



PhoneBurner for Salesforce

How to do a dial-session from Salesforce

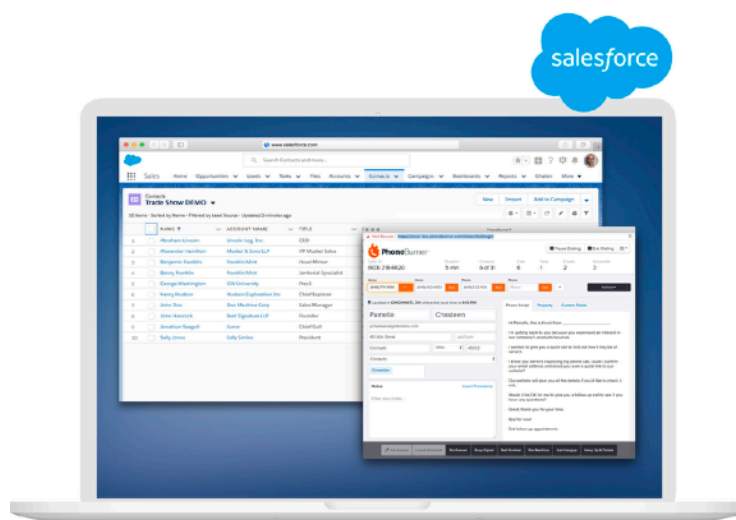


Using PhoneBurner for Salesforce

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.

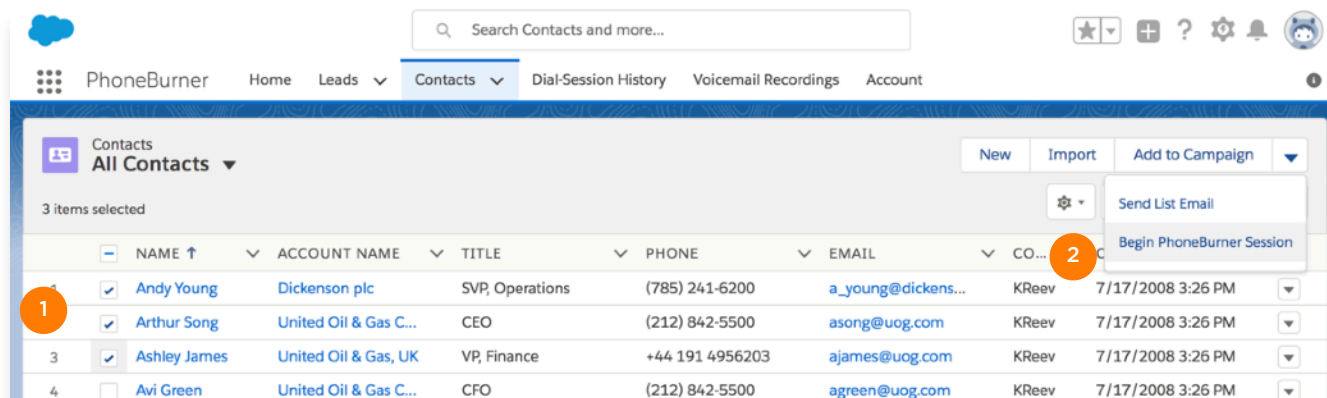
Use this step-by-step guide to learn how to do a dial-session from inside your Salesforce account.

