



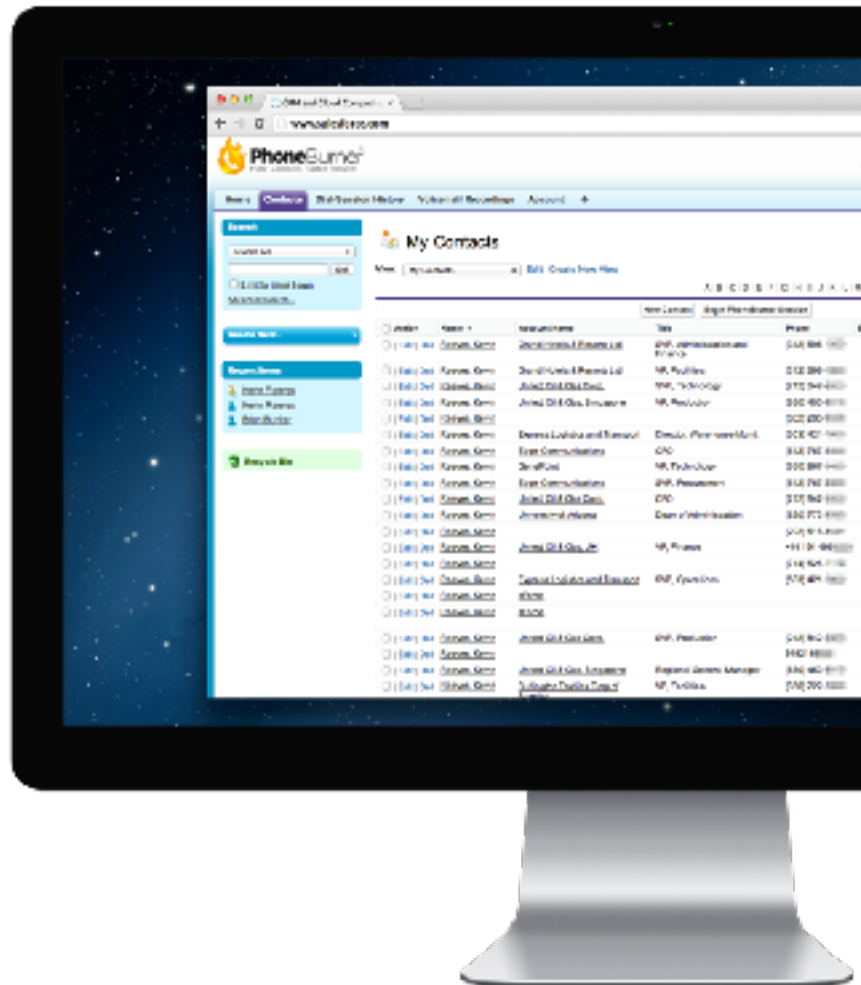
# PhoneBurner for Salesforce How to do a dial-session from Salesforce

## Using PhoneBurner® for Salesforce

PhoneBurner's power dialer dramatically boosts live client interactions and overall productivity by 447%. PhoneBurner automatically dials contacts live. If voicemail picks up, a single click sends a professional pre-recorded voicemail and personalized email. Salesforce records are updated as well, allowing the seller to immediately take the next call.

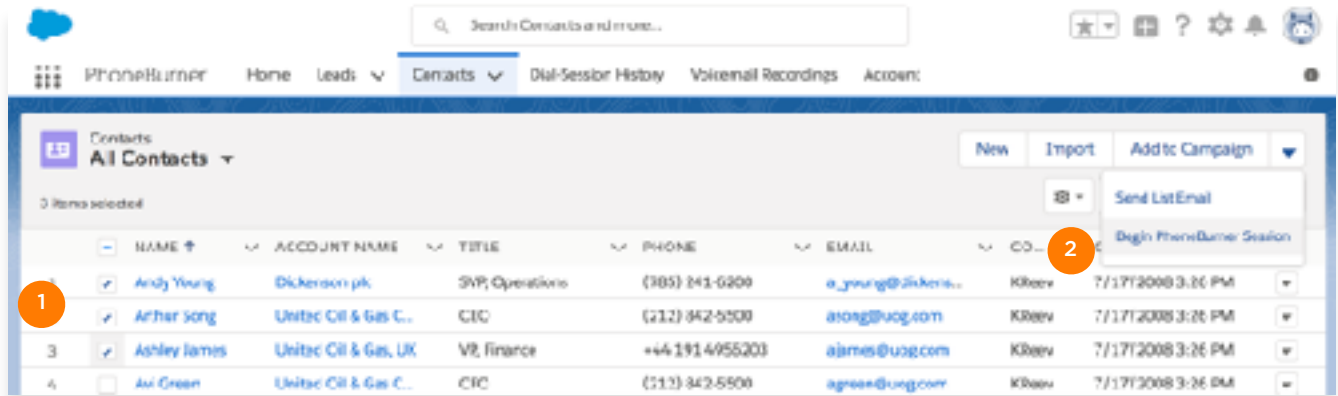
Use this step-by-step guide to learn how to do a dial-session from inside your Salesforce account.

