CallBox

MAKING
OUTBOUND CALLS

There are 3 ways to make outbound (OB) calls using your Call Box account and a tracked outbound line.

MANUAL OR SPEED DIAL OUTBOUND CALLS

To track your outbound calls, the call needs to go through an outbound tracking line.

1

OPTION 1: MAKE AN OUTBOUND CALL USING YOUR PHONE (DESK OR CELL)

1. Program the outbound line as a speed dial *(if your phone system allows it).*
2. Call the outbound number. Once the outbound number is dialed, you'll hear a dial tone.
3. Enter your phone code with a # sign (example: 0123#) and wait for the next dial tone *(this step is only necessary if you want to know which staff member made the call).*
4. You'll then dial the patient's phone number *(be sure to wait for the dial tone).*

CALLS THROUGH CALL BOX

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OPTION 2: RETURN A PARTICULAR INBOUND CALL

If you're in Call Box listening to calls and you've found a caller you'd like to call back, you can do that!

Fri, Nov 2, 2018 - 11:16 AM

New Patient, Appt Opp, Appt Requested
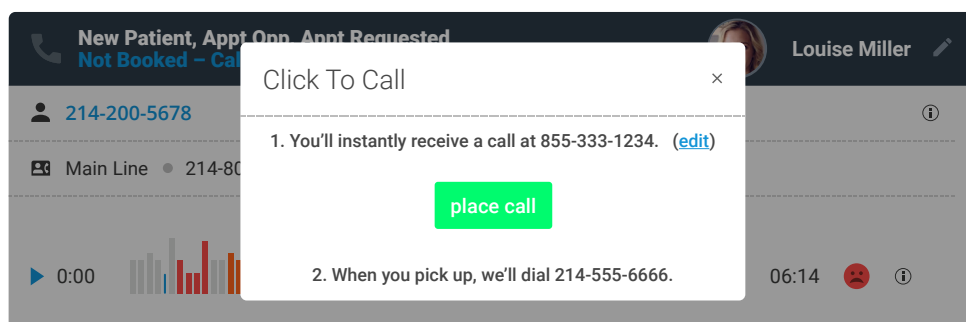**Not Booked — Calendar**

Louise Miller

214-200-5678

Main Line ● 214-800-3210 ● Ext 1

▶ 0:00   06:14

1. Click on the customer's phone number.

Fri, Nov 2, 2018 - 11:16 AM

New Patient, Appt Opp, Appt Requested
Not Booked – Ca

Louise Miller

Click To Call ×

👤 214-200-5678

1. You'll instantly receive a call at 855-333-1234. (edit)

📧 Main Line • 214-80

place call

▶ 0:00

2. When you pick up, we'll dial 214-555-6666.

06:14 ☹

2. Verify that the number listed in "1" is the correct number to reach **you**. *(If you want to make these calls using your cell phone, your 10-digit cell phone number should be what you see under "1."*

*Instructions for how to set this up are at the bottom of this document.
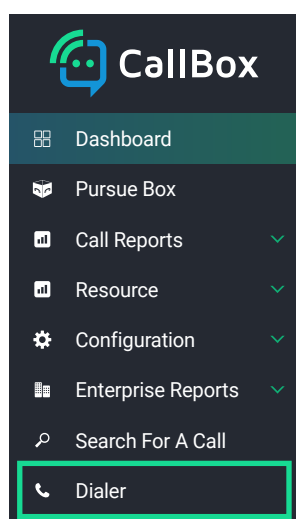
3. Once you click "place call," **your** phone will start ringing. You'll pick it up and immediately hear more ringing, as if you had just dialed that patient's number yourself. Just wait for them to pick up and you've successfully made a Click to Call through Call Box!

MAKING CALLS THROUGH CALL BOX

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OPTION 3: CALLING ANY PHONE NUMBER THROUGH CALL BOX

If you have a list of people you need to call back, but aren't specifically returning inbound calls from them, you can also do that in Call Box!


CallBox

⊞ Dashboard

📦 Pursue Box

📊 Call Reports ⌄

📊 Resource ⌄

⚙ Configuration ⌄

🏢 Enterprise Reports ⌄

🔍 Search For A Call

📞 Dialer

1. Click on the *Dialer* in the navigation bar on the left side of your Call Box dashboard.

330-774-8811

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
*	* +	#

📞 Call

We'll call you at 2148001234 and then connect you to the number you dial above.

2. You'll use this like a normal phone – either click the numbers or use your computer's keypad.

3. Once you have a number "dialed," you'll click the green "Call" button. Very similar to the other way to make calls in Call Box, the number you see under the green "Call" button *(We'll call you at 8058459778....)* is the number that Call Box will call **you** on to initiate the call.

4. Your phone will ring, you'll pick it up, and you'll already be dialing out to the phone number you entered!

SETTING UP OUTBOUND CALLS THROUGH CALL BOX

We need to ensure that we have the correct number for us to call you on when making these calls through Call Box.

1. The person/people making outbound calls in Call Box should be set up in the "Staff Profiles" pod.

Staff Profiles
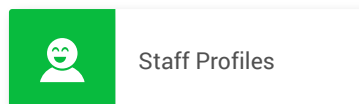
2. Set up a new (or current) staff member:

- Make sure to choose the outbound line from the drop down menu *(there will only be one option, so pick that one). Click "Update."*

- The direct phone should be the number you'd like us to call you on when initiating this call. For example, if you'll be using your cell phone for these calls, "Direct phone" should be **your** cell phone number.

3. Click "Submit."