PhoneTools FAQ

Click to Call and SMS

Q: Why are the icons not appearing next to the phone number in Classic?
A: Make sure you click PhoneTools on the Side Bar Component in order to have the icons appear

Q: Why is it saying 'Device not Registered'?
A: You will need to install the mobile app onto the device you would like to make calls and send SMS messages from. To check what devices are registered already, go to the Cell Phones tab in your Salesforce® Org.

Q: Will PhoneTools accept different number formats?
A: Yes, we strip the numbers so that it can read formats such as (000) 000-0000

Q: What devices do you support?
A: PhoneTools is available for both Android and iOS. To experience every feature available in the package, we recommend using an Android device version 5 or higher.

Q: What functionality do I gain in Android that I don't in iOS?
A: Calls and texts can be sent from an Android device without any user interaction with the device. iOS will require user to submit the action on the handset itself.

Phone Screening

Q: I have run out of TPS and/or CTPS credits. How can I get more added to my Org?
A: Contact sales@provenworks.com giving your Org ID and how many credits you would like to purchase

Q: I don't want to screen phone numbers that show on records where the address is not in the UK. Is this possible?
A: Yes, you can create a formula field on all objects to ensure that the numbers are bypassed in any screening process should the formula equate to true on the record in question. Here is our guide on creating formula fields.

Q: How often should number be screened to remain compliant?
A: Numbers must be screened every 28 days. You can select "enable scheduled screen" to configure an Apex Job in Salesforce to ensure that overdue numbers are screened.

Q: If the same phone number appears on several contacts as well as on an account, will we be charged to screen each item?
A: No; although the number will appear as having been looked up multiple times, only one credit will be consumed per unique number within a 24-hour period.

Q: If I enable daily screening of my objects, will I use up my lookups very quickly?
A: Screening results are saved, and numbers that have been screened will not be re-screened by batch processes for 28 days. Daily screening and clean-up will catch and screen all new numbers added to your chosen objects and re-screen all your objects periodically.

Q: I have a new number that I want to scan right now. What is the easiest way to do this?
A: PhoneTools comes packaged with direct screening buttons that can be added to your object pages to allow individual on-demand screening; simply add the custom button(s) to the relevant object's page layout.

Q: How do I know whether I need to screen my numbers against the TPS, the CTPS, or both?
A: The Direct Marketing Association's website has the most up to date information about compliance, and the differences between the preference services.

If your question has not been answered, please contact support@provenworks.com with your issue and Org ID.