



360 SMS

Configuration & User Guide

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Introduction

360 SMS is an easily implemented integration of inbound and outbound Text Messaging (SMS) capabilities within Salesforce as well as MMS (sending pictures and files) and Ringless Voicemail. The 360 SMS features at a high level are:

- Individual One-on-One conversational texting
- Batch Texting from List Views, Campaigns or Reports
- Scheduled Texting
- Triggered automatic texting via native Salesforce Process Builders, Flows or APEX triggers
- SMS Templates
- ChatBot/Survey tool for point-and-click Auto-Responder automation and Inbound answer processing to update Salesforce Fields or trigger additional messages
- SMS Drip Campaigns – ability to define a series of templates to be sent at defined intervals
- Ringless Voicemail – ability to send a recorded message to a mobile phone and have it show up as a missed call plus a voicemail.
- Verify Phone Numbers – tool to verify if your phone values are landlines or mobile numbers
- WhatsApp – 360SMS has full WhatsApp support perfectly integrated so that all the same SMS interfaces are used.

The solution is the only 100% native Salesforce solution on the market, meaning that no data is stored outside of Salesforce. 3rd party SMS Aggregator messaging services are invoked from the Salesforce environment but the messages (SMS) and/or attachments (MMS) themselves are **never** on any servers outside of the customers own Salesforce org.

The solution installs just a few custom objects, buttons and Visual Force pages which the administrator adds to the Page Layouts of key objects such as Contact, Lead and/or Case. It also fully supports custom objects.

When first installing the application either after purchase or as an evaluation, one or more phone numbers are provided to facilitate the outbound and inbound text messaging.

When evaluating the solution, a free temporary phone number and free outbound SMS credits are issued for 7 days by default. **From start to finish one can enable 360 SMS in Salesforce in just 10 minutes** by pressing two buttons (Outgoing Setup/Incoming Setup) to automatically issue the new phone number and credits and then adding the **Send SMS** button and **SMS History** related list to your Contact or Lead page layout. That's it! You should be texting in less than 10 minutes. Optionally, you can drag the SMS Conversation View Visualforce page to your Contact/Lead page layout to add even more value.

When purchasing, the customer may use their own phone numbers which are then "SMS Enabled" by 360 SMS through your provider. We take care of everything.

This document provides a high level "How It Works" section, Basic Installation and Configuration Instructions and an **Advanced Configuration** section which covers some of the more innovative features that differentiate 360 SMS from other solutions.

How It Works

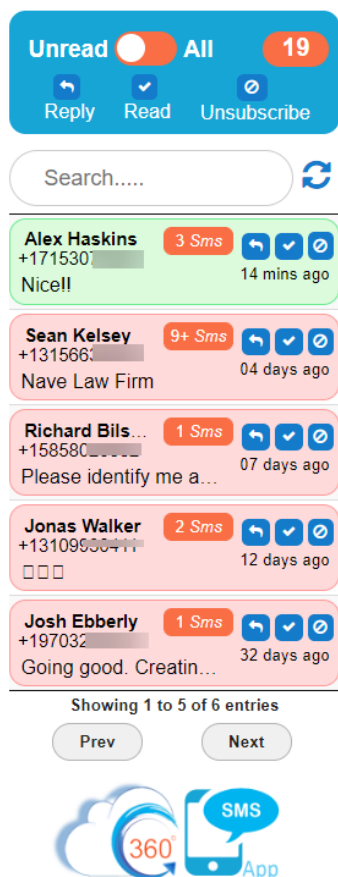
Once you have configured the basic application, you can send an Outbound SMS either via the **Send SMS** button or via the **Conversation View**. Either method writes a record to the SMS History related list for the object. The messages are designated with Type = Outgoing or Type = Incoming.

Incoming messages automatically resolve to whatever objects are defined in the Object Setup. By default, the app is configured for Contacts and Leads and for common phone fields. The inbound number first matches to its preceding Outgoing. Only if that fails such as with an unsolicited incoming message (one without a preceding outgoing message to the customer) does it then revert to matching to the designated fields defined in Object Setup and create an SMS History record of Type = Incoming. It automatically handles various phone formats.

NOTE: Storing both the Outgoing and Incoming in a single SMS History object is an important differentiator for 360SMS as it makes reporting and automations significantly easier than with other SMS applications.