If you need assistance, please contact support at: **(888) 928-7637**  
**support@phoneburner.com**

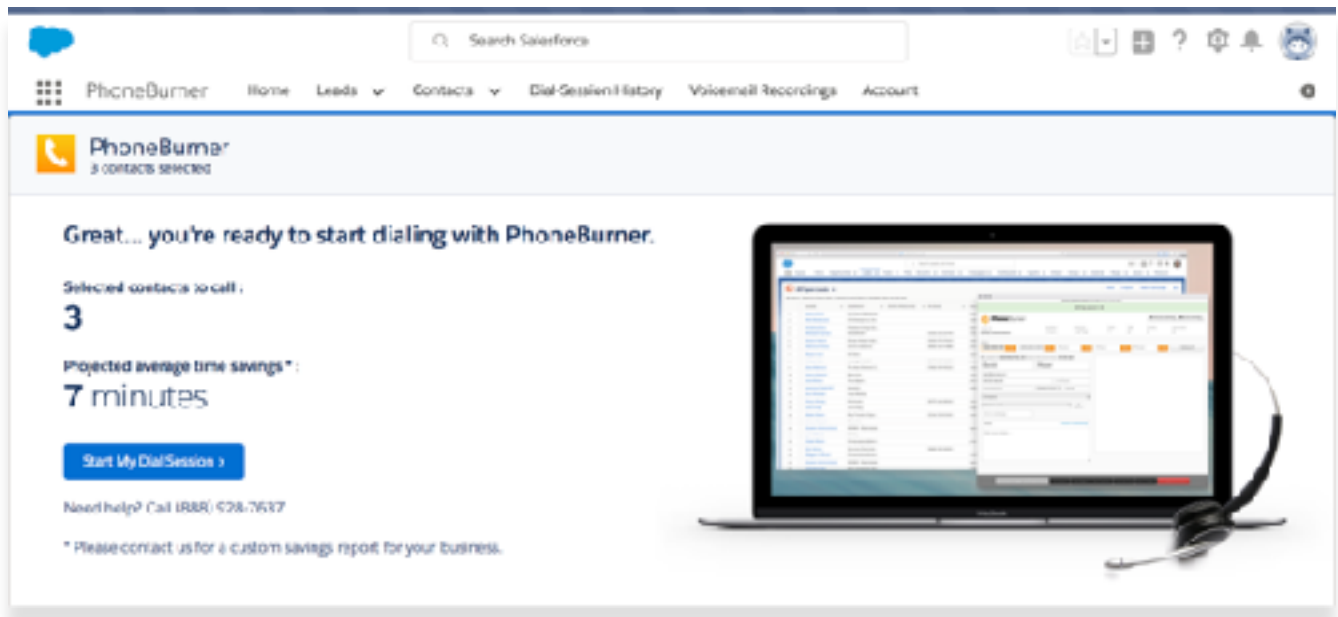


## From your Salesforce Contacts or Leads tab:

1. Select the contacts or leads to call.



2. Click the “Begin PhoneBurner Session” button. This will take you to a new window summarizing the contacts you’re about call.
3. Click to Begin your Dial Session.



