Version

1.10

refractive dialer

DialForce for Salesforce.com's AppExchange

Workflow

Workflow

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Overview

This Workflow guide will walk you through setting up a basic workflow that will be triggered by an Agent's Disposition of a phone call outcome.

Refractive Dialer's DialForce is the premier solution for outbound dialing on Salesforce.com's AppExchange. Fully integrated with Salesforce.com, you will be able to dial campaigns, leads, or any custom object group, gaining all the efficiencies you are used to from the Salesforce platform coupled with the power of DialForce. In this guide we will show you how to create a basic workflow. Workflows are a very powerful tool provided by Salesforce.com. The example shown here is simple. More complicated workflows can be created.

Note: Workflow is a Salesforce.com feature. The examples shown here are provided on a good faith effort as a way to get you started if you do not have experience with Workflow. You should take advantage of the Salesforce.com Help/Training to further educate yourself or for support related to this feature.

Creating a Basic Workflow

In this section you will be walked through creating a basic Workflow that will be triggered when an Agent pushes one of the disposition buttons within DialForce. In the example below we are going to create a Workflow based on the Lead Object Type, since our DialForce Call List contains Leads. The Workflow will send out an email template to the Lead's email address when the Lead Status field is changed to Qualified.

Creating a Workflow:

1. While logged into Salesforce.com **click** the **Setup**, then **expand** the **Create** tree, then **Click** on **Workflow & Approvals.**

2. **Click** on the **Create and manage workflow rules** link shown in Fig 1.1 below.

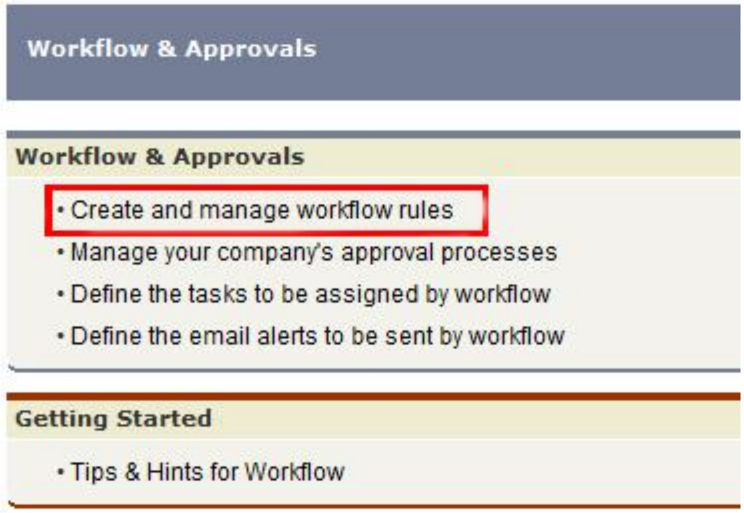

Fig 1.1 – Create and manage workflow rules link.

3. **Click** on the **New Rule** button shown in Fig 1.2 below.

Fig 1.2 – New Rule Button.

4. On the screen for Step 1, **Select** the object type **Lead** then **Click** then **Next** button. Shown in Fig 1.3 below.

Fig 1.3 – Step1: Select Object type Lead.

5. On the screen for Step 2, **Enter** a **Name** for the **Rule**. Typically you want to enter something that describes what this rule does. (i.e. "Lead Qualified Email"). An example of this is shown below in Fig 1.4.

