# Salesforce CRM Integration

Connect once, import your contacts, and get validation results, including email scores, written back to your CRM fields automatically.

DELIVERABLE · RISKY · UNDELIVERABLE

This guide provides step-by-step instructions for verifying emails using No2Bounce directly inside your Salesforce CRM account.

**PREREQUISITES**

- An active No2Bounce account: sign up free (includes 100 free verification credits)
- A valid Salesforce CRM account with access to Contacts, Leads, or Accounts modules
- No developer setup required: the integration uses OAuth and takes under 5 minutes

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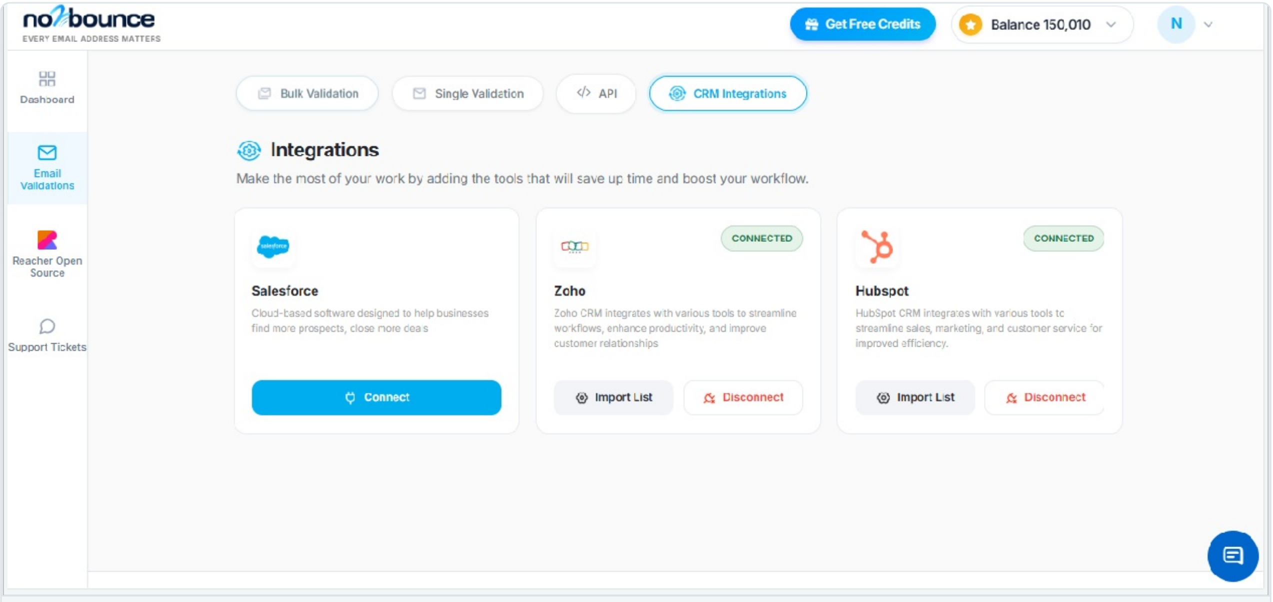
## 01 Go to CRM Integrations & Click Connect on Salesforce

Log in to your No2Bounce account. In the left sidebar, click **Email Validations**, then select the **CRM Integrations** tab at the top of the page.

You will see three integration options: Salesforce, Zoho, and HubSpot. Click the **Connect** button on the Salesforce card to begin the authorization flow.