4. That will open a login window that prompts you to enter your PhoneBurner credentials.

## Once you're logged in, you'll have a chance to configure your dial-session:

1. Select a voicemail.
2. Select a disposition set.
3. Click to begin your dial-session.

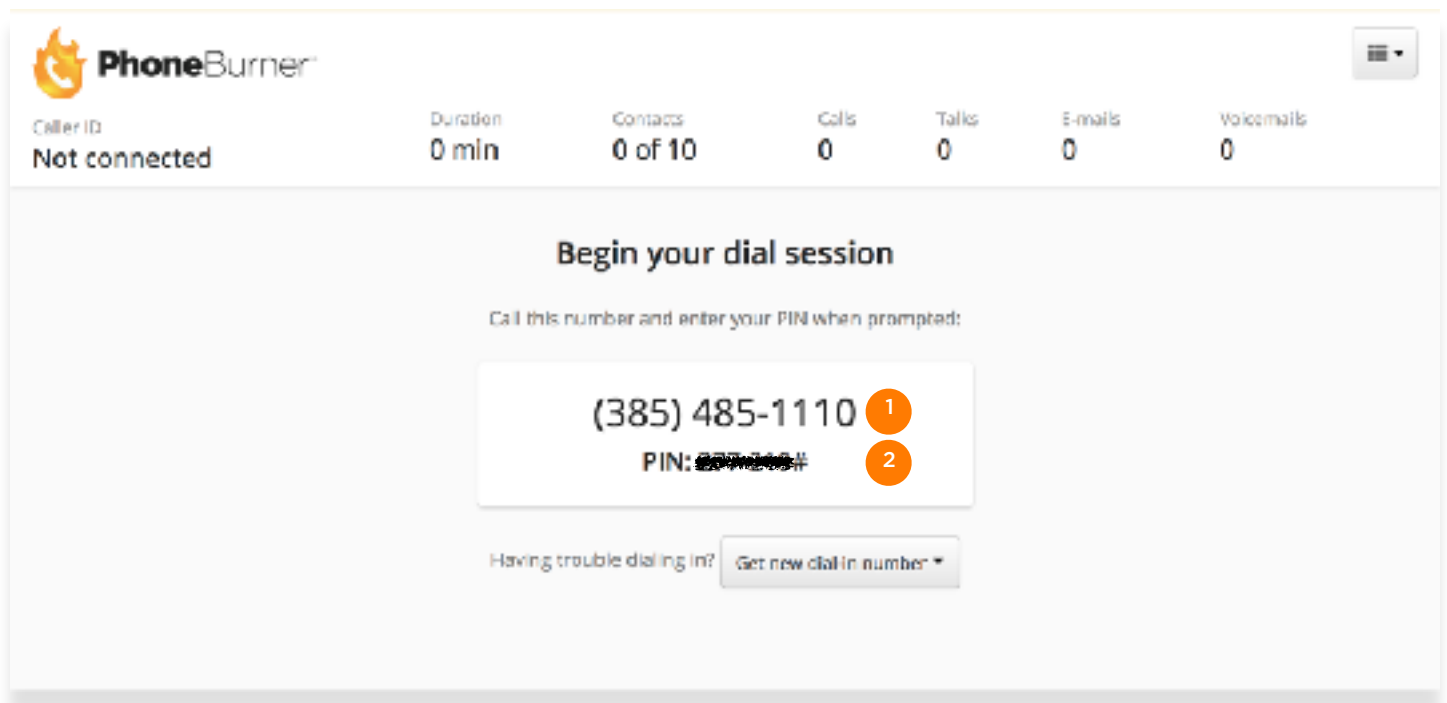
The screenshot shows the PhoneBurner interface for configuring a dial session. At the top, there is a status bar with the PhoneBurner logo and several metrics: Caller ID (Not connected), Duration (0 min), Contacts (0 of 9), Calls (0), Talks (0), E-mails (0), and Voicemails (0). Below this is the 'Dial session settings' section, which includes a heading 'Dial session settings' and a sub-heading 'There are 9 contacts to be called.' The settings are as follows:

Setting	Value	Annotation
Voicemail recording:	1st Appointment VM	1
Dialing set:	APT Setting Defaults	2
Live answer set:	APT Setting Defaults	3
Enable call recording:	Yes	
Enable Local ID:	Yes	

Below the settings is a large orange 'Continue' button. At the bottom, there is a disclaimer: 'By using this dialer to make calls and/or leave messages, I agree that I will follow all applicable local, state, national and international laws, rules, and regulations including those governing call recording and telemarketing. I also agree to abide by the [terms of service](#).'

