

# DNCSolution Delivers Compliance Intelligence Across Salesforce

With DNCSolution for Salesforce, deliver consistent DNC and TCPA enforcement through a single source of compliance that governs every outreach across Salesforce and Heroku. Your apps, campaigns, workflows, data pipelines, and agent consoles all operate under the same rules — eliminating gaps and guaranteeing provable compliance across every interaction.

Heroku AppLink uses a single connection pattern across Salesforce Core CRM, Marketing Cloud, Data Cloud, and Agentforce to deliver consistent, real-time compliance across your organization.

Instantly verify contact eligibility with automated built in checks against Federal, State, and Internal Do Not Contact lists, Wireless Lists, EBRs, the FCC's Reassigned Numbers Database and known TCPA litigators at the moment of action, so every call, SMS or email is evaluated before it is sent.

## A Single Compliance Engine. Every Salesforce Cloud.



## Enforcement of Federal & State Rules Integrated into Your Workflows

DNCSolution provides seamless integration between Salesforce and your telephone system, allowing users to initiate calls directly from Salesforce after verifying their callable status to ensure Do Not Call, TCPA (Telephone Consumer Protection Act) and TSR (Telephone Sales Rule) compliance.

Regulations are enforced automatically, eliminating manual intervention and risk of noncompliance:

- Does the phone number have a **DNC flag**?
- Is it from a state where today is an **observed holiday**?
- Is it from a state that is in a **current state of emergency**?
- Is it restricted from being called during **certain hours of the day**?
- Has the number **changed hands or been reassigned**?
- Are you calling a **known litigator**?

## Customer Contact Compliance Made Simple

The screenshot shows a Salesforce contact record for John Doe. The record includes phone numbers and call compliance information. Annotations explain various features:

- Contact Information Header:** Includes a menu icon and a button to launch reports via SSO.
- Phone Numbers:** Assistant, Other, Home, Business, and Mobile phone numbers are listed. Home, Business, and Mobile numbers are clickable hyperlinks.
- Call Compliance:** Shows call curfew times for Alabama (0800 to 1300) and Georgia (0800 to 2000). Lists include "US National List" and "Acme Corp Master List".
- Email:** Contact email is Johndoe@example.com, with a green checkmark indicating "Email Valid".

Annotations provide details:

- Click to launch reports, seamlessly connecting to the DNCSolution dashboard page via SSO.
- Click to launch dialer.
- Callable status is determined in real-time upon page load. The reason code for non-callable numbers is displayed in red.
- Callable numbers are displayed as clickable hyperlinks.
- Phone numbers are associated with the Account, Contact, or Lead record in Salesforce.
- Email status is checked in real-time upon page load.
- Email address is associated with the Account, Contact, or Lead record in Salesforce. Emails on Do No Email lists appear in red to indicate they can't be used.

## A Full Compliance Feature Set

Leverage full compliance capabilities purpose-built to streamline outreach, ensure regulatory compliance, and improve customer experience.

**Compliance Tracking:** Phone & email tied to any lead, contact, or account is validated for:

- Federal, State, and Internal DNC lists
- Established Business Relationship exemptions
- Wireless numbers
- Reassigned Numbers Database
- Known litigator identification
- Time-of-day calling restrictions (by area code)
- State-specific rules enforcement
- Automatic call attempt limits

**Safe Harbor Protection:** Protect your organization from accidental violations and preserve safe harbor status by scrubbing against the Reassigned Numbers Database.

**Value-Based Reports:** Managers gain access to powerful oversight, including:

- DNC, RND, & professional litigator risk avoided
- Existing Business Relationship (EBR) revenue potential
- Call activity tracking by rep
- Volume analytics by date range
- Disposition history and trends
- Full outbound metadata and audit trails

**Lead List Management:** Empower reps with curated lead lists that prioritize safe, effective outreach.

**Spam Flag Mitigation:** Prevent “SPAM Likely” labels designed to protect your caller ID reputation.

**Click-to-Call Functionality:** By integrating with your existing cloud-based dialer, calls can be placed directly within Salesforce with a single click. Reps can use their own mobile phones while keeping every interaction logged and compliant.

**Two-Step Call Connection:** By integrating with your existing cloud-based dialer, a call can be placed to the agent's phone number. After the agent answers, the system automatically dials the target number. Agents can also make manual calls through the interface and choose whether to associate the call with a Salesforce record.

## Click-to-Dial Workflow Functionality Makes Calling Compliance Simple

The screenshot shows the 'Phone Dialer' window in Salesforce. It includes a search bar at the top, a navigation menu with 'Accounts', 'Contacts', and 'Leads', and a main area with a 'Phone Dialer' title. Below the title is a checkbox for 'Associate to Account/Lead'. The main dialer area is titled 'Agent Dialer' and contains a numeric keypad, a 'Call' button, and a 'Select outcome' dropdown menu. The dropdown menu is open, showing options like 'Scheduled Appointment', 'Callback Requested', 'Left Voicemail', 'No Answer', 'Not Interested', 'Lost to Competition', 'Management Attention', and 'Wrong Number'. There is also a 'Notes (Optional)' field and an 'End Call/Save Disposition' button.

If **Checked**: The call will be logged and associated with the current record (account/lead/contact).

If **Unchecked**: The call will still be logged in Salesforce, but only tied to the phone number, not the specific record.

Recording the call disposition is **mandatory** for every call.

Adding notes is optional but highly recommended for follow-up actions or context for future reference.

