



360 SMS APP

Verify the Mail and Verify the Phone
User Manual & Configuration Guide



360 DEGREE CLOUD TECHNOLOGIES PVT. LTD

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Verify The Mail (VTM) and Verify The Phone (VTP)

Introduction

Verify The Mail / Verify The Phone is a Salesforce-based application developed by 360 Degree Cloud Technologies Pvt. Ltd. This application is used to verify the mail and the phone number fields of the Standard and Custom objects.

You can verify thousands of Salesforce records in just a few minutes!

Benefits

1. The VTM/VTP application can verify emails and phone numbers for individual records or bulk records simultaneously in a few minutes!
2. By verifying phone and email data, organizations can enhance data quality, improve communication efficiency, and prevent issues such as bounced emails and disconnected phone numbers.
3. Proper verification processes help to maintain up-to-date and reliable contact information, enabling businesses to reach their customers effectively and avoid wasting resources on inaccurate or obsolete data.
4. Additionally, you can leverage custom automation and/or scripts to verify your entire Salesforce database.

VTM/ VTP App

The 360 Verify The Mail (VTM) Verify The Phone (VTP) app is available on the Salesforce [AppExchange](#). From there, you can download it into your Salesforce instance.

Setup

After the package is installed in your system, follow the following steps:

Admin Info Page

1. Go to App Launcher.
2. Go To VTM Setup App.
3. Admin Info page will open.

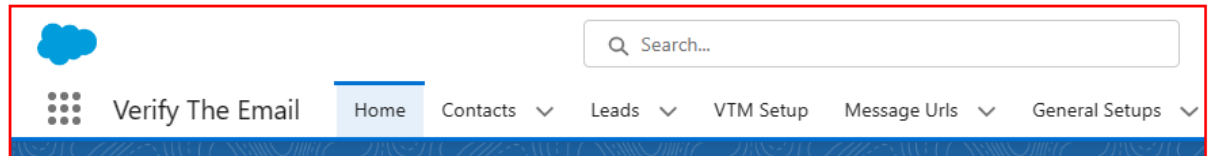


Fig 1: VTM Setup

The image shows the "ACCOUNT DETAILS" page. It has a blue header with a user icon and the text "ACCOUNT DETAILS". Below the header, there are four input fields, each with a label to its left: "First Name" (containing "Martin Wordsworth"), "Email" (containing a redacted email address), "Company Name" (containing "360 Degree Cloud Technologies Pvt. Ltd."), and "Org Id" (containing a redacted organization ID).

Fig 2: VTM Account Info Page

The page will show the logged-in Admin user information.

App Usage

This page will show the total available credits for VTM / VTP usage. Whenever additional credits are purchased, click on the update button and it will update the available credits.

The image shows the "APP USAGE" page. It has a blue header with a document icon and the text "APP USAGE". Below the header is a table with two columns: "Verify The Email Status" and "Verify The Phone Status". The table has two rows: "Active" and "Trial". The "Active" row shows "Total Credits" as 50. The "Trial" row shows "Total Credits" as 100. Below the table is a blue "Update" button.

Verify The Email Status	Active	Verify The Phone Status	Trial
Total Credits	50	Total Credits	100

Fig 3: App Usage Page

Email / Number Field Setup

On this page, you can set up the email and number field APIs for different objects which will be used to verify the email and phone numbers of those particular object records.

Follow the following steps for email and phone number fields setup for validation:

1. Enter the object name in the object dropdown
2. Enter the Email API Name in the concerned dropdown
3. Click on the Save button
4. A record will be created in the record list below populating with the values that you have entered before.
5. You can change the values of the record by clicking on the Edit button.
6. You can delete the record by clicking on the Delete button.
7. Scrolling down, you will find a section to set up the Phone Number Field APIs.
8. Here, you can set up the phone fields from different objects for verification.

The screenshot displays the 'EMAIL SETUP' interface. It features a table with three columns: 'Object', 'Email API Name', and 'Action'. The 'Object' column has a search bar and a dropdown menu with options: 'Contact', 'Contact Point Address', 'Contact Point Consent', 'Contact Point Email', 'Contact Point Phone', and 'Contact Point Type Consent'. The 'Email API Name' column has a dropdown menu currently set to 'None'. The 'Action' column contains a 'Save' button. Below the table, there is a list of existing records with 'Email API Name' and 'Action' (Edit/Delete) buttons.