There are numerous settings which govern things such as SMS_History.Owner (the user who gets notified when an incoming message arrives) and an important setting which links the Incoming Message to its preceding Outbound message. Review the **General Settings** section to see them all.

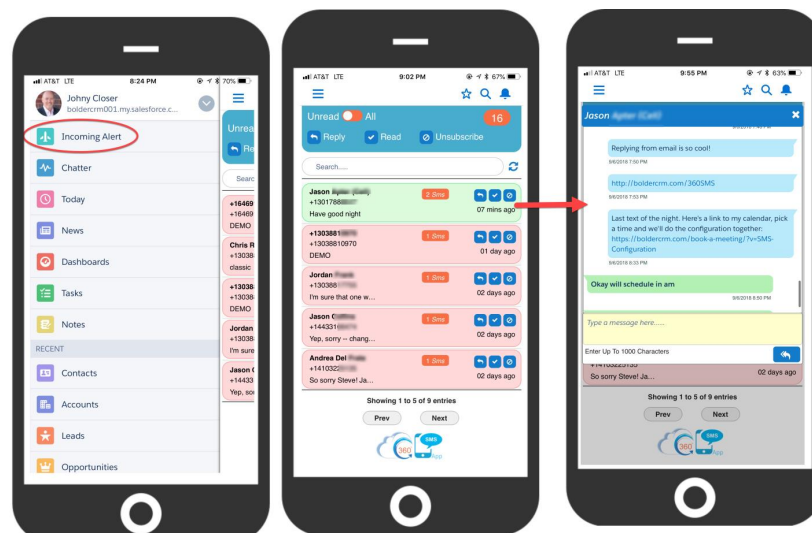
The linking of Incoming messages to their preceding Outgoing message is an important feature when working from non-primary objects such as the Case object and Custom Objects, as the incoming message will automatically resolve to the specific Case or Custom Object from which the outbound was sent. Additionally, this setting controls the SMS_History.Owner so that the outbound owner will be notified when his/her message is answered regardless of the parent object records ownership.



Incoming Alerts

The application provides numerous methods for alerting users to incoming SMS Messages. Configuring the incoming alerts is discussed in depth in the configuration section but in general these are the various options:

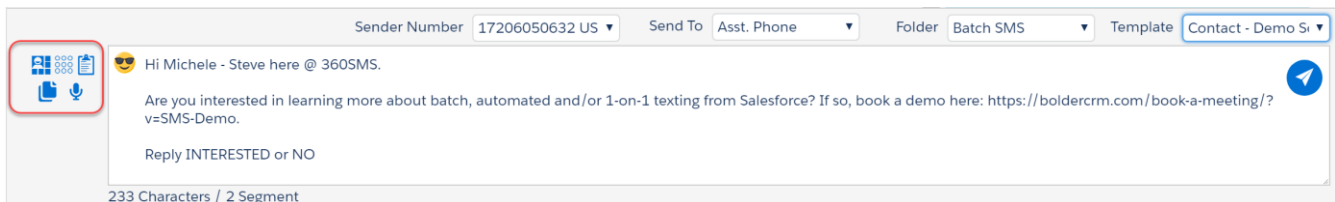
- Salesforce Classic Sidebar and/or Dashboard element
- Lightning Dashboard
- Lightning Utility Bar
- Salesforce Mobile app navigation item
- Email Notifications



Conversation View

The application comes with a pre-configured Conversation View offering a phone-like display of the physical data stored in the SMS_History object. The Convo View is VisualForce page installed automatically for standard objects such as Lead, Contact, Account, Opportunity and Case. The VF page need only be dragged onto the page layout. See the advanced configuration for creating the conversation view for custom objects. Some of the key features of the conversation view are documented here:

1. Incoming messages are shown on the left and outgoing on the right.
2. A message may be linked to multiple objects at one time such as these common use cases:
 - a. **CASE** object SMS messages automatically roll-up to the parent Contact automatically by setting a link to both the Case and the Contact.
 - b. **Contact** object SMS messages can be rolled-up to the parent Account (showing all SMS for the contacts at that account), using a simple process builder on the SMS History creation.
 - c. **Opportunity** object SMS messages could be rolled-up to the parent Contact (if there is a relationship defined) or to the Account using a process builder on the SMS History creation.
 - d. **Open Opportunities** can have SMS sent to a contact automatically linked to any open opportunities – contact Sales or Support to learn this easy trick using Salesforce Flows.
3. In the conversation view and incoming alert, a field named “**Sender Name**” displays if the object is primarily linked to another object (Related_Object_Name and Related_Object_Id). Examples are shown below where the messages to the contact do not need any context, but those messages linked to the CASE object show the **Sender Name (Joe Smith | 1007)** which doubles as a hyperlink to the primary record.
4. Easy icons to inspect the message to see what other objects it is linked to or open the actual SMS History record.
5. Hyperlink tracking shows the number of clicks to a hyperlink sent in an outbound SMS
6. Deliverability reporting directly on the convo view with the double checkmark Icon
7. Filter messages by User, Date or search for specific words – the default is to show All Conversations but can be set to “My” as well.
8. Icons in the compose message section toggle menu items to appear. Icons only appear if the user has the appropriate access:



