# Advanced Do Not Call Lookup

**v.4.0**

**for ACT! 2005**

**Another efficient and affordable ACT! Add-On by**

http://www.exponenciel.com

## Table of contents

## Purpose of the add-on

Starting January 1, 2005, the FTC rules for Telemarketing require that telemarketers scrub their call list every 31 days (see http://www.ftc.gov/donotcall/ ).

The objective of Advanced Do Not Call Lookup is to allow you to identify the contacts, companies or groups which are listed in your Do Not Call lists in order to avoid heavy penalties.

## How it works

*Advanced Do Not Call Lookup* allows to match against your Do Not Call lists:

- A single phone number or
- A record (contact, company or group) multiple phone numbers or
- A lookup of records (contact, company or group) multiple phone numbers

*Advanced Do Not Call Lookup* works for contacts, groups or companies depending on the view that is active when launched.

## Installation procedure

Download the program file from our <u>download page</u> and double-click it to start the installation.

An icon should have been added to your Contact toolbar to launch Advanced Do Not Call Lookup directly from within ACT!.

Note that contrarily to versions supporting previous ACT! versions and because of the changes in ACT!, add-ons are now DLL files and not executable files. This means that they are automatically initialized by ACT! when placed in ACT! plugin folder (a subfolder of the main ACT! directory) and cannot be started from the Windows Start menu anymore. This is why you are not given a choice of installation directory during the installation process.

ACT! should automatically add an icon to the Contact Detail window and an item to the Tools menu. Icons and menu items are now the only ways to start your Exponenciel add-on.

## Adding icons to other views

To add icons to other toolbars, run Advanced Do Not Call Lookup and go to the *Options > Integrate with ACT!* menu. Check the views you want to add icons to and restart ACT!.
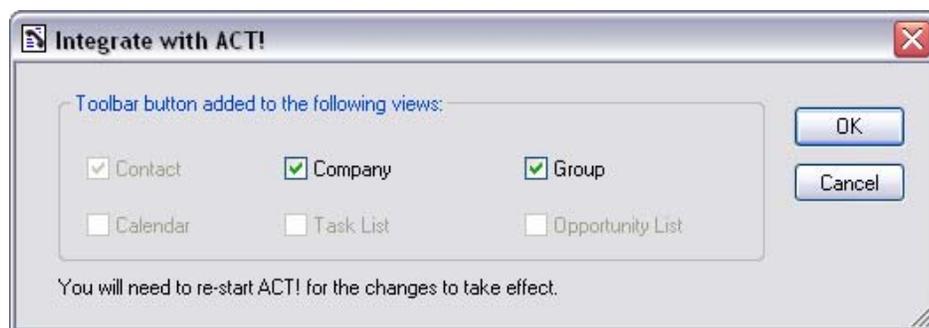


When ACT! re-starts, whatever icons you asked to be created should be there to launch TriggerCalc.

### Known issue

After re-starting ACT!, if an icon is missing in a particular view, do a right-click on the ACT! toolbar and choose Customize.  Make sure all items are checked. Then close the window. Repeat in all views where you are missing an icon. Then re-start ACT! The icons should now be there.

## Setting up Advanced Do Not Call Lookup

### Step 1: converting your DNC Lists to DNC format

The first thing to do is to convert your DNC lists to the DNC file format that *Advanced Do Not Call Lookup* uses. This operation needs to be done once for each file (of course, if you download a new file each month, then it needs to be re-done each month).

Simply launch *Advanced Do Not Call Lookup* and go the *File* menu. Select *Convert DNC List...*



Click the *...* to browse for your DNC list file. Select it and click *Open.* Then enter the date the list was issue and click *Convert.* Once the list is converted, it will be located in your default list folder (which can be changed in the Preferences screen).

The date the list was issued allows *Advanced Do Not Call Lookup* to check the validity of your list (see *List Validity Warning* below).

## Step 2: defining default lists

Unless you choose the *Launch the lookup wizard* option off the main screen, *Advanced Do Not Call Lookup* uses your default lists to match against phone numbers. To define these default lists, go to the *Options* menu and choose *Preferences*.



Under *Default Do Not Call lists*, you may add as many lists as you want (the lists need to have been converted prior to this. See previous step).

## Step 3: defining default phone fields

When you use the *Check current record* on the main screen, *Advanced Do Not Call Lookup* tries to match the values contained in some of your ACT! fields for the current record (contact, group or company) against your default DNC lists.

These fields need to be defined under *Default ACT! fields to match against*.

You are done and ready to use *Advanced Do Not Call Lookup*.

