



PhoneTools Phone Screening Installation Guide

Please note:

PhoneTools had two features: **Click to Call and SMS** functionality, and **Phone Screening** Functionality. This installation guide will cover **Phone Screening** functionality. If you wish to set up Click to call and SMS, please go to this [guide](#).

Contents

PhoneTools Phone Screening	3
Understanding the Screen Statuses.....	3
Installing from the AppExchange	4
PhoneTools General Configuration.....	5
Org-Wide Settings.....	5
Configure a Field for Screening.....	5
PhoneTools Lightning Configuration.....	7
PhoneTools Classic Setup.....	10
Scheduled Screening Configuration.....	12
Contact Us.....	13

PhoneTools Phone Screening

PhoneTools provides you and your users the ability to screen the numbers stored in your Salesforce Org against the UK-TPS and UK-CTPS databases ensuring compliance with the Telephone Preference Services. The tool provides you with the results directly on your page and makes them visible to your users and assists in keeping them all up to date and removing the requirements for any external application to handle this for you.

Information on each number is stored in the Org providing your users with information on whether it's listed or not as well as when it needs screening again. Automated batch screening processes can also be configured on a daily cycle that will screen overdue numbers ensuring no numbers are left unchecked.

Access to the UK-TPS and UK-CTPS credits are provided at a pay-per-click basis. Please get in contact with sales@provenworks.com for more information on pricing.

Understanding the Screen Statuses

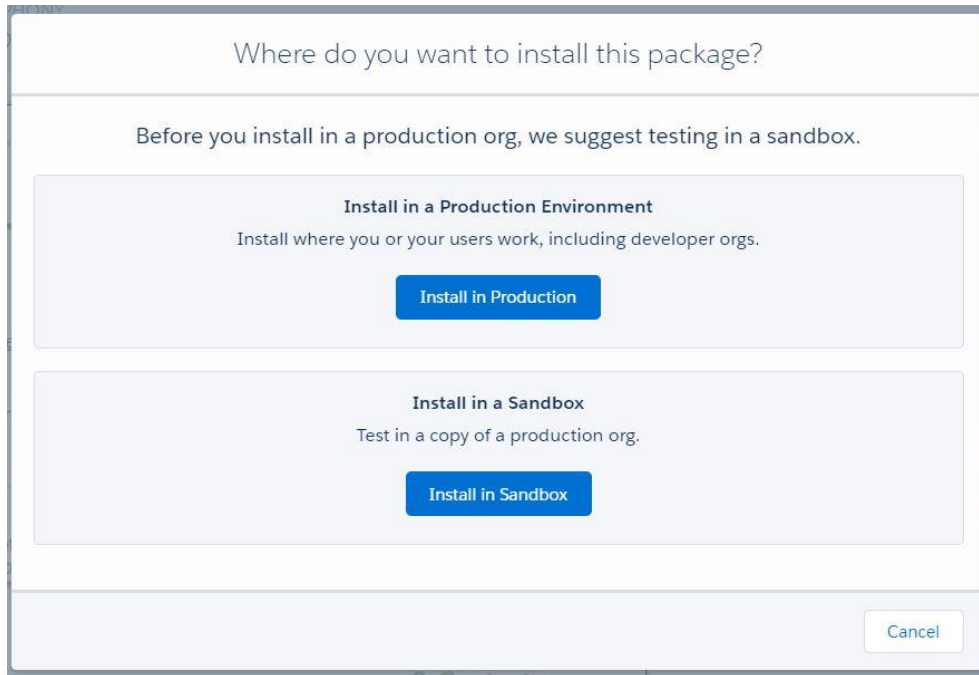
Numbers configured for screening can encounter **5 different states** which reflect their state against the TPS and CTPS databases. It is important to have an understanding of these to ensure that you are aware if any action is needed for the number.

- 1) **Not Checked** – The number has been entered into the Org and has not yet been screened against the configured databases
- 2) **Not Listed** – The number has been screened against the configured databases and is not listed.
- 3) **Overdue** – The number has previously been screened but now requires rescreening to stay compliant with the TPS and CTPS guidelines.
- 4) **Listed In** – The number exists on the database it has been screened against
- 5) **Not Required** – The configured formula criteria is not true meaning the numbers doesn't need screening

Installing from the AppExchange

The following steps assume that you are installing PhoneTools either from the AppExchange “**Get it Now**” button, or via direct link provided to you by ProvenWorks.

