

Version

1.16



Dialsource for Salesforce.com's AppExchange

Installation Guide



Installation Guide

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Table of Contents

Installation Overview.....	pg1
Obtain The App install Link.....	pg1
Install Dialsource & Deploy.....	pg2
Network Access.....	pg5
Edit User Object Page Layout.....	pg6
Edit Task Page Layout.....	pg7
Installation Complete – Next Steps.....	pg8

Installation Overview

Outlining the steps required to install Dialsource for Salesforce.com's AppExchange.

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 installing Dialsource onto your Salesforce.com Org, **you must** use an **Administrative level account!**

1. Obtain the App install Link.
2. Install Dialsource & Deploy.
3. Configure Network Access.
4. Edit User Object Page Layout.
5. Installation Complete -- Next Steps.

1. Obtain The App Install Link

You may obtain the App Install Link by either having us email it to you or via Salesforce.com's AppExchange.

Getting the App Install Link from AppExchange:

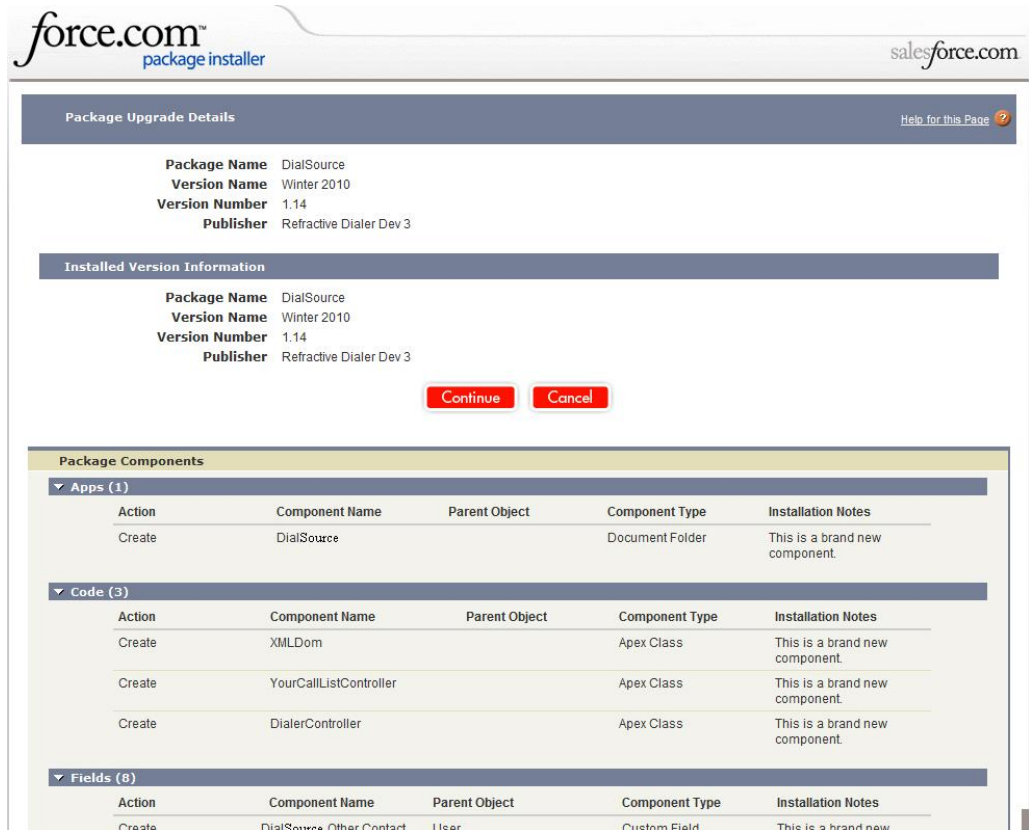
1. **Visit** the AppExchange and **search** for **Dialsource**.
2. **Click** on **"Get It Now"**.

Getting the App Install Link via Email:

1. **Send** an email to Sales@refractedialer.com asking for the install link.
2. **Click** on the link when you receive the reply email and **login** as an **Admin**.

2. Install Dialsource & Deploy

Once you have obtained the install link and clicked on it you should see a screen similar to that below in Fig 1.1.



The screenshot shows the Salesforce Package Upgrade Details page. The page header includes the Salesforce logo and 'package installer'. The main content area is titled 'Package Upgrade Details' and contains the following information:

- Package Name:** DialSource
- Version Name:** Winter 2010
- Version Number:** 1.14
- Publisher:** Refractive Dialer Dev 3

Below this is the 'Installed Version Information' section, which displays the same details as above. At the bottom of this section are 'Continue' and 'Cancel' buttons.