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

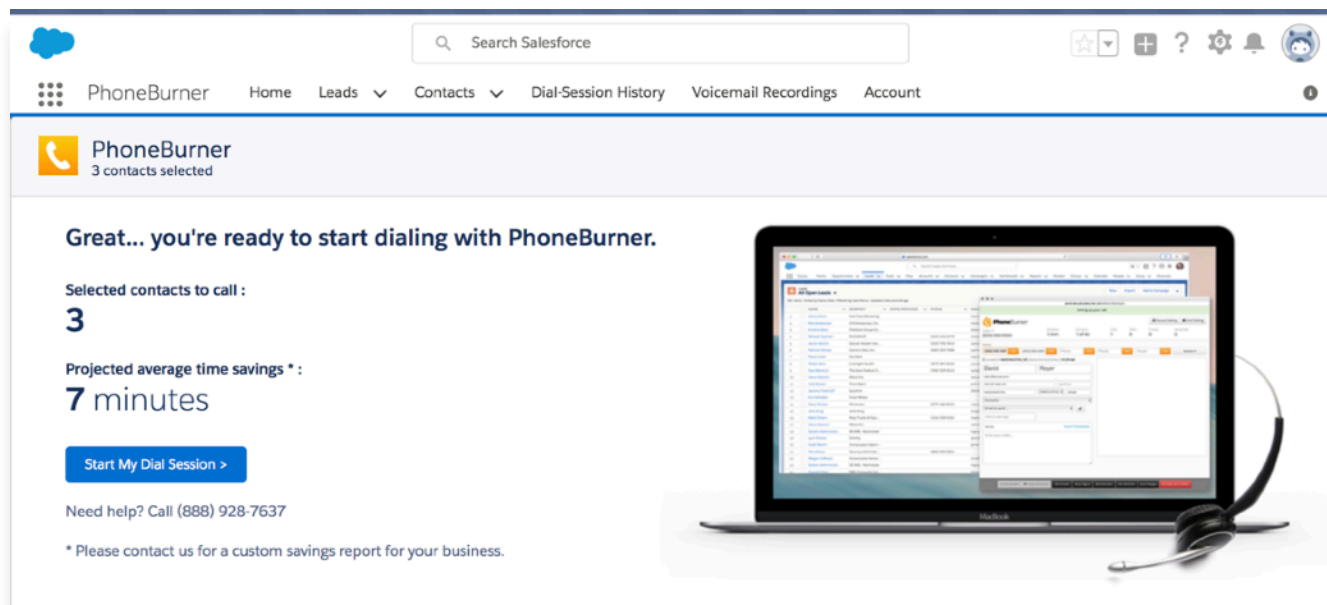


From your Salesforce Contacts or Leads tab:

1. Select the contacts or leads to call.



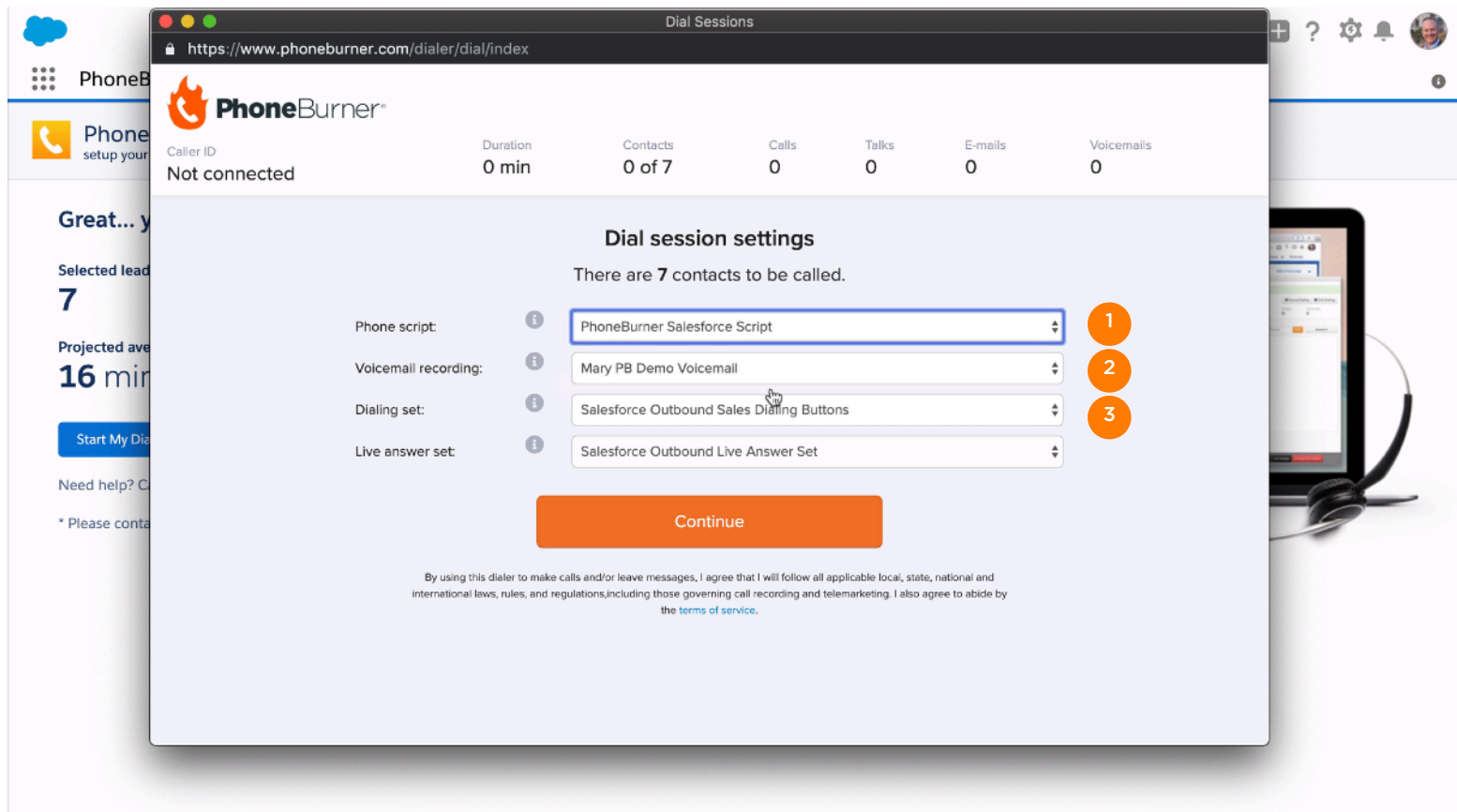
2. Click the “Begin PhoneBurner Session” button. This will take you to a new window summarizing the contacts you’re about call.
3. Click to Begin your Dial Session.



