

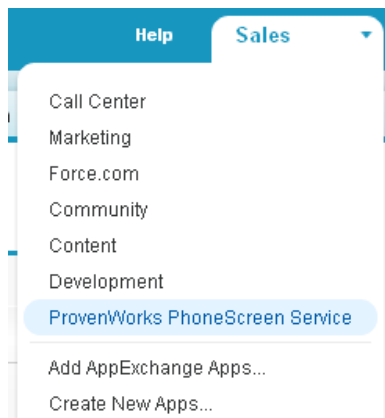
Introduction

This guide assumes that you have successfully installed and deployed the PhoneTools application from the Salesforce AppExchange. For more information on how to install PhoneTools please see our installation guide:

<http://provenworks.com/doc/ptinstallation.pdf>

If you encounter any problems with this please contact us at support@provenworks.com.

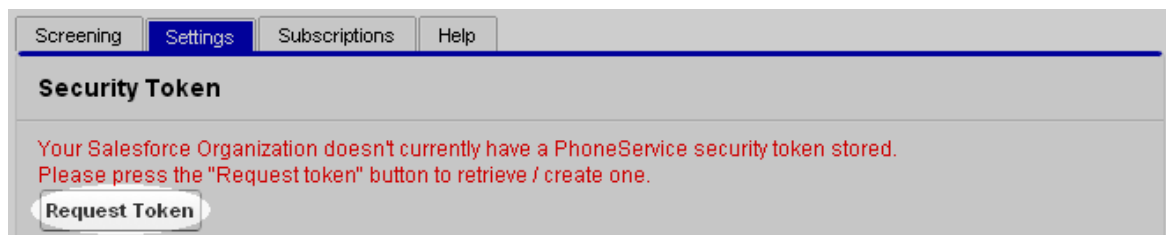
All configuration options are accessed via the PhoneScreen Administration tab which can be found in the ProvenWorks PhoneScreen Service application, or via the "All Tabs" button



Security Token

In order for your Salesforce Organization to access the screening service, you must first request a security token. From the PhoneScreen Administration tab, select the Settings tab, and click the "Request Token" button.

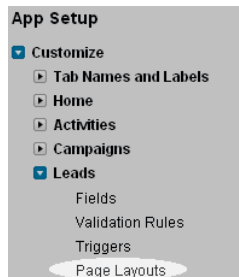
Once the message appears: "Your Salesforce Organization currently has a PhoneService security token stored," you may proceed.



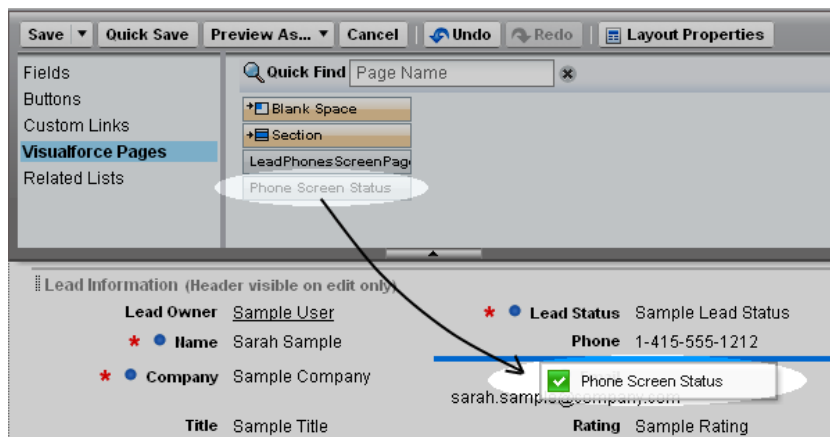
Visualforce PhoneScreen Status

Included in the PhoneScreen package is a custom Visualforce page to display the TPS/CTPS status of numbers, which you may add to your page layouts.

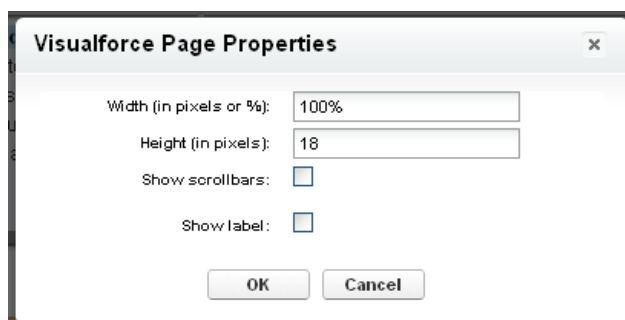
Navigate to Setup>App Setup>Customize>[Chosen Object]>Page Layouts



Select “Visualforce Pages” from the list of objects, then click, hold and drag “Phone Screen Status” beneath the phone number field on the page layout.



Mouse-over the PhoneScreen Status Visualforce element on the page layout edit screen, and click on the wrench in the top right hand corner of the box to enter Visualforce Page Properties. Amend the height and tick ‘Show label’. Click OK, then click Save to save the page layout.



