Greengage

CallShield

HubSpot User Guide

Automated TPS & CTPS phone number screening for
Contact and Company records in HubSpot



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Glossary

TPS
The UK's official opt-out register for individuals who do not wish to receive unsolicited sales and marketing calls.

CTPS
The equivalent of TPS for businesses and corporate subscribers.

CallShield App Card
The card added to a record page layout that displays live TPS/CTPS screening results and the Screen Numbers button.

CallShield Phone Record
A custom record type storing the latest screening result for each phone number, associated with the relevant Contact and/or Company.

PECR
UK legislation setting out specific privacy rights for electronic communications, including telephone marketing.

ICO
The UK's independent regulator for data protection and privacy, responsible for enforcing PECR and GDPR.

About CallShield for HubSpot

- CallShield is a HubSpot marketplace app by Greengage that **automatically screens the phone numbers** stored on your **Contact** and **Company** records against the UK TPS and CTPS registers — directly inside HubSpot.
- Results appear directly on the record via the **CallShield App Card**, and are also stored as associated **CallShield Phone Records** for reporting. Every screening is also logged on the record's activity timeline as a permanent audit trail. No separate CallShield account is required — connecting via HubSpot OAuth is all that's needed.

Why TPS & CTPS Matter

- **Telephone Preference Service (TPS)** is the UK's official opt-out register for individuals who do not wish to receive unsolicited sales and marketing calls. The **Corporate Telephone Preference Service (CTPS)** is the equivalent register for businesses and corporate subscribers.
- It is a **legal requirement** under the **Privacy and Electronic Communications Regulations (PECR)** to check these registers before making unsolicited marketing calls. Calling a number registered on TPS or CTPS without consent can result in enforcement action — including **significant fines** — from the **Information Commissioner's Office (ICO)**.
- **Disclaimer:** CallShield is a compliance aid — it remains your organisation's responsibility to meet all legal obligations before making outbound calls.

About CallShield

Advantages of CallShield

Prioritising Legal Compliance
- Checking the CTPS/TPS registers is a mandatory legal requirement for UK marketers.
- CallShield gives you effortless, instant visibility of individuals and businesses who have opted out of marketing calls — without leaving HubSpot.

Supporting an Uninterrupted Workflow
- CallShield runs automatically whenever a phone number is added or updated, so there's no need for separate tools, manual lookups, imports, or exports.
- Your team gets the information they need exactly where and when they need it — right inside the Contact and Company records they already use every day.

Protecting Business Reputation
- Calling numbers registered on TPS or CTPS can damage your brand, erode customer trust, and expose your organisation to regulatory action.
- CallShield helps you demonstrate a clear commitment to respecting individual and business communication preferences.