Object	Email API Name	Action
search	None	<button>Save</button>
Contact Contact Contact Point Address Contact Point Consent Contact Point Email Contact Point Phone Contact Point Type Consent	Email API Name Action	
	Email Address	<button>Edit</button> <button>Delete</button>
	EmailAccount	<button>Edit</button> <button>Delete</button>

Fig 4: Email Field Setup

Object	Email API Name	Action	
Case	Email Address	Edit	Delete
Account	EmailAccount	Edit	Delete
Contact	email	Edit	Delete

Fig 5: Email Setup Records

NUMBER SETUP

Object	Number API Name	Country Code Setting	Action	
search	x None	None	Save	
Object	Number API Name	Country Code Setting	Country Code	Action
Contact	Asst. Phone,Home Phone,Mobile Phone,Other Phone,Business Phone	None		Edit Delete
Account	Account Phone	Org Wise	+91	Edit Delete
Contact Point Phone	Telephone number	Org Wise	+1	Edit Delete

Fig 6: Phone Number Setup

Note:- Follow a similar procedure for selecting an Object and Number API Name.

While selecting Country Code, you will have two options, None and Org Wise.

1. If you choose None, it will be universal.
2. If you select Org Wise, you must define your Salesforce Org's Country Code.

NUMBER SETUP

Object	Number API Name	Country Code Setting	Country Code	Action
Account	x Account Fax	Org Wise	+91	Save
Object	Number API Name	Country Code Setting	Country Code	Action
Contact	Asst. Phone,Home Phone,Mobile Phone,Other Phone,Business Phone	None		Edit Delete
Contact Point Phone	Telephone number	Org Wise	+1	Edit Delete

Fig 7: Country Code Setup

Click Save to create a record.

You can change the values or delete a record by clicking on Edit and Delete buttons respectively.

Note:- We can verify 5 Number APIs simultaneously for a single object whereas, for Email API, we can verify only one at a time.

Object Setup

In the object setup page, you can set the instant when the verification can be executed for Contact and Lead objects. It can be on Record creation or updation or both.

For setting up the object for verification, follow the following steps:

1. Select the object
2. Select the verification options as per your preference
3. Click on the Save button
4. After the record is created, you can Edit / Delete the record by clicking on the respective buttons.
5. Here you will find a section for setting up Phone fields for Contact / Lead objects.
6. Follow a similar set of steps to set up phone number verification.

The screenshot displays the 'EMAIL SETUP' interface. At the top, a blue header bar contains the title 'EMAIL SETUP' and a subtitle '(Currently supported for contact and lead, For more objects please contact support.)'. Below this, there are two main sections. The first section is a configuration area for the 'Contact' object, featuring a dropdown menu set to 'Contact' and three checkboxes for 'Verify on Email Insert', 'Verify on Email Update', and 'Verify Both', all of which are checked. A 'Save' button is located to the right of these options. The second section is a table listing the configured objects.

Object	Verify on Email Insert	Verify on Email Update	Verify Both	Action
Contact	☒	☒	☒	<button>Save</button>

Object	Verify on Email Insert	Verify on Email Update	Verify Both	Action
Contact	✓	✓	✓	<button>Edit</button> <button>Delete</button>
Lead	✓	✓	✓	<button>Edit</button> <button>Delete</button>

Fig 8: Email Setup for Objects

General Setup

In this tab, you can set up the re-verification settings for the phone and email fields of all the configured objects. Re-verification allows you to repeatedly verify the status and continuously check the deliverability of the recipient's email and phone addresses.

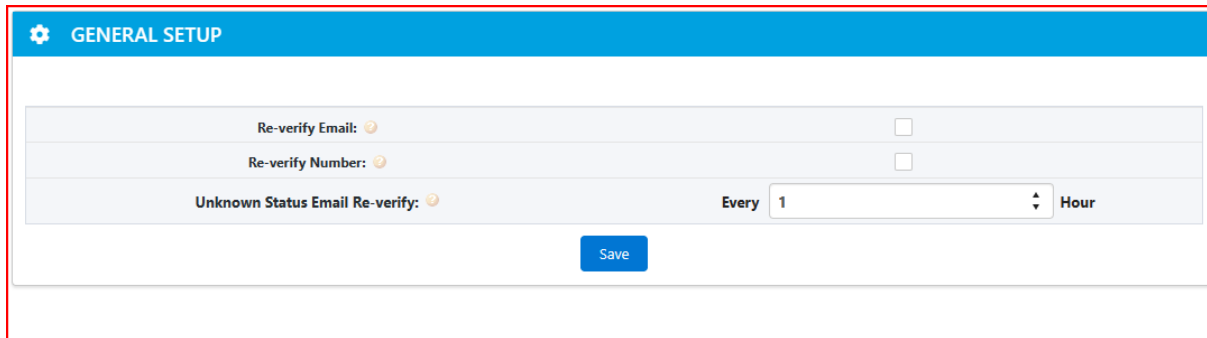
The screenshot shows a web interface for 'GENERAL SETUP'. It has a blue header bar with a gear icon and the text 'GENERAL SETUP'. Below the header, there are three rows of configuration options. The first row is 'Re-verify Email:' with a yellow help icon and a checkbox. The second row is 'Re-verify Number:' with a yellow help icon and a checkbox. The third row is 'Unknown Status Email Re-verify:' with a yellow help icon, followed by the text 'Every' and a numeric input field containing '1', and then a unit selector with an up/down arrow and the text 'Hour'. At the bottom center of the form is a blue 'Save' button.