*No2Bounce CRM Integrations page: click Connect on the Salesforce card.*

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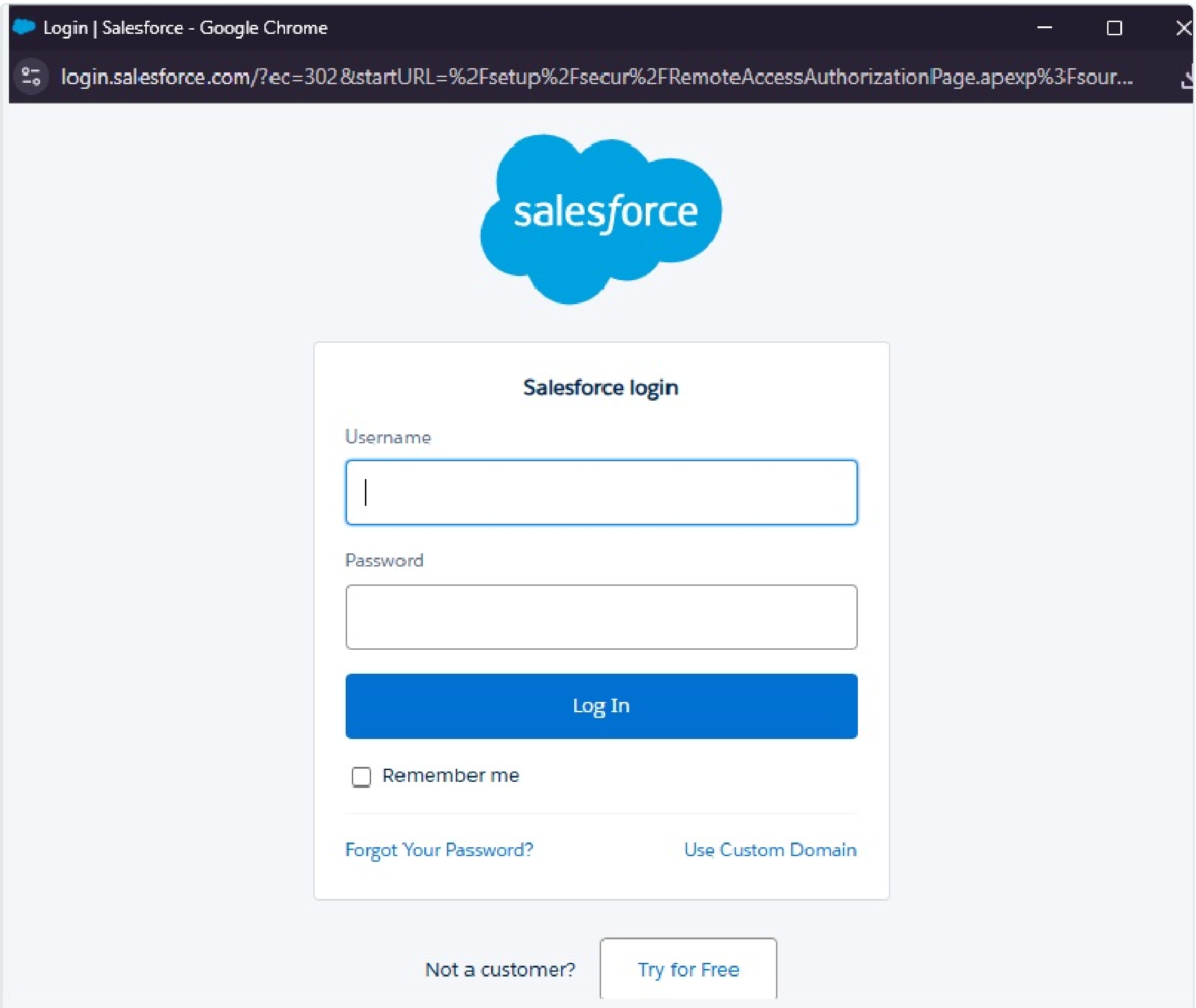
## 02 Sign In to Your Salesforce Account

You will be redirected to Salesforce's secure authentication page. Enter your Salesforce email address or mobile number and click **Next** to proceed with your password.

Alternatively, use one of the social sign-in options: Google, Apple, Yahoo, Facebook, LinkedIn, X (Twitter), or Microsoft. If you don't have a Salesforce account, click **Sign up now** to create one for free.



