



June 2016 Release Step-By-Step Guide

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Highlights

This release includes new features and maintenance improvements.

Features include:

- Call Disposition Data: Sales Managers gain visibility into the outcome of call activity to improve sales strategy and execution. Call data will be captured and associated with actions (dispositions) via enhancements to the Velocify Record History. Two new canned reports are available as templates: Last Week's Velocify Call Activity by User, and Results from Calls Last Week.
- Better ability to track changes to a record when it is owned by a Queue.
- Every Pulse Action, as well as other events such as ownership or status change, is now stored as its own record attached to the Velocify Record History. This enables much better reporting and improves data transparency and feeds the two new canned reports.
- CPU Optimization of all Pulse processes especially on batch import, upsert, and ownership changes.

Notable fixes include:

- Fixes for the Salesforce 1 Mobile application focusing on dialing and other cosmetic issues.
- Fixed edge case on Asynchronous conversion where the error "Too many query rows: 50001" could stop the process.
- Fixed issue where the Billing/Shipping Street could not be used as an Export Criteria.
- Minor improvements to the Sandbox Reset process introduced in our May '16 release.

Call Disposition Data and Actions as VRH Items

This brings a better visibility into and understanding of what your Agents are doing during a call, and how those Actions affect the outcome of the sales strategy. This new feature will associate all Actions taken while on a call to the Velocify Call Details, and better illustrates the record's story as it moves through the sales life cycle. Call disposition data is available as a new Velocify Record History Item (VRH Item) that can be reported on and analyzed to improve sales strategy and execution.

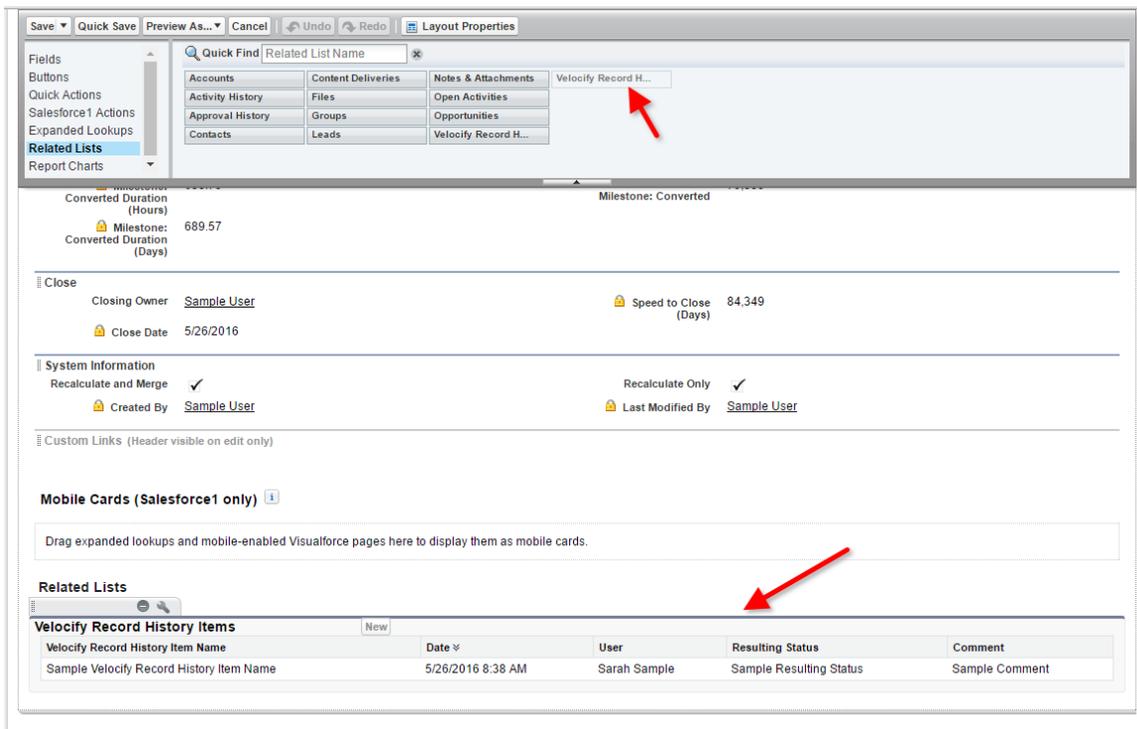
What is the Velocify Record History (VRH) and a VRH Item?

