Version

1.15

Dialsource for Salesforce.com's AppExchange

# Load From Report

# Load From Report Guide


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# Overview

*Features of Load From Report for 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. With the new Load From Report feature you can now populate your Call Lists from a Salesforce custom report. This can be a powerful tool in addition to the standard Load From View feature.

**The following steps are required** when using the new Load From Report Feature!

1. Modify your existing custom report to include the Object ID field.

2. Modify your existing custom report to include at least one Phone Number field.

3. Modify your existing custom report to include any Time Critical Information the agent needs to see prior to the object form fully loading (i.e. Prospect Name, Title, Company Name, etc…).

We will go through the steps required to prepare your existing custom reports for integration with the Load From Report feature in the following sections. The Fig 1.1 table below shows what Objects the Load From Report feature supports, and lists the associated Object ID field that you must include.

**(NOTE:** Currently you may create Call Lists based on Activities (Event & Task). However, it is important to keep in mind that these object types do not support association with other Activities. For this reason call outcomes will not be recorded when dialing these object types.**)**

| Object Name | Object ID Field |
|---|---|
| Account | Account ID |
| Case | Case ID |
| Contact | Contact ID |
| Event | Activity ID |
| Opportunity | Opportunity ID |
| Lead | Lead ID |
| Task | Activity ID |

Fig 1.1 – Dialsource Supported Object Types for Load From Report**.**

## 1. Modify a report to include the Object ID field

Your report must include the Object ID field so that Dialsource knows which object and associated form to load when a call is connected. To do this, follow the steps below:

**Add the Object ID field:**

1. From within Salesforce.com **go to** the **Reports** tab.
2. **Click** the **Edit** link next to the report you want to integrate.
3. **Click** the **Jump to Step** drop down and **Select** the **Select Columns** option.
4. In the **General** section, make sure to **mark** the check box next to the **Object ID** field. You can find the field name in the Fig 1.1 table above.
5. **Click** the **Save** button at the bottom of the screen to save the changes.

## 2. Modify a report to include a Phone Number field

Your report must include at least one Phone Number field. To add a Phone Number field, follow the steps below:

**Add a Phone Number field:**

1. From within Salesforce.com **go to** the **Reports** tab.
2. **Click** the **Edit** link next to the report you want to integrate.
3. **Click** the **Jump to Step** drop down and **Select** the **Select Columns** option.
4. **Mark** the check box next to the **Phone Number** field you want dialed for this object. You may select multiple phone fields if required, but you must have at least one phone field included.
5. **Click** the **Save** button at the bottom of the screen to save the changes.

## 3. Modify a report to include Time Critical Information

Your report must include any Time Critical fields that the agent needs to see prior to the object form displaying. To add a Time Critical field, follow the steps below:

**Add a Time Critical field:**

1. From within Salesforce.com **go to** the **Reports** tab.
2. **Click** the **Edit** link next to the report you want to integrate.
3. **Click** the **Jump to Step** drop down and **Select** the **Select Columns** option.
4. **Mark** the check box next to each field you want displayed to the agent prior to the object form loading (i.e. Prospect Name, Title, Company Name, etc). You may select multiple fields if required.
5. **Click** the **Save** button at the bottom of the screen to save the changes.

# Loading a Report

In this section you will be walked through how to create a call list using the Load From Report feature.

### Loading a Custom Report:

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.

2. **Click** on the **Manage Call Lists** tab.

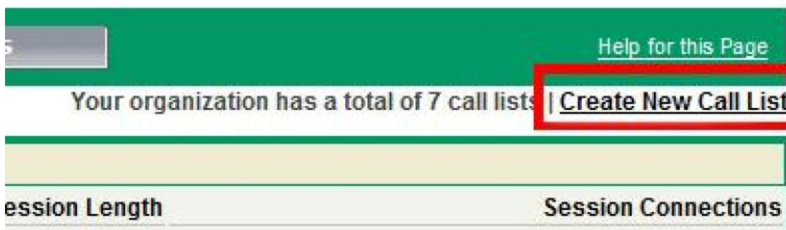


Fig 1.2 – Click Create New Call List link on Manage Call Lists tab.

3. **Click** on the **Create New Call List** link in the upper right corner of the tab shown in Fig 1.2 above.

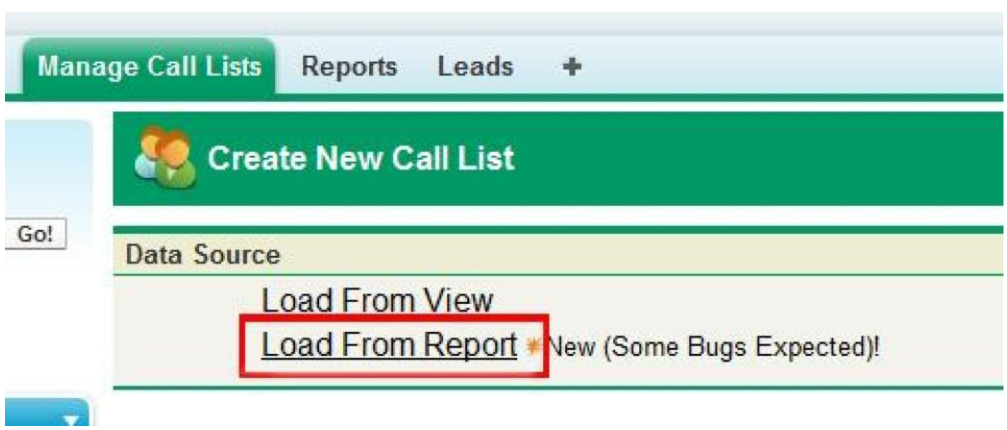


Fig 1.3 – Click on Load From Report.

