

**Version**

**1.16**



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Dialsource for Salesforce.com's AppExchange

*Quick Start*



# Quick Start

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## Overview

*This Quick Start guide will help you quickly configure Dialsource and create your first Call List.*

**R**efractive 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** and must be performed while logged in with an **ADMINISTRATIVE ACCOUNT**:

1. Configure Dialsource including Custom Settings.
2. Buy Dialsource credits.

## Configuring Dialsource

In this section you will be walked through configuring Dialsource.

### Loading into Dialsource:

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 as shown in Fig 1.1 below.

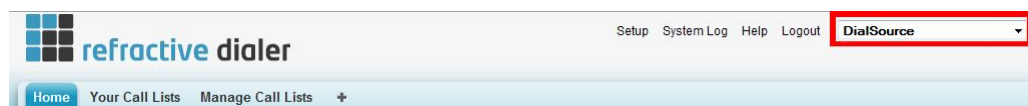


Fig 1.1 – Selecting the Dialsource app.

2. The window should refresh showing you the Dialsource tabs, which include **“Your Call Lists”** and **“Manage Call Lists”**.

### Custom Dialsource Settings:

Here you will be configuring Custom Settings for Dialsource. These settings grant permissions to users to perform specific tasks.

1. **Click** on **Setup** in the upper right hand corner of your Salesforce.com screen.
2. **Click** to expand **Develop** on the left hand side of your screen.
3. **Click** to select **Custom Settings**.
4. **Click** on the **Manage** link next to Dialsource Settings, as shown in Fig 1.2 below.



New					
Action	Label ▲	Visibility	Settings Type	Namespace Prefix	Description
Edit <b>Manage</b>	DialSource Settings	Public	Hierarchy	dialforce	

Fig 1.2 – Dialsource Custom Settings, click Manage.

5. **Click** on the **New** button above “**Default Organization Level Value**”, as shown in Fig 1.3 below.

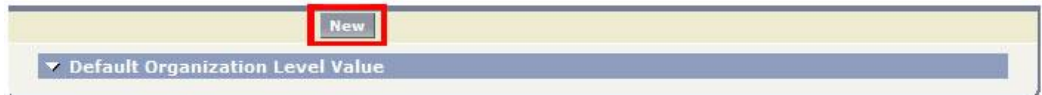
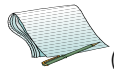
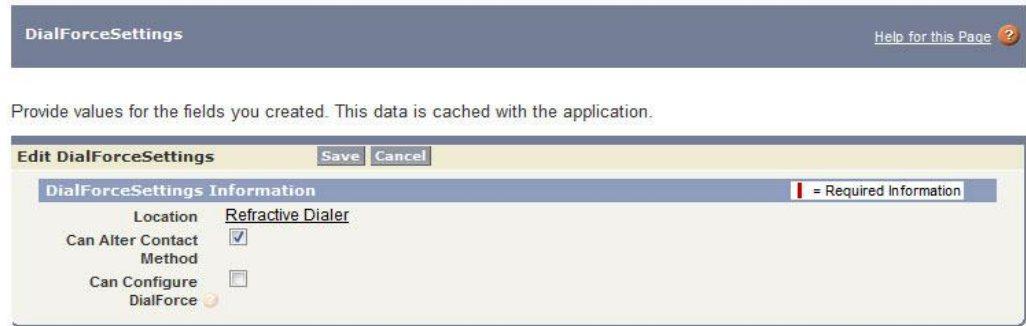


Fig 1.3 – Dialsource Custom Settings, click New to configure a default.

6. **Mark** the **Check Box** next to “**Can Alter Contact Method**” and “**Can Configure Dialsource**”. Fig 1.4 below shows what the screen looks like.



**(Note:** there are several ways to configure these settings, this is just one example.)



DialForceSettings Help for this Page ?

Provide values for the fields you created. This data is cached with the application.

