Version

1.15

refractive dialer

Dialsource for Salesforce.com's AppExchange

Agent Reference

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Section 1

Overview

This reference guide will help telemarketing agents quickly learn the features of Dialsource and how to use it.

Refractive Dialer's Dialsource 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 Dialsource.

The following steps are required when an agent logs into Dialsource for the first time:

1. Enter/Edit Your Contact Information

2. Record a Voice Mail Template (if using this feature)

Getting into Dialsource

In this section you will be walked through loading into Dialsource.

Loading into Dialsource:

1. While logged into Salesforce.com **select** the **Dialsource** option from the drop down list which appears in the upper right-hand corner of your salesforce.com screen as shown in Fig 1.1 below.

Fig 1.1 – Selecting the Dialsource app.

2. The window should refresh showing you the Dialsource tabs, which include **"Your Call Lists"** and **"Manage Call Lists"**.

3. **Click** on the **"Your Call Lists"** tab shown in Fig 1.2 below.

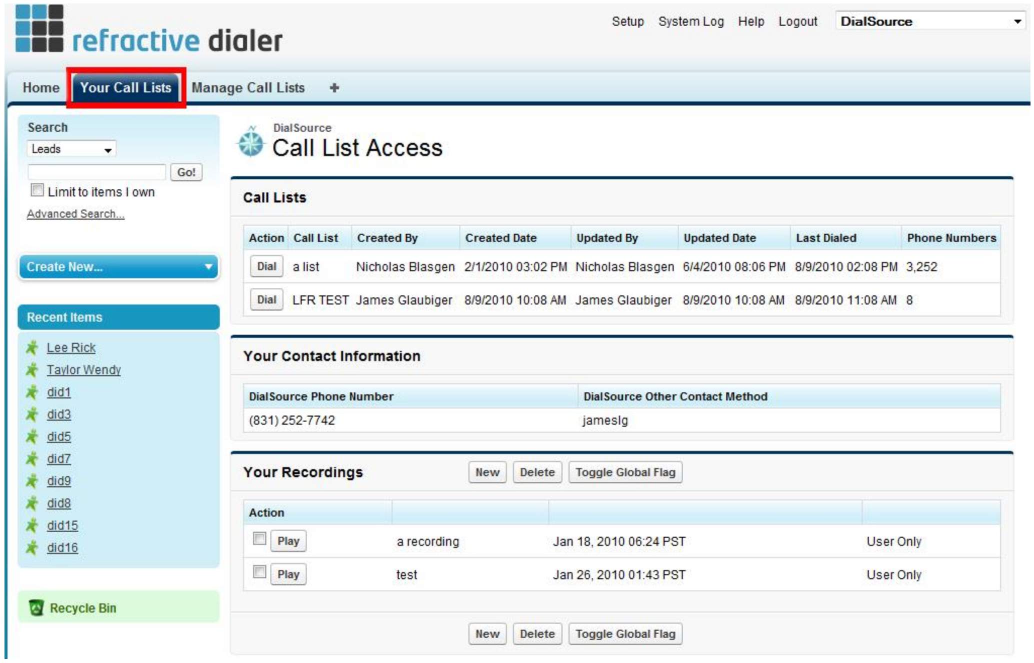

Fig 1.2 – Your Call Lists tab. From this screen you will be able to access the most commonly used components of Dialsource **Call Lists**, **Your Contact Information**, **Your Recordings.**

Your Contact Information

In this section you will be walked through setting up your Contact methods. You should see that Dialsource supports two Contact methods **Dialsource Phone Number**, and **Dialsource Other Contact Method**. Either field will allow a 10-digit phone number to be entered. **Dialsource Other Contact Method** also supports Skype, GoogleTalk, or SIP usernames.

Setting up Your Contact Information:

1. **Click** on **Setup** in the upper right hand corner of your Salesforce.com screen.
2. **Click** to expand **My Personal Information** on the left hand side.
3. **Click** on the **Personal Information** option.
4. You should now see your User Profile. **Click** on the **Edit** button.