The Velocify Record History (VRH) is an object that is created for every Lead, Opportunity, Account, or Contact. It tracks important data and events for the lifespan of the record including the contact strategy distribution and actions. This information in the VRH can be transferred or archived during the conversion process.

Each VRH Item tracks changes such as resulting status or milestone, what Priority or Distribution Rule was involved, which call was associated (if any), and some other metrics. It provides a way for a Salesforce Admin or Sales Manager to better understand how the Agents (or Users) are interacting with records, and the effectiveness of their team and sales strategy.

To View the VRH Items

1. Navigate to **Salesforce Setup** (menu) > **Build** (menu) > **Create** (menu) > **Objects** (menu)
2. Select **Velocify Record History** from the list of custom objects
3. Go to the **Page Layouts** and edit the Record History Details and Summary
4. Add the Velocify Record History Item related list to the page layout

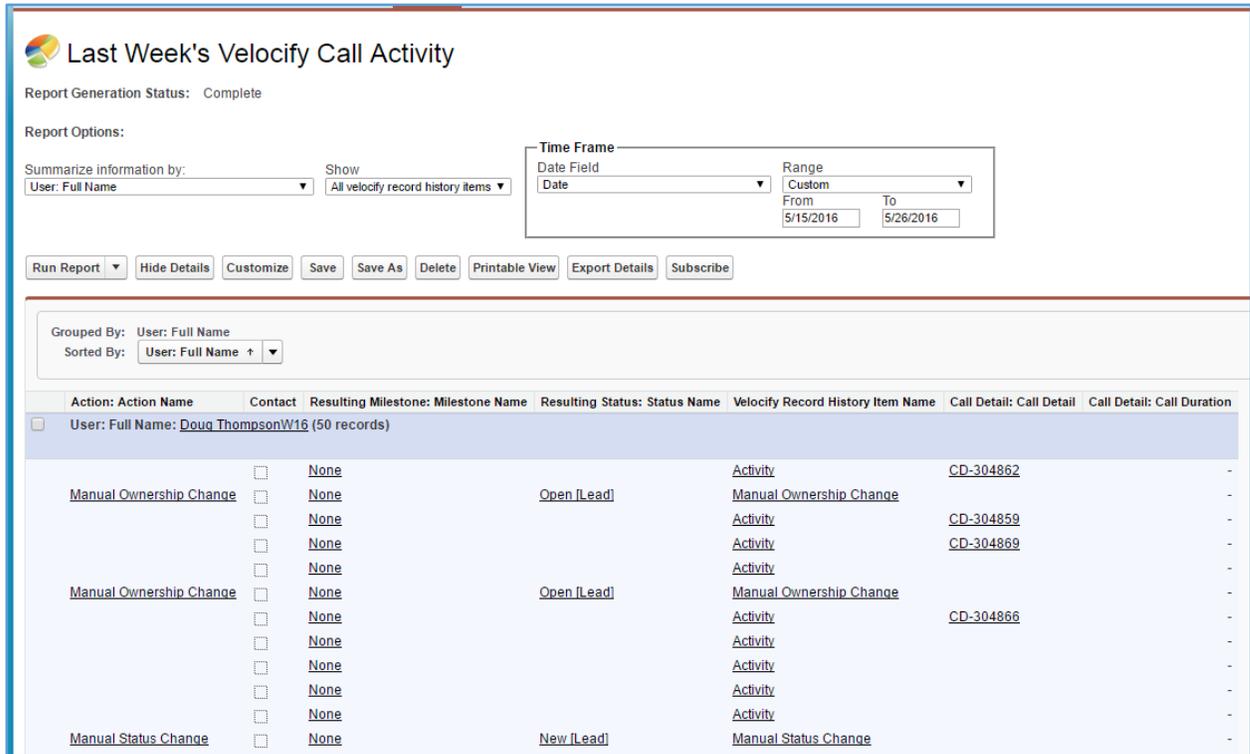


Tips

- **Warning:** If your Salesforce Org is space constrained – i.e., you are near your data storage limit – you will need to Archive your VRH records to archive (or delete) your VRH Items.
 - This process can be completed manually, via workflow, via a batch process, or via a Trigger by checking the “Archived” checkbox. Please refer to standard Salesforce

documentation for further details on how to implement Workflows or other related processes.

- Two new report templates are provided as simple guides as to what reporting can be extracted from the VRH Items.



Last Week's Velocify Call Activity

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range From To

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Sorted By:

Action: Action Name	Contact	Resulting Milestone: Milestone Name	Resulting Status: Status Name	Velocify Record History Item Name	Call Detail: Call Detail	Call Detail: Call Duration
User: Full Name: <u>Doug ThompsonW16</u> (50 records)						
Manual Ownership Change	<input type="checkbox"/>	None		Activity	CD-304862	-
Manual Ownership Change	<input type="checkbox"/>	None	Open [Lead]	Manual Ownership Change		-
Manual Ownership Change	<input type="checkbox"/>	None		Activity	CD-304859	-
Manual Ownership Change	<input type="checkbox"/>	None		Activity	CD-304869	-
Manual Ownership Change	<input type="checkbox"/>	None		Activity		-
Manual Ownership Change	<input type="checkbox"/>	None	Open [Lead]	Manual Ownership Change		-
