WebTalk:

Quick Start Guide for Making Phone Calls

WebTalk allows you to track and record outbound phone calls to prospects. You can use WebTalk when initiating a phone call from several locations in the Web Control interface. The directions below describe how to make the call and what you will on see on the Prospect Details History after the call is complete.

To Make a WebTalk Phone Call:

1. Start a phone call from one of the following locations in Web Control:

    a. On the **Prospect Details** record, click **Call**.

    b. On the **Organizer**, select **Completed** from the **Status** menu of the call you want to make.

    c. On the **Future Actions** tab of the **Prospect Details** record, select **Completed** from the **Status** menu of the call you want to make.

    d. On the **What Do You Want to Do Next** screen, click **Make a Phone Call**.

    e. On the **Work Plan** view of the **Organizer**, select **Completed** from the list under **Call/Meeting Notes** of the call you want to make. (Advanced or Premium Package Customers Only)

2. On the **Phone Call Record** screen, click the **Make Phone Call** icon next to the number you want to call.

3. In the **Phone # calling from field**, verify the number listed or type a new number from which you are calling, and click **Dial Phone**.
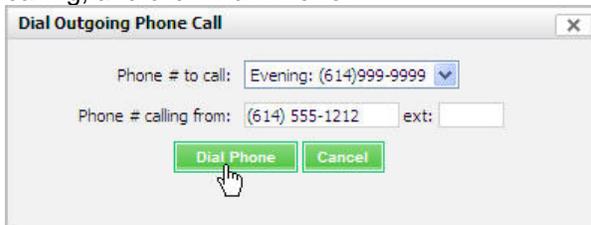
> **Important Notes:**
> - The phone number in the **Phone # calling from** field is the required phone number that is associated to you in Web Control. To change this number, go to your **Edit Info** page in **Settings**. Standard users can find this page by clicking **Edit User**, and Manager Users can find it by clicking **List Users** and the name of the salesperson whose information they want to change.
> - Depending upon your dealership's setup, your prospects may hear an announcement at the beginning of the call that states the call is being recorded.

4. Close the **Dial Outgoing Phone Call** window so you can view the **Phone Call Record**.

5. During or after the call, type notes in the **Phone Call Record**.

6. Click **Save Record**.

7. View the **Prospect Details History** to see notes that result from the calling process. They are:

    a. **Made Call or Phone Call Note** – This note signifies that the call connected to the prospect or an answering machine/service, and contains the time the call connected. This note is a clock stopping action.

    b. **Call Record Note** – This note contains the information you type in the Phone Call Record.

    c. **OutgoingCall Note** – This note contains the data about the call and the recording. It includes the phone number dialed, the start time of the call, the end time of the call, and the duration of the call. It also includes a link to the recording in the header of the note, where you find the Print button.