5. **Find** the **Dialsource Phone Number**, and **Dialsource Other Contact Method** fields, and fill them in with your **Phone Number**, and/or Skype, GoogleTalk, or SIP username respectively.

6. **Click** on the **Save** button to save the changes.

7. **Click** on the **Your Call Lists** tab and you should see the contact methods filled in as shown in Fig 1.3 below.

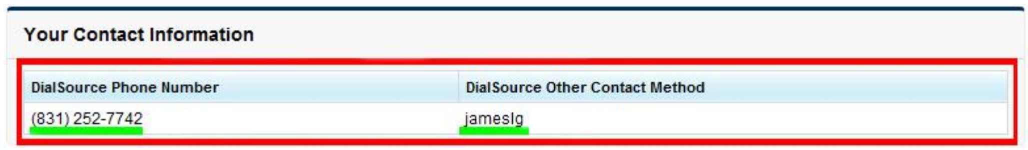

Fig 1.3 – Your Contact Information zoom in on Dialsource fields.

Your Recordings

In this section you will learn how to manage your Voice Mail Templates or Recordings. Dialsource supports the ability for agents to pre record a Voice Mail Template related to the purpose of the phone call. Once the agent has identified a connected call as an answering machine, the agent can select the appropriate Recording to leave. Dialsource will move the agent to the next live call, while in the background it will play the Voice Mail Template Recording as if the agent had left the message themselves.

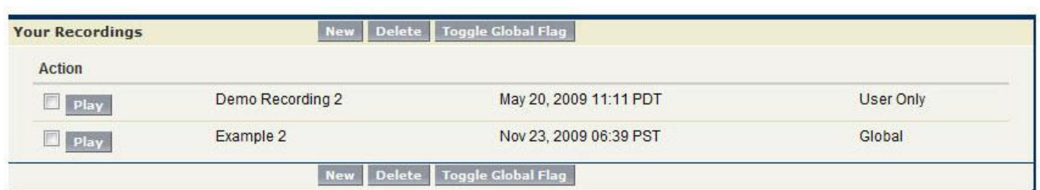

Fig 1.4 – Your Recordings Section.

Make a New Recording:

1. On the Your Call Lists screen, **Click** on the **New** button in the Your Recordings section.

2. You will be taken to a new screen similar to Fig 1.5 below.

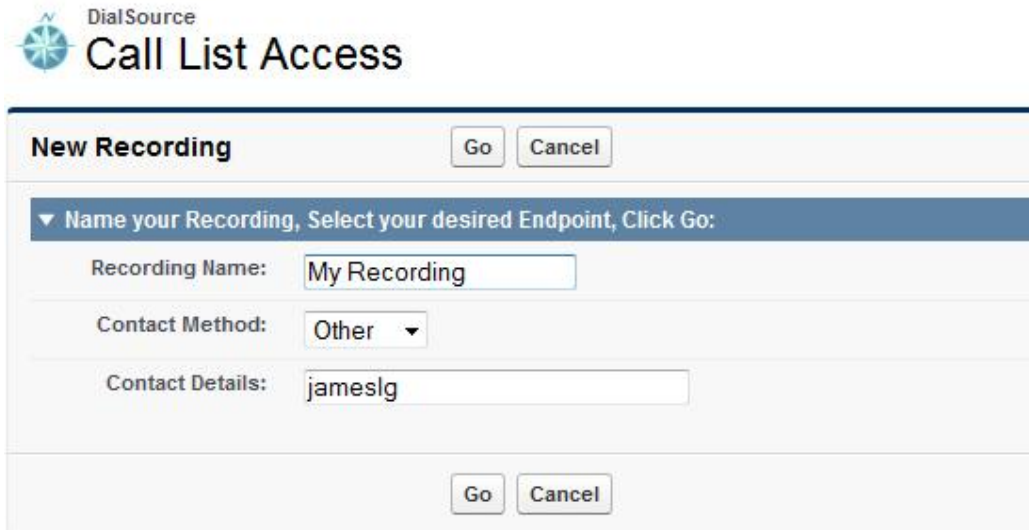

Fig 1.5 – New Recording Screen

3. **Enter** a **Recording Name.**

4. **Select** where Dialsource should call you to record the Voice Mail Template **using** the **Contact Method** drop down list.

