

Work The Lead



Customization & Enhancement Guide

Using This Document

This document highlights the 2 changes necessary to your Salesforce organization in order to fully use Work The Lead.

You will be adding a field named TDCC_Outbound to the Lead Object and the Contact Object.

These changes are only necessary if you want users to be enabled to flag Leads and Contacts for outbound campaigns such as Customer Surveys.

If you are using Work The Lead in an Inbound Call Center mode only, we recommend that you do not make these changes. Adding the outbound fields will only confuse users if your Company does not want Work The Lead to make outbound calls.

If you plan to use Work The Lead as your outbound call center for either Contacts or Leads only, you may add the field to just the Contacts Object or just the Leads Object.

Work The Lead



1. Create Field in Contacts Object

What: Create TDCC_Outbound field so users can flag a Contact for an outbound call campaign.

Why: Work The Lead pulls all Contacts where the Field TDCC_Outbound is checked, making it simple for users to perform customer surveys and reminders.

How: [Create a Custom Field](#)

Go To: **Setup > App Setup > Contacts>**

>Add New Custom Field > New > CheckBox >Next >

Field Labels: Outbound Call

Leave unchecked as default.

Field Name: TDCC_Outbound (Case Sensitive)

Description: This field allows user to flag Contacts for an outbound campaign conducted by Work The Lead. When the campaign is scheduled to begin Work The Lead will pull all checked Contacts into a dial list.

> Next > Add Field Selected > Save

Field Name	Field Type
TDCC_Outbound	Check Box

2. Create Field in Leads Object

What: Create TDCC_Outbound field so users can flag a Lead for an outbound call campaign.

Why: Work The Lead pulls all Leads where the Field TDCC_Outbound is checked, making it simple for users to perform customer surveys and reminders.

How: [Create a Custom Field](#)

Go To: **Setup > App Setup > Leads >**

>Add New Custom Field > New > CheckBox >Next >

Field Labels: Outbound Call

Leave unchecked as default.

Field Name: TDCC_Outbound (Case Sensitive)

Description: This field allows user to flag contacts for an outbound campaign conducted by Work The Lead. When the campaign is scheduled to begin Work The Lead will pull all checked Leads into a dial list.

> Next > Add Field Selected > Save

Field Name	Field Type
TDCC_Outbound	Check Box