- a. Choose from multiple sender numbers (if the user has access to more than one number)
- b. Choose which phone fields to send to (if the object has multiple phone fields defined)
- c. Choose SMS Templates and filter by Folders if desired
- d. Attach pictures
- e. Choose a Ringless Voicemail file to send instead of a text message

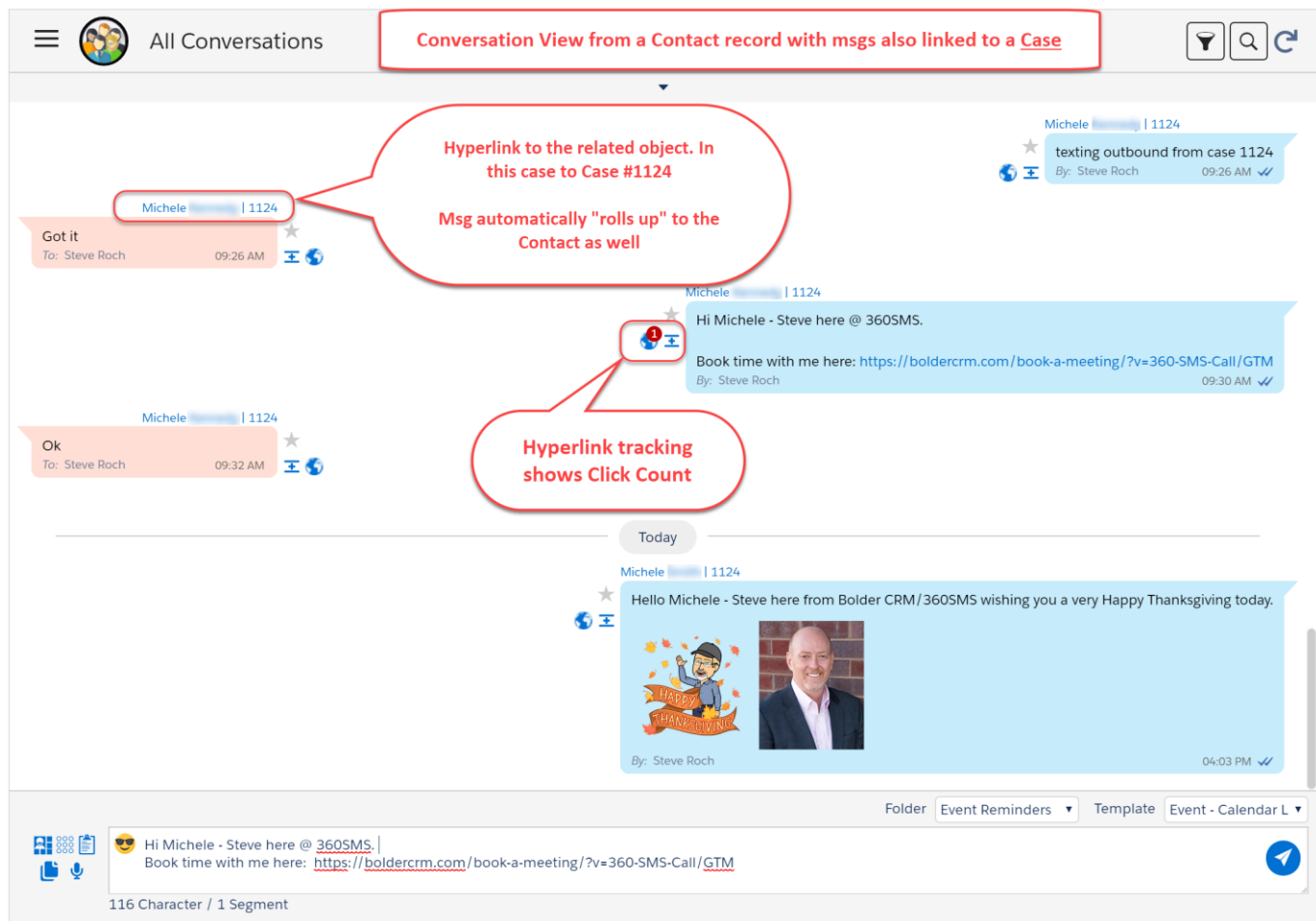


Figure 1 - Conversation View

Send SMS button

The Send SMS button is another method of sending an SMS and is available for the record detail (page layout) or for the List View (Batch SMS). The buttons are automatically installed for standard objects and as noted in the Advanced Configuration section can be easily created for custom objects. The screen capture on the next page ([Figure 2](#)) highlights some of the features of the Send SMS dialog invoked via the Send SMS button.

Batch Texting / Bulk Texting

Batch texting can be performed from three areas:

1. Send SMS button(s) on the **List View** of any standard or custom object
2. From the **Campaign** object with the Send SMS button – sending SMS to selected Campaign Members by status
3. **SMS from Reports** – which is documented in the Advanced Configuration section

Batch Texting with 360 SMS offers three very beneficial and differentiating features for marketers texting on behalf of other Salesforce users:

1. **Formula Based Sender Number** (Sticky Sender Number)
 - a. 360 SMS is the only SMS App that facilitates an Admin defining business logic in a specially named formula field (sticky_sender__c), thereby allowing the number to be set by sales user, geography, territory or whatever logic may be needed. When the Sticky_Sender field is defined, the Conversation View, and both

Send SMS buttons (Batch and Detail) will use this number rather than the users defined Default SMS Number, thereby minimizing mistakes in picking the number from a pick list and giving the customer a consistent texting number regardless of which Salesforce user might be manually sending a message, batch sending or triggering a message. In **Figure 2**, the field label is “**Record Owner #**” for clarity.

- b. This is most useful when marketers Batch SMS from a list of records and the messages need to come from each Contact.Owner’s unique number. In most other SMS Apps the marketer must create separate lists or complicated process builders to handle this basic requirement.
