Version

1.16

refractive dialer

Dialsource for Salesforce.com's AppExchange

Disposition Guide

Disposition Guide

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Overview

This Disposition guide will help you quickly configure Dialsource Dispositions and create the business logic associated with them.

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 Disposition functionality provided by Dialsource allows you to track outcomes of calls and trigger associated business logic to be performed upon an Agent dispositioning the outcome of a call.

Configuring Dispositions

Dispositions allow you to assign business logic to all the possible outcomes of a call. This logic will dictate what happens to the call when a disposition is selected. Some dispositions support a sub-action. Since we use your own Salesforce.com objects, some of the options will be populated from your objects (i.e. Lead Status will populate from your pick-list options). There are two components to setting up a disposition: 1) Creating the Custom Disposition, 2) Assigning the Actions a Disposition will trigger when selected. Please follow the instructions below.

To Add/Edit/Remove Custom Dispositions:

1. **Click** on **Setup** in the upper right hand corner of your Salesforce.com screen.
2. **Click** to expand **Customize**.
3. **Click** to expand **Activities**.

4. **Click** to select **Activity Custom Fields**.

5. **Click** on **Dialsource Dispositions.**

6. On the bottom of the screen you will see a list of the **Dispositions,** Fig 1.7 below shows what this screen looks like.

   - You may **Add** a **New** one by **Clicking** the **New** button.

   - Or you may **Delete** one by **Clicking** the **Delete** button**.**

   - You can also **Edit** one by **Clicking** on the **Edit** button.

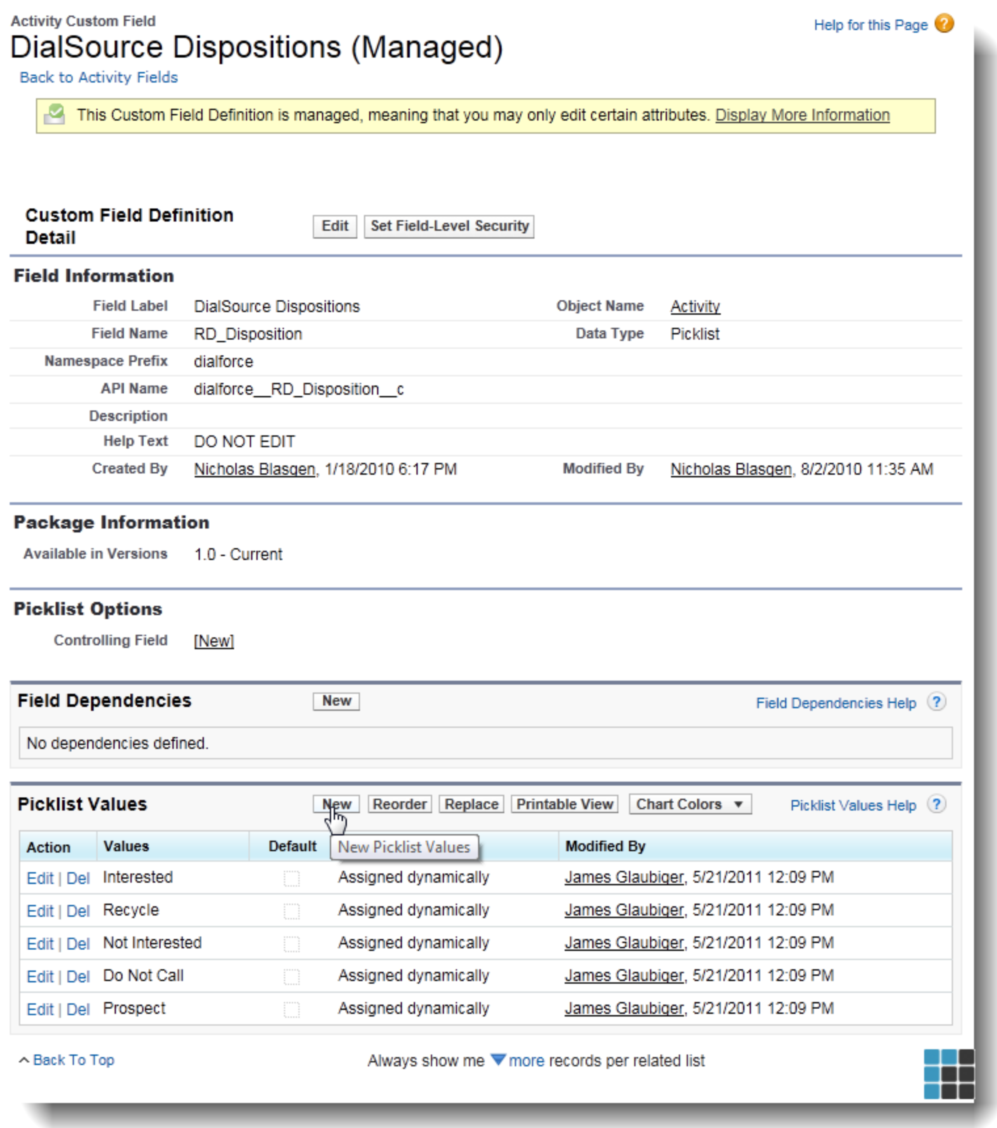

Fig 1.1 – Dialsource Custom Disposition Editing.

