Sales Dialer Implementation Guide

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@salesforcedocs

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EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

Dialer Prerequisites

Plan out your implementation before enabling Dialer in your organization.

The supported browsers for Dialer include the most recent versions of Chrome, Firefox, and Edge.

Make sure your browser allows Web Real-Time Communication (WebRTC). This should be enabled by default, but if your teams are using Edge, make sure the **Hide my local IP address over WebRTC connections** option in the about:flags menu is not selected.

Having a dedicated network for your Dialer calls is best. We recommend having at least 10 kbps per Dialer session available, but having 500 kbps+ per Dialer session is optimal. For more information about Dialer's network requirements, see Sales Dialer Network Requirements.

To use the Voicemail Drop feature, content deliveries need to be enabled for your org. From Setup, enter `Content Deliveries` in the Quick Find box. Then select **Content Deliveries and Public Links**. Ensure that the **Content Deliveries feature can be enabled for users** setting is selected. If you don't see the setting available, contact Salesforce Customer Support.

> Note: Dialer should not be assigned to users already using Open CTI.
>
> To disable Open CTI for users, from Setup, enter `Users` in the `Quick Find` box, then select **Users**. Then deselect the `Call Center` field for Dialer users.

If your org has record types enabled for tasks, you need to assign the Log a Call quick action to a specific record type in order to log calls.

If calls continue in inactive tabs for longer than your org's session timeout limit, they aren't logged properly. Notes made on the call may also be lost. If your org automatically logs out users after a short time (such as 15 minutes), encourage reps to keep the tab active or modify your org's session security settings. From Setup, enter `Session Settings` in the Quick Find box. Then select **Session Settings** and make updates.

Before beginning the implementation process, Salesforce must enable Dialer permissions and provision Dialer licenses for your organization. Your Salesforce contact coordinates it with you, but you can check if your organization has available Dialer licenses. In Setup, enter `Company Information` in the Quick Find box, then select **Company Information**, and check for **Dialer Outbound User** and **Dialer Inbound User** under Permission Set Licenses.

For information about using Dialer in a sandbox environment, see Test Dialer Features in Sandbox.

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USER PERMISSIONS

To enable Dialer features:
- Customize Application

To assign permission sets:
- Assign Permission Sets

To manage users:
- Manage Users

  AND

  Manage Profiles and Permission Sets

Dialer Limitations

Be aware of the limitations that apply to Sales Dialer.

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General Limitations

- Dialer features are available in Lightning Experience on the desktop only.
- No support in Experience Cloud sites.
- Users can now store up to 20 voicemail messages in Salesforce. Voicemail messages are limited to two minutes. The messages are saved as files in Salesforce, and they count toward your files storage quota.
- Call Monitoring is not supported in Salesforce Essentials.
- Outgoing calls are supported to the U.S. and Canada only. Puerto Rico is not supported.
- The Local Presence feature is only available in the U.S. and isn't available in Canada.
- Permission set groups aren't supported for Dialer permissions. Assign Dialer and Call Monitoring permission sets without using permission set groups.
- Dialer users can't have Service Cloud Voice permission sets or be part of a Salesforce call center.
- Phone numbers in dashboards can't be directly called with Dialer.
- The utility bar supports only one Phone item at a time.
- Users can't pop out (or pop in) the call panel from the utility bar during an active call.
- When users call a landline number that's busy, Dialer ends the call without ringing or a busy signal.
- Deactivated call result values aren't removed from the call panel. Delete any unneeded call result values instead.
- Users need the "Edit Task" permission to log calls. This permission isn't automatically included with some profiles, so users with those profiles can make calls, but those calls aren't logged.
- Users need a Dialer Inbound license to assign a number or access personal Dialer settings from the call panel.
- If you're creating a sandbox from an org that already has voice calls, voice call records and voice call recordings are not copied over. To use Dialer in sandbox, you must enable it from Setup again.
- It isn't possible to make or receive live calls with Dialer in sandbox environments. You can make test calls and test automation that occurs after a call is made, such as the log a call task. For more details, see "Test Dialer Features in Sandbox."
- The records that can be added to call lists include leads, accounts, person accounts, and contacts. Call lists use the standard Phone field for these records.
- To use voicemail greetings, password protection can't be required by default for content deliveries. From Setup, enter Content Deliveries in the Quick Find box, then select Content Deliveries. Ensure that Password protection is required is not selected. This feature is available only to users with outbound and inbound calling access.
- Dialer users with the voicemail drop feature can store up to 10 prerecorded voicemail messages.
- With call monitoring, you can listen to only one sales rep at a time, and only outbound calls are monitored. You can't monitor calls that your sales reps receive. Monitored calls use double the minutes of a regular call, counting the call time for both the rep and manager.
- Dialer respects the **Do Not Call** field, and records with the field selected have one-click calling disabled.
- Call recordings are saved as files in Salesforce. An hour of recording takes up roughly 15 MB of storage space, and the same sharing rules apply to recordings as other files in Salesforce. Admins can delete call recordings from the Recording Management page in Setup.
- If required by law, users must notify the call recipient of call monitoring and/or recording and stop monitoring and/or recording upon request.

