



DNC (Do Not Call)

Salesforce Application

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Overview

DNC Australia is a fully automated Salesforce package which checks Phone & Fax numbers in Salesforce by washing them against the ACMA (Australian Communications and Media Authority) Do Not Call Register to enable organisations to easily comply with Australian telemarketing laws and focus on closing more deals.

Features:

- Easy install, no technical skills required
- Either check a record in real time before you dial, or schedule a batch run for bulk records.
- Accesses donotcall.gov.au directly (no third party services)
- Pre-filters numbers (within Salesforce) to reduce the number of washes on your donotcall.gov.au subscription
- Default settings include standard Salesforce phone number fields on the Lead and Contact objects (Leads fields: Mobile, Phone, Fax. Contact fields: Phone, Mobile, Home Phone, Other Phone, Fax)
- Customisable - enables your Salesforce administrator to include additional custom fields on any object, to the list of fields being washed.
- Flexible scheduling - hourly, daily, weekly scheduled batch checks of any standard or custom fields.
- Allows multiple batches, for example to allow an hourly check of new leads, but a weekly check of older recycled leads.

Default fields setup

- Leads fields utilised by default: Mobile, Phone, Fax.
- Contact fields utilised by default: Phone, Mobile, Home Phone, Other Phone, Fax

Why use Do Not Call?

It's important that you use a service like this if you are conducting telemarketing or making calls which are subject to the do not call guidelines. Failing to do so could result in fines of \$170 per breach or legislation units.

Users of this service must ensure that they stay compliant. We cannot be held responsible for any misconfiguration, failure of the do not call registry or problem caused by the service.

To ensure that you stay compliant you should:

- Ensure that you wash the numbers regularly
- That you regularly check that the service is working (you should create a report that checks for errors)
- You should fully test the service for your own use before relying on it.

Reference:

<http://www.acma.gov.au/Industry/Marketers/Do-not-call-register/How-to-comply-with-the-Do-Not-Call-Register/do-not-call-register-enforcement-outcomes>

Setup

Install the managed package from:

Production or Sandbox: <https://appexchange.salesforce.com/> and search for Do Not Call Australia. Click 'install now'.

Go to the Configuration page and enter your Login Details.

* If you haven't already, register for an account at www.donotcall.gov.au (quick link: <https://www.donotcall.gov.au/dncrtelem/newregistration.cfm>)

* You should create a special user on the donotcall.gov.au site. Setup a user under Account Details > User Accounts

* Ignore the CSV-related settings on the new DNC website user, as they are not applicable

* Enter your telemarketing Id (available on your DNC homepage), the User Id of the new 'wash only' DNC website username and password

Lead / Contact setup

The following actions only need to be completed for fields you want to display to end-users in Salesforce (they are not required on the page layout in order for the DNC washing to occur):

Per-field DNC

Edit the layout and put the fields ending in 'DNC Status' against each field.

One field

Edit the layout and put 'Lead DNC'/'Contact DNC' onto the layout. This is a formula field which checks all all the standard Lead phone and fax fields. The logic of this field is checked in the following way:

- If any of the fields are 'Do not call', then show 'Do not call'
- Then if any of the fields are 'Retryable Error', then show 'Retryable Error' - this ensures that any failures are not mistakenly read as successes
- Then if any of the fields are 'Can Call', then show 'Can Call'
- Otherwise leave blank

Manual rechecking

If you want, add the 'Recheck DNC' button to the Lead or Contact page which will recheck all the standard phone fields.

Scheduling

Go to the DNC-Australia configuration page, and Select the Fields you'd like to batch check.

- Select the object with the field on it
- Then select the relevant field. If the field is not visible (if it's a custom field, then check that you have created the fields with the correct naming convention)
- Specify a value for 'Retry items older than'. Items older than this number of days are re-washed. Note that you need to check phone numbers every 30 days - so if you are checking only weekly, you would need to re-wash after 23 days to ensure that no numbers are missed.
- You can either run a manual update (by clicking Wash Now).
- or you can schedule the wash to occur at any of the specified intervals. You can edit and/or delete the scheduled jobs you have already configured from the menu **Setup > Monitor > Jobs > Scheduled Jobs**.

Custom fields

Custom fields can be easily configured to work with DNC-Australia.

For the field Phone__c, the following fields need to be created:

* Phone_DNC_Status__c.

- Type: PickList

- Values;

Can call

Do not call

Invalid Number

Retryable Error

* Phone_DNC_Checked__c

- Type: Date/time

Please read the Real Time Status check field on how to setup a button to check a field.

If you create all the necessary fields, then scheduling a field for update should come up as an option in the usual schedule page (see Scheduling)

Phone number changes. You will also need to implement a trigger to reset the DNC Status when a phone number is changed. Please see the 'Phone number changes' section below.