Disposition Actions:

Now that you have created your Custom Dispositions, we need to configure the business logic triggered when each Disposition is selected. Below Fig 1.2 shows a very basic example of what the Disposition Logic interface looks like. Take a minute to review it before we jump into the details.

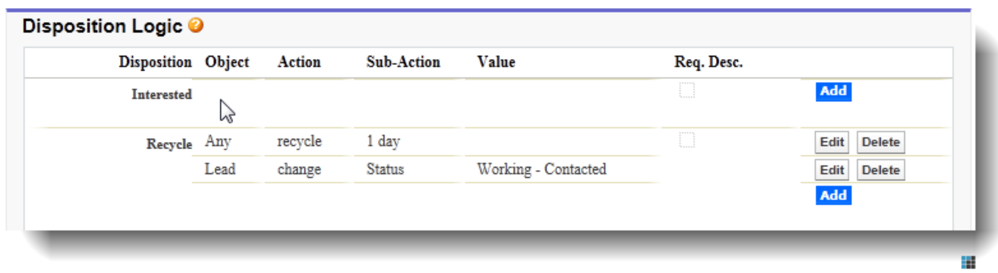

Fig 1.2 – Dialsource Disposition Logic on the Dialsource Configurations Screen.

With the most recent release of Dialsource we have revamped the Disposition engine. You now have the ability to perform multiple business logic actions when a single Disposition is pressed.

> For example, if the Call List you created is calling on Lead Objects you could have a Disposition named "Recycle". This Disposition could perform a Recycle, and a Change Field on the Lead Object. To understand this better, look at Fig 1.2 above. The Recycle Disposition is configured to perform a Recycle on Any Object Type, and it also changes the Status of a Lead Object to "Working – Contacted".

The ability to perform multiple business logic actions by pushing a single Disposition is a very powerful tool. In addition we provide you the ability to use the same Disposition "Recycle" on other objects by allowing you to configure business logic for additional Object Types. **The system knows what type of object the Agent is connected to, and will perform only the business logic for that type of Object.**

> For example, you could add actions for Contacts to this same Disposition as we have done in Fig 1.3 below. Therefore if the Agent is connected to a Lead and pushed the "Recycle" Disposition, the actions for the Lead Object Type and Any Object Type will be executed. If the Agent is connected to an Account and pushed the "Recycle" Disposition, the actions for the Account Object Type and Any Object Type will be executed.

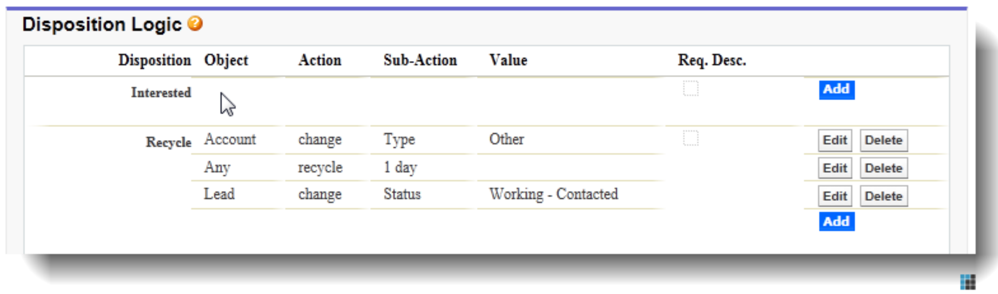

Fig 1.3 – Dialsource Disposition Logic on the Dialsource Configurations Screen.

<u>**Disposition Logic**</u> – Define the business logic for the custom call outcomes. Each disposition has a check box called **"Require Description"**, mark this if you want to require that additional notes be added by the agent when this disposition is selected. **Click** the **Save** button in this section after assigning the disposition logic.

Please refer to the table below for a more detailed description of what logic is available for configuration with Dispositions.

