

Version

1.15



Dialsource for Salesforce.com's AppExchange

Agent Reference Supplement



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© Refractive Dialer, LLC.
548 Market Street • #25020
San Francisco, CA 94104
Phone 800.928.0392

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Overview of Changes & New Features

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

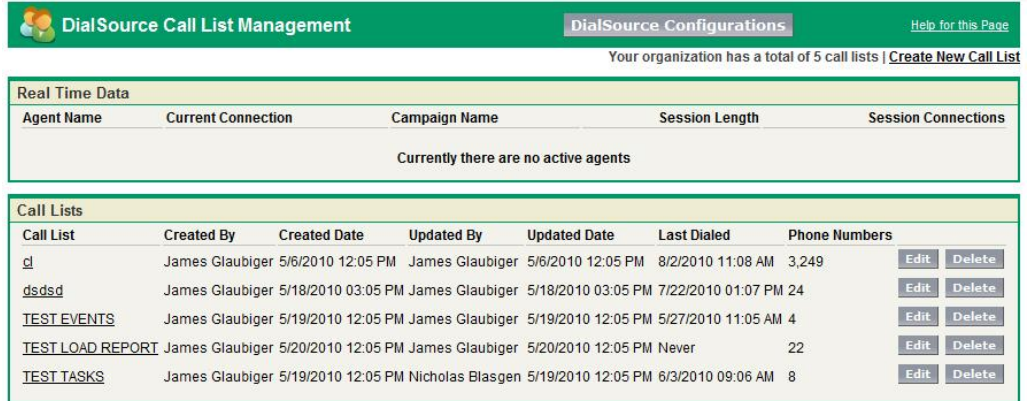
Refractive Dialer's Dialsource is the premier solution for outbound dialing on Salesforce.com's AppExchange. Fully integrated with Salesforce.com, you will be able to dial campaigns, leads, or any custom object group, gaining all the efficiencies you are used to from the Salesforce platform coupled with the power of Dialsource. With the release of our new package, we have added new features and made significant changes to how users interact with the system. This guide will give a brief overview of the changes and features to get your agents up to speed. These changes include:

1. Preview Mode – see information about the call before you place the call by clicking “Dial”.
2. Ability to “Dial” a Prospect Back Manually.
3. Conference/Transfer System.
4. Changes to the System Layout.

Preview Mode for Dialing Call Lists

Preview Mode is configurable via the Manage Call Lists Tab when editing a specific Call List. By setting a Call List to Preview Mode you are altering how the system will dial. Instead of dialing multiple lines and connecting the agent to the first answered call, the system will now load the object form prior to any calls being made for the agent to review. When the agent is ready to call this prospect they will click the “Dial” button. The system will then make a single phone call to this prospect. Upon Dispositioning of the call outcome, the system will load the subsequent prospect form, again waiting for the Agent to click “Dial”. This method of dialing has been highly requested by clients

that wish to read notes or status information about the prospect to prepare for the phone call.



Agent Name	Current Connection	Campaign Name	Session Length	Session Connections
Currently there are no active agents				

Call List	Created By	Created Date	Updated By	Updated Date	Last Dialed	Phone Numbers	Edit	Delete
cl	James Glaubiger	5/6/2010 12:05 PM	James Glaubiger	5/6/2010 12:05 PM	8/2/2010 11:08 AM	3,249	Edit	Delete
dsdsd	James Glaubiger	5/18/2010 03:05 PM	James Glaubiger	5/18/2010 03:05 PM	7/22/2010 01:07 PM	24	Edit	Delete
TEST EVENTS	James Glaubiger	5/19/2010 12:05 PM	James Glaubiger	5/19/2010 12:05 PM	5/27/2010 11:05 AM	4	Edit	Delete
TEST LOAD REPORT	James Glaubiger	5/20/2010 12:05 PM	James Glaubiger	5/20/2010 12:05 PM	Never	22	Edit	Delete
TEST TASKS	James Glaubiger	5/19/2010 12:05 PM	Nicholas Blasgen	5/19/2010 12:05 PM	6/3/2010 09:06 AM	8	Edit	Delete

Fig 1.1 – Dialsorce Manage Call Lists tab.

Setting a Call List to Preview Mode:

1. Click on the **Manage Call Lists** tab, shown in Fig 1.1 above.
2. Click on the **Name** of the **Call List** you want to modify.
3. At the **bottom** of the **Call List Edit** page, you can **modify** the **Dialing Mode** for the **Call List** by using the **Dial Mode** drop down.
4. Select the **Preview** option, shown below in Fig 1.2.