The 'Package Components' section is expanded to show three categories:

- Apps (1):** A table with one row: Action: Create, Component Name: DialSource, Parent Object: (blank), Component Type: Document Folder, Installation Notes: This is a brand new component.
- Code (3):** A table with three rows:

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	XMLDom		Apex Class	This is a brand new component.
Create	YourCallListController		Apex Class	This is a brand new component.
Create	DialerController		Apex Class	This is a brand new component.
- Fields (8):** A table with one row:

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	DialSource Other Contact	User	Custom Field	This is a brand new

Fig 1.1 – Page displayed when you click on the install link.

1. Review the Package Installation Details, then **Click Continue**

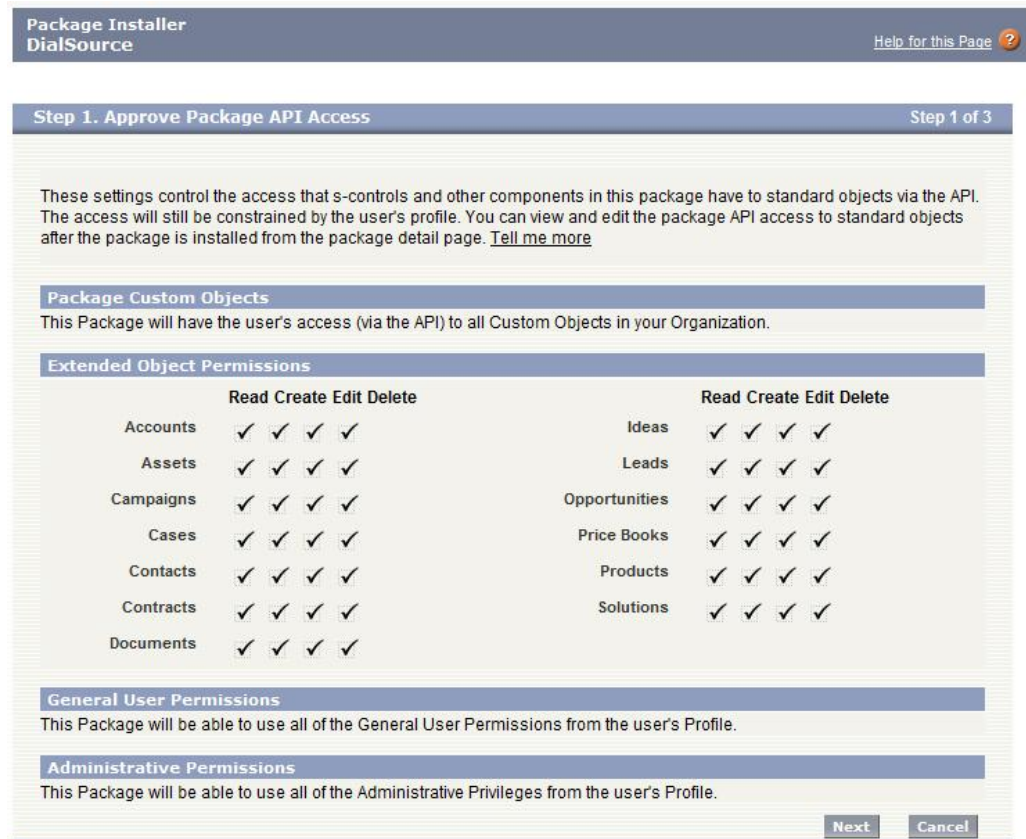


Fig 1.2 – The Approve Package API Access screen.

- Dialsource requires access to Salesforce.com's objects via the API. Review and Approve the required access by **Clicking Next** as shown in Fig 1.2 above.

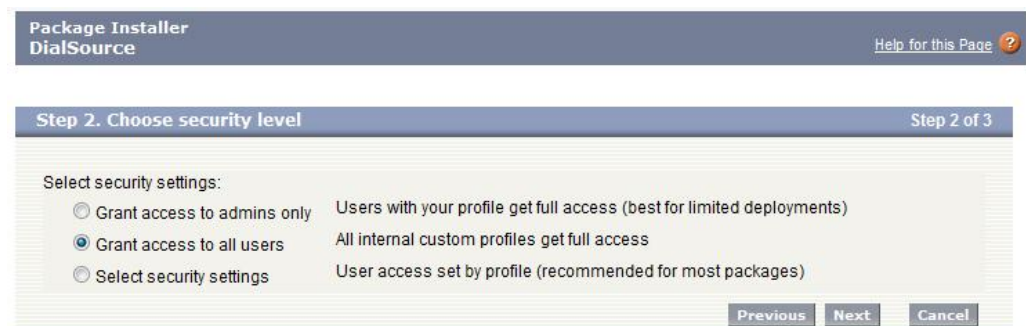


Fig. 1.3 – Security level screen.