## Once you've configured your session, you'll be asked to dial into the phone system.

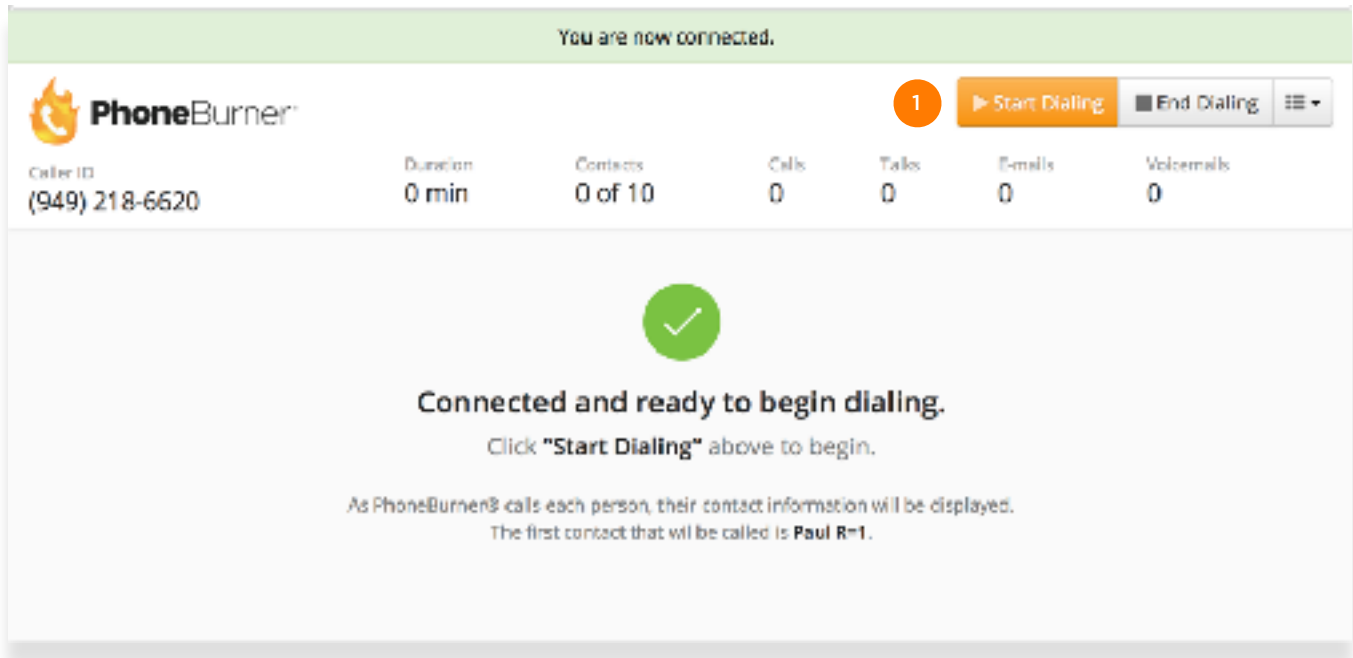
1. Call the number displayed on your dial-session window.
2. If prompted at any time for your PIN code, enter the number near bullet point #2.



The screenshot shows the PhoneBurner interface. At the top left is the PhoneBurner logo. To its right is a status bar with the following metrics: Caller ID (Not connected), Duration (0 min), Contacts (0 of 10), Calls (0), Talks (0), E-mails (0), and Voicemails (0). Below this is a large central area with the heading "Begin your dial session". Underneath the heading is the instruction "Call this number and enter your PIN when prompted:". A white box contains the dialing information: "(385) 485-1110" with a red circle containing the number "1" to its right, and "PIN: ~~888888~~#" with a red circle containing the number "2" to its right. At the bottom of this central area, there is a link "Having trouble dialing in?" followed by a button labeled "Get new dial in number".