On the installation screen, choose who you want to install PhoneTools for. When the option is selected, press **Install**.



*Note: If **Install for Admins Only** or **Install for Specific Profiles** is chosen, see **Security & Permissions** to view the permissions that require alterations to allow users to access PhoneTools functionality.*

Next, tick **Yes, grant access to these third-party web sites** and select Continue.

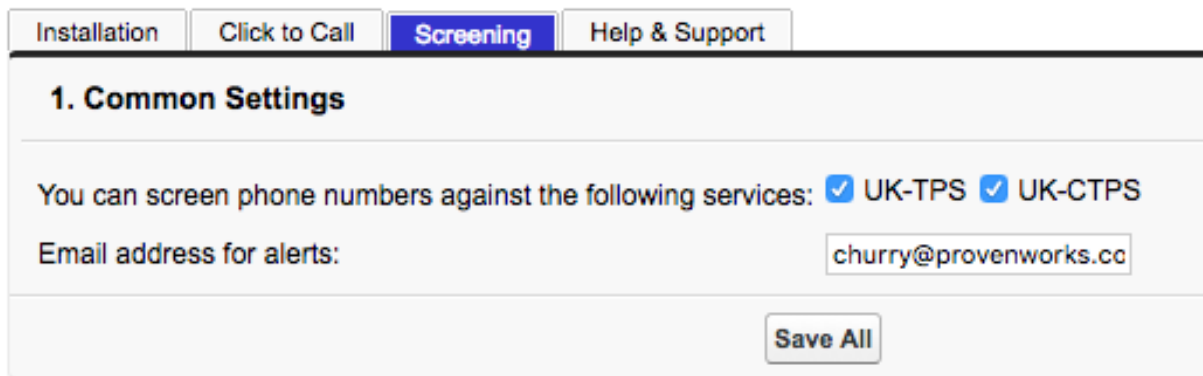
The application will now be installing into your Salesforce environment; you will receive an email once this process has been completed.

PhoneTools General Configuration

Org-Wide Settings

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

Use the **UK-TPS** and **UK-CTPS** checkboxes from the **Common Settings** section to setup which databases you are able to screen against and then populate the **Email address for alerts** with a valid email address. Press **Save All** to confirm the changes.

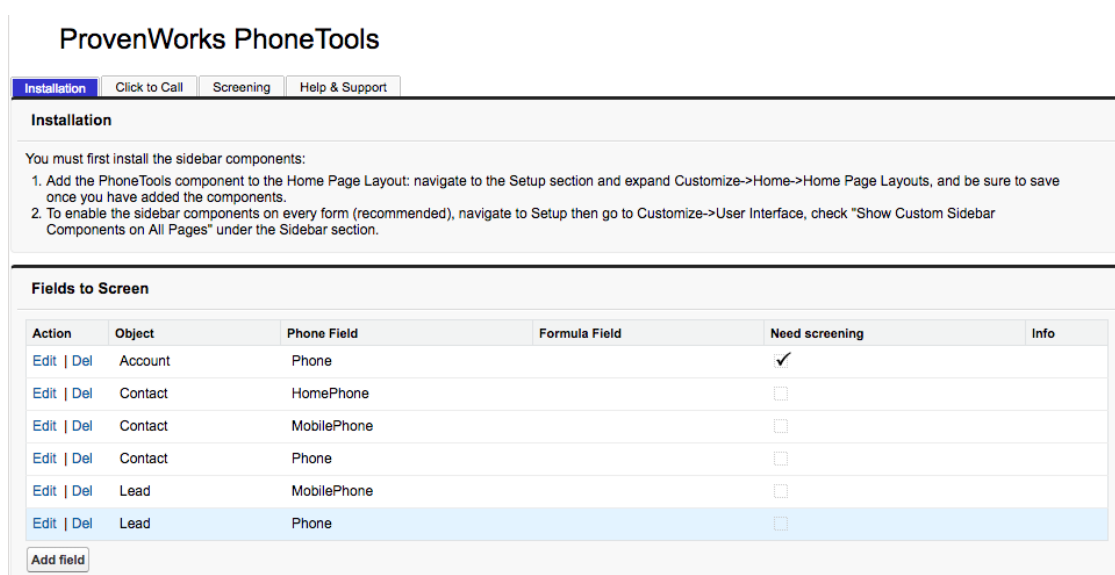


The screenshot shows the 'Screening' sub-tab selected in the navigation bar. Below the navigation bar, the section is titled '1. Common Settings'. The main content area contains the text 'You can screen phone numbers against the following services:' followed by two checked checkboxes: 'UK-TPS' and 'UK-CTPS'. Below this is a text input field labeled 'Email address for alerts:' with the value 'churry@provenworks.cc'. At the bottom right of the section is a 'Save All' button.