Select Outcome

- Scheduled Appointment
- Callback Requested
- Left Voicemail
- No Answer
- Not Interested
- Lost to Competition
- Management Attention
- Wrong Number

No manual checks. No guesswork. Just defensible, auditable decisions.

## Reassigned Numbers Database Protects You from Exposure

The Reassigned Numbers Database (RND) is one of the most significant and overlooked components of TCPA compliance. As mobile and VOIP usage surged, the lack of reliable data on permanently disconnected numbers created major legal risk for callers. Today the RND tracks over 554 million disconnected numbers and is growing by nearly 9 million each month.

Companies must scrub reassigned numbers before calling to minimize exposure to TCPA violations. DNCsolution for Salesforce integrates RND compliance automatically to streamline the process and provide safe harbor reassurance.

## Known Litigator List: Identify Professional Plaintiffs Who Exploit the TCPA

PossibleNOW's known Litigator List is a compliance safeguard against professional litigators that actively work to entrap businesses and it integrates seamlessly into Salesforce. By living inside the Salesforce Trust Boundary on Heroku, the Litigator List works automatically in real time across clouds, apps, and workflows, giving every Salesforce team the confidence to engage safely.

### How Litigator List Works Within Salesforce

#### Data & Marketing Cloud



- Enriches customer profiles with compliance intelligence.
- Suppresses high-risk contacts before they enter campaigns.
- Keeps Dynamic Segments, Unified Profiles, and Calculated Insights safe.

#### Agentforce, MuleSoft, and Heroku



- Acts as a real-time safeguard for APIs, applications, and experiences.
- Ensures compliance is enforced by design across flows, outreach, and apps.
- Positions Salesforce's AI and developer ecosystem as trusted for regulated industries.

#### Sales & Service in Slack



- Prevents risky outreach at the conversation and workflow level.
- Lets reps and AI assistants flag or block attempts to contact litigators automatically.
- Adds a seamless compliance layer without slowing down collaboration.

#### The Value



- **Marketing:** Build segments with litigators already suppressed.
- **Sales & Service:** See compliance checks run invisibly in the background.
- **Developers & Admins:** Integrate once, then let it run everywhere Salesforce connects.
- **Reduce Risk:** Block risky outreach before it happens.
- **Work Natively:** Compliance integrated in the tools your teams already use.
- **Scale with Ease:** Whether you're marketing, selling, or servicing, it adapts to your workflow.

## Compliance Doesn't Have to Add Complexity

At PossibleNOW, we make compliance simple, automatic, and transparent. With our comprehensive Salesforce integrations, organizations have the confidence to conduct customer outreach without concern. Focus on growth and engagement while staying fully protected from regulatory risk.



### Salesforce Platform

- Flow automation to block actions when litigator numbers appear in records
- Custom objects & triggers to score and enforce compliance logic natively
- Audit logging with platform events to track and report risky interactions

### Salesforce Agentforce:

- Pre-action checks to block or reroute calls, texts, or campaigns to litigator numbers
- Explainable compliance where agents clarify why an action was suppressed
- Automated workflows that adapt in real time, replacing risky outreach with safe alternatives

### Salesforce Commerce Cloud (B2C/B2B)

- Checkout validation to block orders linked to litigator phone systems
- Account creation screening to prevent risky profiles from entering the system
- Post-order workflows that flag or reroute fulfillment tied to litigator identities

### Salesforce Marketing Cloud

- Journey Builder auto-suppression litigator numbers from campaigns
- Pre-send validation & emails, texts, or call blocks before launch
- Audience mgmt. to keep risky contacts out of segmentation list

### Salesforce Slack

- Real-time alerts in Slack when a risky number is detected
- Approval workflows with Approve/Deny buttons for exceptions
- Guided collaboration with contextual compliance info linked to Salesforce

### Salesforce Mulesoft

- API policy enforcement to block/flag litigator numbers before downstream calls
- Data transformation filters that strip risky records out of integrations
- Compliance service exposing the Known Litigator List across all connected systems

### Salesforce Tableau & Analytics

- Compliance dashboards visualizing litigator matches across clouds and channels
- Trend analysis on risky outreach attempts and suppression effectiveness
- Executive reporting with drilldowns into violations, regions, and business units

### Salesforce Heroku for Developers

- Heroku Connect syncs or exposes the Litigator List as External Objects in Salesforce
- Heroku AppLink APIs deliver real-time compliance checks from the Litigator service
- Custom apps on Heroku log, audit, and extend compliance workflows across systems

### Salesforce Service Cloud, Voice & CTI

- Caller ID screening to flag or block inbound calls from litigator numbers
- Agent whisper alerts that warn reps in real time when handling risky contacts
- Case routing rules that divert or escalate interactions tied to known litigators

### Salesforce Industry Clouds & Agentic Solutions

- FSC: Block outreach to litigator numbers in client management
- Health Cloud: Exclude risky numbers from patient communications
- CG Cloud: Screen accounts, loyalty, and promotions for litigators

### Salesforce Data Cloud

- Data ingestion filters to block or flag litigator numbers at entry
- Segmentation rules that automatically suppress risky profiles from audiences
- Unified profiles enriched by compliance signals for downstream activation

### Salesforce Core CRM (Sales & Service Clouds)

- Lead and contact screening to block litigator numbers at entry
- Dialer integration to prevent outbound calls to risky contacts
- Opportunity workflows that flag compliance risks tied to phone numbers

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