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PhoneTools Phone Screening Formula Field Creation

Please note:

PhoneTools had two features: **Click to Call and SMS** functionality, and **Phone Screening** Functionality. This installation guide will cover Formula field creation which is relevant to Phone Screening.

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Formula Field Configuration

We understand that you won't want to screen every number in your Salesforce Org, so we provide the ability to include/exclude numbers based on a true or false formula.

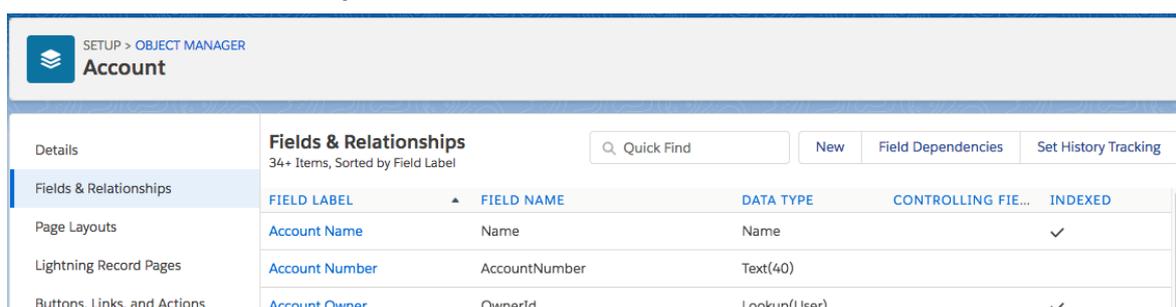
For this example, we want to exclude any number that sits on a record where the Billing Address is not "United Kingdom" or is left blank, as we are going to make an assumption that the number on the record won't be British.

Note that you can configure your formula to whatever your own requirement is giving you full control over your screening process.

Creating a Formula

Navigate to **Setup**  and select **Object Manager**. Once the page has loaded, select the object you want to create the **formula** for by clicking the **Label**.

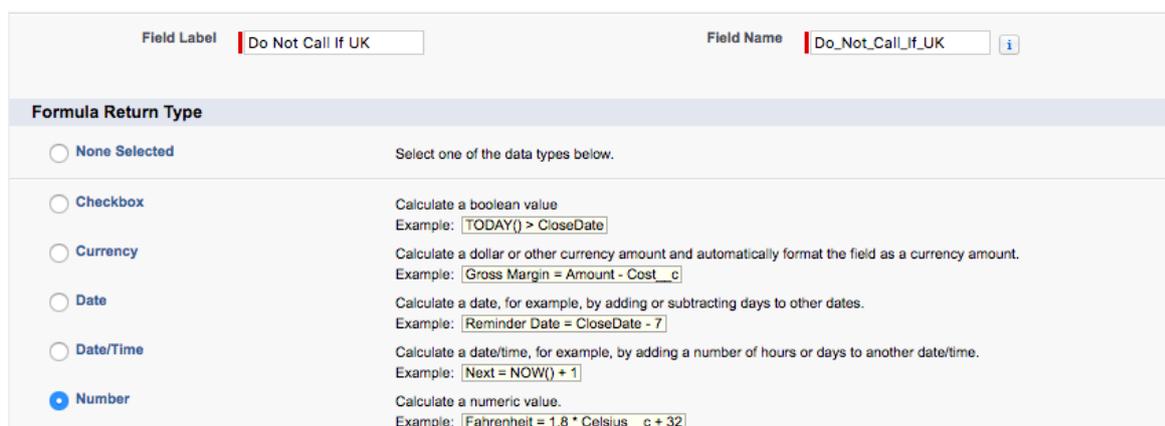
Click **Fields & Relationships** and then select **New**.



The screenshot shows the Salesforce Object Manager interface for the 'Account' object. The 'Fields & Relationships' tab is active, displaying a table of existing fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Account Name (Name), Account Number (Text(40)), and Account Owner (Lookup(User)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓

Choose **Formula** from the field types available and select **Next**. Once the next page has loaded, provide a **Field Label** and **Field Name** of your choosing and select **Number**. Select **Next** to continue.



The screenshot shows the 'Formula Field Configuration' screen. The 'Field Label' is 'Do Not Call If UK' and the 'Field Name' is 'Do_Not_Call_If_UK'. The 'Formula Return Type' is set to 'Number'.

Field Label: Field Name:

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

Type your formula into the field which **must result in 0 or 1**.

0 = Number doesn't require screening

1 = Number does screening



Here is a basic formula used for this example:

IF(OR(BillingCountry='United Kingdom',ISBLANK(BillingCountry)), 1, 0)

Account Help for this Page ?
New Custom Field

Step 3. Enter formulaStep 3 of 5

Previous Next Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius_c + 32 [More Examples ...](#)

Simple Formula Advanced Formula

Select Field Type

Insert Field

Insert Operator

Do Not Call If UK (Number) =

Check Syntax

Description

Help Text

Previous Next Cancel

Select **Next** and then ensure that **All Profiles** are granted **Visibility** to the formula. Select **Next** and **uncheck** adding the formula field to your **page layout**. Then press **Save** to finish.

Adding the Formula to the Phone Field

Navigate to the Salesforce **App Launcher**  and then select **PhoneTools Administration** under **All Items**. Once loaded, select the **Installation** sub-tab.



Scroll down to the **Fields to Screen** section and select **Edit** next to the field that you just configured your formula for.

ProvenWorks PhoneTools

Installation | Click to Call | Screening | Help & Support

Installation

You must first install the sidebar components:

1. Add the PhoneTools component to the Home Page Layout: navigate to the Setup section and expand Customize->Home->Home Page Layouts, and be sure to save once you have added the components.
2. To enable the sidebar components on every form (recommended), navigate to Setup then go to Customize->User Interface, check "Show Custom Sidebar Components on All Pages" under the Sidebar section.

Fields to Screen

Action	Object	Phone Field	Formula Field	Need screening	Info
Edit Del	Account	Phone		<input checked="" type="checkbox"/>	
Edit Del	Contact	HomePhone		<input type="checkbox"/>	
Edit Del	Contact	MobilePhone		<input type="checkbox"/>	
Edit Del	Contact	Phone		<input type="checkbox"/>	
Edit Del	Lead	MobilePhone		<input type="checkbox"/>	
Edit Del	Lead	Phone		<input type="checkbox"/>	

[Add field](#)

Scroll down the **Formula Field** picklist to find your new **Formula's API name**. Once chosen, select **Save**.

Configure fields to screen Save Cancel

Field ID #1 +

Object *Account*

Phone Field *Phone*

Formula Field

Need screening

Save Cancel

Now when checking a record that doesn't meet the formula criteria, the TPS and CTPS alert bubbles will display grey with a 'Not Required' status.



Account Owner



Industry

Billing Address

93117

CA

United States

Phone

(805)967-9255

Phone Screen Status

Account Phone (805)967-9255 Not Required

Fax

Website

PhoneTools

Screen TPS

Screen CTPS

RECORD

QUICK DIAL

NUMBER

CALL

SMS



Account Phone
(805)967-9255



Contact Us

If you are experiencing any issues, or have any questions, please reach out to support@provenworks.com where a member of our team will be happy to assist.