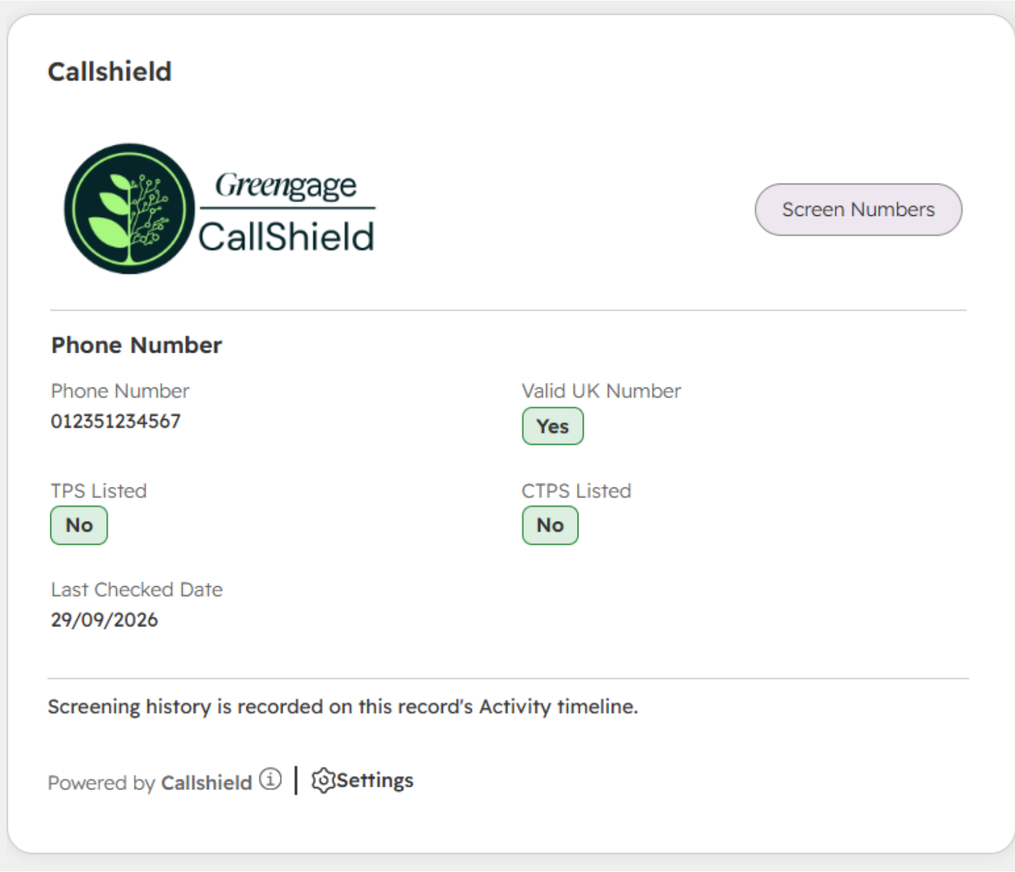
Reducing ICO Enforcement Risk
- The ICO has the power to issue significant fines for serious breaches of PECR.
- Using CallShield as part of your compliance process helps demonstrate due diligence, backed by a timeline audit trail of every check.

Built for HubSpot
- CallShield works within the standard Contact and Company records your team already uses every day, with results stored as associated CallShield Phone Records for reporting.
- There's no need for separate compliance tooling — your team gets the information they need, right where and when they need it.

CTPS/TPS Screening App

The CallShield App Card

Once added to a record's page layout, the App Card displays the latest screening results for that Contact or Company directly on the record.



How it Works

Understanding the Results

For each phone number, CallShield checks and records the following:

Field	Meaning
Valid UK Number	Whether the number is recognised as a valid UK phone number. TPS and CTPS results are only available where this is Yes.
TPS Listed	Whether the number is registered on the TPS individual opt-out register. Only checked for valid UK numbers.
CTPS Listed	Whether the number is registered on the CTPS corporate opt-out register. Only checked for valid UK numbers.
Last Checked	When the number was last screened.

If Last Checked is more than 30 days old, an Out of Date tag appears. CallShield recommends re-screening records at least monthly.



How it Works

Result Tags & Non-UK Numbers

How it Works

Each result on the App Card is shown as a coloured tag:

Colour	Meaning
Green	**Good news:** the number is NOT listed — clear to call, subject to your own compliance checks.
Red	**Caution:** the number IS listed on TPS or CTPS — do not call for unsolicited marketing.
Grey	**Not established:** the number is not a valid UK number, or has not been screened yet.

Non-UK and invalid numbers
CallShield screens the UK TPS and CTPS registers, so a number must be a valid UK number to be screened against them.

- If a number is not a valid UK number (international, malformed or incomplete), **Valid UK Number** shows **No**, and the TPS and CTPS fields are hidden rather than shown as clear.
- This is deliberate: an absent result is not the same as a negative one, and CallShield will not imply a number is safe to call when it has not been checked.
- International numbers are not screened at all. Apply whatever local rules govern the destination country.

Automatic Screening

CallShield monitors the phone properties you have selected in **Phone Property Mappings** on your Contact and Company records. A screening check is automatically triggered when:

- **A new Contact or Company is created** with at least one selected phone property populated.
- **An existing phone number is added, changed, or removed** on a record.

