

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.

All Remote Sites

[Help for this Page](#)

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: **All Remote Sites** [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All									
New Remote Site									
Action	Remote Site Name ↑	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date	
Edit Del	ApexDevNet	—	http://www.apexdevnet.com	✓		6/4/2020, 8:28 PM		6/4/2020, 8:28 PM	
Edit Del	Nexmo	—	https://api.nexmo.com	✓		6/7/2020, 9:24 AM		6/7/2020, 9:24 AM	

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.

Sites

[Help for this Page](#)

What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

Your Force.com Domain

MyCompany.force.com

Your Sites

MyCompany.force.com/developers

MyCompany.force.com/customers

MyCompany.force.com/marketing

Create Your Force.com Sites

Your Salesforce site domain name is mitchellvonage-developer-edition.na135.force.com

[Salesforce Sites Terms and Conditions](#)

Settings

These settings affect all Salesforce sites.

☒ Assign new records created by Salesforce Sites guest users to a default owner in the org

☒ Allow using standard external profiles for self-registration and user creation

[Save](#) [Cancel](#)

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.

Lead Field
Lead Source
[Back to Lead Fields](#)

Edit Set Field-Level Security View Field Accessibility

Field Information

Field Label	Lead Source	Field Name	LeadSource
Data Type	Picklist		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Field Dependencies New [Field Dependencies Help](#)

No dependencies defined.

Validation Rules New [Validation Rules Help](#)

No validation rules defined.

Account/Lead Source Picklist Values New Reorder Replace Printable View Chart Colors [Account/Lead Source Picklist Values Help](#)

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Web	Web	<input type="checkbox"/>	Assigned dynamically	Don Mitchell, 6/4/2020, 8:28 PM
Edit Del Deactivate	Phone Inquiry	Phone Inquiry	<input type="checkbox"/>	Assigned dynamically	Don Mitchell, 6/4/2020, 8:28 PM
Edit Del Deactivate	Partner Referral	Partner Referral	<input type="checkbox"/>	Assigned dynamically	Don Mitchell, 6/4/2020, 8:28 PM
Edit Del Deactivate	Purchased List	Purchased List	<input type="checkbox"/>	Assigned dynamically	Don Mitchell, 6/4/2020, 8:28 PM
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically	Don Mitchell, 6/4/2020, 8:28 PM

Inactive Values Leave this inactive to avoid users from selecting in the UI.

Action	Values	API Name	Modified By
Del Activate	Web2Lead	Web2Lead	Don Mitchell, 9/7/2020, 8:01 PM
Del Activate	External Referral	External Referral	Don Mitchell, 6/4/2020, 8:28 PM
Del Activate	Partner	Partner	Don Mitchell, 6/4/2020, 8:28 PM
Del Activate	Public Relations	Public Relations	Don Mitchell, 6/4/2020, 8:28 PM
Del Activate	Trade Show	Trade Show	Don Mitchell, 6/4/2020, 8:28 PM
Del Activate	Word of mouth	Word of mouth	Don Mitchell, 6/4/2020, 8:28 PM
Del Activate	Employee Referral	Employee Referral	Don Mitchell, 6/4/2020, 8:28 PM

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

[Help for this Page](#) ?

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	<input checked="" type="checkbox"/>	10		9/13/2020, 8:46 AM		9/15/2020, 12:56 PM

Platform Cache Partition: verify1

[Help for this Page](#) ?

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	3/13/2020, 8:46 AM
Label	verify1	Created Date	9/13/2020, 8:46 AM
Name	verify1	Last Modified By	3/15/2020, 12:56 PM
Default Partition	<input checked="" type="checkbox"/>	Last Modified Date	9/15/2020, 12:56 PM
Description			

Capacity (MB)

Session Cache Allocation	
Trial	5
Organization	0
Provider Free	0
Total	5
Org Cache Allocation	
Trial	5
Organization	0
Provider Free	0
Total	5
Total Allocation	
Trial	10
Organization	0
Provider Free	0
Total	10

I used Org Cache allocation for cached called.

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/invokeable 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.

SETUP
Lead Conversion Field Mapping

Custom Fields

Use the tabs to map each of your organization's custom lead fields to one of your custom account, contact, or opportunity fields. These mappings are used when you convert leads to accounts, contacts, or opportunities.

