

TPS / CTPS PHONE SCREENING CONFIGURATION GUIDE

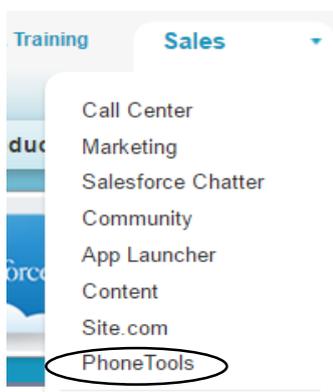
Introduction

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>

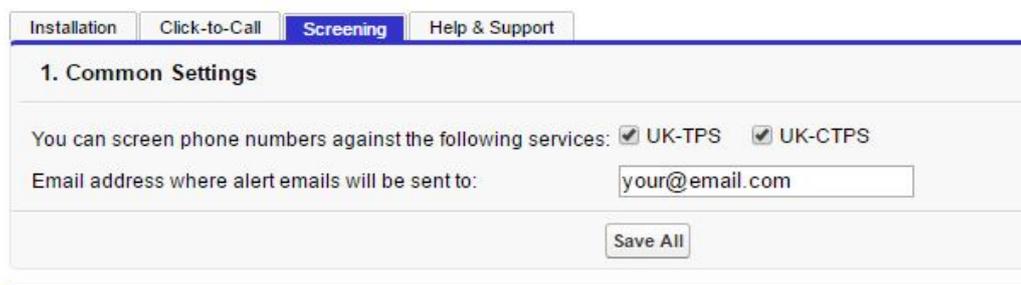
If you encounter any problems with this please contact us at support@provenworks.com.

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



Initial Settings

Before using the screening service, an email address should be registered under the Screening tab. This is to allow alerts to be sent as a result of batch/scheduled screening and will inform you when you are low on credits.



You can use the checkboxes to select screening from the TPS and/or 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.

Lookups Remaining

Under the Screening tab you will also see your Org’s remaining lookups. The Lookup 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 selected for screening.

2. Purchase UK-TPS & UK-CTPS Screening Credits

| Service | Licensed | Lookups Remaining | Next Lookup Count | Expiry Date | Purchase |
|---------|--------------------------|--|--|-------------|--|
| UK-TPS | <input type="checkbox"/> | <div style="width: 100px; height: 15px; background-color: #0070c0;"></div> | <div style="width: 100px; height: 15px; background-color: #0070c0;"></div> | | <input type="button" value="Purchase 2000"/> <input type="button" value="Purchase 10000"/> |
| UK-CTPS | <input type="checkbox"/> | <div style="width: 100px; height: 15px; background-color: #0070c0;"></div> | <div style="width: 100px; height: 15px; background-color: #0070c0;"></div> | | <input type="button" value="Purchase 2000"/> <input type="button" value="Purchase 10000"/> |

Please have your Salesforce Organization ID - [00D58000000ccSWEAY](#) – ready to enter as part of the order process.

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 Installation 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. To enable the field for screening, select edit and check the Needs screening checkbox. Once done, select save.

Fields to Screen

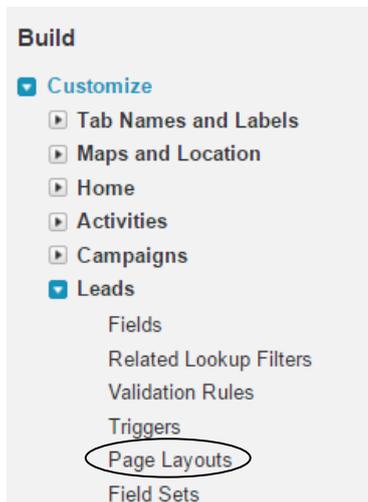
| Action | Object | Phone Field | Formula Field | Need screening |
|--|---------|-------------|---------------|--------------------------|
| Edit Del | Account | Phone | | <input type="checkbox"/> |
| Edit Del | Contact | HomePhone | | <input type="checkbox"/> |
| Edit Del | Contact | MobilePhone | |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