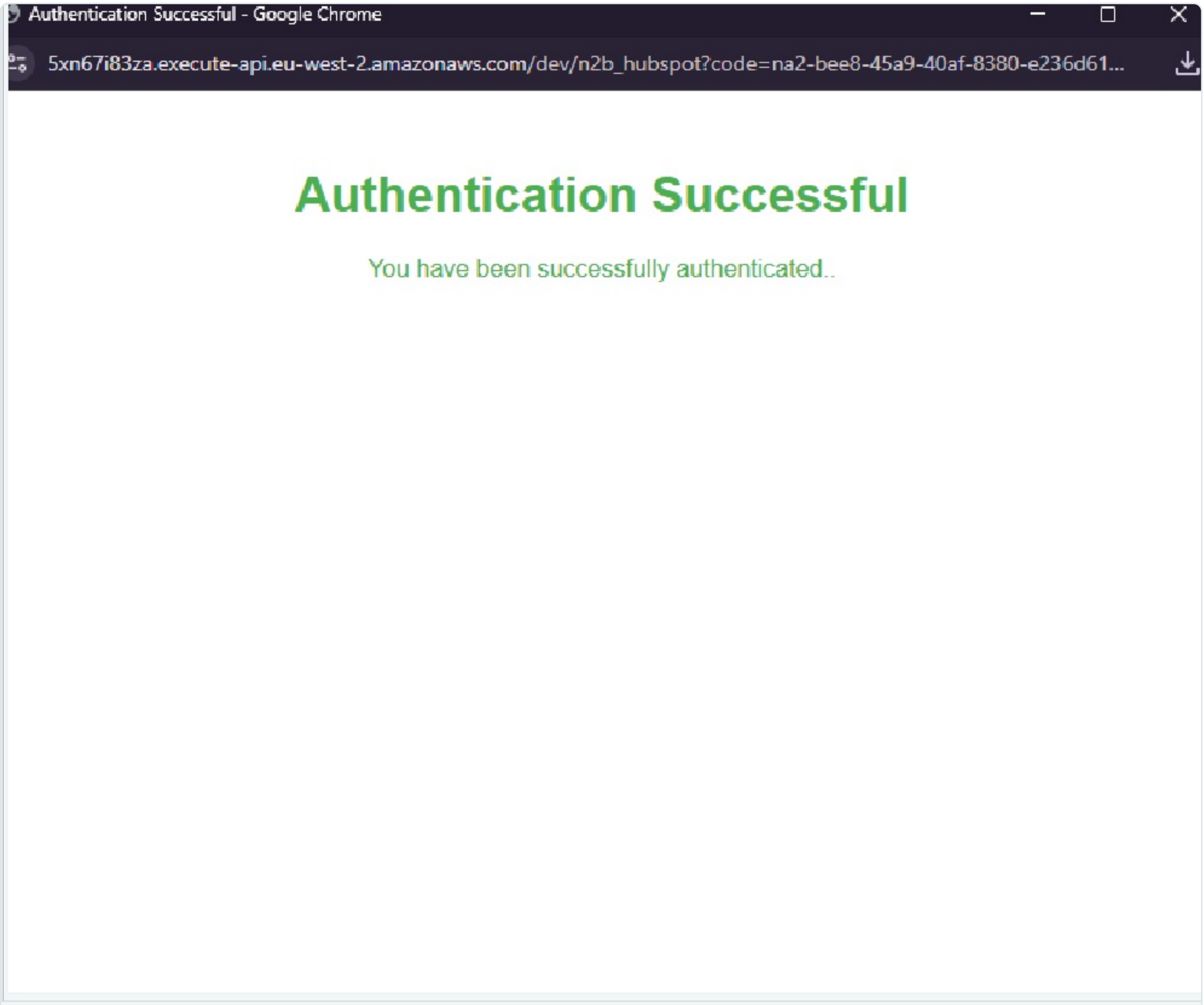

*Salesforce's secure sign-in page: enter your credentials or use social login.*

## 03 Grant CRM Access Permissions

After signing in, Salesforce will display a permissions consent screen showing what No2Bounce is requesting access to. The permissions include:

- Group scope to perform CRUD operations on CRM metadata
- READ access to fetch data using CRM Object Query Language
- Perform CRUD operations on CRM modules (Contacts, Leads, Accounts)
- Group scope to update records in bulk

Check the "I allow No2Bounce to access the above data from my Salesforce account" checkbox, then click **Accept**. You will be automatically redirected back to No2Bounce.