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

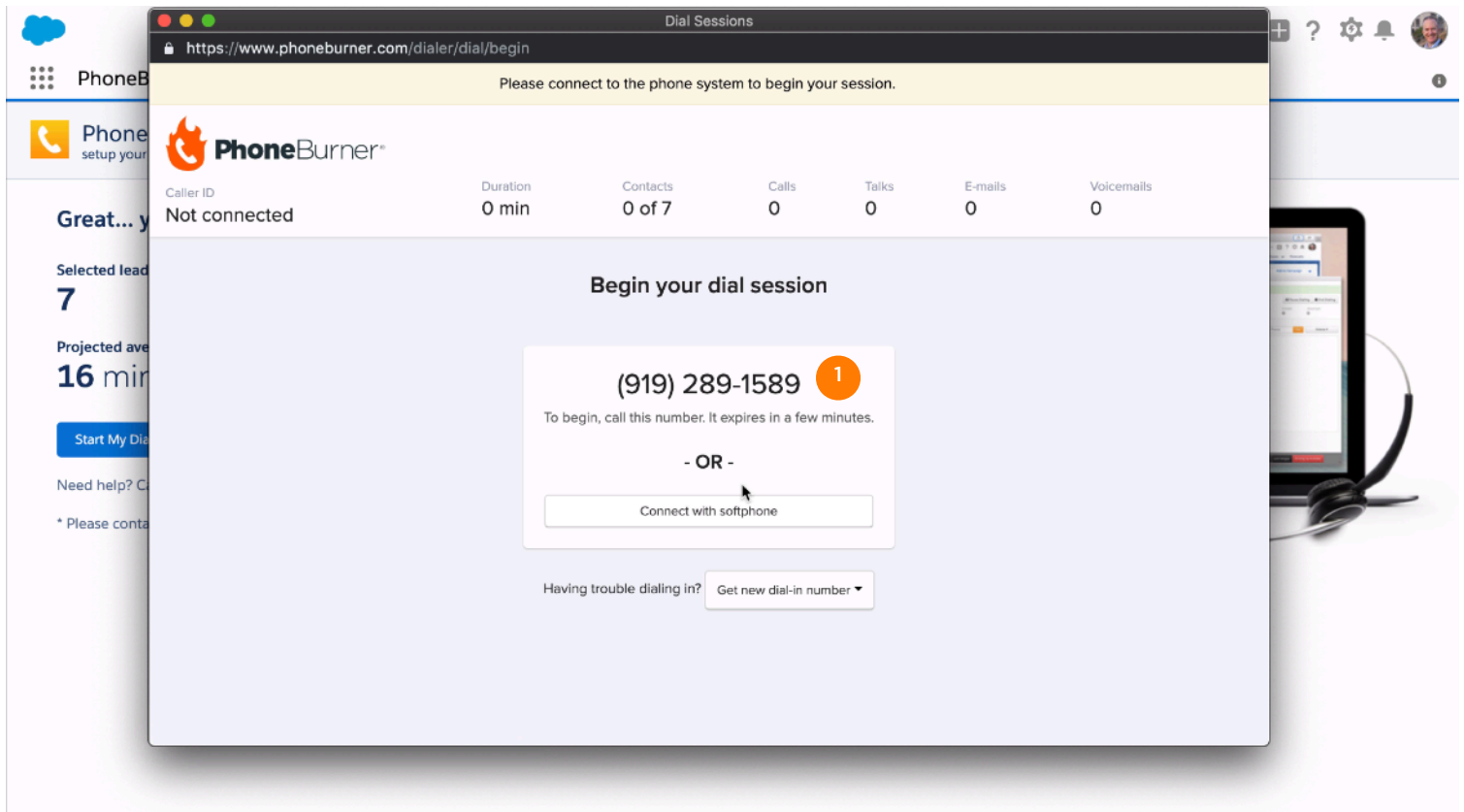
Once you're logged in, you'll have a chance to configure your dial-session:

