

Tips & Hints



With telephone gateway service offered by WebForPhone, you can access your Salesforce.com data in real-time via any telephone you have. You can just say the commands to access and update information from accounts, contacts, opportunities, events, and tasks. You can also send and receive information to (from) your mobile phone.

1. Logon

You're asked to say your full name as registered in salesforce.com & access code (you're required to pre-register at www.webforphone.com/salesforce).

2. Main Menu

You can say 'Main Menu' at any time prior to selection of sub menus which are the tab menus in your salesforce.com account.

3. Sub Menu

You can say one of the tab menus or also 'directory search'. You can search phone directory by city & state, first name, and last name of the person you are looking for. Just say 'directory search'.

4. Search

After choosing one of the sub menus, you can search any specific one with the name in the item. The command format is 'search [for] <name>' for Accounts or Opportunity, or just 'search' for Leads or Contacts. In the tab menu *Calendar*, you can search events or tasks by date with the command 'any <item kind> <data>'. <item kind> is events, tasks, or activities for both. <date> in the command format for calendar can be 'today', 'tomorrow', (this or next) a day of the week, 'this week', 'next week', or specific calendar date with (MM/DD) or (MM/DD/YYYY) format. If you search and select any contact or lead, you can ask a transfer-call to the person.

5. Retrieve, Update, & Create

5.1 Retrieve

Once you search and find an item, you can retrieve fields information with a command 'get me [the] <field>'. You can hear all the details of the fields at once by saying 'get me [the] details' or just 'details'. You can even receive the detailed information to your mobile phone by saying 'send me an SMS' or just 'SMS'.

Sub Menu	Field (Retrievable)
Accounts	Address, Phone, Fax, Contacts, Opportunities
Contacts	Account, Address, Phone, Mobile Phone, Fax
Opportunities	Account, Stage, Amount, Probability, Description
Calendar (Events)	Subject, Location, Date & Time, Description, Creator, Account
Calendar (Tasks)	Subject, Due Date, Description, Creator, Account
Leads	Owner, Company, Title, Phone, Status, Address

5.2 Update

You can edit some of the fields with a command 'update <field>'.

Sub-Menu	Field Name
Accounts	Phone, Fax, Address
Contacts	Phone, Mobile Phone, Fax, Address
Opportunities	Name, Stage, Amount, Probability, Attaching Voicemail
(New) Events	<Accept> & <Decline> with voicemail, Attaching Voicemail
Lead	Phone, Fax, Rating, Lead Source, Annual Revenue

5.3 Create

You can create a document (voice note) or a text (text note), and attach it into an opportunity or an account.

Phone numbers
• Voice Enrollment: 215-701-7840
• Service: 215-701-7841

Sub (tab) Menus
• Accounts
• Contacts
• Opportunities
• Leads
• Calendar

Sample (Directory Search)
• 'Directory Search'

Sample (Search)
• 'Search for WebForPhone' (for accounts or opportunities)
• 'Search' (for leads or contacts)
• 'Any events today?'
• 'Any activities on March 6th?'
• 'Any task in this week?'

Sample (Transfer)
• 'Call him' or 'Call her'

Sample (Retrieve)
• 'Get me the phone number'
• 'Get me the address'
• 'Get me the subject'
• 'Get me the location'

Sample (Update)
• 'Update the phone number'
• 'Update the address'
• 'Update the stage'
• 'Update the probability'

Sample (Create)
• 'Text note'
• 'Voice note'