsed times for placing the call. The call record will need to be enabled to be dialed at the appointed time.

### Methods for Adding Calls

Often times you may want to add multiple calls from contact or call information that might be contained in other applications. The Personal Power Dialer provides a couple of ways to accomplish this.

#### Drag-and-Drop from MS Outlook

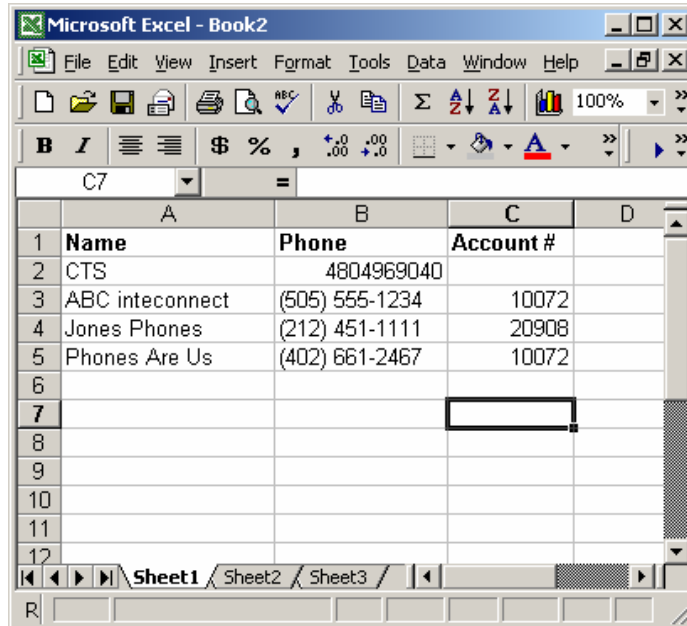
If you are using Microsoft Outlook, you can simply select one or more of your contacts in your Outlook Contacts database and simply use the mouse to drag them over and drop them on the power dials "Calls Window". Each contact will then be individually added to the power dialer allowing you to specify the date/time of each call to be placed.

#### Drag-and-Drop from Net Phone Call History

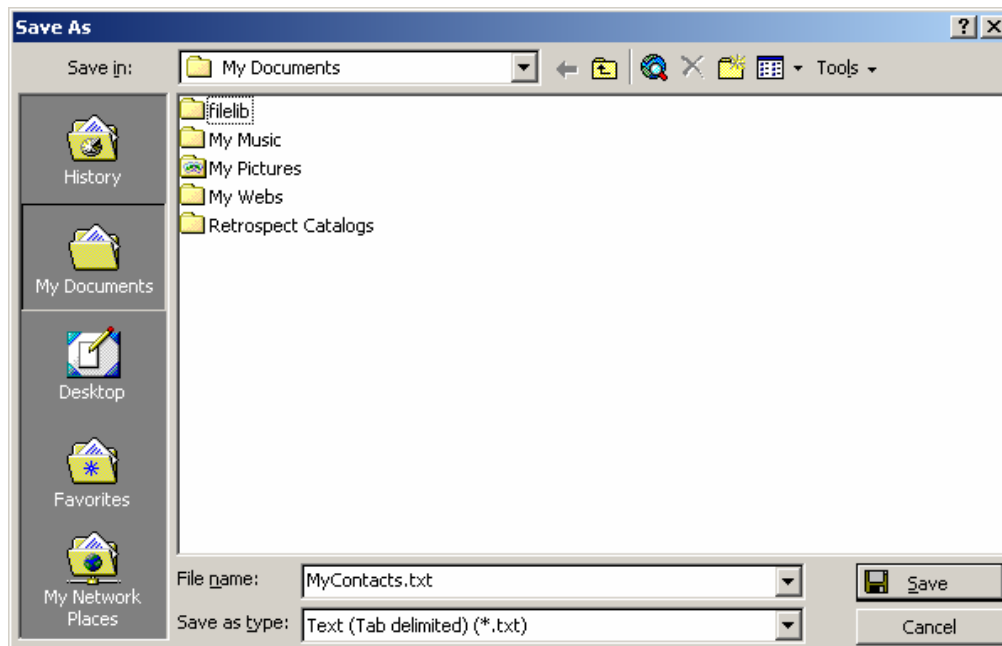
Often times you may want to place a call to someone you've called (or who called you) in the past. Since the Net Phone call history provides a complete list of all calls placed and received, you can simply find the desired call in the call history and use the mouse to drag-and-drop a copy over to the power dialer window.