**Edit DialForceSettings** Save Cancel

**DialForceSettings Information** = Required Information

Location Refractive Dialer

Can Alter Contact Method

Can Configure DialForce

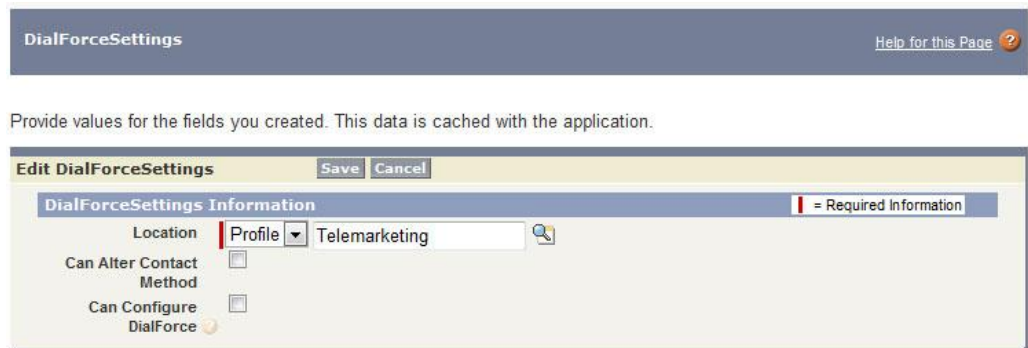
Fig 1.4 – Dialsorce Custom Settings

- Once you have defined your default settings, **Click** on the **Save** button.



**OPTIONAL:** If you have specific profiles created in Salesforce.com which you would like to configure Dialsorce Custom Settings separately from the Defaults we defined above follow the steps below. For example if you have a *Telemarketing* profile assigned to your Agents, you may not want them to be able to change the Dialsorce Configurations.

- Click** on **Setup** in the upper right hand corner of your Salesforce.com screen.
- Click** to expand **Develop** on the left hand side of your screen.
- Click** to select **Custom Settings**.
- Click** on the **Manage** link next to Dialsorce Settings, as shown in Fig 1.2 above.
- Click** the **New** button located in the lower section and you should be taken to a screen similar to Fig 1.5 below.



DialForceSettings Help for this Page ?

Provide values for the fields you created. This data is cached with the application.

**Edit DialForceSettings** Save Cancel

**DialForceSettings Information** = Required Information

Location **Profile** Telemarketing

Can Alter Contact Method

Can Configure DialForce

Fig 1.5 – Dialsorce Custom Settings for a specific profile or user.

6. **Click** on the **Drop Down List** next to **“Location”**, and **Select “Profile”**.
7. **Click** on the **Lookup** to the right of the text box and **Select** the **Profile** you want to configure Custom Settings for.
8. **Mark** the options you wish to grant to this profile. (**Note:** in this case we demonstrate restricting permissions to *Altering Contact Methods* or *Configuring Dialsource* as shown in Fig 1.5 above, so neither are marked).
9. **Click** the **Save** button when you are done.

### **Dialsource Configuration:**

In this section we will be configuring Dialsource via the Dialsource Configuration screen. You will be setting up the main components of Dialsource: Administrative Salesforce Account for data synchronization, Caller ID, and Disposition logic.

1. **Click** on the Dialsource **Manage Call Lists** tab.
2. At the top of the page you will see a button for **Dialsource Configurations**. **Click** the button. (**Note:** Assuming you are logged in on a profile that has the proper Dialsource Custom Settings defined to allow access to this. If you do not see this button go back to the Dialsource Custom Settings section on pg 3).
3. You should now see the Dialsource Configuration screen similar to Fig 1.6 below.