5. **Click** on the **Go** button when you are ready for the system to call you.

6. **Answer** the call and follow the audio directions to record your Voice Mail Template.

7. When you are done, **Click** on the **Your Call Lists** tab or **Click** the **Cancel** button to return.

Delete a Recording:

1. To **Delete** a Recording **Mark** the **Action Check Box** next to the **Play** button of the Recording you wish to delete.

2. Then **Click** on the **Delete** button, as shown in Fig 1.6 below.

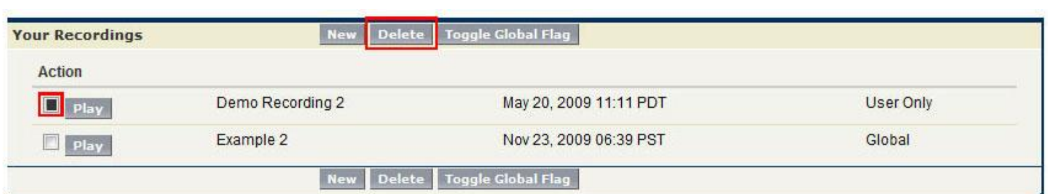

Fig 1.6 – Mark Action box, then click Delete.

Toggle User/Global for a Recording:

Recordings can be User Only, meaning that only the current user has access to that specific Voice Mail Template, OR a Recording can be available Globally if the Global flag is set. Below you will learn how to swap from User to Global, but you can reverse the setting using the same steps.

1. To **Toggle** a recording from User Only to Global, **Mark** the **Action Check Box** next to the **Play** button of the recording you wish to change the setting for.

2. Then **Click** the **Toggle Global Flag** button as shown in Fig 1.7 below.

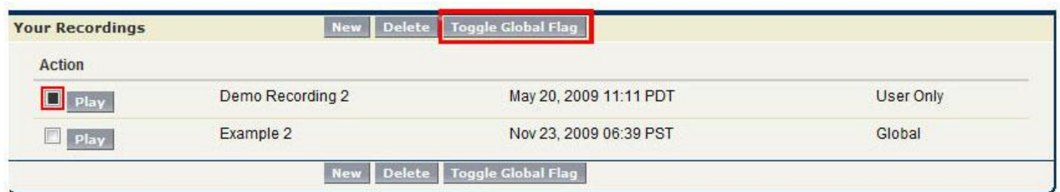

Fig 1.7 – Mark Action box, then click Toggle Global Flag.

Call Lists

The Call Lists section displays all the lists that an agent has access to. Basic information is displayed about each list. Since certain aspects of the system are customizable, example images and or buttons available may be different from what you see.

Dialing a Call List:

1. **Click** on the **Dial** button next to the Call List you want to start dialing, as shown in Fig 1.8 below.

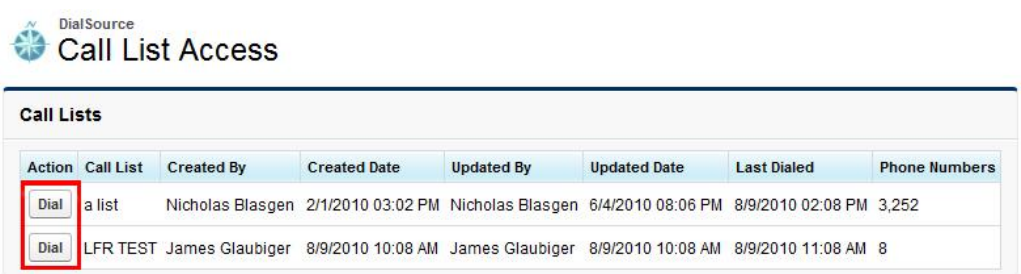

Fig 1.8 – Call Lists Dial button, click one to dial a list.