- Dialer doesn't support Enhanced 911. Location information is not automatically shared over 911 calls.
- You can use Sales Dialer to make calls to or receive calls from the U.S. and Canada only.

Phone Number Limitations

- Phone numbers are subject to availability, and numbers from all area codes may not be available.
- Every inbound license is allowed one dedicated number. To change it, an admin can release the number, and the Dialer user can then reassign themselves another number. Admins can release and replace, at most, a single number for each user each month.
- Before a user can use a custom phone number, the user must enter a provided code to verify it. Phone numbers that use a directory can't be verified.
- The same custom phone number can't be used for multiple users.
- Phone numbers provided by Salesforce can be used only in association with Sales Dialer.

Enable Sales Dialer

Turn on Dialer from the Dialer Settings page in Lightning Experience.

1. From Setup, enter `Dialer` in the `Quick Find` box, then select **Dialer Settings**.
2. Enable Dialer.

   Optionally, enable personal voicemail, prioritized call lists, voicemail drop, and other settings for your org as well.

   Note: You can turn on and manage more features under the **Dialer** node in Setup. Depending on your org, this may include local presence, call result tracking, and more.

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- Customize Application

Add Dialer to the Utility Bar

Use the App Manager to make Dialer available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

1. From Setup, enter `App Manager` in the `Quick Find` box, then select **App Manager**.
2. Edit an existing Lightning app or click **New Lightning App**. You can also upgrade a custom Classic app to a Lightning app.

   If available, the Lightning Sales app contains numerous options preconfigured for sales users.
3. On the Utility Items tab, click **Add Utility Item** and select **Dialer**.
4. On the User Profiles tab, make the app available to relevant user profiles.
5. Verify the other app details, including the app name, branding information, and available menu items.
6. Save your changes.

To verify your changes, from the App Launcher, find and open the app that has Sales Dialer enabled.

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- Customize Application

Assign the Dialer Permission Set to Users

Assign the Dialer licenses to users from Setup.

Permission set groups aren't supported for Dialer permissions. Assign Dialer and Call Monitoring permission sets without using permission set groups.

Dialer users can't have Service Cloud Voice permission sets or be part of a Salesforce call center.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. Assign the Dialer Outbound and (if available) Dialer Inbound permission sets.
5. Click **Save**.
6. Repeat the process for other users you want to grant Dialer access to.

   The number of permission sets you can assign is limited by the number of feature licenses you've purchased.

   Note: Assigning the permission set automatically assigns a corresponding permission set license. However, if you wish to remove Dialer licenses from a user, you need to remove both the permission set and the permission set license to make the feature licenses available to reassign.

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USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

HOW DO I MANAGE DIALER USAGE?

See your org's Dialer usage from Setup.

From Setup, enter `Usage Report` in the `Quick Find` box, then select **Usage Report**.

The page displays your org's total minutes used this month and last month. You can view usage by date, and also sort and filter the usage data.

Salesforce admins receive an email when their org is approaching the end of their available Lightning Dialer minutes for the current month. Another email is sent when there are no available minutes and reps are unable to make calls.

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Guard Outgoing Calls Against Filters

Help your teams reach their customers with a few tips, including protocols that validate outbound calls from your teams.

Protect your teams' calls from being marked as spam with the following recommendations:

- Register all numbers through Free Caller Registry in order to submit business information directly to major US wireless providers.
- Use STIR/SHAKEN protocols to validate your teams' outbound calls. From Setup, enter **Trusted Calling** in the Quick Find box, and select Trusted Calling. Enter your company's information and submit it to Twilio. It can take from 24 to 48 hours for Twilio to review your submission.

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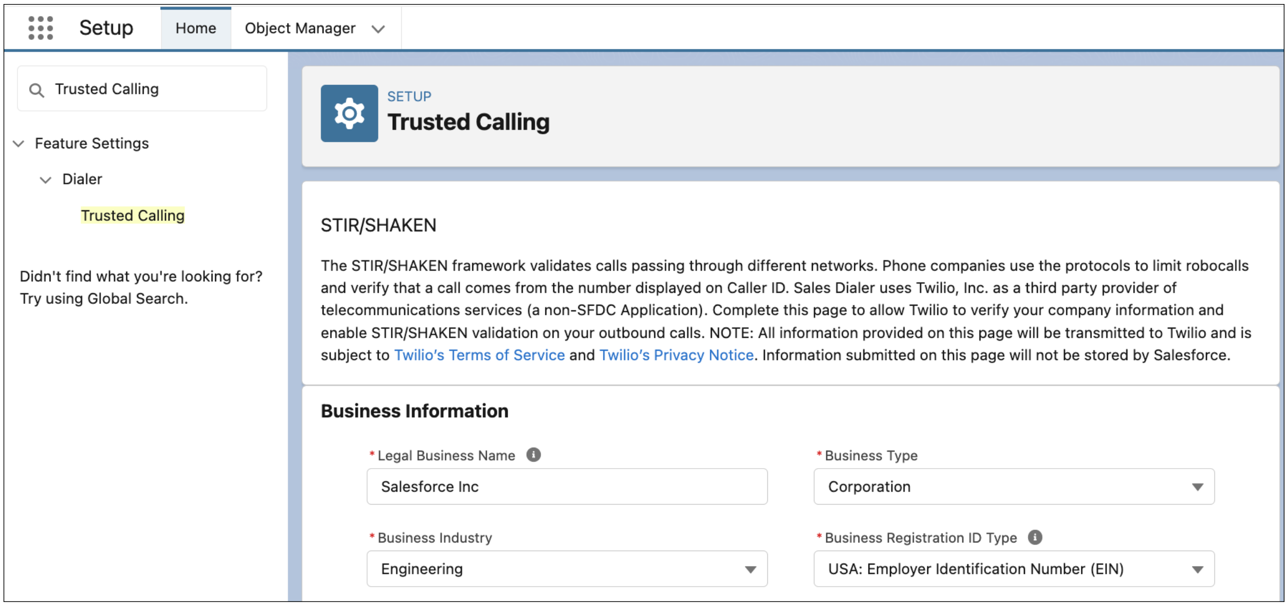