Fig 9: General Setup

Features

Ways of verification

There are three ways of verification using the Verify The Email/Phone App

1. Single Record Verification
2. Bulk Record Verification
3. Automated Verification

Single Record Verification

Follow the following steps to verify individual records:

1. Go to the record detail page.
2. Click on the Verify The Number button.
3. Click on the Verify button.

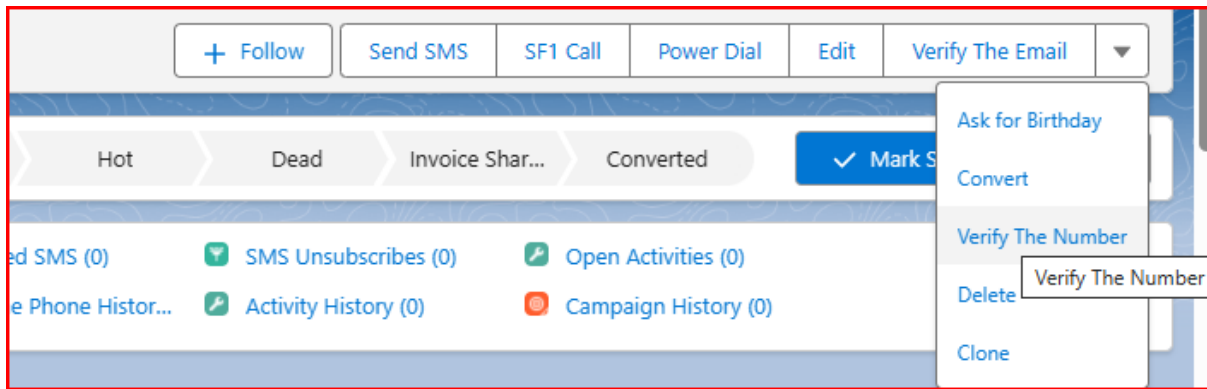


Fig 10: Verify The Number Button

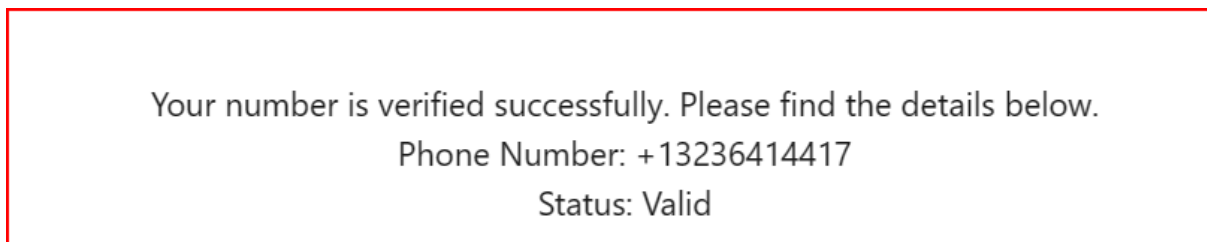


Fig 11: Verification Message

Follow the same process for Email Verification, except this time, click on the “Verify The Email” button in step 2.

