

# TelDial©



# Manual

## TelDial/VoIP/Skype

For TelDial revision 2.00 or higher  
Document revision last update 2/17/2008

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# Introduction to TelDial

## Program Overview

TelDial can be used for telemarketing, collections, appointment setting, sales, telephone surveys, emergency communications, or in any application where a large number of people need to be contacted, as efficiently as possible. After the TelDial is installed and configured properly it can be a very powerful tool for maintaining accurate and complete information each time you call, fax or email a contact. Before you start installing the software and playing around with TelDial, take the time to read this manual. It will save you hours of time in the long run.

## Before You Start

You will need to call your local telephone company to have business lines installed. It is a good idea to have the lines installed in the same physical area that your computer is located. Of course, if you are using a laptop, you can take the laptop to the phone.

You may want to buy a UPS – Un-interruptible Power Supply. This will keep the computer system running while the electricity is off – due to storms, power outages, etc. If using a laptop, the UPS will not be necessary.

TelDial and the TelDial Phone operate based on the parameters you define in the TelDial Setup. This manual will detail how you setup the parameters. You need to setup the parameters before using TelDial.

## What's in the package

- One ZiPhone device (Optional unit may be sold separately)
- TelDial CD
- TelDial Startup
- Headset
- A RJ-11 phone cord for connecting the ZiPhone to the phone jack in the wall
- USB cable to plug into your computer

## System Requirements – Minimum

- Pentium II 350 or higher
- 256 Meg Memory
- Microsoft Windows 2000 or XP
- USB Port
- A POTS line or an analog extension of a PBX

## Order of Installation

Please see detailed instructions in this manual.

Install the ZiPhone II

Install the TelDial Software (**Make sure you have Contacts and Leads databases active. Use the sample databases until you are ready to load your own. You MUST have the 2 databases active at all times.**)

Run the ZiPhone II Tester Program

If you pass the Tester Program, click on the TelDial icon on your desktop and you're ready to go.

## Our Philosophy

You may know from personal experience that the auto dialer makes people angry when they get calls from a "recording", thus the Do Not Call List from the government was born.

Auto dialers made so many calls per day that some people received numerous calls from different companies, selling the same or different products, services, etc.

By using the TelDial, sales people can actually talk with people on the phone. Prospective customers can have contact with a human instead of pressing 1 for this and 2 for that. The use of the TelDial has made it possible for people to use the phone again as it was designed to be used. To talk to people.

One of our great ideas was to have volunteers from Senior Citizens Centers call homebound seniors each day using the TelDial to make sure they were OK and to see if they needed anything. For some people, this was the only contact they had with someone. Imagine if the senior, at home, alone was to get a recorded message. What a let down.

Please use the TelDial as it was intended. Talk with someone.

## **Lists and Databases**

You will see the words Lists and Databases used interchangeably in this manual. You may be able to guess the age of the writer of this manual by the choice of words.

TelDial uses the concept of two databases or lists open at all times. These databases are named Contacts and Prospects. All names of people or companies in the databases are considered contacts, but the titles of Contacts and Prospects help you decide what you want to do with each one.

TelDial allows more than one user per database if your computer system is set up to share files. Each user will need a ZiPhone II, TelDial software, a headset and a phone line.

## **Contacts**

Contacts is one of the Tabs on the TelDial screen. Contacts are people or companies you do business with or call everyday.

## **Prospects**

Prospects is one of the Tabs on the TelDial screen. Prospects are people or companies you want to do business with. After you make a sale or acquire a client from a Prospect, they become a Contact. At that point, the Prospect needs to be moved to the Contacts list.

TelDial allows you to move Contacts and Prospects to other databases without re-entering the data. That's the reason you have to have 2 databases open at all times - One Contacts database and One Prospects database.

## **Making Calls**

Making calls is the way to make money. Whether it's inbound or outbound, if you don't want to talk to people you're not a very good salesman or woman. TelDial allows you to take incoming calls as well as make outbound calls.

You have a choice with the TelDial: You can select the person you want to call and the TelDial will dial the number for you or you can Smart Dial.

When using the Smart Dial feature, the TelDial automatically dials the available number for you. You talk with the contact or leave a message (or not, you decide) and dispose of the call and the next call is made for you.

## **Disposition**

Disposition or disposing of a call means to hang up the phone when the call is finished.

When you are calling your Prospect list and you are ready to dispose of a call, ask yourself this question: What was the outcome of the call?

With the answer to the above question, you decide how to dispose of the call.