Manual Ownership Change	<input type="checkbox"/>	None		Activity	CD-304866	-
Manual Ownership Change	<input type="checkbox"/>	None		Activity		-
Manual Ownership Change	<input type="checkbox"/>	None		Activity		-
Manual Ownership Change	<input type="checkbox"/>	None		Activity		-
Manual Ownership Change	<input type="checkbox"/>	None		Activity		-
Manual Ownership Change	<input type="checkbox"/>	None		Activity		-
Manual Ownership Change	<input type="checkbox"/>	None		Activity		-
Manual Status Change	<input type="checkbox"/>	None	New [Lead]	Manual Status Change		-

- Be sure to import your Velocify Call Details, if you are using our DialIQ product, to link the VRH Item with any calls to get a 360° view of the call duration, status, transfers, etc.
 - Manually: Go to **Velocify Admin** (tab) > **Dialer** (menu) > **Data Management** (menu) and click the **Run** button.
 - Scheduled Process: You can create a schedule import for your Call Details data. For further details, please contact Velocify support.

Track Changes to Records Owned by Queues

Historically, changes made to records synced with Velocify for Prioritization and Distribution were not tracked and it caused a gap in the record's sales story. This was very common when a batch of records moved from one team to another and used a Queue as the intermediary.

Now, any Actions, Status changes, Ownership changes, or changes to synced fields will be tracked and synced with Velocify, and will no longer interrupt history tracking, Prioritization, or Distribution.

CPU Optimization

One of the challenges in developing an application in the Salesforce ecosystem is sharing system resources with client and 3rd party code. Many of the Salesforce governor limits are unique to each managed package, but one resource, CPU Time per transaction, is shared across all code bases. Especially in batch processing, we have sometimes used more than our “fair share” and we have made great strides in reducing our CPU time used. We have seen 50%-80% reduction in overall time for our triggers to fire and that is great news for complex Salesforce Orgs.

Many of the CPU optimizations in this release are configuration free – they are available right out of the box – but some do require some configuration by the Pulse Team. These tweaks are made based on many factors and are easily enabled after a quick discussion with our Team. Contact your Account Manager directly or send an email to dl-accountmanagers@velocify.com to have them reach-out to our Technical teams for more information.