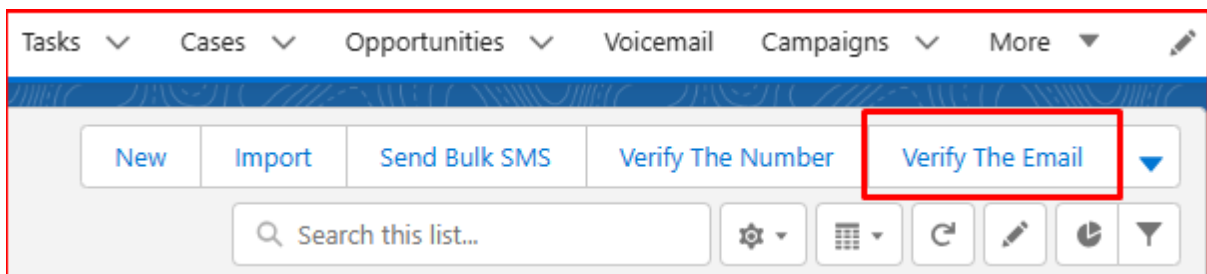


Fig 12: Verify The Email Button

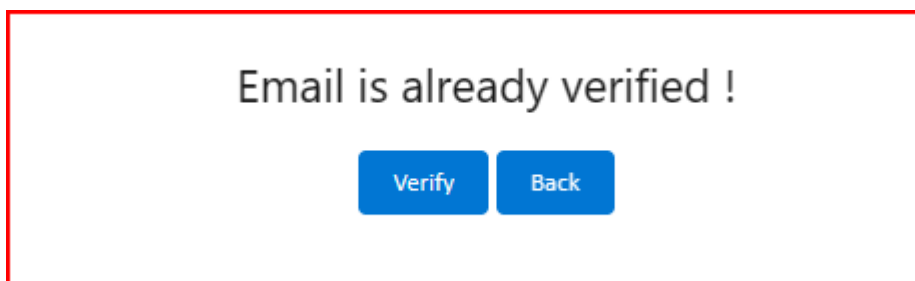


Fig 13: Email Verification Message

Bulk Record Verification

Follow the following steps to verify records in bulk:

1. Go to the list view of the particular object.
2. Select the desired records by clicking on the checkbox next to them.
3. Click on Verify The Number button.
4. If you want to perform bulk email verification, you can click on Verify The Mail button.

☒	Name ↑	Email	Email Status	Mobile	Phone	Phone Status
1	☒ Alina starcove	alina.starcov@gmail.com	✓ Deliverable to alina.starcov@gmail.com	+13236414417	(978) 999-1736	✓ Valid +13236414417
2	☒ Anastesia Steele	a.steele@gmail.com	✓ Deliverable to a.steele@gmail.com	(640) 208-2040	+918928711699	ⓘ Not Verified Yet
3	☒ Dona White	dona.w@suncorp.com	⚠ Unknown dona.w@suncorp.com	+919953131955	+919953131955	ⓘ Not Verified Yet

Fig 14: Bulk Records Selection

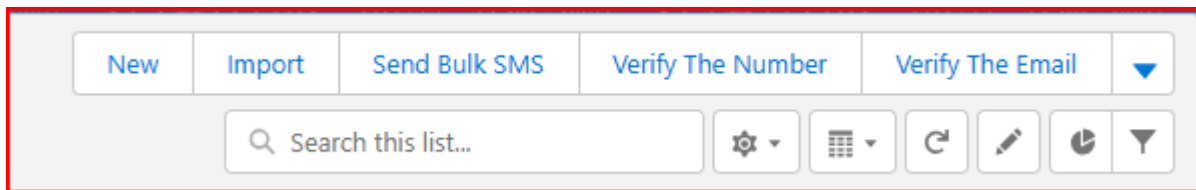


Fig 15: Bulk Records Verification Buttons

Note: You must select a list view to proceed with bulk verification. Ensure “Recently Viewed” list view is not selected.

Automated Verification

There are two ways to perform automated verification

1. Using Flows
2. Using Process Builders
3. Using Object Setup

1. Using Flows

Users can develop their own custom automation using flows. This enables the users to define their own conditions to verify the records. To know more about

these features, you can contact our expert support team using the given [Contact Information](#).

2. Using Process Builders

In order to develop the custom automation using process builders, follow the following steps:

1. Create a new process builder
2. Select the object on which you want to perform the verification
3. Set up your own conditions under which you want the phone/email to be verified.
4. In the immediate actions sections, enter the following details as shown in the figure.

The screenshot shows the 'Call Apex' action configuration in Salesforce Process Builder. The 'Action Name' is 'verifyThePhone' and the 'Apex Class' is 'Verify Phone From Process Builder'. Under 'Set Apex Variables', there are two rows: 'Record Id' with type 'Field Reference' and value '[Contact].Id', and 'Phone API' with type 'String' and value 'MobilePhone'.

Field *	Type *	Value *
Record Id	Field Reference ▼	[Contact].Id 🔍
Phone API	String ▼	MobilePhone

Fig 16: Process Builder

5. Activate the process
6. Go to your desired object and create a record.
7. The record's phone and email fields will be updated automatically.