When a check runs, CallShield screens every selected phone property on the record against the TPS and CTPS registers, and:

- Creates or updates a **CallShield Phone Record** with the results.
- Adds an entry to the record's **activity timeline**, marked **Triggered by: Phone property changed**, so automatic screenings can be told apart from manual ones.

You can also click **Screen Numbers** on the App Card at any time to trigger an immediate re-screen — typically taking just a few seconds.

How it Works

Prerequisites & Installation

Set-up and Config

Prerequisites

- A HubSpot portal (any plan, including Free).
- Super Admin or App Marketplace permissions in HubSpot to install apps.
- Permissions to customise record page layouts, to add the CallShield App Card.
- UK phone numbers stored on your Contact or Company records.

Installation

- **Step 1 – Find the app:** Search for “CallShield” in the HubSpot App Marketplace.
- **Step 2 – Install:** Click Install app. HubSpot will prompt you to confirm which portal to install into if you manage more than one.
- **Step 3 – Authorise:** Review the requested permissions on the HubSpot consent screen (see next page) and click Connect app. You will be redirected back to HubSpot once authorisation is complete.

Note: CallShield reads only phone numbers and never modifies your existing properties.



Permissions Requested

During installation, the HubSpot consent screen asks you to approve the following permissions:

Permission	Why it's needed
Read Contacts	To retrieve phone numbers from Contact records
Read Companies	To retrieve phone numbers from Company records
Create / Edit / View / Delete CallShield Phone Records	To store and update TPS/CTPS screening results in HubSpot
Read CallShield Phone Record schema	To query the custom object structure
Write timeline events	To record each screening on the Contact or Company's activity timeline
Read timeline events	Reserved for planned functionality; not currently used

What CallShield accesses
CallShield **reads** only phone numbers from your Contact and Company records — it does not access deal, ticket, or email data. It **writes** two things: CallShield Phone Records holding screening results, and an activity timeline entry for each screening. It does not modify any of your existing Contact or Company properties.

Connecting Your Portal

Access the settings page at any time via Settings → Integrations → Connected Apps → CallShield → Settings.

Note: your portal should be connected as part of the initial installation — the steps below are for reconnecting or checking status afterwards.

Connection status
- **Connected** — displays your hub domain and the date the connection was made.
- **Not connected** — you need to complete the authorisation step below.

Connecting your portal
- If not connected, click Connect to HubSpot, approve the requested permissions in the new tab, then return and click Refresh Status to confirm.

Revoking access
- Click Revoke Access to disconnect CallShield. This removes CallShield's authorisation tokens. Existing CallShield Phone Records and any timeline entries already recorded remain in your portal, but no new screenings can run until you reconnect.



