

**Version**

**1.10**



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DialForce for Salesforce.com's AppExchange

Load From View

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# Load From View Guide

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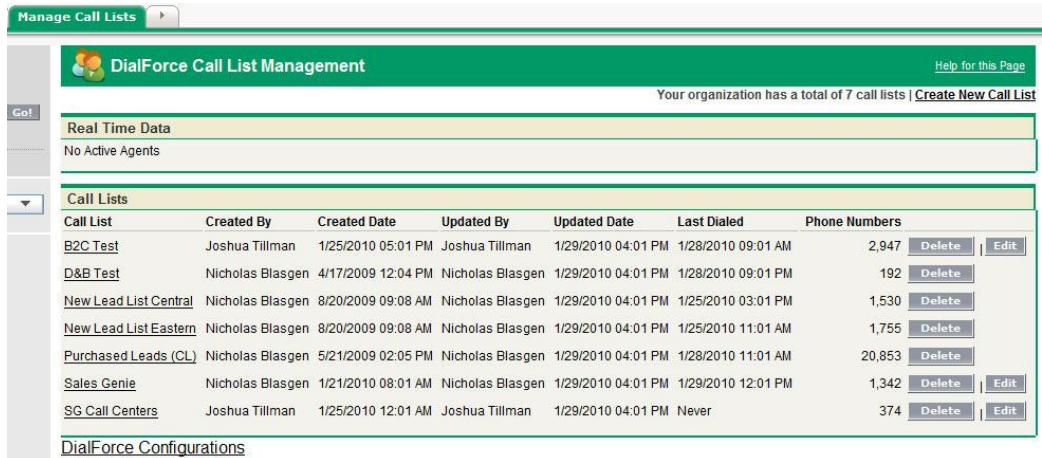


## Load From View

In this section you will be walked through creating Call Lists in DialForce using the Load From View method. DialForce uses objects from your Salesforce.com org to create Call Lists (Leads, Contacts, Accounts, or Custom Objects). For information on importing data into Salesforce use the Salesforce help system. Here we describe how to create a DialForce Call List from data you already have in Salesforce.

### How to create a Call List with Load From View:

1. Click on the **Manage Call Lists** tab.



Call List	Created By	Created Date	Updated By	Updated Date	Last Dialed	Phone Numbers		
<a href="#">B2C Test</a>	Joshua Tillman	1/25/2010 05:01 PM	Joshua Tillman	1/29/2010 04:01 PM	1/28/2010 09:01 AM	2,947	Delete	Edit
<a href="#">D&amp;B Test</a>	Nicholas Blasgen	4/17/2009 12:04 PM	Nicholas Blasgen	1/29/2010 04:01 PM	1/28/2010 09:01 PM	192	Delete	
<a href="#">New Lead List Central</a>	Nicholas Blasgen	8/20/2009 09:08 AM	Nicholas Blasgen	1/29/2010 04:01 PM	1/25/2010 03:01 PM	1,530	Delete	
<a href="#">New Lead List Eastern</a>	Nicholas Blasgen	8/20/2009 09:08 AM	Nicholas Blasgen	1/29/2010 04:01 PM	1/25/2010 11:01 AM	1,755	Delete	
<a href="#">Purchased Leads (CL)</a>	Nicholas Blasgen	5/21/2009 02:05 PM	Nicholas Blasgen	1/29/2010 04:01 PM	1/28/2010 11:01 AM	20,853	Delete	
<a href="#">Sales Genie</a>	Nicholas Blasgen	1/21/2010 08:01 AM	Nicholas Blasgen	1/29/2010 04:01 PM	1/29/2010 12:01 PM	1,342	Delete	Edit
<a href="#">SG Call Centers</a>	Joshua Tillman	1/25/2010 12:01 AM	Joshua Tillman	1/29/2010 04:01 PM	Never	374	Delete	Edit

[DialForce Configurations](#)

Fig 1.1 – DialForce Manage Call Lists tab.

2. Click on the link **“Create New Call List”** in the upper right hand corner, shown in Fig 1.1 above.
3. Select the **Load From View** option.
4. You will be taken to the **Load Call List** screen, shown below in Fig 1.2.

Fig 1.2 – DialForce Load Call Lists screen.