Configure a Field for Screening

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 you want to enable screening for.



The screenshot shows the 'Installation' sub-tab selected in the navigation bar. Below the navigation bar, the section is titled 'Installation'. The main content area contains the text 'You must first install the sidebar components:' followed by two numbered instructions. Below this is the 'Fields to Screen' section, which contains a table with columns: Action, Object, Phone Field, Formula Field, Need screening, and Info. The table lists several fields for screening, with the 'Phone' field for 'Lead' objects highlighted in blue. Below the table is an 'Add field' button.

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"/>	

Check **Need Screening** to allow the number to be screened then select **Save**.

Configure fields to screen

Object *Contact*


Phone Field *MobilePhone*

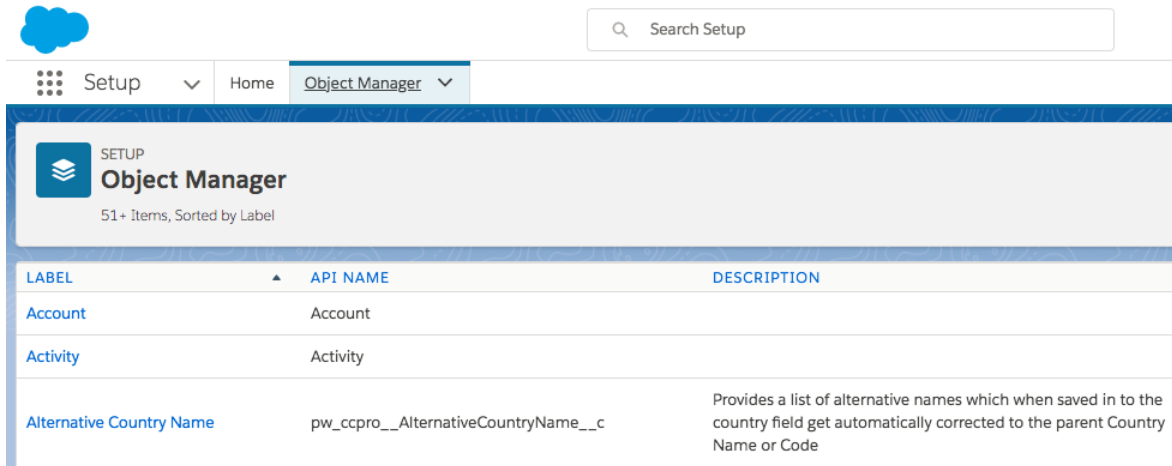
Formula Field

Need screening

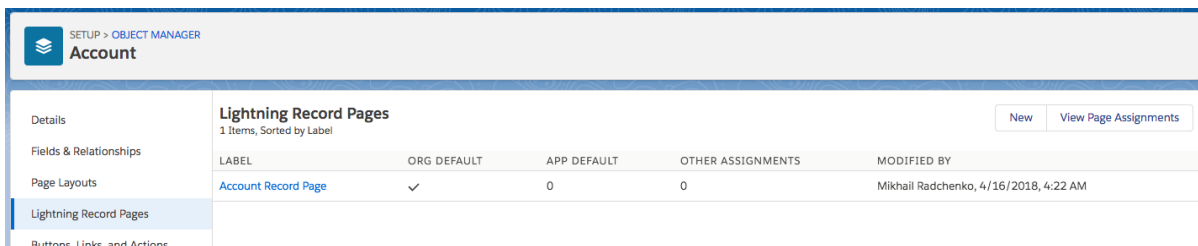
If you wish to set up a Formula field, which assists in only screening numbers when a formula equates to true, please check this [document](#).