Set-up and Config

Phone Property Mappings

Set-up and Config

Choosing which properties are screened

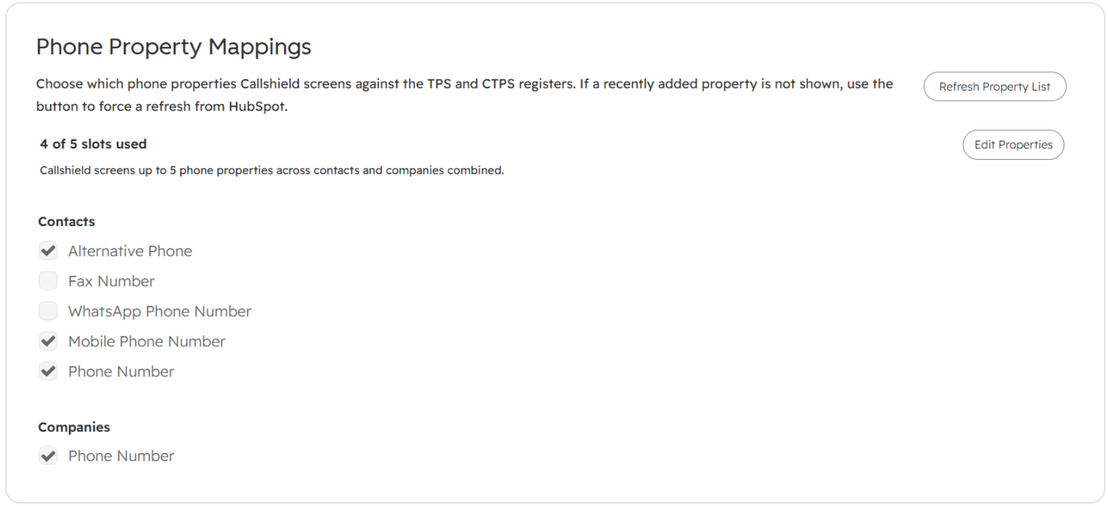
- CallShield automatically discovers every phone-type property on your Contacts and Companies objects, including custom ones — but you decide which of them it checks.
- You can select up to **five phone properties in total, across Contacts and Companies combined** (not five of each). A counter shows e.g. “3 of 5 slots used”.
- Click **Edit Properties**, tick the properties you want screened, then **Save Properties** (or **Cancel**). Once all five slots are used, the rest are greyed out — untick one to free a slot.
- **Important:** unselected properties are never screened. If a number isn’t appearing on the App Card, check its property is one of your five selections.

Why only five?

- HubSpot caps the total records a portal can hold. The limit keeps the number of CallShield Phone Records in bounds — choose your five most-called phone properties.

A new property isn’t listed?

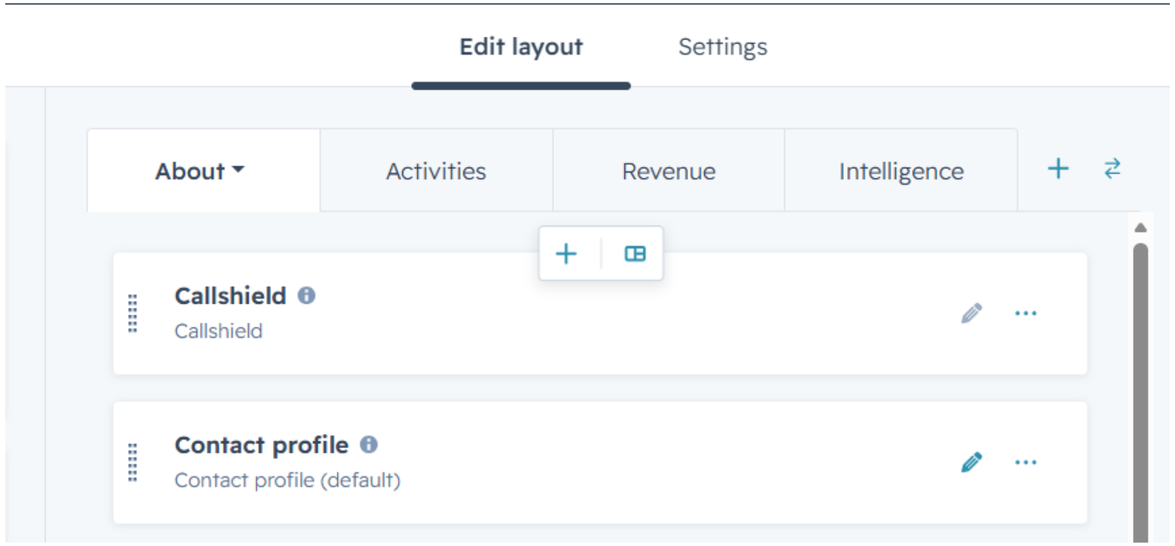
- Click **Refresh Property List** to force a fresh lookup.