*Salesforce permissions screen: review, check the box, and click Accept.*

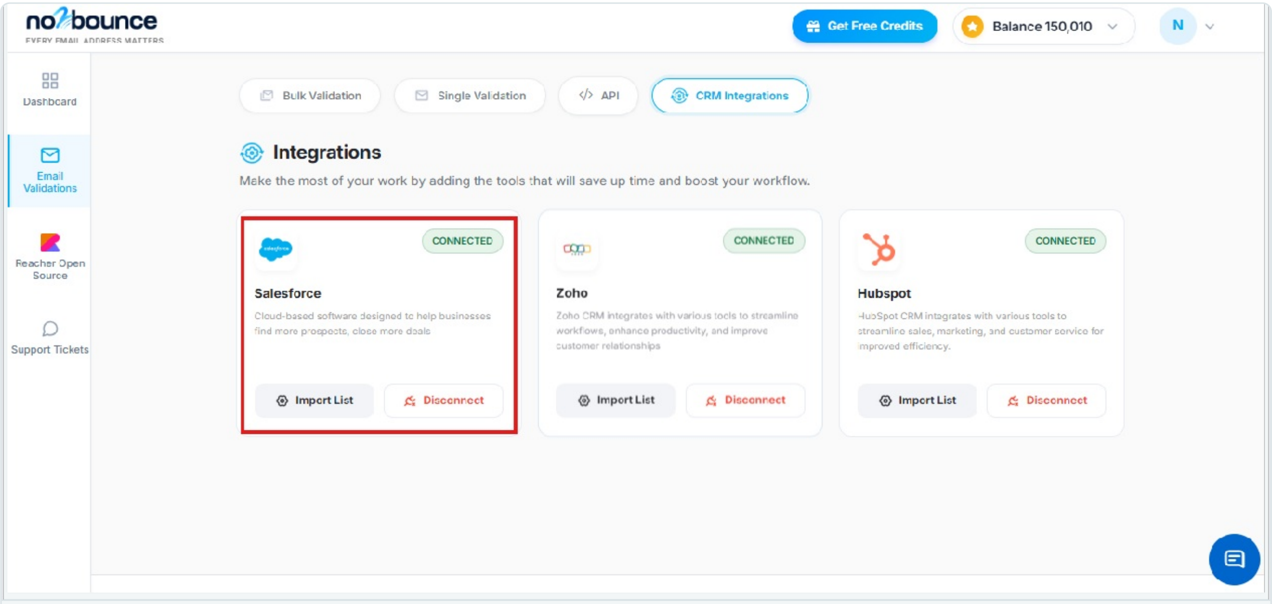
> No2Bounce only accesses your CRM data to read contacts and write validation results back. Your data is never shared with third parties.

# 04 Salesforce Is Now Connected: Click Import List

Once authorization is complete, you are redirected back to No2Bounce's CRM Integrations page. The Salesforce card now shows a green **CONNECTED** badge in the top-right corner, and two new action buttons appear:

- **Import List**: opens the Salesforce Integration contact management view
- **Disconnect**: safely unlinks your Salesforce account at any time

Click **Import List** to proceed to the next step.

