DOCUMENTATION:
To modify or extend the capabilities of the Vonage verify api offerings:
https://developer.nexmo.com/api/verify

Sites:
https://help.salesforce.com/articleView?err=1&id=sites_managing_sites.htm&type=5

Salesforce:
https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_callouts_named_credentials.htm

Addition assistance can be accessed in Salesforce by clicking on the upper right corner of the page "**Help for this Page**".

PRE-INSTALLATION SETUP:

Remote Sites:
This is needed for the Web Call Outs endpoints.

Sites (Setup > Quick Find type Sites)
Setup new Site page to host the Pin visualforce page.
Guest User permission for NexmoCredential__c and verify_Lead_ID__c will need at-least read and edit access. This is needed for the codeline object creation.

Web-To-Lead:

Web-to-Lead Setup

Using pre-existing pages on your company's website, you can capture contact and profile information from users and automatically generate new leads in

Web-to-Lead Settings   Edit | Create Web-to-Lead Form

Web-to-Lead Enabled	✓
Require reCAPTCHA Verification	☐
Default Lead Creator	Don Mitchell
Default Response Template	

Add/modification to the Web-to-Lead html

<input type=hidden name="retURL" value="https://{this will be the name of the site page}-developer-edition.na135.force.com/verifypin2">

Add this input tag to capture each lead as a Lead lead source = "Web2Lead". The value can be whatever you choose to pass to Salesforce.

 <input type=hidden name="lead_source" id="lead_source" value="Web2Lead">

Remember to add this value to the Standard Object Lead > Lead Source dropdown.

Platform Cache:

This is essential for the functionality of the codeline. Codeline uses the Org cache for the following:

1. Capture the request_id, needed in combination with the pin to validate the phone with Vonage.
2. Capture the status_id after the pin/request_id is submitted. The status is feed back to the UI for the user result of validation.

Platform Cache Partition

Platform cache partitions let you segment the org's available cache space. Each partition's capacity is managed independently.

Trial Capacity Available!

Org Has Zero Available Platform Cache

New Platform Cache Partition

Action	Namespace Prefix ↑	Name	Label	Default Partition	Allocated Capacity	Created By	Created Date	Last Modified By	Last Modified Date
Edit		verify1	verify1	✓	10		9/13/2020, 8:46 AM		9/15/2020, 12:56 PM

Platform Cache Partition: verify1

View the partition's current usage relative to the org's total usage, and the partition's cache usage relative to the capacity allocated to each cache type for this partition.

« Back To Platform Cache Partitions

Partition Has Zero Used Capacity

Recalculate
(Last: 9/16/2020, 10:14 PM)

Edit

▼ **Details**

Namespace Prefix	local	Created By	9/13/2020, 8:46 AM
Label	verify1	Created Date	9/13/2020, 8:46 AM
Name	verify1	Last Modified By	9/15/2020, 12:56 PM
Default Partition	✓	Last Modified Date	9/15/2020, 12:56 PM
Description			

▼ **Capacity (MB)**

Session Cache Allocation

Trial	5
Organization	0
Provider Free	0
Total	5

I used Org Cache allocation for cached called.

Org Cache Allocation

Trial	5
Organization	0
Provider Free	0
Total	5

Total Allocation

Trial	10
Organization	0
Provider Free	0
Total	10

Components:

Standard Objects: new fields

Field name (api):	Data type:	Description:
Verified_Number__c	checkbox	This field will capture verified numbers by checkbox. This field is populated with process builder w/invocable calls to apex code.
pin__c	text box (10 characters)	This is a filler field for the visualforce page - verifypin2.vfp. No data is actually captured in the field.

Lead conversion mapping:

This is a very important step if continuous tracking is one of the keys to tracking the life of a lead.

Custom Objects: (api)	Custom Fields: (api)	Description:
verify_Lead_ID__c (needs to be changed to verify_phones)	Lead_Phone__c	This table is populated with the phone numbers of new leads from the Web-to-Lead form.
NexmoCredential__c	api_key__c api_secret__c brand__c code__c	This table holds the Vonage credentials that are called programmatically.