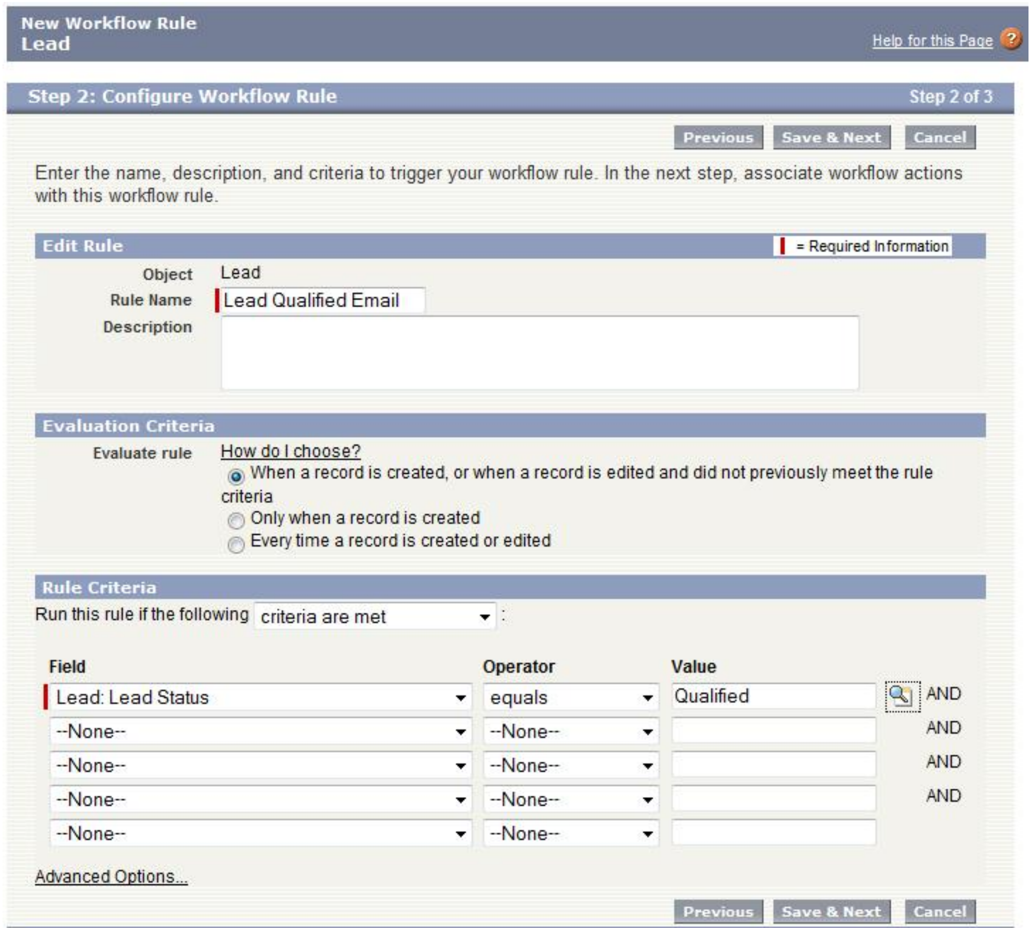

Fig 1.4 – Step 2: Configure Workflow Rule

6. In the **Evaluation Criteria** section we will leave the default option set to **When a record is created, or when a record is edited and did not previously meet the rule criteria**.

7. In the **Rule Criteria** section, **Select** the **Lead: Lead Status** field from the drop down on the left.

8. **Select** the **equals** operator from the drop down in the middle.

9. **Click** the **Lookup Icon** next to the **Value** field on the right type in **Qualified.**

10. **Click** the **Save & Next** button on the bottom of the screen. You will be taken to the Step 3 screen shown below in Fig 1.5.

Fig 1.5 – Step 3: Specify Workflow Actions

11. **Click** the **Add Workflow Action** button and **Select** the **New Email Alert** option. This will allow us to choose an email template to send when this workflow is triggered.