App Card Placement

Adding the CallShield App Card to record pages

- The App Card is not shown by default. Open a Contact or Company record and click Customize record page.
- Add a new card, under Card Library select “CallShield” from the list of installed app cards Note this is different from the “CallShield Phone Records” card, which only shows phone record links.
- Position the card where you’d like it to appear, save the layout, and repeat for the Company object if required.
- Placement is a layout choice, so it can differ between record types and teams, CallShield behaves identically wherever it is placed.



Set-up and Config

Using CallShield on Records

Finding the App Card

- Open any Contact or Company record where the App Card has been added to the page layout. If you can't find it, ask whoever manages your HubSpot record layouts.

Viewing results

- The App Card lists each phone number held in your selected phone properties, along with its current status, result tag, and the date it was last checked.

Manually re-screening a record

- Click **Screen Numbers** on the App Card to run an immediate check of all phone numbers on the record. Screening typically takes a few seconds, and results update the App Card straight away.
- Each screening is also recorded on the record's activity timeline (see Screening History & Audit Trail).

Automatic re-screening

- If a phone number on a record is added, changed, or removed, CallShield automatically triggers a fresh screening — no manual action needed.
- Automatic re-screens appear on the timeline marked **Triggered by: Phone property changed**.

Using Call-Shield

Reporting with Phone Records

CallShield Phone Records
For each phone number screened, CallShield maintains an associated CallShield Phone Record — a custom CRM record type linked to the relevant Contact and/or Company.

When a number is re-screened, CallShield updates the existing CallShield Phone Record for that number (creating one if it doesn't yet exist) rather than creating a new record for every check. Each CallShield Phone Record reflects the current result as of its Last Checked date — the full history of past checks lives on the activity timeline.

Screening data can be used across HubSpot's reporting tools, for example to:

- Build lists or reports of Contacts/Companies with numbers currently listed on TPS or CTPS.
- Track Last Checked dates to identify records that are overdue for a re-check.

FIRST NAME	LAST NAME	PHONE PROPERTY	PHONE NUMBER	CTPS LISTED	TPS LISTED	LAST CHECKED DATE - MONTHLY
Wile	Coyote	mobilephone	0777888999	False	False	Apr 2026
Wile	Coyote	phone	01234 567890	False	True	Jun 2026
Brian	Halligan (Sample Contact)	phone	01345887773	False	False	Apr 2026

Using CallShield

Screening History & Audit Trail

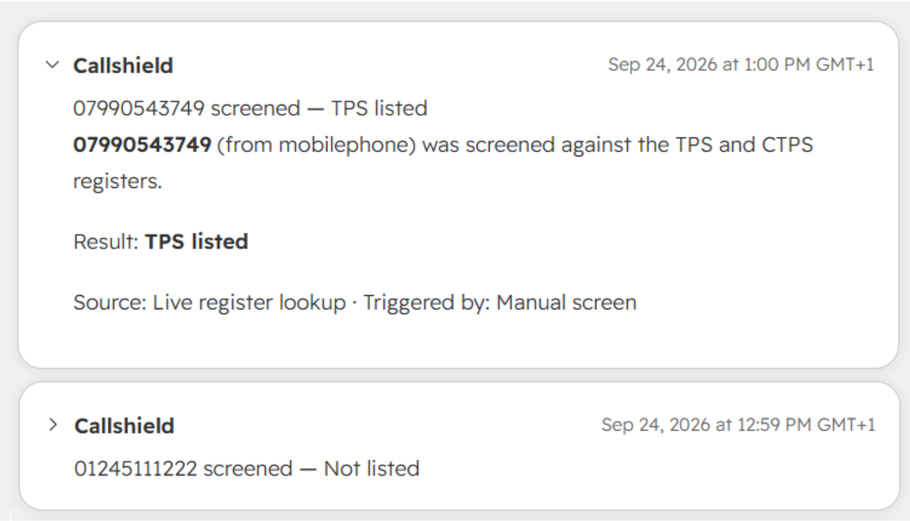
Every screening CallShield performs is also recorded as an entry on the Contact or Company's **activity timeline**, alongside notes, emails and calls.

