

Version

1.15



Dialsource for Salesforce.com's AppExchange

Load From View



Load From View Guide

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

Table of Contents

Loading a View.....	pg1
---------------------	-----

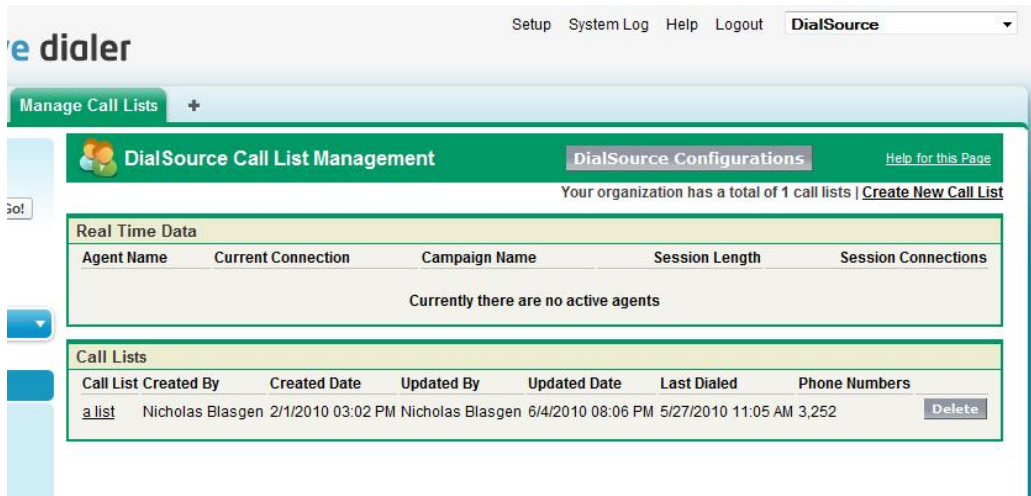


Load From View

In this section you will be walked through creating Call Lists in Dialsource using the Load From View method. Dialsource uses objects from your Salesforce.com org to create Call Lists (Leads, Contacts, Accounts, or Custom Objects). For information on importing data into Salesforce use the Salesforce help system. Here we describe how to create a Dialsource Call List from data you already have in Salesforce.

How to create a Call List with Load From View:

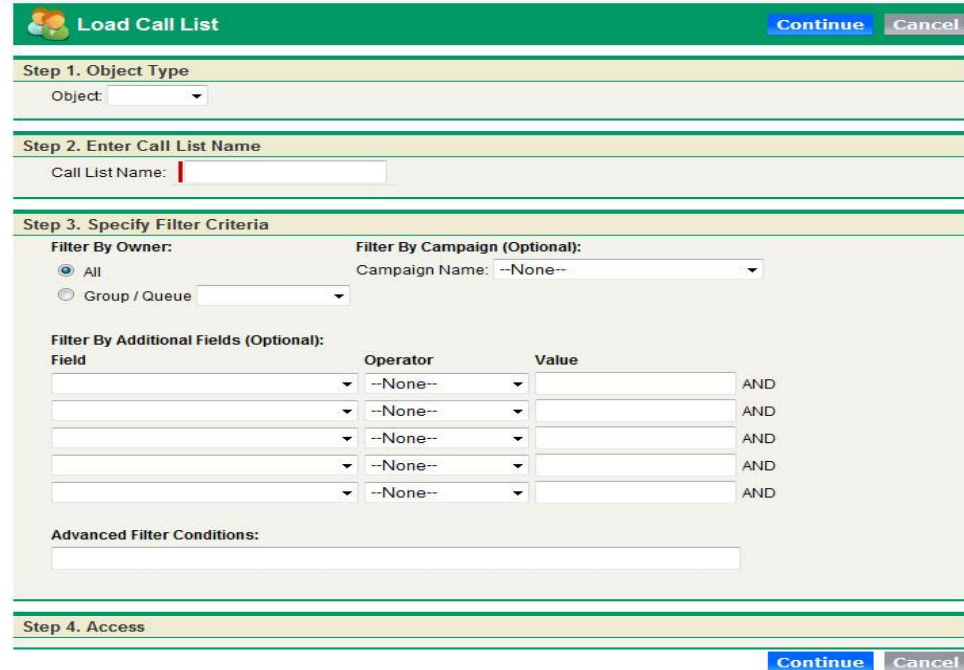
1. Click on the **Manage Call Lists** tab.



The screenshot shows the Dialsource web interface. At the top, there is a navigation bar with 'Setup', 'System Log', 'Help', 'Logout', and a dropdown menu for 'DialSource'. Below this is a 'Manage Call Lists' tab. The main content area is titled 'DialSource Call List Management' and includes a 'DialSource Configurations' button and a 'Help for this Page' link. A message states 'Your organization has a total of 1 call lists | [Create New Call List](#)'. There are two main sections: 'Real Time Data' and 'Call Lists'. The 'Real Time Data' section has a table with columns: Agent Name, Current Connection, Campaign Name, Session Length, and Session Connections. Below the table, it says 'Currently there are no active agents'. The 'Call Lists' section has a table with columns: Call List Created By, Created Date, Updated By, Updated Date, Last Dialed, and Phone Numbers. A single row is visible with the following data: 'a.list', Nicholas Blasgen, 2/1/2010 03:02 PM, Nicholas Blasgen, 6/4/2010 08:06 PM, 5/27/2010 11:05 AM, 3,252. A 'Delete' button is located to the right of the row.

Fig 1.1 – Dialsource Manage Call Lists tab.

