

Setting Up Phone Validation in Nanacast

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Note: This feature requires a Twilio account, and adding your Twilio credentials to your Nanacast account as described here:

[Setting up SMS/Voice Integration in Nanacast](#)

In order to use the Phone Validation feature for your offer, you must add the Phone field to the Active Custom Fields for your offer:

From the Overview menu of your offer, click the link for Notifications/Custom Fields.

On the Notifications/Custom Fields page, if you have not already added the "Phone" field to your offer, it will appear in the "Add Unused Permanent Fields" box at the top of the page. Click on the "Phone" field link, it will take you to the Add Custom Field page for Phone.

If you have already added the "Phone" field, it will appear in the "Active Custom Fields" box at the bottom of the page. Click on the "Edit" link for the "Phone" field, it will take you to the Edit Custom Field page for Phone.

If you have already added your Twilio Credentials to your account, the "Verify the phone number" check box option will be available to check to enable this option. (If not, you will find a link here to add them to your account preferences.)

Once you enable the "Verify the phone number" option, you can provide:

- » The Twilio number you will use with this offer.
- » Which type of validation you want as default (Voice or Text), and whether you the validation to be automatic on your form.
- » An optional type of validation as a backup. This will be whichever type of validation you didn't choose as default.
- » Whether you want a Skip button to appear on the form, which will allow customers to skip Phone Validation.

Once the phone validation settings are configured and committed on your offer, the Phone Validation process will interrupt the checkout/opt-in process for your customer/subscriber to either send an SMS message or initiate a phone call to the number your customer/subscriber provides in the Phone field of your checkout/opt-in form.

- » The customer/subscriber will have the ability to change the number used for validation.
- » If you have enabled multiple validation methods, the customer will be able to change to the secondary validation method.

» The voice call or text will provide a special code that the customer/subscriber must enter in the field they will be provided for phone validation.Â

» If you have enabled the skip button, the customer will be able to skip the phone validation process.

Once the customer/subscriber has successfully provided the validation code, the checkout/opt-in process will continue as normal.