Why Candi?

- Click and connect to your clients in Salesforce.
- Pre-record messages that can be ‘dropped’ in a voice mail.
- Automatically logs calls in Salesforce.

Please note you must have signed up with Client Instant Access for the sidebar dialer to work.
How to operate CIA’s Instant Daytime Dialer

1. Add your number to connect
My Number, select the plus sign to add the number where the system will call you.
- To add a new number, select ++, e.g. 9734874457. For international: enter the number starting with international call prefix + country code + phone number, e.g. 01142079999999
- To remove select –.
- Select “Call Me” to connect your phone to the system. You will see the following popup:

2. Recording a message(s)
Add a Message Label, select the sign and follow the prompts to record your message. When you have finished recording your message please click the red telephone button so all messages are available for use. Please note: the system will call your line first and then start the countdown to recording the message.
Replaying message by selecting ✌. Deleting the message by selecting ✗.

3. Calling a contact
Select the contact you want to call, click on the number. If the system is already connected it will call the contact immediately. If you have not connected yet, the system will call your line first and then dial the contact number.

Call options:
When calling a contact the options are as follows:

Live Answer:
If you reach a client live, you may talk to them then select ✐ to hang up once conversation is completed. Select ✒ Add notes that will then log under the activity area under that contact.

Play Message:
When the client’s voice mail greeting ends, recite your personal comment then select ✮ Play Message and your recording will drop seamlessly after your personal comment.

Leave Message:
If you reach your clients voice mail, select ✳ Leave Message while the outbound greeting is in progress.

Please Note: To disconnect the system, once you are finish making your calls, hang up your phone.