PhoneTools Lightning Configuration

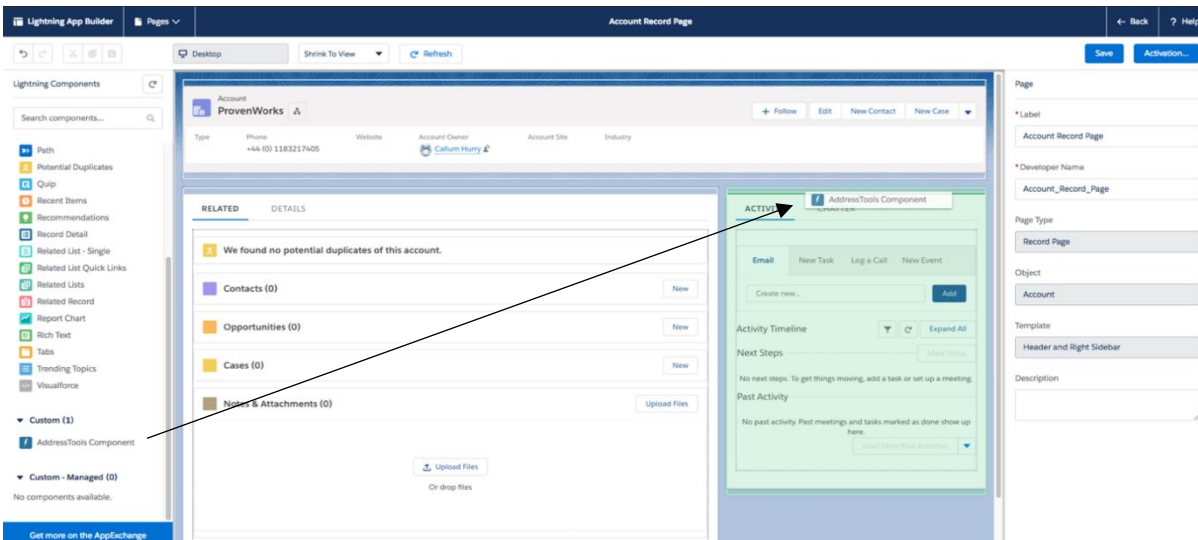
To get this configured on your object pages, navigate to **Setup**  and select **Object Manager**. Once the page has loaded, select the object you want to place the **PhoneTools Component** functionality on by clicking the **Label**.



Select **Lightning Record Pages** and press **New** to configure a new record page, alternatively if you already have a custom record page, select its label and press **Edit**.



Select **PhoneTools** from the **Lightning Components** list on the left of the screen and drag the component to your desired location on your page layout.



The PhoneTools Component has **4 custom design parameters** for configuring on the right side of the screen, toggling these will determine the functionality for the component in use:

- 1) **Click to Dial Functionality** – Enable dial and SMS to record feature on component
- 2) **Quick Click To Dial Functionality** – Enable quick dial and SMS to any number feature on component
- 3) **TPS Functionality** – Enable TPS screening buttons and status on component
- 4) **CTPS Functionality** – Enable TPS screening buttons and status on component

Note: you can use Add Filter to create rules for when the component is visible. i.e hide if phone field is empty.

Save Activation...