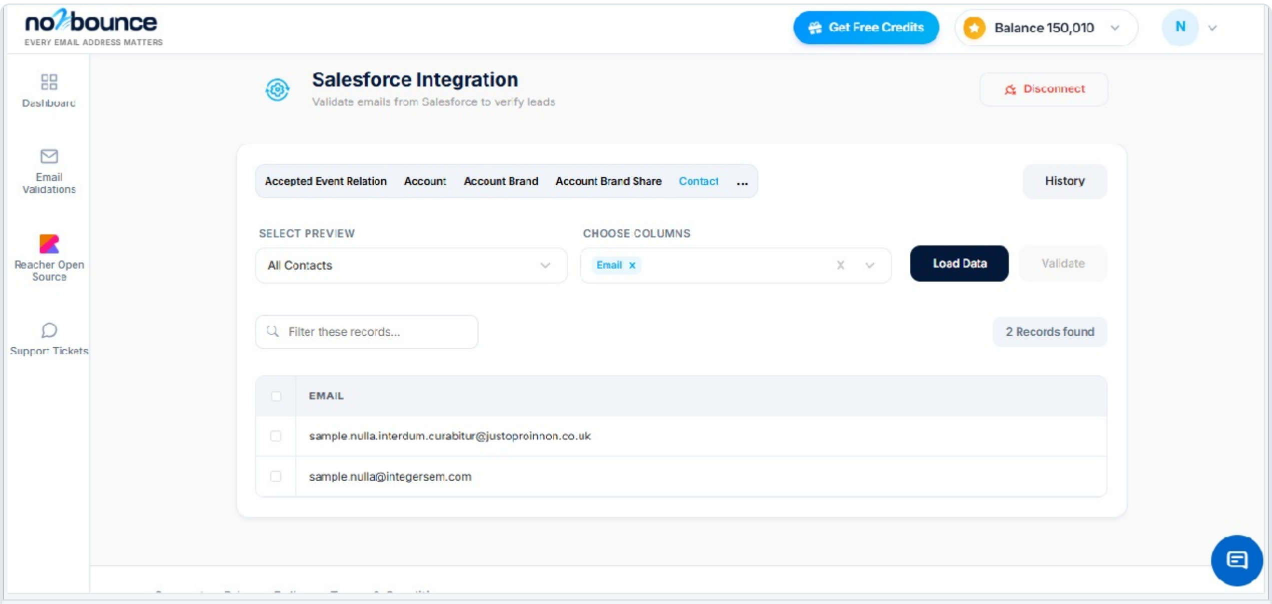



*Salesforce card showing CONNECTED status with Import List and Disconnect options.*

# 05 Select Columns & Load Your CRM Data

The Salesforce Integration page opens with module tabs at the top: Home, Leads, Contacts, and Accounts. Select the module containing the records you want to verify.

Under **Choose Columns**, click the dropdown to select which fields to import. At minimum, select the Email column. You may also add Last Name, Full Name, First Name, or any other relevant fields for context. Then click **Load Data** to preview your records.



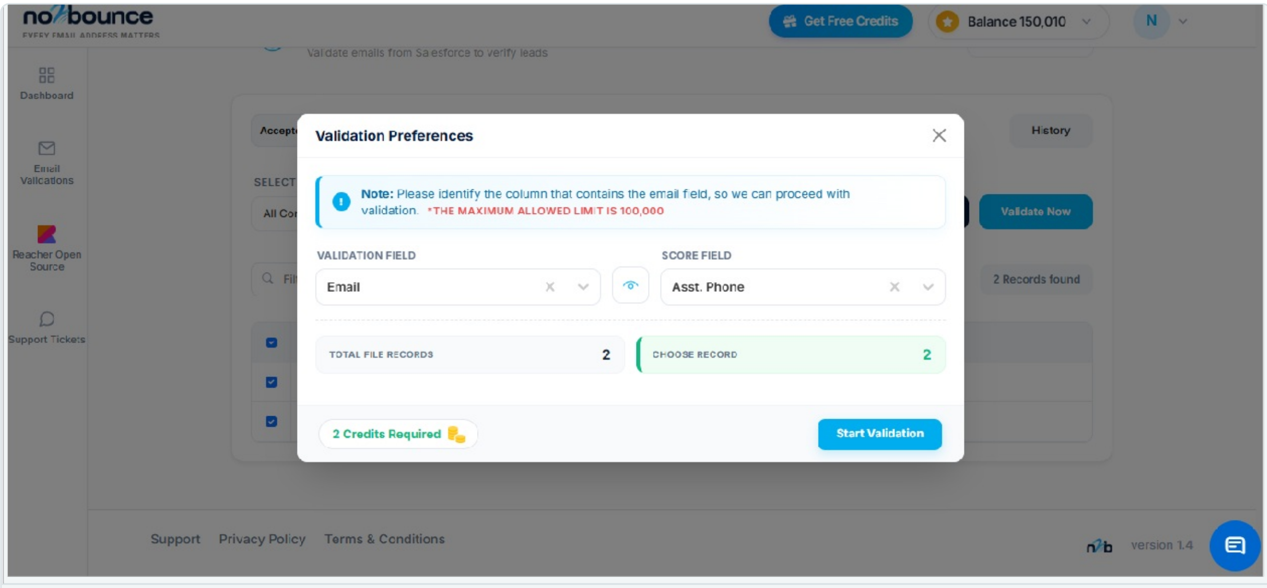

*Select your columns (including Email) and click Load Data to preview CRM records.*

> The Email column must always be selected: it is required for the validation process to run correctly.

# 06 Select Records & Click Validate Now

Your contacts load in a table showing all selected columns. Use the checkboxes to select individual records, or click the top checkbox to select all at once. You can also use the search or filter bar to narrow down specific contacts before selecting.