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



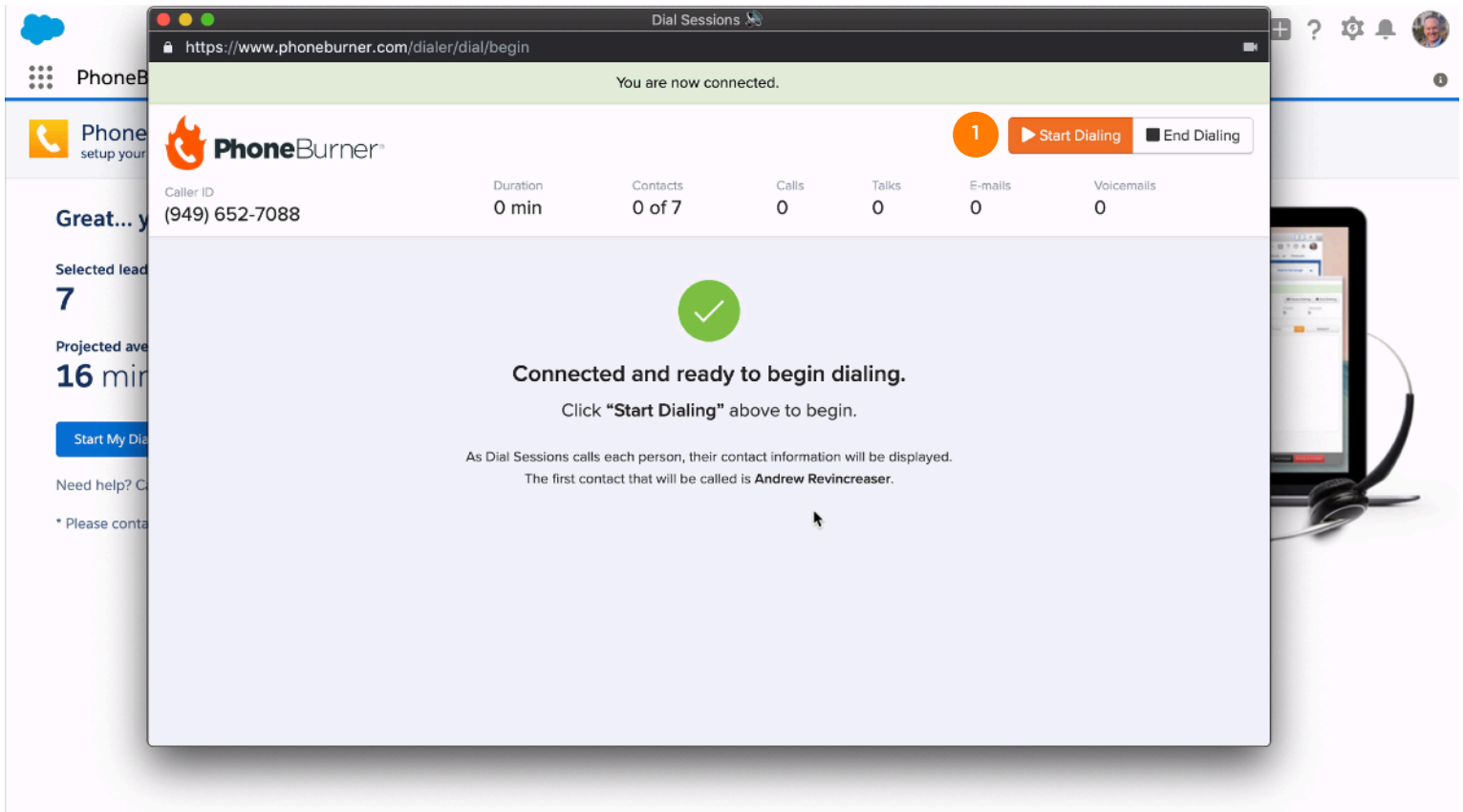
Once you've configured your session, you'll be asked to dial into the phone system.