### Drag-and-Drop MS Excel file

In Microsoft Excel it is quite easy to create and keep a list of desired contacts and add them into the power dialer. In MS Excel simple create a spreadsheet with at least two columns (Name and Phone number) as shown in the following example.



Then simply use "Save As" and save the file as a "Text (Tab delimited)" file, as shown in the following window. Note: The "CSV (comma delimited)" format can also be used.



Then in windows explorer simple drag this file into the power dialer window and all the contacts will be immediately added to the power dialer list of calls. Note: Alternatively, if you save this file from MS Excel directly into the ".\PDimport" sub-folder of Net Phone the entries will be automatically imported into the power dialer (see "Advanced Topics" on page 10 for more details on Automatic Imports).

### Drag-and-Drop Other files

Any program that can export contacts into a “tab-delimited” or “comma-delimited” text file format can operate with the Power Dialer. Similar to the MS Excel file, those files can then be dragged/dropped or automatically imported into the power dialer.

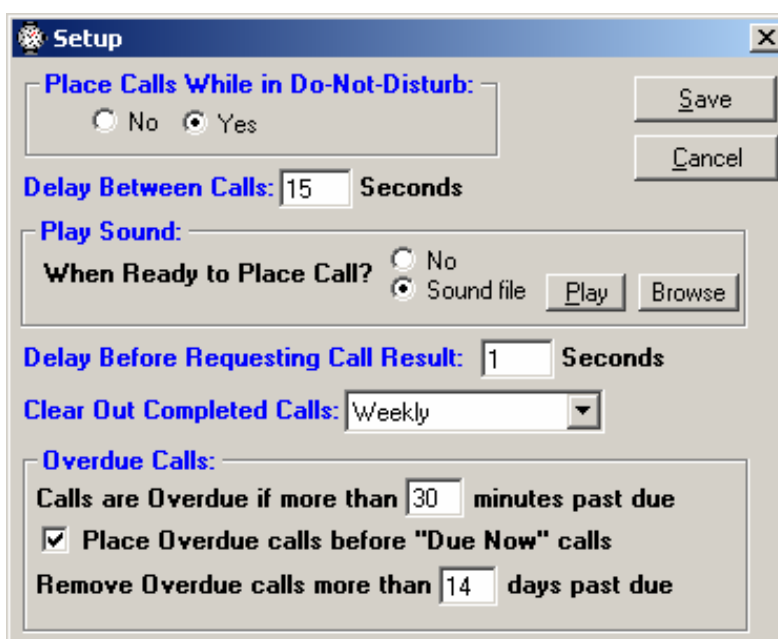
### Goldmine Export

The Goldmine contact management software provides a way to setup re-usable filters and export formats as well as a way to add a “Power Dialer (export)” button on the Goldmine screen. Using these features and the automatic import feature of power dialer described above it is very easy to send a list of Goldmine contacts directly to the power dialer to be dialed.

## Power Dialer Setup

### Configuration Settings

The Personal Power Dialer provides some configuration options for the user. To view or change the configuration, right-click on the icon in the upper-left corner of the main screen and then select the “Setup” menu option. This will bring up the Setup window as shown below.



- **Place Calls While in Do-Not-Disturb** – This setting controls whether the power dialer should attempt to place calls if the user’s phone is in Do-Not-Disturb. For example the user may want to set his phone into “Do-Not-Disturb” mode to stop all incoming calls but still continue using the power dialer to place outgoing calls. Note: On some phone systems the Net Phone cannot detect and display the Do-Not-Disturb setting of the phone, in which case this setting has no effect.
- **Delay Between Calls** – it’s often desirable to provide some “wrap-up” time after the last call before dialing the next call. This value is used to provide this time delay between calls placed by the power dialer.
- **Play Sound** – on a sound-equipped PC, the user may want to play a selected WAV file to alert him/her whenever a call is ready to be placed. This feature and the desired WAV file can be set up here.