**Dialsource Configuration** [Back to Management](#) [Help for this Page](#)  
 You have 15.3 hours in usage remaining | [Buy More](#)

---

**Salesforce Account Configuration** [New](#)

Username  [Edit](#)

---

**Caller ID Setup** [New](#)

Caller ID Label	Phone Number
Default Caller ID	(408) 395-2110

[Edit](#)

---

**DNC Setup** [New](#)

DNC Label
Default DNC

---

**Disposition Groups** [New](#)

Group Label
Sales

[Edit](#) [Delete](#)

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**Disposition Logic** [New](#)

Disposition	Object	Action	Sub-Action	Value	Req. Desc.	
Recycle	Any	recycle	1 day		<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Delete</a>
	Lead	change	Status	Working - Contacted		<a href="#">Edit</a> <a href="#">Delete</a>
	Task	change	Status	Completed		<a href="#">Edit</a> <a href="#">Delete</a>
						<a href="#">Add</a>
Not Interested	Any	recycle	1 day		<input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Delete</a>
						<a href="#">Add</a>
Do Not Call	Any	recycle	1 day		<input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Delete</a>
						<a href="#">Add</a>
Prospect	Any	recycle	1 day		<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Delete</a>
						<a href="#">Add</a>

Fig 1.6 – Dialsource Configuration Screen.

4. In the **Salesforce Account Configuration** section, **enter** an Admin level Salesforce.com account **Username** and **Password**.

**NOTE:** The Salesforce Account will be used for the following:

- i) Synchronizing Call Lists on a periodic basis.
  - ii) Logging of Call Outcomes such as non-agent-connected calls (i.e. No Answer, Line Busy, among others). For this reason we suggest using an account that is not used by an agent for Dialing.
5. **Click** the **Save** button in this section.
  6. In the **Caller ID Setup** section, **enter** 10-digit **phone numbers** that will be displayed on outgoing phone calls to prospects by **Clicking** the **New** button.
  7. **Click** the **Save** button in the popup.

8. In the **DNC Setup** section, **enter** the name of a **DNC** you wish to create by **Clicking** the **New** button.
9. **Click** the **Save** button in the popup.

### **Dispositions:**

Please reference the Dialsouce Dispositions Guide for instructions on how to configure Dispositions.

## **Buying Dialsource Credits:**

In this section you will be walked through buying credits for Dialsource. Our service is designed to discount higher usage, the more you buy in bulk the less expensive the per minute rate becomes.

### **How to buy Dialsource Credits:**

1. **Click** on the **Manage Call Lists** tab.
2. In the upper right hand corner of this screen you will see how many hours you have available to dial, and the **“Buy More”** link.



Fig 1.13 – Dialsource Manage Call Lists screen, zoom in on Buy More.

3. To buy more credits **Click** on the **Buy More** link. You will be taken to our price calculator as shown below in Fig 1.8.

Get an instant quote!

Enter your expected usage:  **\$4440 Buy**

**Pricing Table**

Number of Hours Used	COST	
	per Hour	per 100 Hours
<b>First 5 Hours FREE</b>		
0 - 125	8.00	\$800.00
126 - 500	7.70	\$770.00
501 - 1000	7.40	\$740.00
1001 - 1750	7.00	\$700.00
1,750+	<a href="#">Contact us for special pricing</a>	

Fig 1.8 – Dialsorce Billing Management, price calculator.

- In the **Expected Usage** box **Enter** how many hours you anticipate using per month, OR how many hours you wish to purchase.
- Click** the **Buy** link next to the total once you are ready.
- You will be taken to our payment processing screen as shown below in Fig 1.8.

Billing Management - Your Credit Card Wont Be Charged (Sandbox) [Help for this Page](#)

**Process**

**Billing Information**

First Name

Last Name

Address 1

Address 2

City

State

Zipcode

Country

Email Address

---

**Credit Card**

Credit Card Type

Credit Card Number

Expiration

CVV2 Number

Amount \$4,440 (600 hours at \$7.40)

**Process**



Fig 1.9 – Dialsorce Payment Processing screen.

7. **Enter** your Billing Information and Credit Card then **Click** the **Process** button.

This concludes the Quick Start Guide. You have now successfully setup Dialsorce. Please refer to the Load From Report or Load From View guides to setup your first Call Lists. If you have any remaining questions regarding how to use Dialsorce, please contact Support:

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