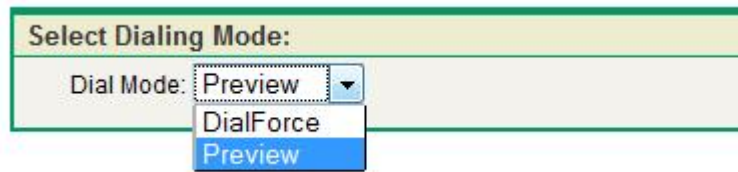


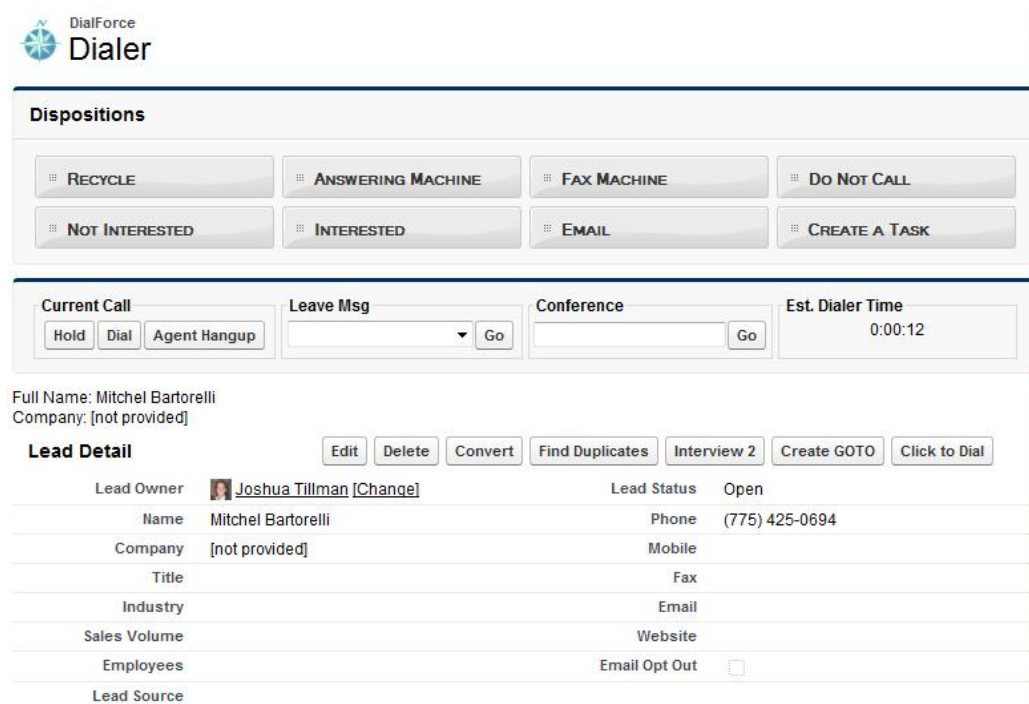
Fig 1.2 – Dialsorce Manage Call Lists tab.

5. Click the **Go Back** button to return to **Manage Call Lists** tab when done.

Dialing a Preview Mode Call List:

1. Click on the **Your Call Lists** tab.
2. Click the **Dial** button next to the **Preview Mode Call List** you wish to dial.

3. Click the **Go** button once you have selected the correct **Contact Method**.



DialForce
Dialer

Dispositions

RECYCLE ANSWERING MACHINE FAX MACHINE DO NOT CALL

NOT INTERESTED INTERESTED EMAIL CREATE A TASK

Current Call Leave Msg Conference Est. Dialer Time

Hold Dial Agent Hangup [dropdown] Go [input] Go 0:00:12

Full Name: Mitchel Bartorelli
Company: [not provided]

Lead Detail Edit Delete Convert Find Duplicates Interview 2 Create GOTO Click to Dial


Lead Owner	 Joshua Tillman [Change]	Lead Status	Open
Name	Mitchel Bartorelli	Phone	(775) 425-0694
Company	[not provided]	Mobile	
Title		Fax	
Industry		Email	
Sales Volume		Website	
Employees		Email Opt Out	<input type="checkbox"/>
Lead Source			

Fig 1.3 – Dialsorce Dial Screen when in Preview Mode.

4. The system will call you at your **Selected Contact Method**.
5. **Answer** your **Phone**.
6. You will hear music and be able to review the **Prospect Form**, as shown in Fig 1.3 above.
7. **When** ready to **Dial** this **Prospect**, **Click** the **Dial** button located in the **Current Call** section, shown in Fig 1.3 above.
8. The system will then **Call** the loaded **Prospect** and you may engage in your sales call.
9. To **end** your **Call**, you may either **Click** the **Hangup** button and make your **Notes** on the **Prospect Form** then **Click** one of the **Dispositions**. **Or Click** a **Disposition**. Once a **Disposition** has been **Clicked**, you will be moved to the next **Prospect** in the **Call List**.

Ability to “Dial” a Prospect Back Manually

While in Dialsource Mode with a Prospect form populated an Agent may occasionally need to Dial a prospect back due to a poor connection or dropped call. In the event this is required the Agent may click the “Hold” button once. After doing this the button will change to a “Dial” button. Clicking “Dial” will call the current Prospect back.

Dialing a Prospect Back Manually While in Dialsource Mode:

1. While dialing a **Dialsource Mode Call List**.
2. If you are disconnected from the **Prospect** for any reason, **Or** need to **Call Back** the **Prospect** while the **Prospect Form** is still **Loaded**.
3. **Click** the **Hangup** button, **Then Click** the **Dial** button.
4. The system will call back the loaded **Prospect**.

Conference/Transfer System Changes

The Conference/Transfer System has been updated to work more smoothly. It also now supports warm transferring: If your Agent has a Prospect on the phone and needs to transfer the Prospect to another Agent or Supervisor this can now be done.

Conference/Transfer to Another Agent:

1. **Type** the **Name** of the Agent or Supervisor **into** the **Conference box**
2. **A list** of available **Phone Numbers** for that **Agent** will be **populated**.
3. **Select** the correct **Phone Number** to **transfer** the **Prospect** to then **Click Go** to bridge in the Agent or Supervisor.
4. **If** you wish to speak to the Agent or Supervisor privately, you may **Click** the **Hold** button to place the **Prospect on Hold**.
5. **Clicking** the **Unhold** button will bridge all three parties back into the same call.
6. **To move on to the next call**, leaving the Agent or Supervisor connected to the Prospect, **Click** the appropriate **Disposition**.

Changes to the System Layout

Changes to the System Layout have been made while on the Dial Screen to beautify and organize the Agent's view and controls. These changes are mostly in the Current Call section of the screen.

In Fig 1.3 above, you may notice the changes made to the Call Controls row.

This concludes the Agent Reference Supplement Guide. If you have any remaining questions regarding how to use Dialsource, please contact Support:

Support@refractedialer.com