APEX Classes:

verifyController3	This is the controller for the verifypin2.vfp page.
verifyAll3	The full codeline for the Vonage verify request and the Vonage verify check.
verifyUpdateLeadVNum	This is an apex invocable method for a process builder to populate verified phone numbers on the Lead object.

APEX Triggers:

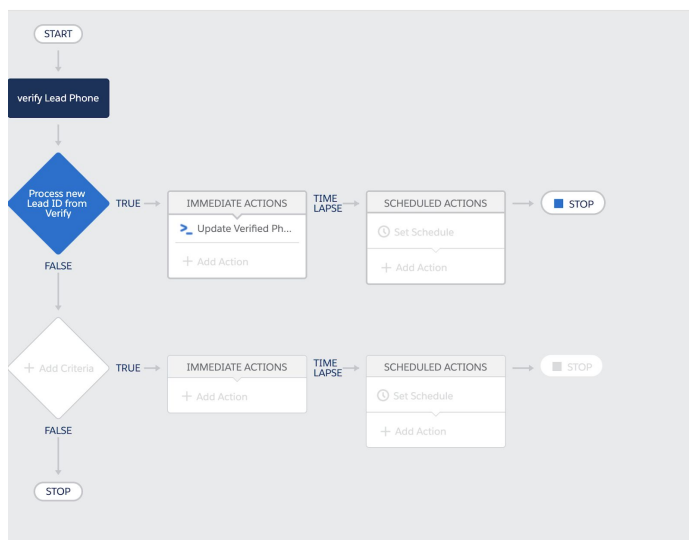| TriggerWeb2Lead	This trigger supports the Web-To-Lead form submission by capturing the phone number for verification.

APEX Visual Force Page:

verifypin2.vfp	This visual force page is built to capture pin and submit for verification. It will offer UI feedback on status of verification.

Process Builder:
verifyLeadId setup to call apex : verifyUpdateLeadVNum
Full map view:

First screenshot

START

verify Lead Phone

Process new Lead ID from Verify — TRUE → IMMEDIATE ACTIONS
>_ Update Verified Ph...
+ Add Action

TIME LAPSE → SCHEDULED ACTIONS
🕐 Set Schedule
+ Add Action

FALSE

+ Add Criteria — TRUE → IMMEDIATE ACTIONS
+ Add Action

TIME LAPSE → SCHEDULED ACTIONS
🕐 Set Schedule
+ Add Action

FALSE

STOP

Choose Object and Specify When to Start the Process

Object * ℹ️

verify Lead Phone

Start the process *
- ◉ only when a record is created
- ○ when a record is created or edited

› Advanced

We only want this process to fire on creation.

Second screenshot

START

verify Lead Phone

Process new Lead ID from Verify — TRUE → IMMEDIATE ACTIONS
>_ Update Verified Ph...
+ Add Action

TIME LAPSE →

FALSE

Define Criteria for this Action Group

Criteria Name * ℹ️

Process new Lead ID from Verify

Criteria for Executing Actions *
- ○ Conditions are met
- ○ Formula evaluates to true
- ◉ No criteria–just execute the actions!

Third screenshot

Expand All | Collapse All   View All Processes | Clone | View Properties | **Deactivate** | Read Only ℹ️

START

verify Lead Phone

Process new Lead ID from Verify — TRUE → IMMEDIATE ACTIONS
>_ Update Verified Ph...
+ Add Action

TIME LAPSE → SCHEDULED ACTIONS
🕐 Set Schedule
+ Add Action

FALSE

Call Apex ❓

Action Name * ℹ️

Update Verified Phone

Apex Class * ℹ️

Update Verified Phone

Set Apex Variables

[verify_Lead_ID__c].Lead_-Phone__c

Field *	Type *	Value *
phone	Field Reference ▾	[verify_Lead_ID__c].Lea... 🔍

POST - INSTALLATION SETUP:

1. One the Lead tab, create a View:

2. Keys to this view. The Verified Number checkbox is active and the Lead Source is Web2Lead.

3. **Here is the unmanaged package to load into your sandbox or developer instances.**