## How to check a number

To check a single number and see if it belongs to your default DNC lists, launch *Advanced Do Not Call Lookup*, simply type the number in the box next to check this number and press the OK button.
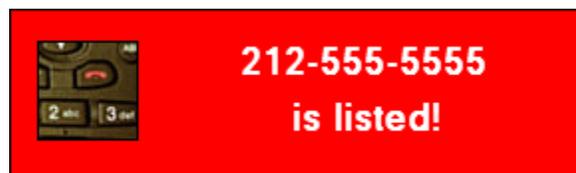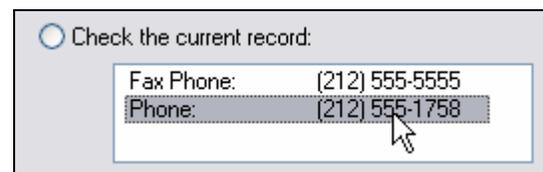


You will get either



Or



Simply click the warning screen to dismiss it.

NOTE: If you want to check one of the numbers that appear in the current record box, simply double-click it.
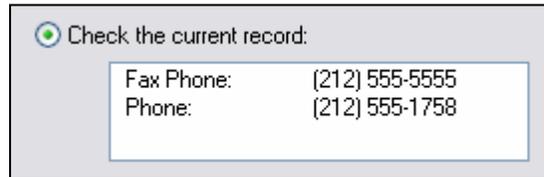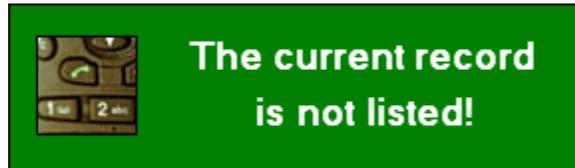
## How to check a record (contact, group or company)

Make the record active in ACT!, then launch *Advanced Do Not Call Lookup*, select the second action (*Check the current record*) and click OK.



Note that the field values are filled automatically by *Advanced Do Not Call Lookup* and are not editable.

You will get either



Or



If you want to know which phone number is listed in which list, click the *Details* link at the bottom right corner.

## How to create a lookup

*Advanced Do Not Call Lookup* also allows to create lookups through the Create lookup wizard.

The wizard has only 2 screens. The first one allows you to choose Do Not Call Lists and ACT Fields to be matched. The Default buttons allow you to load your default lists and fields but you may use others as well.



 Once you are done selecting lists and fields, click Next> and you will be taken to the second screen.

In this second screen you may to choose to create a lookup of records which are in the DNC lists you just specified or which are NOT in the DNC lists you specified.
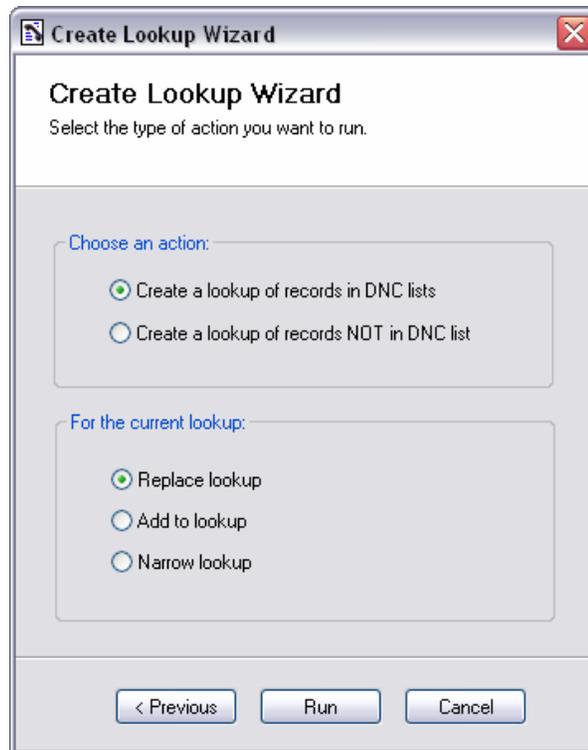


You also have the same standard lookup options that you find in ACT! for the current lookup. When you are done choosing your options, click Run and the lookup you requested will be automatically created.

## List Validity Warning

At startup, *Advanced Do Not Call Lookup* automatically checks the date of your default list(s). Since starting January 1, 2005, the FTC rules for Telemarketing require that telemarketers check DNC lists monthly, it is important that you get these lists regularly so that you are up-to-date.

By default, the warning is set at 28 days, ie. when a list is more than 28 days old, you will be warned. This setting can be changed in the *Preferences* screen.

DNC lists are automatically checked as well when creating a lookup, as the DNC lists used might not be the same as your default DNC lists.

## Registering Advanced Do Not Call Lookup

You may buy licenses from [Exponenciel](). Registration is based on ACT! user names, so you will have to supply your ACT! username when registering. Once you get your registration code, simply go to the *Help | About* menu.

## Support

For support, please contact [support@exponenciel.com]().

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