1. Call the number displayed on your dial-session window.
2. If prompted at any time for your PIN code.



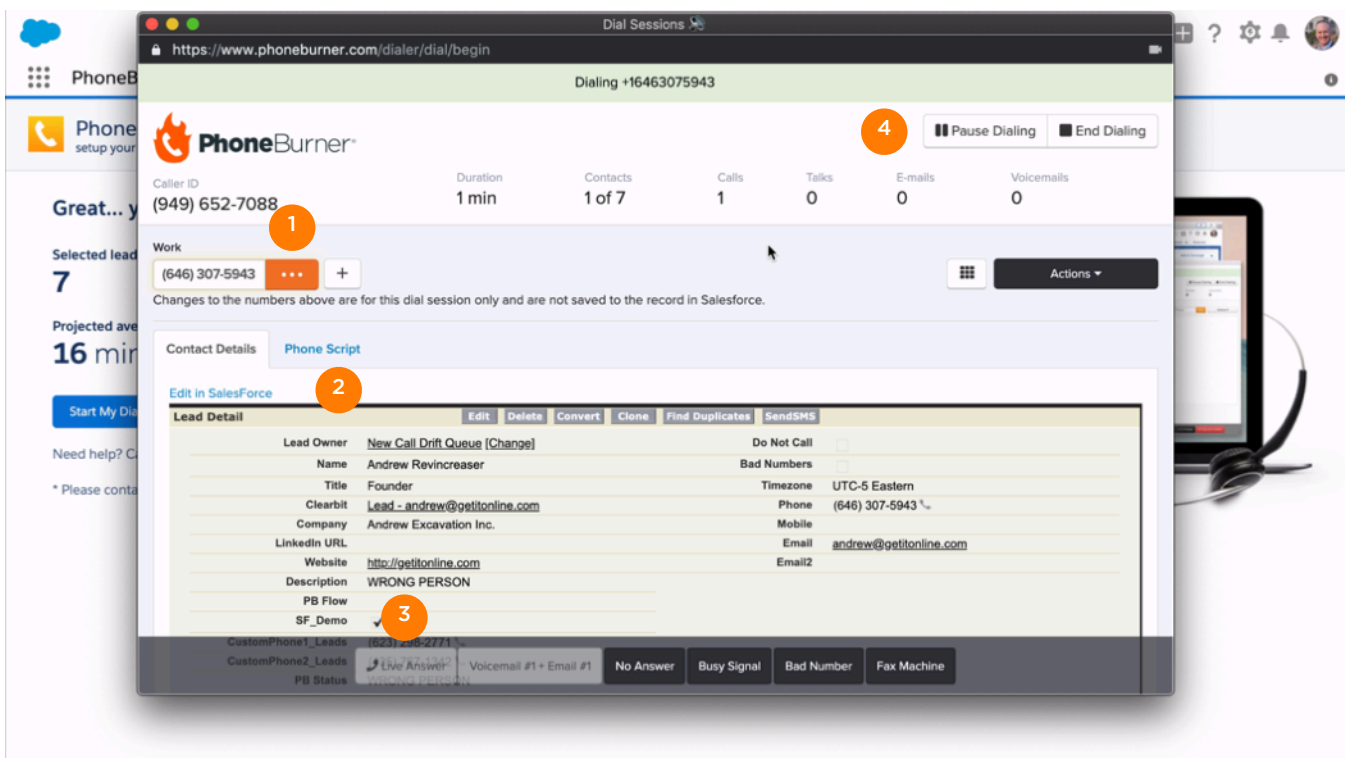
Now that you're connected, you can begin your dial-session.

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



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.