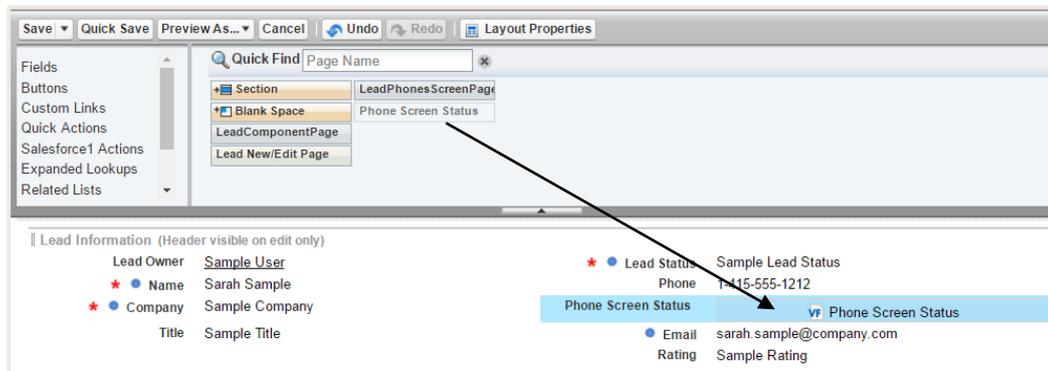
Visualforce PhoneScreen Status

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.

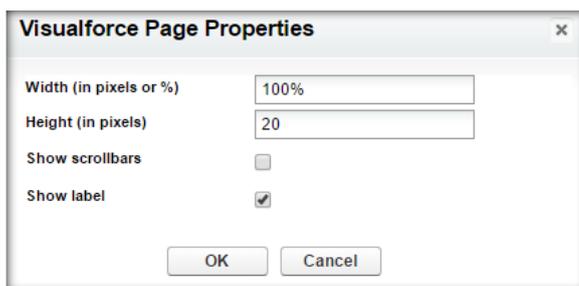
Navigate to Setup → Build → Customize → [Chosen Object] → Page Layouts. Click Edit next to your chosen page layout.



Select “Visualforce Pages” from the list of objects 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 corner of the box to show Visualforce Page Properties. Amend the height and tick ‘Show label’. Click OK, then save the page layout.

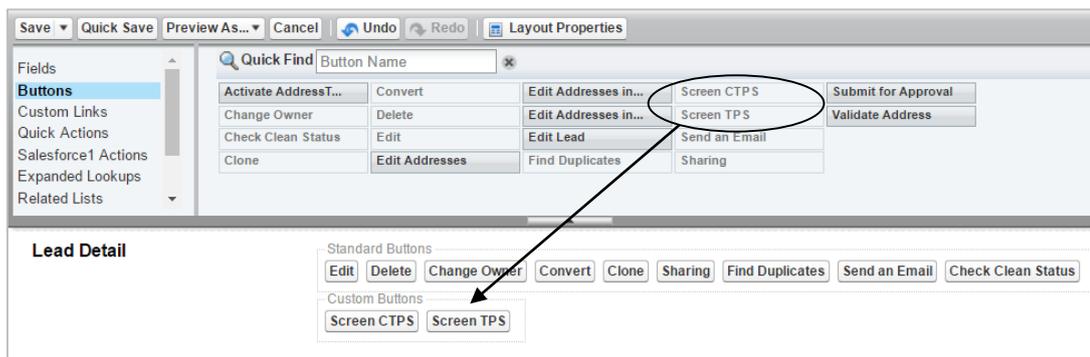


This process will need to be repeated for each page layout where you would like the component to display.

Manual Individual Screening

PhoneScreen also comes with custom buttons for your page layouts to manually screen individual numbers 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.



Manual Batch Screening

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



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.

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:

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.

Create New View | Edit | Delete | Refresh

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

| | Action | Phone Number + | Related Record ID | Databases Screen... | Listed in | Last Screened On |
|--------------------------|------------|----------------------|--------------------|---------------------|-----------|------------------|
| <input type="checkbox"/> | Edit Del | +44 (0) 118 321 7405 | 00Q2000000MjbZYEAZ | UK-TPS; UK-CTPS | UK-CTPS | 28/12/2010 09:32 |

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.