5. **Select** the **Object Type** for this Call List.
6. **Enter** a **Name** for this Call List.
7. **Use** the **Filter Criteria** to narrow your results to the Call List you require. You can populate a list based on a Campaign, or based on criteria you manually enter. This process is the same as Salesforce reports.
8. **Select** the **Caller ID** you want assigned to this Call List.
9. **Click** the **Continue** button when done to compile the Call List.
10. On the next screen you will see the number of results found based on your filter criteria. If this is what you want, **Click** on **Continue**.

Fig 1.3 – DialForce Load Call Lists Continue screen.

- The list is created and the confirmation screen is displayed, as shown below in Fig 1.4.



Fig 1.4 – DialForce Load Call Lists Confirmation screen.

- Click the **Back to Management** button.
- You should now see your new Call List displayed.
- We will now configure user access to the list and other features. **Click** on the **Name** of the Call List. An example of what the Call List Settings screen looks like is shown below in Fig 1.5.

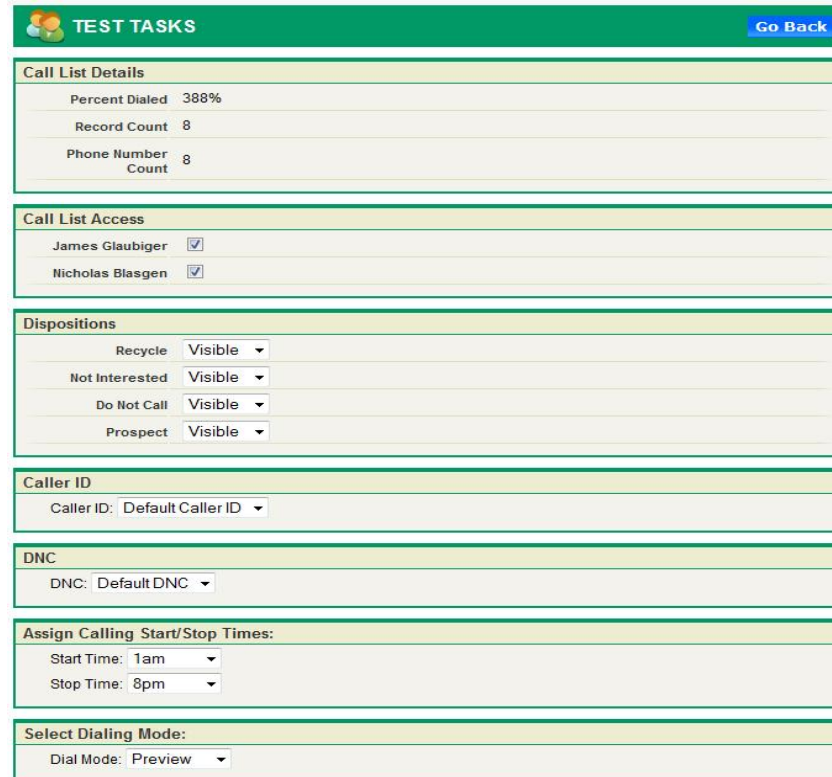


Fig 1.5 – DialForce Call List Settings screen.

15. Here you should **Mark** the **Check Box** next to each **User** you wish to allow access to this list.
16. You can also **Set** the **Custom Disposition Visibility** by **Selecting** the drop down next to each Disposition and **Choosing** either **Visible/Hidden**. Altering these values is automatically saved.
17. DialForce also supports assigning a **Caller ID** to each Call List. **From** the list **Select** the **Caller ID** you want to assign to this Call List.
18. DialForce additionally supports separate **DNC's** for each Call List. **From** the list **Select** the **DNC** you want to assign to this Call List.
19. You may also setup **Calling Start/Stop Times**. In this section **Select** the **Start Time** and **Stop Time** you would like to enforce on this Call List.

**Note:** Start and Stop times are enforced against the time-zone of the numbers you're calling. (i.e. 5pm stop time means that at 3pm Pacific your Agents will not be able to call the East Coast anymore)
20. When you are done **Click** the **Go Back** button to return to Manage Call Lists screen.

This concludes the Load From View Guide. If you have any remaining questions regarding how to use DialForce, please contact support:

[Support@refractivedialer.com](mailto:Support@refractivedialer.com)