Why this matters

- The App Card shows the **current** status of each number. The timeline shows the **history**.
- The Last Checked date is overwritten every time a number is re-screened, so the App Card can only tell you about the most recent check.
- If you need to show what the TPS register said on the day you made a particular call — precisely what a PECR challenge asks — only the timeline can show you. Timeline entries are never overwritten.

Using screening history elsewhere in HubSpot

- Timeline entries are standard HubSpot activity events, so their fields are available as filters in workflows, lists and reports — e.g. a list of contacts whose numbers have become TPS-listed.



Using CallShield

Reading Timeline Entries

Each entry is headed with the number and its result, e.g. **07700 900123 screened — Not listed**. Opening it shows the **number** screened and which **phone property** it came from, plus:

Field	What it shows
Result	Not listed · TPS listed · CTPS listed · TPS and CTPS listed · Invalid number (not a valid UK number, so not screened)
Previous result	Only shown when the result has changed since the last screening — a signal that something changed.
Source	Live register lookup or Cached result. Currently every screening should a live lookup; the field keeps entries unambiguous if cached values are used.
Triggered by	Manual screen (Screen Numbers clicked) · Phone property changed (automatic re-screen)

Repeat screenings on the same day
If the same number on the same record is screened more than once in a day and the result is **unchanged**, only one timeline entry is created. A **changed** result always creates a new entry, so you never miss a status change, but won't see a run of duplicates.

Using CallShield

Security and Data Handling

TPS & CTPS compliance
The TPS and CTPS registers must be checked before making unsolicited marketing calls under PECR, but it remains your organisation's responsibility to ensure you meet all relevant legal obligations — CallShield data should be used alongside, not as a replacement for, your own legal and compliance processes.

CallShield is hosted by Greengage (on a London based server) and accessed securely via HTTPS and OAuth 2.0 authentication.

When a screening check runs, the only data sent to the CallShield service is the phone number(s) being checked — no other Contact, Company, deal, ticket, or email data leaves your HubSpot portal. The CallShield API is stateless: phone numbers are used only to perform the check and are discarded immediately after the results have been returned.

Greengage does not retain phone numbers or any other record details on its servers — it only stores the date and time each request was made. The results of each check are stored within your own HubSpot portal as CallShield Phone Records and activity timeline entries, under your control.

Legal Compliance

Common Issues

Troubleshoot

“CallShield not connected”
This alert appears on a record when your portal has not completed OAuth authorisation. Go to Settings → Integrations → Connected Apps → CallShield → Settings and follow the connecting steps.

“CallShield is still setting up”
CallShield hasn’t finished preparing your portal. This is normally brief and clears shortly after installing or reconnecting — click **Try again**. If it persists, reconnect from the Settings page, making sure you approve **all** requested permissions.

“CallShield is unavailable”
The CallShield service could not be reached. Click **Try again**; if the problem persists, contact support and quote the HTTP status code shown in the message.

“Could not load screening results”
CallShield responded, but the results could not be read back from HubSpot. **Screen Numbers** still works in this state; if it doesn’t clear, reload the record page.

The App Card isn’t showing on a record
The App Card needs to be added to the record page layout before it will appear (see App Card Placement).

More Common Issues

Troubleshoot

“No Phone Numbers Found”
No phone number is set in any of your selected phone properties. Add a phone number, or check in Phone Property Mappings that the property holding the number is one of your five selections.

“Screen failed” error
This may be a temporary network issue — wait a moment and try Screen Numbers again. If it persists, contact support.

A phone property is not appearing
Click Refresh Property List in Settings. If it still doesn’t appear, confirm the field is set to the Phone Number type in HubSpot (not plain text).

Results not updating after a phone number change
Automatic re-screening relies on HubSpot property change events. Allow a few seconds, or click Screen Numbers manually if results still look stale.

Contacting support
Email: info@greengage.co · Web: www.greengage.co/contact-us/ · Phone: +44 20 8610 4444

Thank You



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