**Answer:**

|                    |                                                        |
|--------------------|--------------------------------------------------------|
| <b>HIT</b>         | Sale                                                   |
| <b>HOT</b>         | Call back – ready to buy – almost                      |
| <b>WARM</b>        | Call back – needs a little push                        |
| <b>COLD</b>        | Not interested                                         |
| <b>DO NOT CALL</b> | The person wants to be placed on your Do Not Call List |

Busy  
No Answer  
Fax  
Answering Machine – Left message  
Answering Machine – Did not leave message  
Other (Operator interrupt – wrong number – number disconnected, etc.)

HIT, HOT, WARM, COLD and DO NOT CALL are active when you click on the Prospects Tab and then click on the Smart Tab.

When calling Prospects or Contacts the following dispositions are available on the TelDial Phone:

**Busy**  
**No Answer**  
**Fax**  
**Answering Machine – Left message (You can leave a live message or a recorded message)**  
**Answering Machine – Did not leave message**  
**Other (Operator interrupt – wrong number – number disconnected, etc.)**

## **Recorded Messages**

Recorded Messages are used when you get an answering machine or when speaking with someone you can play a testimonial, a spiel that you give to everyone (the same way), etc.

You can also record the conversation with the person on the phone. Please check the laws in your area for recording conversations.

## **Script**

If you need to follow a script while on the phone with a Prospect, we have a solution for you. You can create scripts that can jump to different parts of a script, website, and so forth.

## **History**

Anything and I mean ANYTHING you do on the TelDial is placed in the history file. For example, if you go to a website, it's in the history. If you send an email, it's in the history. If you record a message, it's in the history. When you turn on or turn off the TelDial, you guessed it – it's in the history.

Many managers love this feature of TelDial. They can tell if the sale people are working or surfing the web.

We hope you will read this manual and follow the directions. It means less tech support calls and more time for you to make money.

## **Import**

TelDial accepts ASCII comma delimited text or .CSV (Excel) formatted files for importing. Please see the detailed directions in this manual.

## **Files and Databases**

When using TELDIAL you will need to know about files and databases. To manipulate files and databases you have know how to get to the Folders in Microsoft.

With Microsoft Windows 2000 and Windows XP, you can use the My Computer icon or the Start button. In this example we will use the Start button.

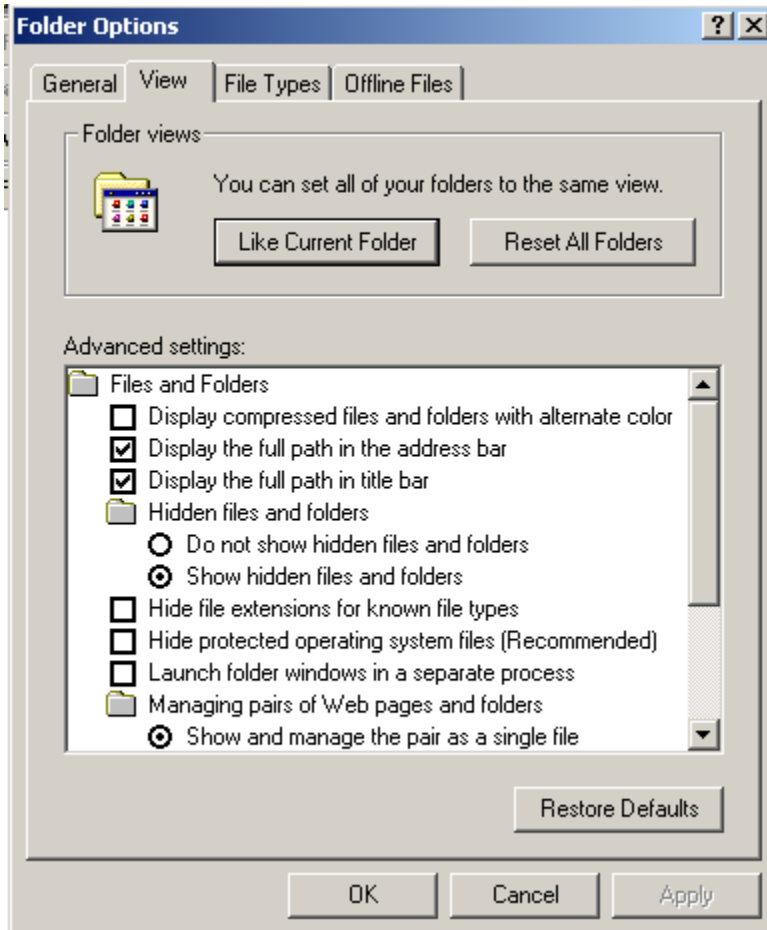
Click on Start, click on Main C:\, find the TELDIAL file folder and click on it to open it. You will see all of the file folders inside the TELDIAL file folder.

You will use the Lists file folder a lot, so let's talk about it.