ACCOUNT CONTACT OPPORTUNITY

Lead Fields	Contact Fields
Current Generator(S)	None
Number Of Locations	None
Pin	None
Primary	None
Product Interest	None
SIC Code	None
Test Date	None
Verified Number	None

Create a new field on one or all the objects: Contact/Account/Opportunity for conversion mapping. Once this is done, it will carry over for the life of the 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.
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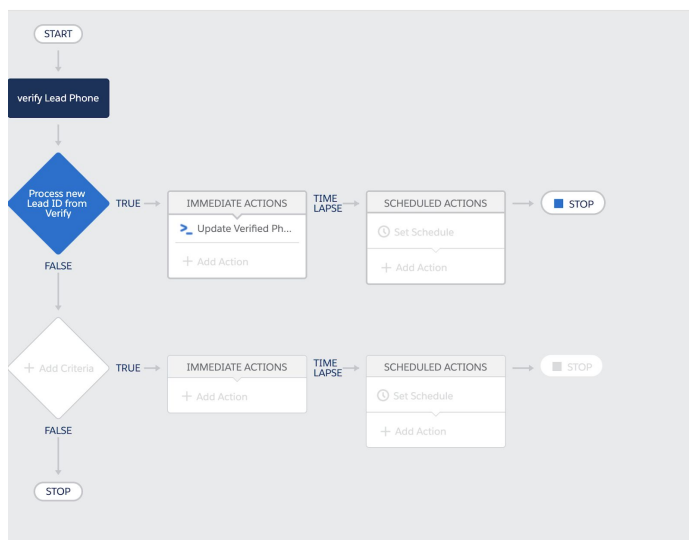
APEX Visual Force Page:

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

verifyLeadId setup to call apex : verifyUpdateLeadVNum

Full map view:



Choose Object and Specify When to Start the Process

Object * ?

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.

Define Criteria for this Action Group

Criteria Name * ?

Process new Lead ID from Verify

Criteria for Executing Actions *

☐ Conditions are met

☐ Formula evaluates to true

☒ No criteria—just execute the actions!

Expand All Collapse All

View All Processes Clone View Properties Deactivate Read Only ?

Call Apex ?

Action Name * ?

Update Verified Phone

Apex Class * ?

Update Verified Phone

Set Apex Variables

Field *	Type *	Value *
phone	Field Reference	[verify_Lead_ID__c].Lea... Q

POST - INSTALLATION SETUP:

1. On the Lead tab, create a View:

[Save](#) [Save As](#) [Delete](#) [Cancel](#)

Step 1. Enter View Name

View Name:

View Unique Name:

Created By: [Don Mitchell](#), 8/31/2020, 10:35 AM Modified By: [Don Mitchell](#), 9/16/2020, 10:41 PM

Step 2. Specify Filter Criteria

Filter By Owner:
☒ All Unconverted Leads
☐ My Unconverted Leads
☐ Queue: --None--

Filter By Campaign (Optional):
 Campaign Name:

Filter By Additional Fields (Optional):

Field	Operator	Value
Verified Number	equals	True
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	

[Add Filter Logic...](#)

Step 3. Select Fields to Display

Available Fields	Selected Fields
Salutation	Name
Last Name	Email
First Name	Verified Number
Title	Lead Source
Company	Lead Status
Website	Created Date
Phone	Unread By Owner
Mobile	
Fax	
Street	

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

Verified Leads [Edit](#) [Delete](#) [Create New View](#)

[List](#) [Feed](#) [Print](#) [Help](#)

Action	Name	Email	Verified Number	Lead Source	Lead Status	Created Date	Unread By Owner
Edit Del +	CD, AB	abc@abcdef.com	<input checked="" type="checkbox"/>	Web2Lead	Open - Not Contacted	9/16/2020	<input type="checkbox"/>
Edit Del +	Dela Cruz, John	abc@abcdef.com	<input checked="" type="checkbox"/>	Web2Lead	Open - Not Contacted	9/15/2020	<input type="checkbox"/>
Edit Del +	Duck, Donald	Testing@help.com	<input checked="" type="checkbox"/>	Web2Lead	Open - Not Contacted	9/16/2020	<input checked="" type="checkbox"/>

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