DEALERMINE | CRM

Know More. Book More. Sell More.

Outbound Assist

Outbound assist will help any employee making outbound calls become more productive.   Outbound users can enjoy making a call without having to dial the actual phone. With the click of a button, our Telephony application will dial the number for the user and re-direct the call to their desk phone or mobile device (depending on setup).

Logging In

Upon logging into DealerMine any user that has been setup for Outbound Assist will have to log in to begin using 'Click to Call'.
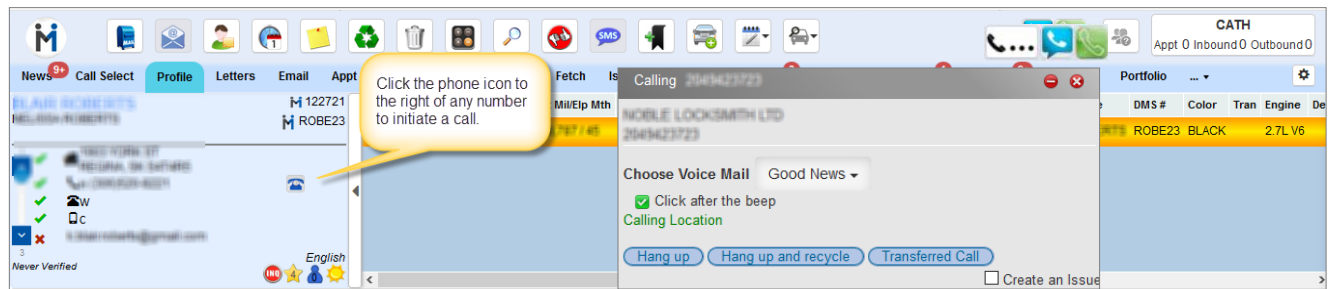
 Click the red phone icon to the left of the username to log in and choose a location from the drop down list.

  Once logged in the icon will turn green and the click to call phone icons will be displayed to the right of all phone numbers 'turned on'.   (See below)

Click to Call

Click any number to initiate a phone call using our Click to Call – Auto Dialer.   The phone number (logged in location) connected to the username logged in will ring immediately after a number is clicked to be called.   Once the user picks up the phone they will hear a ring tone calling their customer.

Call in Progress	The Calling screen will appear when a call is in progress. You can move this floating screen anywhere on the screen. • If the user clicks on the X to close the screen they will be presented with a confirm message popup as closing the screen will end the call. • If the user clicks the – button it will minimize the popup. Click this button to open the popup.
Choose Voice Mail	Choose a voice mail that is linked to the specific contact type on the selected VIN (only necessary if there is more than one voice mail)
Leave Voice Mail	✅ Click Leave Voice Mail once you have listened to the full voice mail message to ensure your voice mail recording is fully delivered to the customer.
Hang up	Click hang up at any point to end your call (Contact History will record that a call attempt was made)
Hang up & Recycle	Click hang up & recycle at any point to end your call and automatically open the Recycle screen. Recycle as usual at this point. (Contact History will record that a call was made and will also store a recording if a call was recorded)
Transferred Call	Click this button when you've transferred a call to someone else and need to hang up, without ending the call between the other parties.
Create an Issue	When clicked an Issue popup will display with the Call Sid number and the Telephony user can enter information on the issue. This information will be sent to DealerMine Development to look into the issue.

Contact History

- Contact History is recorded after every call attempt made using Outbound Assist.
- Users (based on user access) can play and listen to any call that was recorded.
- The Contact Type "Click to Call" represents all calls made through the DealerMine auto dialer and is also tracked in Key Report 4 for each user.
- Duration and phone number dialed is tracked in Recycle Comments.
- An additional Recycle will appear that was used to Recycle the call after it ended for each Click to Call that is recorded.
- If a voice mail was left there would be two audio files which would be played back.

Logging out & Make Busy Reasons

- To log out or disconnect outbound assist simply click the green icon until it shows red next to your Name Tag.
- A list of **"Make Busy"** reasons may appear above the Logout option, if Make Busy reasons have been configured for your dealership.   Click on the correct Make Busy reason and you will be logged out of Telephony.