2. Click on the link **“Create New Call List”** in the upper right hand corner, shown in Fig 1.1 above.
3. Select the **Load From View** option.
4. You will be taken to the **Load Call List** screen, shown below in Fig 1.2.



Load Call List Continue Cancel

Step 1. Object Type
Object:

Step 2. Enter Call List Name
Call List Name:

Step 3. Specify Filter Criteria

Filter By Owner:
 All
 Group / Queue

Filter By Campaign (Optional):
Campaign Name:

Filter By Additional Fields (Optional):

Field	Operator	Value	
<input type="text"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND

Advanced Filter Conditions:

Step 4. Access Continue Cancel

Fig 1.2 – Dialsource Load Call Lists screen.

5. **Select** the **Object Type** for this Call List.
6. **Enter** a **Name** for this Call List.
7. **Use** the **Filter Criteria** to narrow your results to the Call List you require. You can populate a list based on a Campaign, or based on criteria you manually enter. This process is the same as Salesforce reports.
8. **Select** the **Caller ID** you want assigned to this Call List.
9. **Click** the **Continue** button when done to compile the Call List.
10. On the next screen you will see the number of results found based on your filter criteria. If this is what you want, **Click** on **Continue**.



Manage Call Lists Go!

Load Call List Continue Cancel

Confirm Data Sample Size
Found 252 phone numbers. Click Continue to proceed.

Fig 1.3 – Dialsorce Load Call Lists Continue screen.

- The list is created and the confirmation screen is displayed, as shown below in Fig 1.4.



Manage Call Lists

Load Call List [Back to Management](#)

Data Loaded

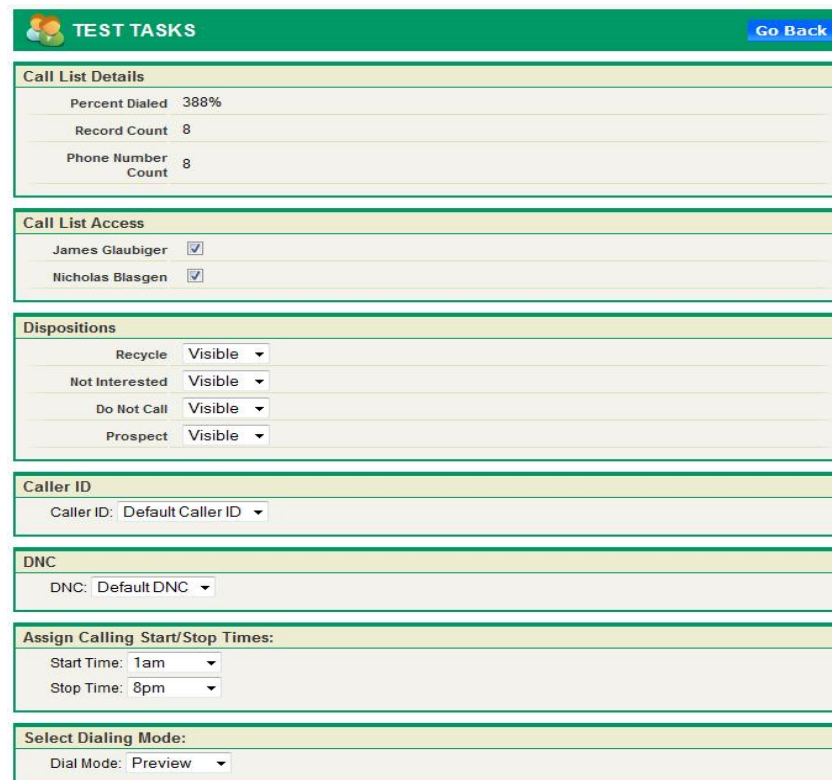
Done!

Added 219 from a total of 252 items

Had the following errors (if any):
 Duplicate Phone Numbers: 0
 Other Errors: 33

Fig 1.4 – Dialsorce Load Call Lists Confirmation screen.

- Click the **Back to Management** button.
- You should now see your new Call List displayed.
- We will now configure user access to the list and other features. **Click** on the **Name** of the Call List. An example of what the Call List Settings screen looks like is shown below in Fig 1.5.



TEST TASKS [Go Back](#)

Call List Details

Percent Dialed: 388%

Record Count: 8

Phone Number Count: 8

Call List Access

James Glaubiger

Nicholas Blasgen

Dispositions

Recycle: Visible

Not Interested: Visible

Do Not Call: Visible

Prospect: Visible

Caller ID

Caller ID: Default Caller ID

DNC

DNC: Default DNC

Assign Calling Start/Stop Times:

Start Time: 1am

Stop Time: 8pm

Select Dialing Mode:

Dial Mode: Preview

Fig 1.5 – Dialsource Call List Settings screen.

15. Here you should **Mark** the **Check Box** next to each **User** you wish to allow access to this list.
16. You can also **Set** the **Custom Disposition Visibility** by **Selecting** the drop down next to each Disposition and **Choosing** either **Visible/Hidden**. Altering these values is automatically saved.
17. Dialsource also supports assigning a **Caller ID** to each Call List. **From** the list **Select** the **Caller ID** you want to assign to this Call List.
18. Dialsource additionally supports separate **DNC's** for each Call List. **From** the list **Select** the **DNC** you want to assign to this Call List.
19. You may also setup **Calling Start/Stop Times**. In this section **Select** the **Start Time** and **Stop Time** you would like to enforce on this Call List.

Note: Start and Stop times are enforced against the time-zone of the numbers you're calling. (i.e. 5pm stop time means that at 3pm Pacific your Agents will not be able to call the East Coast anymore)
20. When you are done **Click** the **Go Back** button to return to Manage Call Lists screen.

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

Support@refractedialer.com