Page > PhoneTools

Click To Dial Functionality

Quick Click To Dial Functionality

TPS Functionality

CTPS Functionality

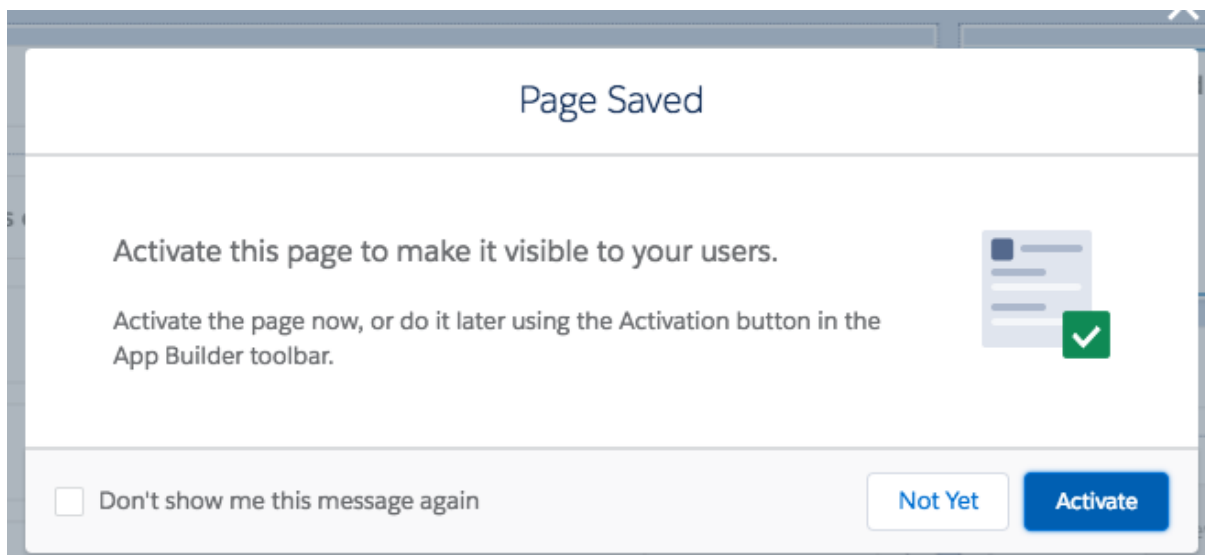
▼ Set Component Visibility

Filters

+ Add Filter

Once your component's parameters have been configured and you're happy with its position, press **Save** at the top of the page.

If the page you have saved is not yet active in your Org, you will receive a prompt asking you to activate it. Select **Activate**.



You can assign your page based around different levels. For this example, we will set the **Org Default** by pressing **Assign as Org Default** but you can select the different tabs and follow the steps based on your requirements.

Custom record pages can be assigned at different levels:

 **The org default** record page displays for an object unless more specific assignments are made.

 **App default** page assignment, if specified, overrides the org default.

 **App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

ORG DEFAULT

APP DEFAULT

APP, RECORD TYPE, AND PROFILE

Set this page as the org default to display it for all Contact records, except when app default or app, record type, or profile-specific assignments are defined.

[Assign as Org Default](#)

Review your page assignment changes and when you're happy, press **Save**.

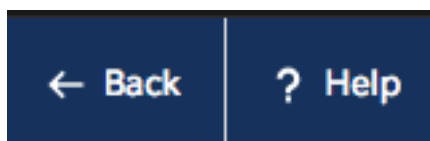
Set as Org Default: Account Record Page

Set this page as the org default to display it for all Contact records, except when app default or app, record type, or profile-specific assignments are defined.

Review Assignments (1)			
CURRENT ORG DEFAULT	LAST MODIFIED	NEW ORG DEFAULT	LAST MODIFIED
System Default	-	Account Record Page	Callum Hurry Apr 17, 2018

[Cancel](#) [Back](#) [Save](#)

Once saved, press **Back** to exit the **App Builder** page.



Now when you go to view a record in your Org with the PhoneTools Component configured, you will be able to see it in action!

*Note: Numbers will only be visible if they're configured in the **PhoneTools Administration page**, follow the next step to configure fields for use.*

Note: the PhoneTools Component settings are for interactive behavior only, batch screening will follow the Org-Wide settings.