- As shown in Fig 1.3, **Select** the “Grant access to all users”, then **Click Next**. (**Note:** Security settings may differ depending on your Organization's security policy)

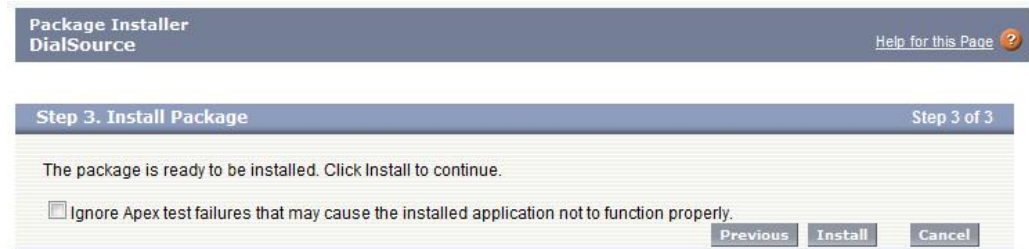


Fig 1.4 – Install Package screen.

4. **Click the **Install** button to install Dialsource into your Org as shows in Fig 1.4. (Note: Do NOT mark the check box to Ignore Apex test failures)**

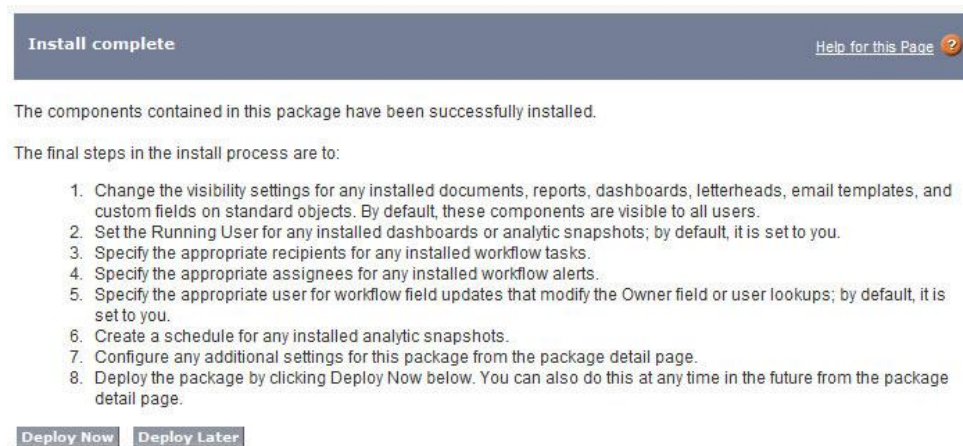


Fig 1.5 – Install Complete & Deploy Now Screen

5. You should now see the Install Complete screen as shown in Fig 1.5. **Click the button to **Deploy Now**.**



Fig 1.6 – Deploy Package screen.

6. On the Deploy Package screen as shown in Fig 1.6, **Click the **Deploy** button.**

Package Details
DialSource (Managed)
[Help for this Page ?](#)

Installed Package Detail			
Package Name	DialSource	Version Number	1.14
Language	English	First Installed Version Number	1.0
Version Name	Winter 2010	Package Type	Managed
Namespace Prefix	dialforce	API Access	Unrestricted [Enable Restrictions]
Publisher	Refractive Dialer Dev 3	Modified By	James Glaubiger , 9/16/2010 11:52 AM
Description			
Installed By	Nicholas Blasgen , 1/24/2010 11:33 AM		

Uninstall
Deploy
Show Dependencies

Package Components			
Action Name	Parent Object	Type	
Can Alter Contact Method	DialSource Settings	Custom Field	
Can Configure DialSource	DialSource Settings	Custom Field	
Date	DialSource Session	Custom Field	
DialForce		App	
DialForce		Document Folder	

Fig 1.7 – Package Details Screen, post install.

- The Package Details screen will be displayed after the install is complete, as shown in Fig 1.7.

You have completed the installation of the Dialsource package. You must now complete the following Configuration steps before Dialsource will work.

3. Network Access

The following steps are **required**:

Configuring Network Access:

- In Salesforce.com **Click** on **Setup** located in the upper right hand corner.
- Click** to expand **Security Controls** located on the left hand side of your screen.
- Click** on the **Network Access** option.
- Click** on the **New** button, which will take you to the following screen Fig 1.9.

Enter the range of valid IP addresses from which user logins are trusted. Users logging in from trusted IP addresses are not asked to activate their computers and may use their user password instead of a security token to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.



Fig 1.9 – Network Access Trusted IP Range Edit screen.

5. In the **Start IP Address** box enter “50.57.207.0”.
6. In the **End IP Address** box enter “50.57.207.255”.
7. **Click** the **Save** button.

4. Edit User Object Page Layout

In this section you will be adding two Dialsorce fields to the User Page Layout. These fields are used by Dialsorce for determining the contact method for each Agent. Each Agent will need to edit their Personal Information and add their Phone number or Alternate Contact Method.