4. **Click** on the **Load From Report** option, shown above in Fig 1.3.

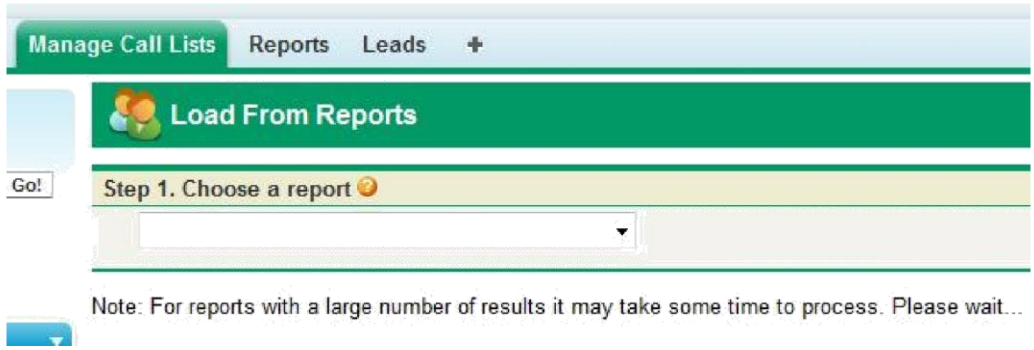


Fig 1.4 – Select the modified custom report from the drop down list.

5. **Select** a **Custom Report** that has already been properly configured for integration with Dialsource from the **Drop Down List,** shown above in Fig 1.4. (Note: If you have not already customized the report for integration with Dialsource, go back to section 1.)

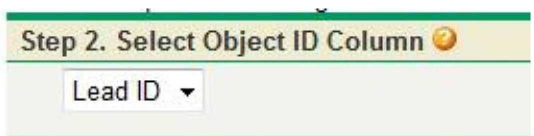


Fig 1.5 – Object ID field should be displayed here.

6. The Object ID field should auto populate as shown in Fig 1.5 above in **Step 2** if you have properly configured your report.


Fig 1.6 –Selecting your Phone Number field(s).

7. In **Step 3 Select** only the **Phone Number** fields you wish to include in your Call List, as shown in Fig 1.6 above. (**Note**: you may select multiple phone number fields)

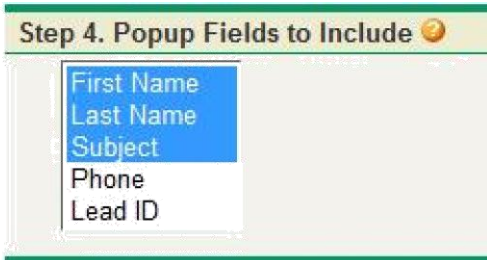


Fig 1.7 –Selecting Time Critical Information to be displayed prior to Object Form.

8. In **Step 4 Select** only the **Time Critical Information** you would like displayed to the agent prior to the Object Form fully populating on the screen upon a connected call. This is shown above in Fig 1.7 (**Note**: we suggest selecting no more than 3 fields.)

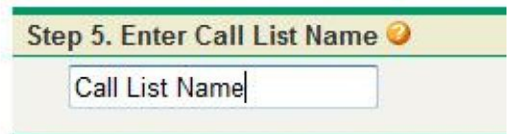


Fig 1.8 – Assign a name to the Call List.

9. In the **Text Box** on **Step 4, Enter** the **Name** for this Call List. Shown above in Fig 1.8.

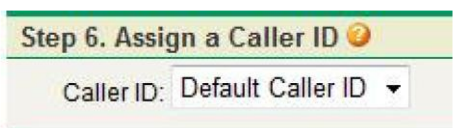


Fig 1.9 – Assign a Caller ID to the Call List.

10. On **Step 6 Select** the **Caller ID** you want to assign to this Call List. Shown above in Fig 1.9.


Fig 1.10 – Click the button when Finnished.

11. When finished **Click** the **Button** in **Step 7** to process the Call List. Shown above in Fig 1.10.

Once the above steps are completed you will be redirected to a confirmation page showing the number of records found in the report and how many were imported. You will now need to click on the Manage Call Lists Tab and configure the Call List for user access. For further instructions on how to do this please refer to the Dialsource Quick Start Guide.

This concludes the Load From View Guide. If you have any remaining questions regarding how to use Dialsource, please contact support:

[Support@refractivedialer.com](mailto:Support@refractivedialer.com)