PhoneTools Classic Setup

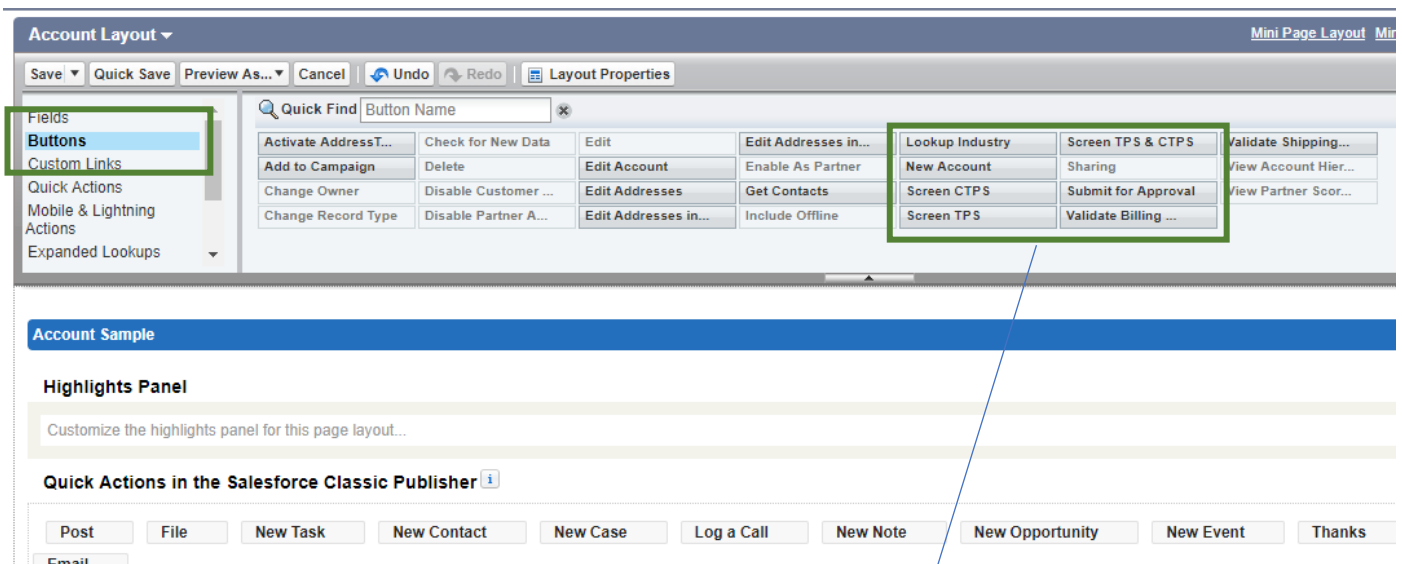
If you are using Salesforce Classic, follow the below instructions.

Navigate to the object you would like to enable the screening functionality on and click **Edit Layout**.

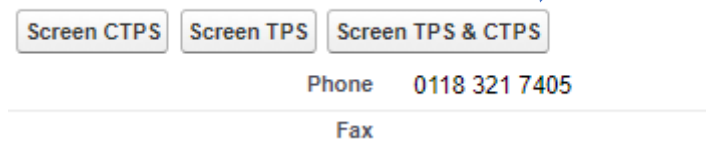


[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

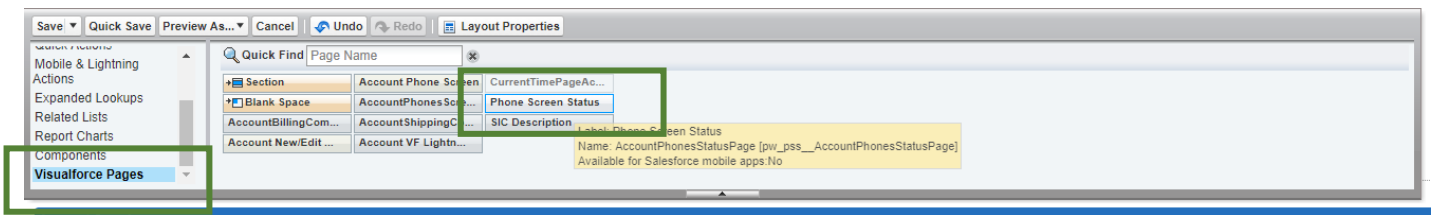
You will firstly need to add some buttons to the page which you will find under **Buttons**. The buttons you add depend on whether you need to screen TPS, CTPS or both. Drag the **Screen TPS & CTPS** buttons on to the page as required.



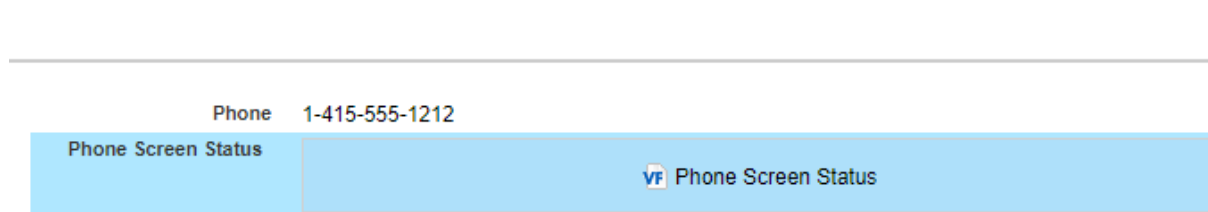
Now you will be able to view the buttons on the **Object**.