## Now that you're connected, you can begin your dial-session.

1. Click the "Start Dialing" button to call the first contact.



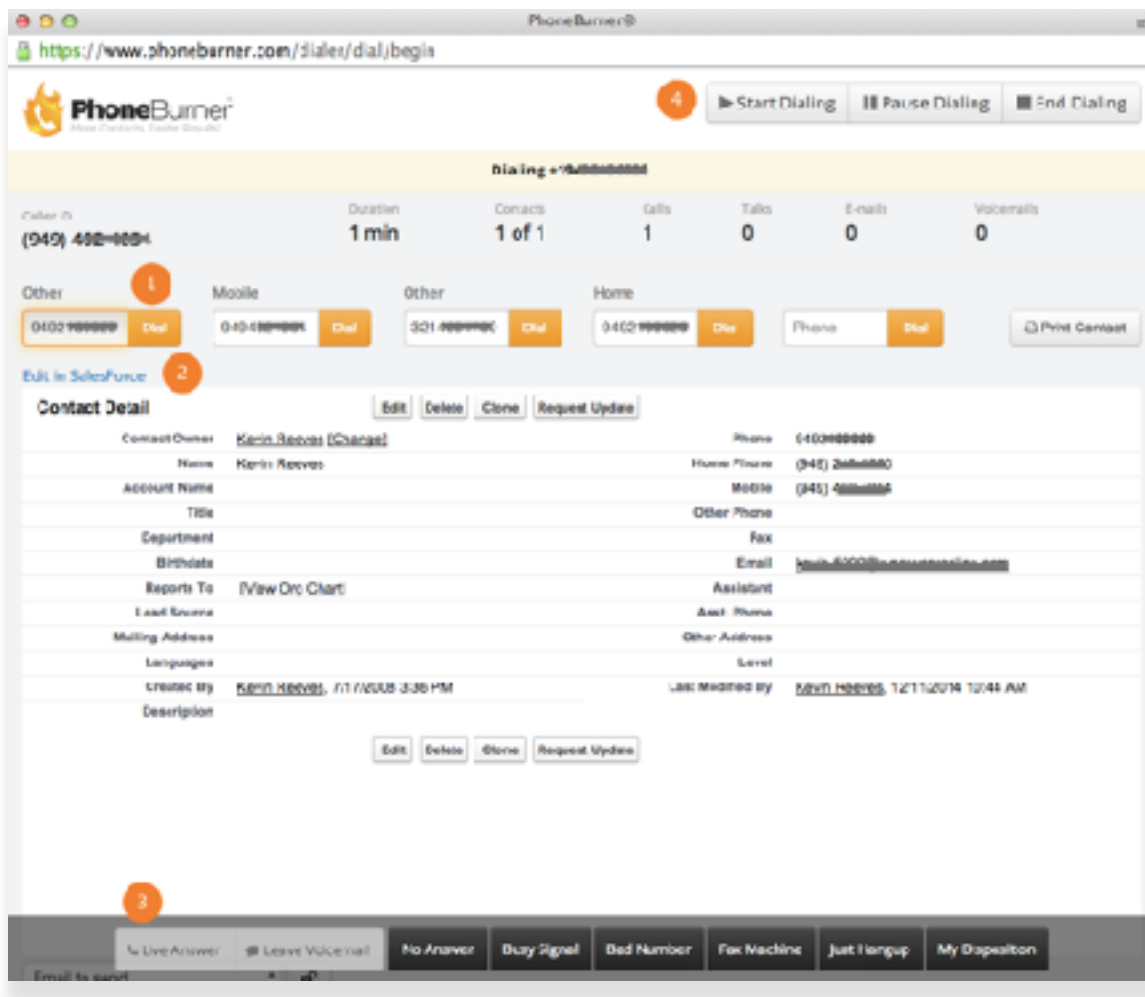
The screenshot displays the PhoneBurner interface. At the top, a green banner reads "You are now connected." Below this, the PhoneBurner logo is on the left, and a "1" in a red circle is next to the "Start Dialing" button. To the right of the "Start Dialing" button are "End Dialing" and a menu icon. Below the buttons is a table with the following data:

Caller ID	Duration	Contacts	Calls	Talks	E-mails	Voice-mails
(949) 218-6620	0 min	0 of 10	0	0	0	0

In the center of the interface, there is a green checkmark icon. Below it, the text reads: "Connected and ready to begin dialing. Click 'Start Dialing' above to begin. As PhoneBurner® calls each person, their contact information will be displayed. The first contact that will be called is Paul R=1."

## As you're dialing, PhoneBurner displays the details of the contact.

1. The phone number that is listed first on the contact is called. At any time you can click the "Dial" button to call an alternate number.
2. To edit the contact directly inside Salesforce.com, click the "Edit in Salesforce" link.
3. Select the appropriate disposition based on the result of the call.
4. At any time, you can Pause a session or End a session. Pausing a session means the system won't automatically call the next lead. It'll wait for you to restart it. But, any active calls will continue. Ending the session will immediately disconnect you from PhoneBurner and terminate the current call.



Once you're done with your dial-session, you can close the dial-session window. All your call activity is recorded inside the contacts' details.