

HOW TO MAKE OUTBOUND CALLS


1

In order for a salesperson to make a call to a prospect, he or she must go to the prospect's profile.


2


Then click on the phone icon or call button.

Enterprise [Ford of Williamstown](#) Ford of East Williamstown

(Individual)  Time is running short! Lease ends in 20 Days! [Dismiss](#) [Edit](#)
Assigned To: David Allen














H: (214) 555-0000
W: (214) 555-1000
C: (214) 555-2000
t.packard@gmail.com
1234 Main St
Dallas, TX, 75201

 Equity: (\$3,000) 2017 Ford F-150 Calculated: 08/28/2019 (hover for details)

 David Allen's Customer

Sales (5) Service Lead (8) Appts (3) Wish List Service (15) Value

Status	Buyer/Co-Buyer	Created	Source	Vehicle
Sold		6/27/19	Repeat Customer	2019 Ford Explorer
Duplicate		6/12/19	Phone Up	
Duplicate		5/21/19	Phone Up	
Sold		5/8/19	Phone Up	2019 Ford F-150
Sold		4/10/19	Repeat Customer	2017 Ford F-150

3

A new screen will pop up.

4

In the Agent Phone Number box, select the phone number you want the system to call you at, then select the customer's **Number to Dial**, and click **Call**.

5

All outbound calls are also pushed into the **Monitored Out** page of the dashboard. You can view and keep track of your outbound calls by clicking on **Monitored Out**.

Call Provider	Customer	Agent	Date	Duration
Car Wars Website Sales	CALL UNASSIGNED (214) 555-0000	Adam Klein (469) 555-1000	8/28/2019 12:09 PM	2.63 (min)
Car Wars Main Line	DALLAS, TX 75201 (214) 555-1000	Nicole Lewis (469) 555-2000	8/28/2019 12:06 PM	0.18 (min)
Car Wars Main Line	CALL UNASSIGNED (214) 555-2000	Bryce Kent (469) 555-3000	8/28/2019 11:17 AM	1.63 (min)
Car Wars OB Caller ID	DALLAS, TX 75201 (214) 555-3000	Rick Tanner (469) 555-4000	8/28/2019 11:12 AM	20.15 (min)
Car Wars Website Sales	DALLAS, TX 75201 (214) 555-4000	Mike Cannon (469) 555-3000	8/28/2019 11:10 AM	2.08 (min)

6

Outbound call audio is pushed into the customer record.