Using Setup

This option is by default provided for Contact and Lead objects. Check out the [Object Setup](#) section for more details.

Verification History

Once verification is done, you can get detailed information from the VTM History record using the below steps:

1. Go to the object record's related list.
2. Go to the Verify The Email / Phone section.
3. Click on the latest record.

VTM History contains details of phone and email verification.

Phone verification details

1. **Lead:** The record used whose phone/email is verified. In Fig 17 (below), we have used Lead Object.
2. **Carrier:** The Carrier used by the recipient.
3. **Verification Type:** Whether the verification was done on phone or email.
4. **Type:** Type of the telephone service verified (Landline, Mobile, VoIP)
5. **Verified Phone:** The Salesforce field name that is verified.
6. **Phone API:** API name of the verified field.
7. **Phone:** The phone number which is verified.
8. **Phone Verification Status:** Status of phone verification which indicates whether the message sent to this number will be received by the recipient or not. Please refer [Verification Status](#) section for more details on different statuses.

Related	Details
VTM Name	V-0488
Lead	Alina starcove
Verification Type	Phone
Verified Phone	Mobile
Owner	Martin Wordsworth
Carrier name	Twilio - SMS/MMS-SVR
Type	voip
Phone API	mobilephone
Phone Verification Detail Phone +13236414417 Phone Verification Status Valid	

Fig 17: Verification History & Phone Verification Details

Email verification details

Related	Details
VTM Name	V-0081
Lead	Alina starcove
Verification Type	Email
Email Verification Detail Email alina.starcov@gmail.com Email Verification Status Deliverable	

Fig 19: Email Verification Details

1. **Lead:** The record used whose phone/email is verified. In Fig 19 (above), we have used Lead Object.
2. **Verification Type:** Whether the verification was done on phone or email.
3. **Phone Verification Status:** Status of email verification which indicates whether the mail sent to this ID will be received by the recipient or not. Please refer [Verification Status](#) section for more details on different statuses.
4. **Email:** Email ID which is verified.
- 5.

Verification Statuses

Whenever an email is verified, you can check the result in the Status field. There are four major statuses for email verification purposes. These are mainly Deliverable, Undeliverable, Risky, and Unknown.

1. **Deliverable** means the server recognizes that the recipient email address exists and the sent mail has a high probability to be received by the intended recipient.

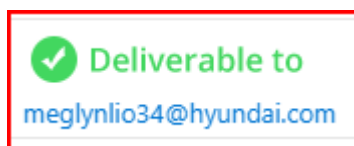


Fig 20: Deliverable Status

2. **Non-deliverable** means the recipient's email address doesn't exist. These addresses will result in a hard bounce of the email and should be removed from the database.



Fig 21: Non-Deliverable Status

3. **Risky** There are 3 reasons why an email address may be classified as risky. A "Risky" classification does not mean an email address is bad or invalid, only that there is a higher likelihood of low engagement or a bounce.

1. Role addresses (e.g., admin@domain.com, ceo@domain.com, etc.) don't guarantee the intended recipient will see your messages since these can often be a distribution list or setup for forwarding.

2. Disposable addresses are certain email services that allow a user to create a temporary email address. It will be deliverable initially, but only for a very limited time. These accounts are automatically deleted or abandoned after the initial use to avoid receiving email.

3. Accept All domains are the most common reason email addresses are marked as risky. The mail server is configured to present any email

address as valid, even if that's not the case. Due to this ambiguity, we classify them as "Risky" and empower you with the data to make an informed decision.

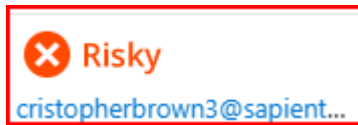


Fig 22: Risky Status

4. **Unknown** An "Unknown" result means a recipient's email server did not respond properly, is unavailable, or may be very slow to respond. Unknown results are not invalid email addresses, so you should treat them as valid until you receive a definitive response from retrying them.

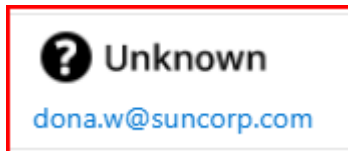


Fig 23: Unknown Status

Tip: You can set auto re-verification of emails with status as Unknown in VTM Setup.

Compatibility

The application requires Sales Cloud. It supports:

- Salesforce Clouds supported: Sales Cloud, Experience Cloud.
- Salesforce Editions supported: Developer, Professional, Enterprise, Unlimited.

Contact Information

For more information or assistance, please contact 360 SMS experts at

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