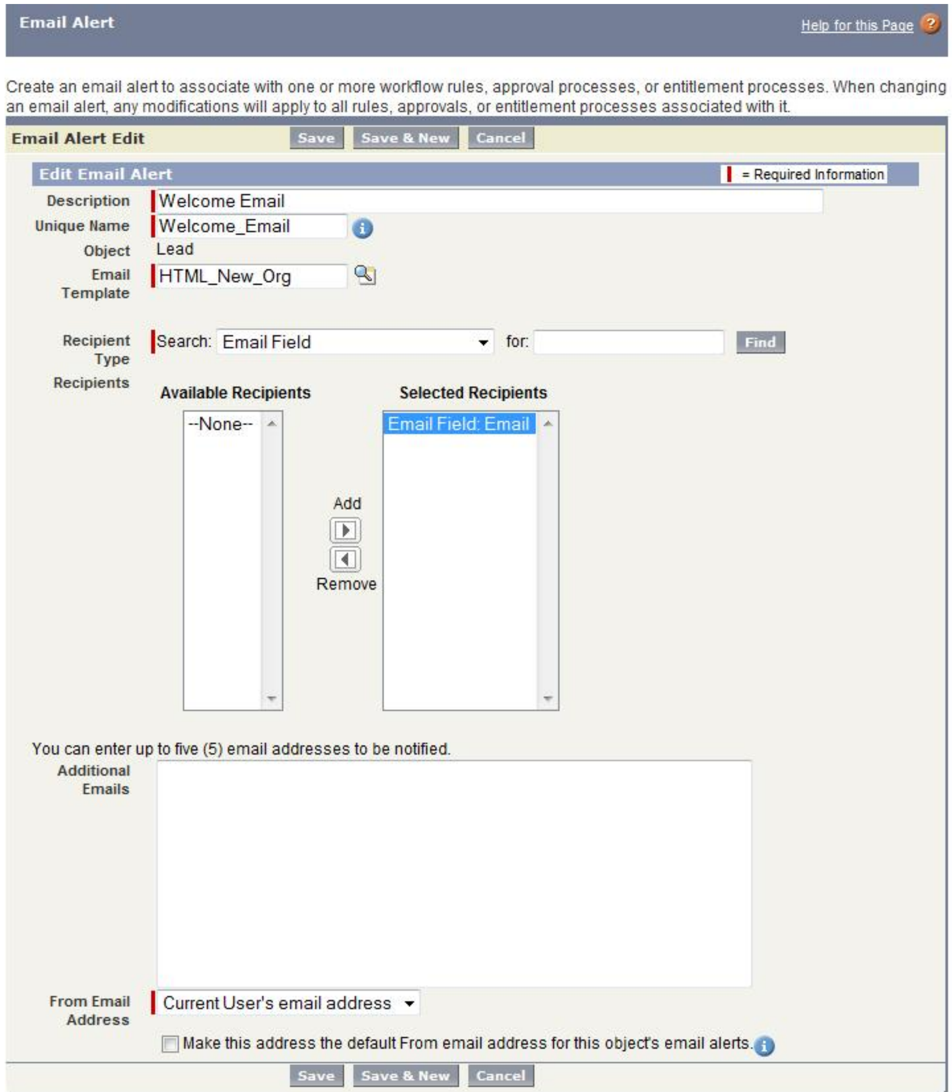

Fig 1.6 – Email Alert Edit

12. On the **Email Alert Edit** screen, shown above in Fig 1.6, **Enter** a **Description**.

13. Next to the **Email Template** box, **Click** on the **Lookup Icon** and **Select** the **Email Template** you wish to send.

14. In the **Recipient Type** drop down, **Select** the **Email Field** option.

15. Now you will see that the **Available Recipients** list contains **Email Field: Email** as an option. **Click** to **Select** it then **Click** the **Right Arrow** to add it to the **Selected Recipients** list.

16. **Click** the **Save** button.

17. Now go back to the **Workflow Rules** page by **Clicking** the **Back To List: Workflow Rules** link.

18. **Next** to the workflow you just created **Click** the **Activate** link.

You have now setup a very basic workflow that will send an email to the Lead's email address when a Lead's Status is changed to Qualified. This workflow will be triggered any time a Lead's Status is changes to Qualified, including when a DialForce Call Disposition is pressed by an Agent that alters the Lead Status to Qualified. This is a very powerful tool, especially since you can perform multiple actions automatically. For example you may also want to add into this workflow the ability to schedule a Task for the Agent to follow up with the Lead in a few days. This scenario can easily be accomplished with workflows. For a more in depth look at Workflows, please use Salesforce.com's Help & Training.

If you have any remaining questions regarding how to use DialForce, please contact Support:

Support@refractivedialer.com