2. You will be redirected to a confirmation page similar to Fig 1.9 below. **Verify** that the correct **Contact Method** is **Selected** and optionally which **Genre** of Music you wish to listen to between calls.

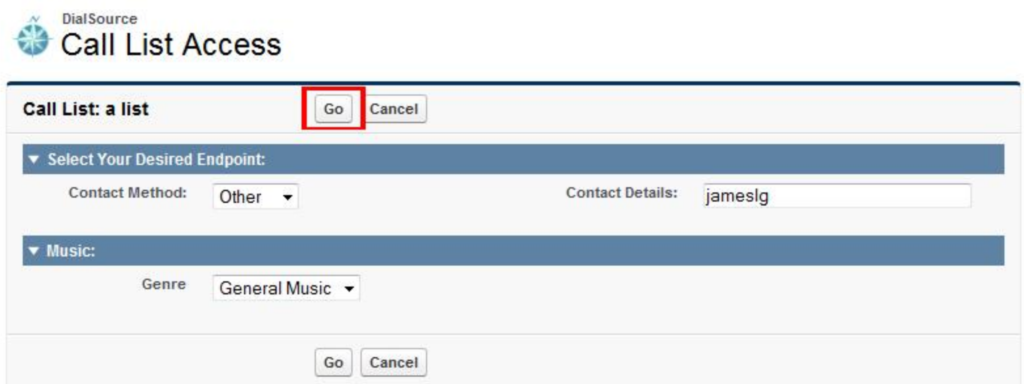

Fig 1.9 – Call Lists Go Screen, click Go to dial a list.

3. **Click** on **Go** to start dialing.

4. You will be taken to the **Dial Screen**. The upper portion of this screen is shown in Fig 1.10 below. The system will also call you at the selected **Contact Method**.

5. **Answer** the incoming call from Dialsource. You will hear the system announce some information about the session, when you hear music dialing has begun.

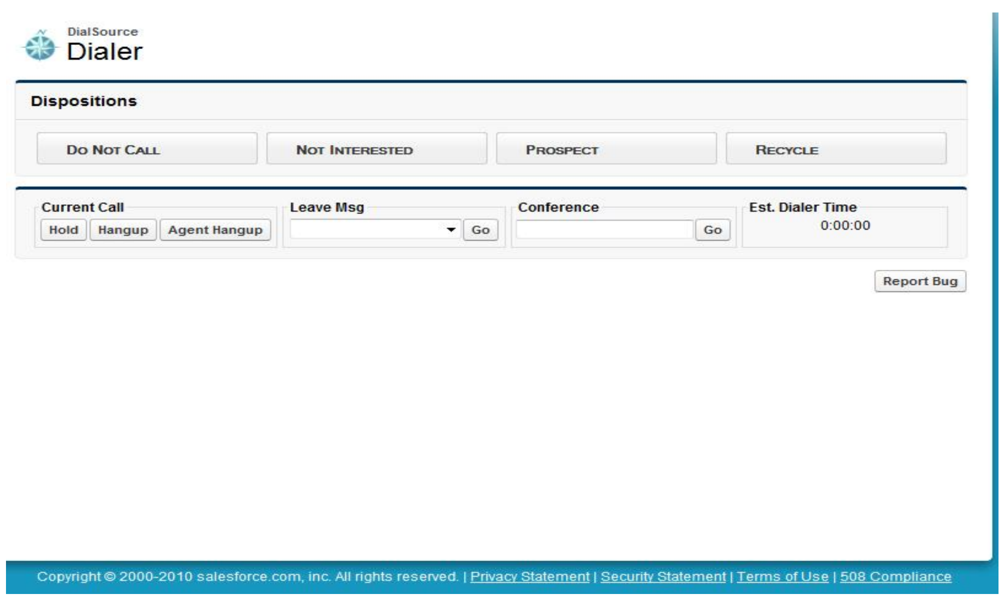

Fig 1.10 – The Dial Page. Dispositions are displayed in the upper section, below are the call controls.