All file name you use for importing (with file extensions .txt and .csv) and those files you use to make calls (with file extension .abs) and others will be on the screen. It is very important to be able to see the full file name with the file extension.

Microsoft defaults to the file name only when looking at file names. You NEED to change this.

Right click on Start, click on Explore, then click on Tools and then Folder Options, click on View and select those that allow the full path file name and show file extensions. Here is an example from my computer. Hope yours looks the same.



If you don't understand about files and databases, please learn it before you call for tech support.

## **Congratulations On Your Purchase**

# **USAutodialer's – TelDial & The ZiPhone II USB Telephone Tester Program**

We are sure you will enjoy using our product, and we hope that it will make your complete telephone experience much more rewarding.

**USAutodialer** Co. – TelDial comes with the ZiPhone II USB / Analog and Internet Telephone.

The ZiPhone II is able to make telephone calls by using the touch-tone buttons on the ZiPhone itself or by dialing with TelDial's Software dialer.

**USAutodialer** Co. – TelDial has **many** capabilities, including *but not exclusive to*, making a telephone call as any normal telephone, as well as recording messages or notes, playing outgoing messages to the receiving party, or recording the complete or any portion of a telephone conversation between both parties.

To familiarize you with the above basic and standard functions of TelDial, we have included in your software package, a ZiPhone II tester program, which can both serve to familiarize you with these features, as well as test the hardware to make sure it is functioning properly.

The ZiPhone II Tester Program will also help you define certain settings to use within TelDial that may be unique to your particular telephone service or calling area.

The ZiPhone II Tester Program is used to make sure you have the ZiPhone connected to your PC properly and to help you determine if you are using the correct type of telephone line. There are two types of standard telephone lines: Analog & Digital. The TelDial and the ZiPhone II are designed to utilize an analog line only.

Analog Lines are **standard** telephone lines. Digital Lines are used between office phones, and their serving PBX phone system. The ZiPhone II is not compatible with Digital PBX lines, without purchasing additional hardware from your PBX provider.

# TelDial Installation Manual

This manual will instruct you in installing the ZiPhone II unit.

Please make sure you have the following items in your package:

- ZiPhone II (If optional unit was purchased)
- TelDial Software
- USB Cable
- Telephone Cable
- Headset



ZiPhone II    TelDial CD    UBS Cable    Phone Cable    Headset

## System Requirements

Telephone Analog Phone Line

CPU Pentium 300 or higher

Operating System Windows 98SE, Windows 2000 or XP

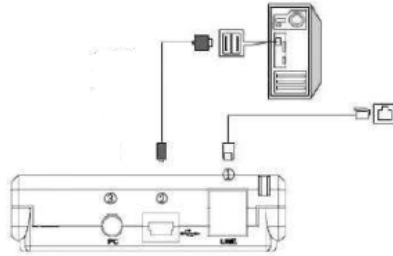
USB 1.1 or higher

Memory 32MB Free or More

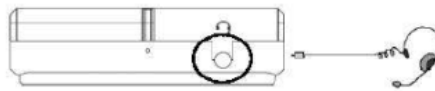
It's really simple to install the ZiPhone II unit. Plug in the USB cable to the ZiPhone II and your PC, then plug in the Analog phone line to the ZiPhone and plug in the headset. That's it!

A simple schematic is provided for your assistance.

### **Schematic of ZiPhone II Connection**



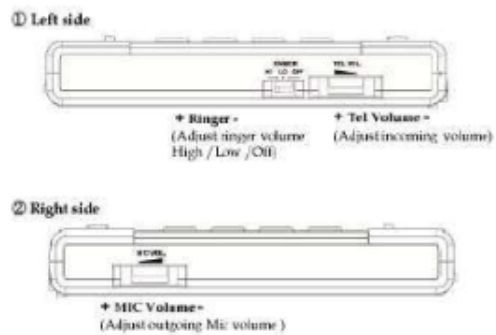
1. Connect telephone line cable. Please make sure you have an Analog telephone line.
2. Plug the USB Cable to the ZiPhone II USB port and Plug the other end to your PC USB port.
3. Connect the audio jack to the speaker port (if you want to plug into speakers).
4. Headset – You can choose the headset type between the 2.5mm and the RJ 22 Jack. Plug 2.5mm headset jack into the ZiPhone II in the front



We have provided a headset with the 2.5mm jack as illustrated above.

I

## Volume Control



Now you should have the ZiPhone II connected. Put on your headset. You should have a dial tone when you click from PC to Tel on the ZiPhone II.



PC/Tel switch between PC (green LED) and  
TEL (red LED) mode

Now install your TelDial software. Put the TelDial CD in your CD drive and follow the onscreen directions.

