Allied Financial Software Knowledgebase

How To Setup the Dialer in ACT! 2006

Note: There are a few conditions you must meet before you are able to use the Dialer in ACT!. You must have a modem that shares a line with your telephone --or-- a telephone equipped with Telephone Application Programming Interface (TAPI) hardware and the appropriate telephone driver software installed on your computer. The Dialer uses TAPI technology included with Microsoft Windows. TAPI functions as a link between your computer and your modem or telephone. You must install and configure your modem.
The Dialer feature in ACT! allows you to place a call to a contact using the Phone number from with in ACT!. You can also time the call and create History of the call. Use the following steps to setup the Dialer:

1.   Launch ACT!

2.   Click the Tools menu, and then click Preferences. The Preferences dialog box appears:

3.   Click Dialer Preferences under the Communication tab. The Dialer Preferences dialog box appears:

4.   Enable the Use dialer option.

5.   Click your communication device from the Modem or line drop-down.
Note: The Setup option will be specific for your modem and version of Windows. (Please refer to your modem and Windows documentation.)

6.   Verify the data in the Location field. If needed, click Properties and make the necessary changes.
Note: The Properties option will be specific for your version of Windows. (Please refer to your Windows documentation.)

7.   Enable the Hide dialer after dialing option. By default this option is not enabled.

8.   If desired, clear the option for Start timer automatically on outgoing calls.

9.   Click OK to save your changes. The Preferences dialog box re-appears.

10.   Click Apply, and then click OK to return to ACT!.

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