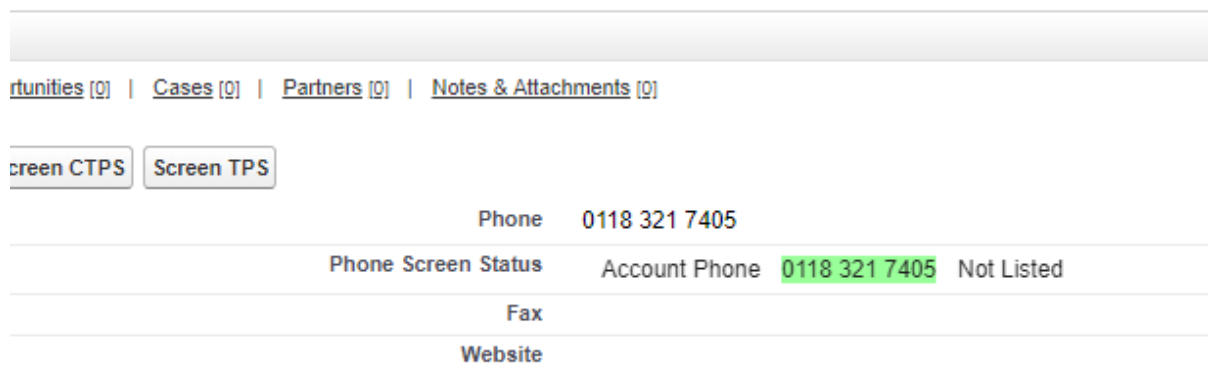
Now you will need to add a **PhoneScreen Status** field onto the screen so that you can easily see the status of the phone number. You can add this by viewing the **Visualforce Pages** and finding PhoneScreen Status.



Drag this under the phone number so that it is easy for the users to instantly see the status of the phone number and whether it is on the TPS or CTPS database or not.



The PhoneTools screening functionality will now be available on your chosen object. Repeat this process if you wish to have the functionality on other objects.




Please note: You are allocated some credits to test with for free when installing into your Salesforce org. If you run out of credits, please contact sales@provenworks.com



Scheduled Screening Configuration

There are three different settings linked to scheduled screenings:

- 1) **Screen now** – screen your **'not checked'** and **'overdue'** phone numbers immediately against the Org-Wide configured settings.
- 2) **Enable Scheduled Screening** – set up a recurring daily process that screens your **'not checked'** and **'overdue'** phone numbers immediately against the Org-Wide configured settings.
- 3) **Enable Scheduled Cleanup** – setup a recurring daily process that removes numbers and their statuses from the Phone Numbers object when the record they existed on is removed.

To find all the setting, navigate to the Salesforce **App Launcher**  and then select **PhoneTools Administration** under **All Items**. Once loaded, select the **Installation** sub-tab.

Scroll down to find **Scheduled Screening Setup**.

Scheduled Screening Setup

Scheduled screening of phone numbers is currently disabled. Once enabled, all phone numbers requiring screening will be screened daily at midnight:

Scheduled cleanup of phone numbers is currently disabled. Once enabled, this ensures that the list of numbers accurately matches those stored within your Account, Contact and Lead records. This job will run daily at 4:00 am:

Pressing screen now will run a one-time screen across all your numbers. Simply select **Screen now**.

Select **Enable Scheduled Screen** to create a **Scheduled Job** that will execute each day screening **not checked** and **overdue** numbers.

Select **Enable Scheduled Cleanup** to create a **Scheduled Job** that will remove any orphaned phone numbers that are no longer exist on any of your Salesforce records.

To manage or delete the scheduled jobs, select **Click here to view or delete scheduled jobs using the Salesforce Scheduled Jobs viewer**.

Scheduled Screening Setup

Job Name	Submitted	Next Scheduled Run
Phone Screening cleanup job	2018-05-11 11:48:20	2018-05-12 04:00:00
Phone Screening job	2018-05-11 11:48:16	2018-05-12 00:00:00

[Click here to view or delete scheduled jobs using the Salesforce Scheduled Jobs viewer.](#)



Contact Us

You will now find that PhoneTools has been successfully configured. If you are experiencing any issues with the setup, please reach out to support@provenworks.com where a member of our team will be happy to assist.

Alternatively, please take a look at our [FAQ](#) page.