When you have finished the TelDial software installation, see the ZiPhone Tester program.

## **Installation of TelDial Software**

Insert the CD into your computer's CD-ROM, DVD or CD-RW drive.

This is NOT an auto-running CD. Go to My Computer and then you select the CD.

Click on TelDialSetUP.EXE.

Click on Next on every screen until you see the screen that has Finish on it. Click on Finish.

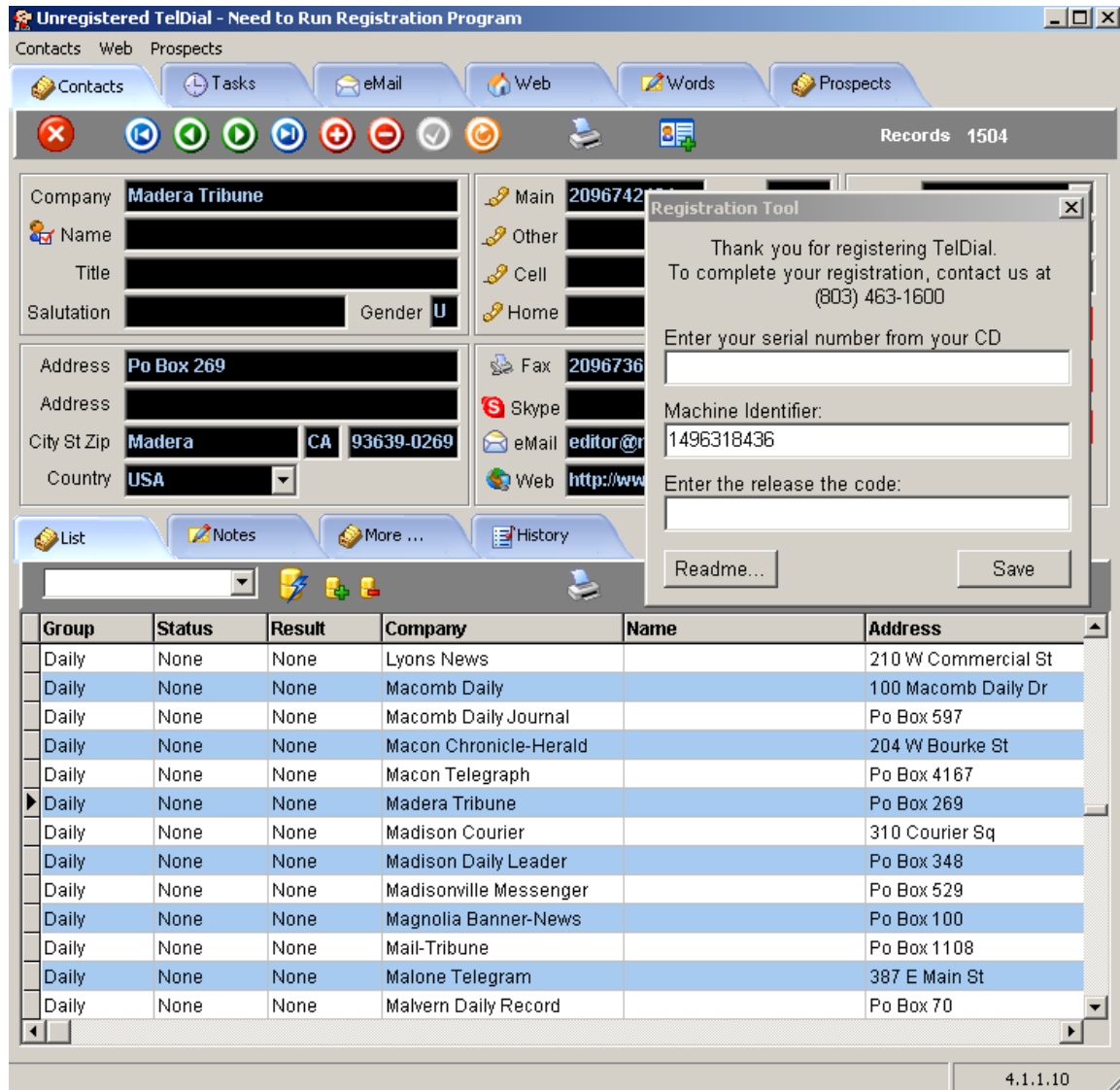
When you click on Finish and you will see the following icons on your Desktop.



Congratulations, you have now installed TelDial.

## Registration

The first time you bring up TelDial you will see the following:



When you start TelDial and it is not registered, a Registration Tool screen will come up on top of the program screen.

Enter the serial number from your CD.

The Machine Identifier is automatically read from your computer.

Call us at (803) 749-8488 and have your Serial Number and Machine Identifier ready.