<u>Custom Disposition Logic Descriptions:</u>

Object Type	**Action**	**Sub-Action Description**
Any	Recycle	Removes the Object from the Call List then Adds the Object back to the Call List after X-days.
Any	DNC	Adds the Object to the Do Not Call List.
Account, Contact, Lead, Task	Field Update	Changes the contents of a field to a static value defined here.
Account, Contact, Lead, Task	Delete	**Delete Number** - Deletes the Phone Number from the record in Salesforce. **Delete Object** – Deletes the Object from the Call List and Deletes the Object in Salesforce.
Account, Contact, Lead	Create Task	Creates a Task for the selected user associated to the selected Object.

Example: Configuring a Field Update

1) **Click** the **Add** button for the **Disposition** you wish to add the **Field Update** logic to.

2) In the Disposition Popup, **Select** the **Object Type**. For this example we select Lead as shown in Fig 1.4 below.

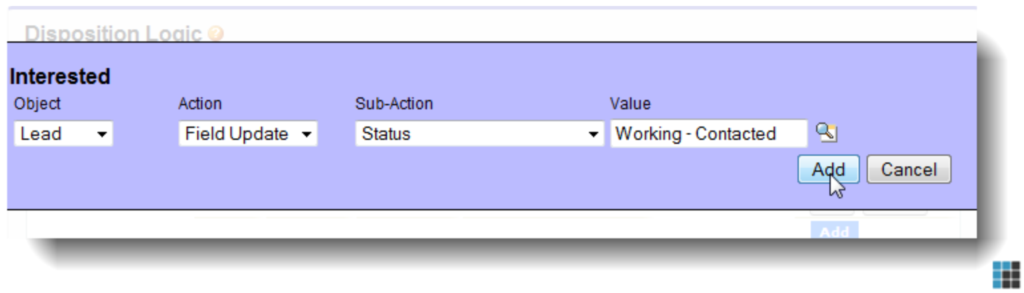

Fig 1.4 – Dialsource DispositionPopup.

3) **Select** the **Field Update** option from the **Action** drop down.

4) **Select** the **Field** to be updated from the **Sub-Action** drop down.

5) **Enter** the **Value** that this field should be changed to in the **Value** text box.

6) **Click** the **Add** button to save.

Disposition Groups

Disposition Groups allow you to define Groups of Dispositions so that you can easily assign a subset of Dispositions commonly used together to a specific Call List. This is helpful if you have some Call Lists for cold calling vs. Call Lists for Call Backs. Using the Disposition Groups will save you time setting up new Call Lists since you can assign a pre-defined Disposition Group to the Call List instead of manually setting which Dispositions are Visible/Hidden.

To create a Disposition Group:

1. On the Dialsource Configurations screen, **Click** the **New** button in the **Disposition Groups** section.

2. The Disposition Grouping Screen will display as shown below in Fig 1.5.

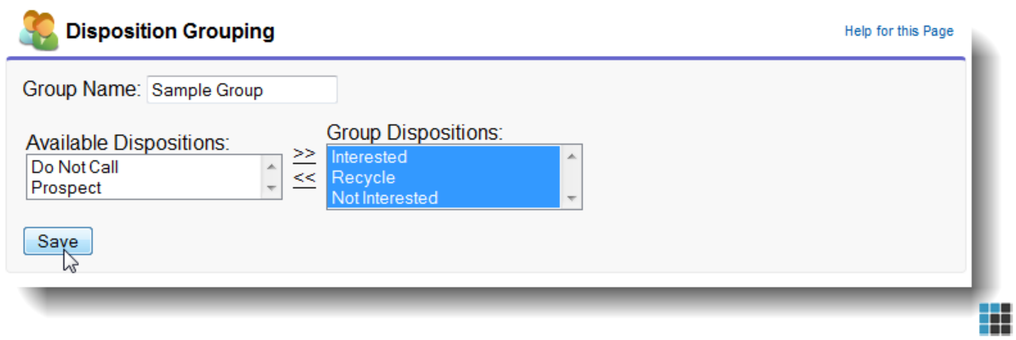

Fig 1.5 – Dialsource Disposition Grouping Screen.

3. **Enter** a **Name** for this **Group.**

4. **Select** the **Dispositions** to add to this Group by **Double Clicking, or** Using the **Double Right Arrow** to move the Disposition to the right column.

5. **Click** the **Save** button when done.

You have now configured a Disposition Group. To assign this Group to an existing Call List simply select the Group from the Disposition Group dropdown on the Call List Configuration screen.

This concludes the Disposition Guide. You have now successfully setup Dialsource Dispositions. If you have any remaining questions regarding how to use Dialsource, please contact Support:

Support@refractivedialer.com