- If a number has been flagged by wireless providers, the fastest fix is to release that number and have your user request a new number.

Release a Dialer Number

Release a number from the Number Management page in Setup.

Once you release a number, it can't be recovered. You can still access calling data, but you can't make calls with the number. Admins can release, at most, a single number for each user each month.

Reassigning a number to another user is not yet supported.

Released custom numbers can continue to be used if they're still available.

1. From Setup, enter `Number Management` in the `Quick Find` box, then select **Number Management**.
2. Click next to a number.
3. Click **Release**.

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USER PERMISSIONS

To enable Dialer features:

- Customize Application

Remove Dialer Licenses from Users

Make Dialer licenses available for others by removing the permission sets and the permission set licenses from existing users.

When assigning licenses to users, you need to only assign permission sets. Permission set licenses are added automatically. However, to make the licenses available to reassign, you need to remove both the permission set and the permission set license.

1. From Setup, enter *Users* in the Quick Find box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. Remove the Dialer permission sets.
5. Click **Save**.
6. In the Permission Set License Assignments related list, click **Edit Assignments**.
7. Deselect the Dialer permission set licenses.
8. Click **Save**.

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USER PERMISSIONS

To remove permission sets:
- Assign Permission Sets

Test Dialer Features in Sandbox

Test Dialer in a sandbox environment by re-enabling the feature in a full sandbox org. Calls placed in a sandbox are test calls, and phone numbers aren't actually dialed.

If you have an org with Dialer enabled, you can test some Dialer features in a sandbox environment. You can place fake outbound calls in sandbox. Inbound calls are not supported.

1. Create a full sandbox of your Dialer org.
2. Log in to your sandbox.
3. From Setup, enter *Dialer Settings* in the Quick Find box, then select **Dialer Settings**.
4. Toggle the Dialer setting off, then back on again.
5. Finish setting up Dialer in your sandbox org.

   If you haven't finished setting up Dialer, this includes adding Dialer to the utility bar, creating a Dialer permission set, and assigning the permission set to users.

   Note: When selecting phone numbers in sandbox, each user can choose from the same list of dummy numbers. An error may occur if multiple users are assigned to the same phone number.

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USER PERMISSIONS

To enable Dialer features:
- Customize Application

To view a sandbox:
- View Setup and Configuration

To create, refresh, activate, and delete a sandbox
- Manage Sandbox

Sales Dialer Troubleshooting Tips

Make sure your environment is set up to use Dialer, and you have the most recent version of Chrome, Firefox, or Edge.

Problem	Potential Solutions
I can't make a call.	• Make sure you have a network connection. • Make sure you've granted your browser permission to access your microphone. • Check that Dialer is properly set up in your org.
The audio is dropping in-and-out of my call.	Check the quality of your network connection. It's best to use a high speed or separate network for calling activity, or to prioritize Dialer traffic on your network.
I'm getting one-way audio (on either end).	• Make sure your microphone and speaker are attached and enabled, and that your microphone isn't muted. • Check that you have opened the correct ports in your computer and network firewalls.
The audio quality is poor on my call.	• Use a wired USB headset over wireless or mobile headphones. • Try to reduce the noise in your area, and take calls in a quiet location. • Adjust the microphone and speaker volume settings. • If you're using a wireless connection, switch to a hardwired connection with adequate bandwidth. • Turn off or disconnect other devices that may be using up bandwidth on your network. • Close extra applications and browser tabs to make sure your computer has enough resources to make a quality call.
I'm having problems with ending or logging longer calls.	You may be exceeding your org's session timeout limit. If your org automatically logs out users after a short time, ongoing calls in inactive tabs aren't logged properly. Keep the tab active or contact your Salesforce admin about modifying your org's session security settings.
I'm seeing an Internal Consistency Evaluator (ICE) error: ICE negotiation with Twilio failed	Your network connectivity is poor, or your connection is being blocked by a firewall. Check your connection and try again. It may help to restart your browser or system. If the problem persists, contact your network administrator.

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