6. **When** a live connection is established **You** will be connected to the prospect. The screen will refresh with the prospect **form** below the Dispositions and Call Controls. An example of what this form might look like is shown in Fig 1.11 below. (**Note:** your forms are customizable and may look different depending on how your Admin has set things up).

Lead Detail Edit | Delete | Convert | Clone | Find Duplicates | Submit for Approval | Interview 2 | Create GOTO

Lead Owner	Joshua Tillman [Change]	Lead Status	Open
Name	Neil Jarvis	Phone	9187869057
Company	State Farm Insurance	Mobile	
Title	Owner	Fax	9187867466
Industry	Insurance	Email	
Sales Volume		Website	
Employees		Email Opt Out	
Lead Source	Salesgenie.com		
DemoAttendee			
Keyword			
LastMassEmail			
Address	1015 S Main St Grove, OK 74344-2847		
Description			
Custom Links	financial profile map		news
Created By	Joshua Tillman, 1/20/2010 3:28 PM	Last Modified By	Joshua Tillman, 1/20/2010 3:28 PM

Edit | Delete | Convert | Clone | Find Duplicates | Submit for Approval | Interview 2 | Create GOTO

Open Activities New Task | New Event

No records to display

Activity History Log A Call | Mail Merge | Send An Email | Compose Gmail

No records to display

Approval History Submit for Approval

No records to display

Fig 1.11 – Prospect Form example (**Note:** Your forms are customizable and may look different depending on how your Admin has set things up).

7. **Once** you are connected to the prospect music will halt. **Begin** your sales call.

8. **If** you need to **Edit** the prospect information, **Click** the **Edit** button.

9. **Make** your changes then **Click** the **Save** button.

10. To get back to the current call **Click** on the **Your Call Lists** tab. You will be redirected to the Dial page and the current prospect's form should populate.

11. To **Disposition** a call, **Click** one of the **Dispositions** located at the top of the screen as shown in Fig 1.10. When you click a **Disposition** you will automatically be taken to the next live call. (**Note:** you will only hang up the phone to end your dialing session, OR when you want to make lengthy edits)

12. **Dialing** will continue until you **Hang-up** your phone. **To End** a dialing session **Hang-up** your phone **then Disposition** the last record.

Voice Mail Template Drop In:

To use this you must have pre recorded a template as outlined in section **Your Recordings – Make New Recording** on **pg 4.** When an Agent determines that a connected call is a voice mail system, the Agent should use the Voice Mail Template Drop In feature as outlined below:

1. **When** you have determined that a connected call is a **voice mail system**, **Click** the **drop down** next to **"Leave Msg"**.

2. **Select** the appropriate **Voice Mail Template** from the list.

3. **Click** the **Go** button.

4. **Click** the appropriate **Disposition** button.

5. The system will move the Agent to the next live call, while in the background it will listen for the tone, then play the selected recording.

Call Hold & Conference:

The system also supports Call Hold, and Conferencing capabilities. Below are examples of how to use these features, but there are several ways to use them. To place a call on **Hold**, perform these steps:

1. **To place** the current call on **Hold, Click** the **Hold** button.

2. **While on Hold** your prospect will hear music.

3. **To** take the call **Off Hold**, **Click** the **Hold** button again.

You can also **conference** in another agent while a call is already on hold:

1. **To Conference** in another Agent, **place** the current call on **Hold** as outlined above.

2. **In** the **Conference** text box, **Type** the name of the Agent you want to conference in. Similar names will auto populate.

3. **Select** the correct Agent from the list, then **Click** the **Go** button to the right of the conference text box.

4. The system will call the other Agent. Assuming they answer, you will be connected to that Agent. Take the caller off hold and you'll be in a 3 way conference. You can choose to hang up on either party or you can disposition the call to disconnect yourself from the 3 way conference and continue dialing.

This concludes the Agent Reference Guide. You should now have a thorough understanding of how an Agent will interact with Dialsource. If you have any remaining questions regarding how to use Dialsource, please contact Support:

Support@refractivedialer.com