Once your selection is ready, click the **Validate Now** button in the upper-right corner to begin the email verification process.




*Select all or specific contacts, then click Validate Now to start verification.*

> **CREDIT USAGE**
> Credits are debited based on the number of email addresses processed. Each email consumes 1 credit. Catch-All verification, if enabled, also consumes 1 credit per email.

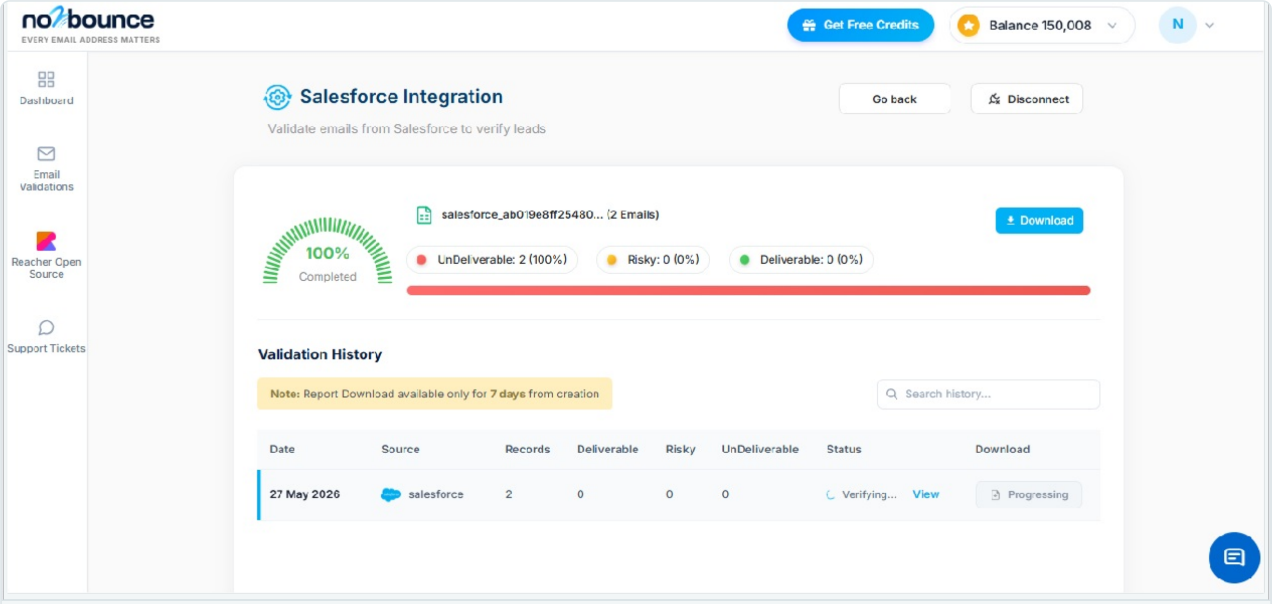
# 07 View Validation Results & Download Report

After clicking Validate Now, you are redirected to the Validation Progress page. A circular progress indicator shows real-time completion percentage. Once complete (100%), results are displayed and automatically written back to your Salesforce CRM records.

The results summary breaks emails into three categories:

- ● **Deliverable**: valid, safe to send
- ● **Risky**: catch-all or uncertain
- ● **Undeliverable**: invalid, do not send

A Download Report option is available for 7 days after each run. The Validation History table below logs every past run, showing date, source, number of records, deliverable/risky/undeliverable counts, status, and a download link.




*Validation Progress page at 100% complete, with results breakdown and Validation History log.*

> Results are automatically synced back to your Salesforce CRM. The Score Field and Validation Field you configured are updated on each contact record without any manual export needed.

## Exported Fields in Salesforce CRM

After validation completes, the corresponding fields are written back to your Salesforce CRM contact records automatically. These fields are created on first validation, so you can use them right away to filter, segment, and build smart views inside Salesforce.

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## Catch-All Email Verification

When the Catch-All option is enabled during validation, No2Bounce performs a deeper check on domains that accept all incoming mail, helping you identify higher-risk addresses that a standard check may mark as valid.

- Catch-all verification consumes `+1 credit / email`
- Results are tagged in the `N2B_SubStatus` field as `catch_all`
- You can choose to enable or disable catch-all per validation run