Real Time Status Check

To do manual checks, you should create a button which directs to:

```
/apex/dncau__recheck?recordId={!CUSTOMOBJECT__C.Id}&objectApiName=CUSTOMOBJECT__C&field  
ApiName=Phone__c
```

If you wish you can do a manual recheck with multiple fields on the same object by using a comma separated list. For example:

```
/apex/dncau__recheck?recordId={!CUSTOMOBJECT__C.Id}&objectApiName=CUSTOMOBJECT__C&field  
ApiName=Phone1__c,Phone2__c
```

To do this in a button you would use something like this:

```
{!URLFOR('/apex/dncau__Recheck',",[objectApiName = 'Lead', fieldApiName = 'MobilePhone', recordId =  
Lead.Id, retURL = URLFOR($Action.Lead.View, Lead.Id) ])}
```

DNC Status

The DNC Status can either be 'Can call' or 'Do not Call'. If a temporary error or problem with your donotcall.gov.au account occurs it will be 'Retryable Error'. If the pre-validation fails on the request, you will get 'Invalid Number'

Phone number Changes

Triggers have been built for standard phone fields which set the DNC Status field to blank when a phone number is changed.

Custom fields will need to implement this trigger for their field. Here is some template code:

```
trigger DNCUpdate on Object__c (before update) {  
    for ( Object__c obj : Trigger.new ){  
        if ( obj.Field__c' ) != Trigger.oldMap.get(obj.id).Field__c ){  
            obj.Field_DNC_Status__c = null;  
        }  
    }  
}
```

Pre-validation

Valid numbers can start with +61, 61 or start with the area code (02, 03, 07, etc).

If the number starts with +61 or 61 (and is a valid length), then the DNC engine checks the number without the prefix. For example +61 2 9222 1234 is valid, as is 61 (02) 9222 1234 - and are first converted to 02 9222 1234 before being passed to the donotcall.gov.au webservice (the phone field data is never changed).

If any of the following rules fail, you will receive an 'Invalid Number' DNC Status

- There is a character other than ‘,’ comma, ‘(, ’) brackets, ‘-’ dashes, ‘ ‘ spaces
- The phone number begins with a **1** (1800 numbers, 1300 numbers, etc)
- The length of the phone number is not 10. Must be in the format like: 02-9222-1234 (white space and certain characters are ignored)

Batch updates

Schedules and manual washes run from the settings screen are run as Apex Batch Jobs. Statuses can be monitored from **Setup > Monitor > Jobs > Apex Jobs**.

Jobs are run in a batch size of 100 (the maximum recommended by the donotcallgov.au webservice).

Retryable Errors

This status occurs if an error occurs while contacting the server. This is normally an error due to an error on the donotcall.gov.au server, such as if you have run out credits, have an invalid username, etc.

Retryable errors are retried on the next attempt.

During batch runs, if a retryable error occurs ‘Do not call’ or ‘Can call’ values are not overwritten. This ensures your data is not cleared in case of an error. However, this means you have to ensure that if your subscription lapses that you have a process in place to check that fields which have not been updated are flagged.

During a manual check, if a retryable error occurs, the DNC status will be set to ‘Retryable Error’.

Frequently Asked Questions (FAQ)

How can I ignore a number from being checked?

Step 1: Set the <prefix>_DNC_Status field to Can Call or Do Not call

Step 2: Then, set the <prefix>_DNC_Checked__c field to a date far in the future (2050, for example) - this prevents the retry script from attempting to recheck the field.

How can I force a number to be rechecked at the next scheduled date?

Set the <prefix>_DNC_Checked__c to blank or null.

How do I check a single Lead/Contact record in real-time?

Click on the 'Check DNC' button on the Lead or Contact record. If this button does not exist on the page layout, please read the 'Real Time Status Check' section of this Product Sheet to configure this button.

What happens if a business calls or faxes a number they believe may be contacted but the consumer claims to be registered?

If this occurs, the telemarketing or fax marketing company should investigate the cause of the call or fax immediately. If the telemarketer or fax marketer has washed its list against the register during the **30 days prior** to the call or fax, and the register did not state that the number contacted was on the list, then the telemarketer or fax marketer will not be in breach of the legislation. For more up to date information on this check the DNC website at

<https://www.donotcall.gov.au/faqs.cfm>

What are the phone number formatting rules applied by the DNC?

The following phone number formats are examples of acceptable and unacceptable formats by the Do Not Call Register:

Acceptable	Unacceptable	Reason for rejection
02 5550 5555	+61 2 5550 5555	<ul style="list-style-type: none">'+' is an invalid characterphone number contains 11 digits
02-7010 5555	7010 5555	Phone number is only 8 digits long.

(05) 5550 5556	0A 5550 5555	Phone number contains a non-digit character 'A'.
08-9990-9999	08,9990,9999	Phone number contains commas.
0777777777	0777777777,	The line ends with a comma.