1. In Salesforce.com **Click** on **Setup** located in the upper right hand corner.
2. **Click** to expand **Customize** located on the left hand side of your screen.
3. **Click** to expand **Users**.
4. **Click** on the **Page Layouts** option.
5. You should now see a screen similar to Fig 1.10. **Click** the **Edit** option next to the Page Layout you wish to modify for this object (you may have multiple).

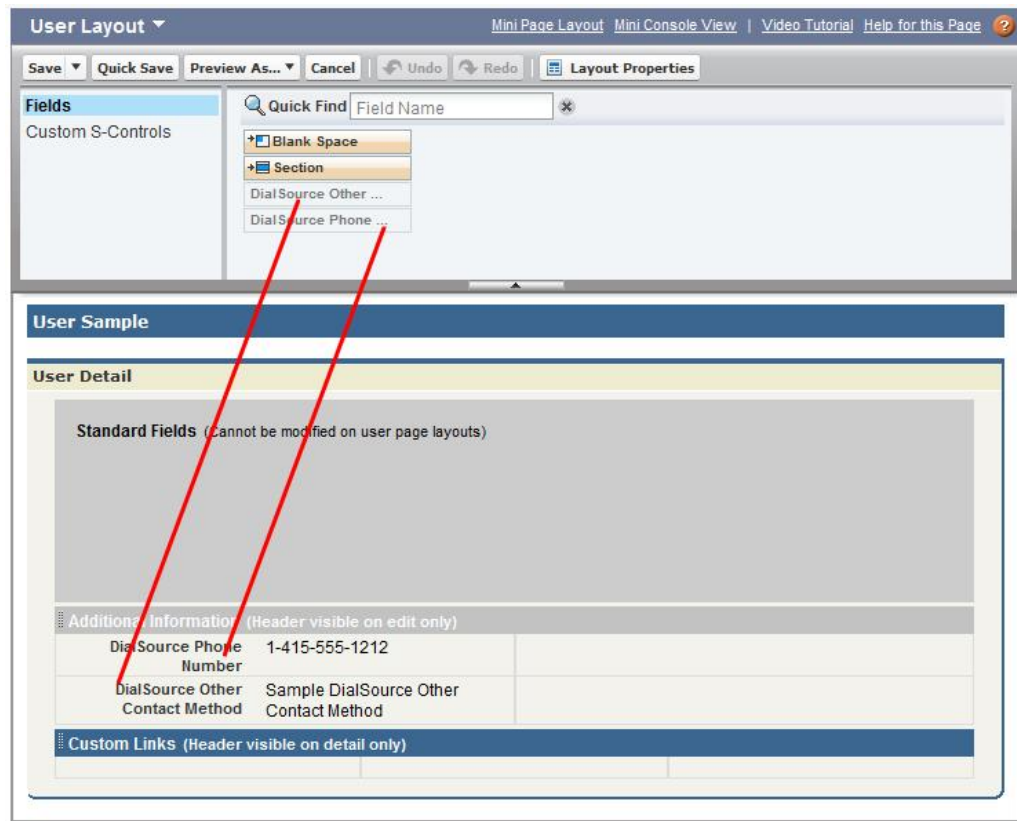


Fig 1.10 – User Page Layout Edit screen.

6. You will **Click and Drag** each “**Dialsource Phone Number**”, and “**Dialsource Other Contact Method**” fields from the top of the screen into the User Layout on the bottom. This is shown with the red lines in Fig 1.10.
7. **Click** the **Save** button in the upper left when done.

5. Editing Task Page Layout (**ONLY FOR PROFESSIONAL EDITION**)

In this section you will be adding two Dialsource fields to the Task Page Layout. These fields are used by Dialsource for logging the Dispositions and Call Lists an Agent was using when they pressed the Disposition while on a dialing session.

1. In Salesforce.com **Click** on **Setup** located in the upper right hand corner.
2. **Click** to expand **Customize** located on the left hand side of your screen.

3. **Click** to expand **Activities**.
4. **Click** on the **Task Page Layouts** option.
5. You should now see a screen similar to Fig 1.10. **Click** the **Edit** option next to the Page Layout you wish to modify for this object (you may have multiple).
6. You will **Click and Drag** each **“Dialsource Dispositions”**, and **“Dialsource Call List Name”** fields from the top of the screen into the Task Page Layout on the bottom.
7. **Click** the **Save** button in the upper left when done.

If you are on Professional Edition and do not perform the steps in section 5 above you will get an error message when trying to access Manage Call Lists and Dialsource Configurations on subsequent steps.

6. Installation Complete – Next Steps

Dialsource is now completely installed, but there is still configuration that needs to be done. Please proceed to the **Dialsource Quick Start Guide** to complete the remaining configurations. If you have any remaining questions regarding how to use Dialsource, please contact Support:

Support@refractedialer.com