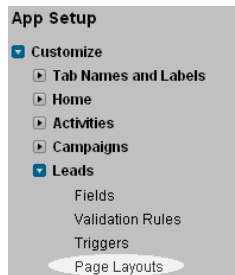
This process will need to be repeated for each page layout where you would like the component to display.



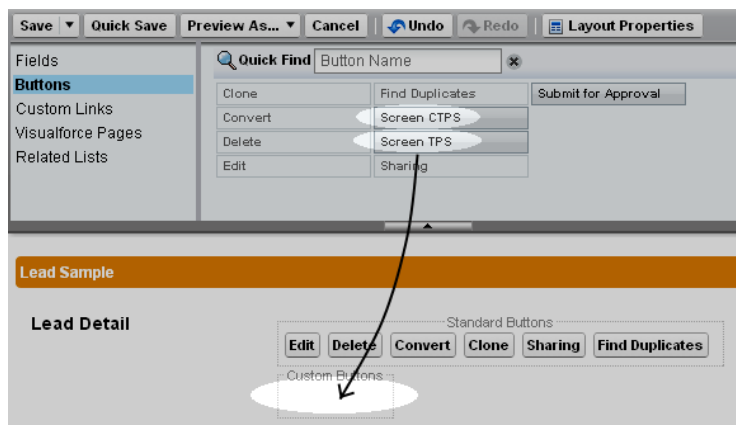
Manual Individual Screening

To screen individual numbers, PhoneScreen comes with custom buttons for your page layouts for screening against the TPS and CTPS databases.

Navigate again to the relevant page layout screen:

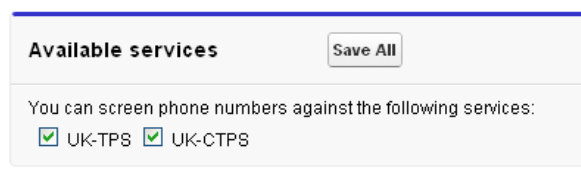


Select “Buttons” from the list of objects then drag the desired button(s) to the Custom Buttons area, and save.



TPS AND/OR CTPS

The PhoneScreen Service offers screening against both the TPS and CTPS number databases. If you have purchased credits for both, you may choose which database your next batch screens will query.



For information about the difference between the TPS and CTPS, and which would be applicable to your customers, please refer to the Direct Marketing Association website. Any questions relating to the TPS and CTPS service lists themselves should be directed to the DMA.



Manual or Automated Screening

The PhoneScreen Service can be configured to best suit your organization’s needs with either manual or scheduled automated screening. Manual screening can be run across all chosen phone fields via the PhoneScreen Service Screening tab, or on individual records via the pre-defined custom buttons provided with the PhoneScreen package.

Fields to Screen

To use either the automated screening functions or the mass manual screening button, you will first need to choose which phone number fields you would like to screen. The Fields to Screen configurations options are available on PhoneScreen Administration’s Settings tab. The default fields are shown below, which may be amended as best fits your organization’s needs with the “Add,” “Edit” and “Remove” buttons. Remember to click “Save All” once you have made your desired changes.

Fields to Screen			Save All	Add
Object	Phone Field		Edit	Remove
Account	Phone		Edit	Remove
Contact	HomePhone		Edit	Remove
Contact	MobilePhone		Edit	Remove
Contact	Phone		Edit	Remove
Lead	MobilePhone		Edit	Remove
Lead	Phone		Edit	Remove

Manual Batch Scanning

To run a onetime batch scan of all your chosen fields from the “Fields to Screen” settings, click the “Screen Now” button on the Screening tab. Manual batch screening will not re-screen numbers which have been screened by any process in the last 21 days.

Screening
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Scheduled Screening Setup

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

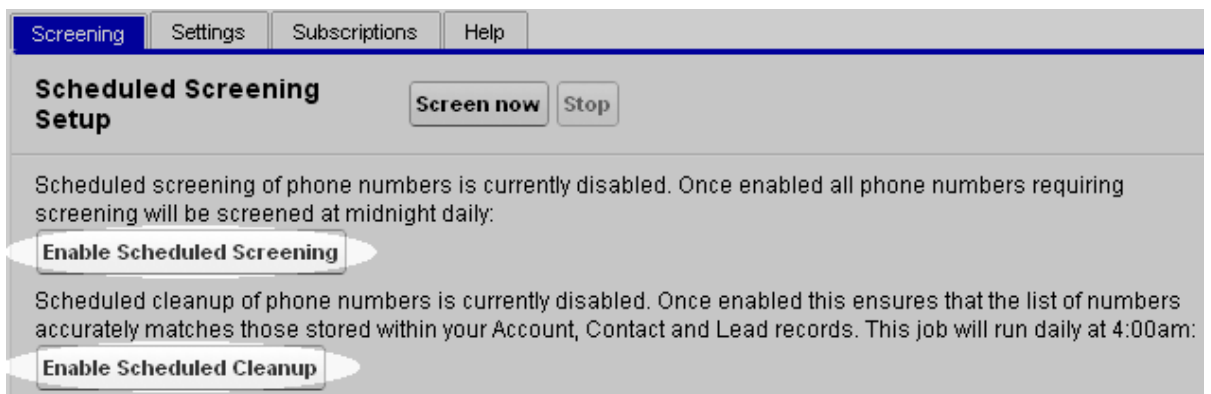
Scheduled cleanup of phone numbers is currently disabled. Once enabled this ensures that the list of numbers accurately matches those stored within your Account, Contact and Lead records. This job will run daily at 4:00am:



Scheduled Batch Screening / Cleanup

You may also enable a daily scheduled screen of all your chosen phone number fields. Enabling scheduled screening will run a screen of all your fields nightly. After compiling the numbers that need to be screened from your Fields to Screen settings, any number that has not been screened for 21 days will be screened. Please refer to the [PhoneScreen Pricing Guide](#) for more details about credit usage.

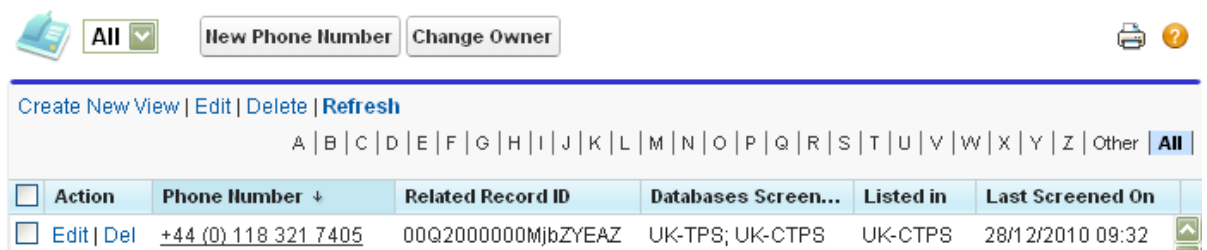
Enabling Scheduled Cleanup ensures that any changes made to phone number fields chosen in Fields to Screen are reflected in your Org's stored list of numbers.



The screenshot shows a web interface with tabs for 'Screening', 'Settings', 'Subscriptions', and 'Help'. The 'Screening' tab is active, showing 'Scheduled Screening Setup'. There are 'Screen now' and 'Stop' buttons. Below, it states 'Scheduled screening of phone numbers is currently disabled. Once enabled all phone numbers requiring screening will be screened at midnight daily:' followed by an 'Enable Scheduled Screening' button. Below that, it states '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 4:00am:' followed by an 'Enable Scheduled Cleanup' button.

Stored Numbers

Numbers screened by PhoneScreen are stored, and may be viewed on the Phone Numbers tab. Clicking on a number will bring up a details page, which includes the number's next scheduled screening date against the 21 day countdown.



The screenshot shows a web interface for 'Phone Numbers'. It includes a search bar with 'All' selected, and buttons for 'New Phone Number' and 'Change Owner'. Below the search bar are navigation links: 'Create New View | Edit | Delete | Refresh'. A filter bar shows letters A-Z and 'Other', with 'All' selected. Below is a table with the following data:

<input type="checkbox"/>	Action	Phone Number ↓	Related Record ID	Databases Screen...	Listed in	Last Screened On
<input type="checkbox"/>	Edit Del	+44 (0) 118 321 7405	00Q2000000MjzbZYEAZ	UK-TPS; UK-CTPS	UK-CTPS	28/12/2010 09:32



Lookups Remaining

At any time you may view your Org's remaining lookups from the PhoneScreen Administration tab. The Lookups Count column displays how many lookups will be consumed by your next batch screening, click refresh count to update the figure. Bear in mind that numbers screened within the last 21 days will not be rescreened by batch processes, so this number will usually be far lower than your full total of numbers on objects selected for screening.

ProvenWorks PhoneScreen Service

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Lookups for screening services

Service	Licensed	Lookups Remaining	Lookups Count	Expiry Date	Purchase	
UK-TPS	<input type="checkbox"/>	2000	0	24/01/2011 00:00	<input type="button" value="Purchase 2000"/>	<input type="button" value="Purchase 10000"/>
UK-CTPS	<input type="checkbox"/>	2000	0	24/01/2011 00:00	<input type="button" value="Purchase 2000"/>	<input type="button" value="Purchase 10000"/>

Please have your Salesforce Organization ID - _____ – ready to enter as part of the order process.

Help & Support

If you have any problems with installation or configuration please get in touch with us via email at support@provenworks.com.

We will be happy to answer any questions or problems that you may have.

Finally, if you can't find a product on the AppExchange to fit your needs, ProvenWorks offers bespoke CRM development and customization. Please get in touch with us at info@provenworks.com.