- **Delay Before Requesting Call Result** – it's sometimes useful to give the user some "wrap-up" to finish up some activity in another application before requesting the result of the call. This value is used to provide this time delay after the call ended before requesting the user to enter the result.
- **Clear Out Completed Calls** – When calls have been completed, they will still appear in the calls window, but they will be automatically cleaned-out based on this setting.

**Note** The Net Phone provides a "Call History" feature for more permanent storage of calls placed and received. The settings options are as follows:

- Hourly
- Daily
- Weekly
- Monthly
- **Overdue calls** – when a call is due to be placed, it will only be placed if the power dialer is enabled and the phone status is idle (and possibly not in Do-Not-Disturb). Thus, since the power dialer will wait until dialing conditions are true, the date/time selected for a call to be placed may pass by, and the settings in this area pertain to those calls:
  - Calls are Overdue if more than 'x' minutes past due – This setting is used to designate how long "Due Now" calls should wait before they are considered to be "Overdue".
  - Place Overdue calls before "Due Now" calls – this option, when enabled, allows the "Over Due" calls to be placed first before the "Due Now" calls.
  - Remove Overdue calls more than 'x' days past due – If the dialer is disabled for an excessive amount of time, the power dialer will automatically clean out overdue calls that are way past due as defined by this setting.



## Adding Action Buttons to Ready to Dial and Results Screens

An optional user-defined button can appear on both the “Ready to Dial” and the “Results” screens in Power Dialer. To setup these buttons, go to the Net Phone main menu select Setup then Preferences, go into the Dialing Tab. Under the Power Dialer, enable either or both of the “Action” buttons and select the Action to be performed when the button is pressed. Optionally, the label can be changed to meet your needs. Press Save to keep your new settings.

The screenshot shows the 'Setup Preferences' dialog box with the 'Dialing' tab selected. The 'Trunk Access Code' is set to 8 and the 'Home Area Code' is set to 480. Under 'Dialing Outside Numbers', the 'Use SERVER Dial Plan' option is selected, and the 'Check Plan' button is visible. In the 'Power Dialer' section, both 'Enable "Action" button on "Ready to Dial" screen?' and 'Enable "Action" button on "Call Results" screen?' are checked. For both, the 'Label' is 'Lookup' and the 'Action' is 'Screen Pop Outlook'.

Section	Field	Value
General	Trunk Access Code	8
	Home Area Code	480
Dialing Outside Numbers	<input type="radio"/> Dial same as User Dialed	
	<input type="radio"/> Use Local Dial Plan	
	<input checked="" type="radio"/> Use SERVER Dial Plan	Check Plan
Power Dialer	<input checked="" type="checkbox"/> Enable "Action" button on "Ready to Dial" screen?	
	Label	Lookup
	Action	Screen Pop Outlook
	<input checked="" type="checkbox"/> Enable "Action" button on "Call Results" screen?	
	Label	Lookup
	Action	Screen Pop Outlook

## Advanced Topics

### Import File format

ASCII text files can be easily imported by the power dialer as long as the file format is as follows:

- One record per line with the following fields:
  - Name – Required – must be non-blank
  - Phone – Required – must have a minimum of 4 digits – can have punctuation {i.e. (480)496-9040}
  - Account code – Optional
  - Subject – Optional
  - Date – Optional – if not provided "Today" is assumed
  - Time – Optional – if not provided "Now plus 5 minutes" is assumed
- The fields within each record can be either Tab-delimited or comma-delimited, however the entire file must be one format or the other (cannot mix formats within a file). Comma-delimited fields can/should use quotation marks around any field containing a comma. For example: "Jones, Skip", 480-496-9040, 1111, "Sample 1,2,3"
- A maximum of 1000 records can be imported.

### Automatic Imports

The Personal Power Dialer will automatically import any file in the above-described format if the file is (1) named with ".TXT" suffix and (2) saved into the "\PDimport" sub-folder in the Net Phone folder. Once the file is imported, it will immediately be deleted.

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