2. **Related Incoming to Record Owner** – another batch texting feature for marketers allows a single user to batch text and have the replies come back to the record owner, i.e. Contact.Owner or Lead.Owner.
3. **Batch Ringless Voicemail** – the platform uses the same Batch dialog to send Ringless Voicemail rather than a template or survey. Just pick the recording file from the microphone icon or record a message on the fly.

Create Message

Send To (Selected Contact: 7)

Christian Roch
Lorie Roch
Steve Roch
Tyger Roch
Peyton Manning
Yash Bhatia
Lincoln Roch

Sender Phone

Record Owner #

Send To

Mobile Phone

Channel

SMS/MMS

☐ Survey ☒ Folder

Folder

Batch SMS

SMS Template


Contact - Demo Solicitation

Message

Hi {!Contact.firstname} - {!\$User.firstname} here @ 360SMS.

Are you interested in learning more about batch, automated and/or 1-on-1 texting from Salesforce? If so, book a demo here: {!\$User.meeting_link_demo__c}.

Reply INTERESTED or NO



240 Characters / 2 Segment(Segment will depend on merge fields)

Add Files

You can select upto 5 files.

☐ Schedule

☒ Relate Incoming to Record Owner

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Cancel

Send

Figure 2 - Send SMS button from a list view (batch sms) or page layout (single) offers a few extra features such as Surveys and Scheduling

Scheduled SMS

No matter where it is invoked, the Send SMS button offers the ability to **schedule** the SMS to fire off at a designated date/time and also includes recurring date/time capabilities. The Scheduled SMS has the advantage of being visible in the records related list.

A further note about Scheduled SMS is that 360 SMS is the only SMS application to provide **programmatically Scheduled SMS**. This provides the Process Builder developer with a much nicer user experience by not using the troublesome Salesforce Process Builder “Scheduled Actions” which have the negative of not being able to see the Scheduled SMS records in a related list.

iText (Intelligent Texting w/ Surveys/Chatbots)

360 SMS offers powerful Intelligent Texting capabilities allowing one to define an entire automatic Question/Answer/Response flow without the need for a developer. An iText differs from an SMS Template in that it anticipates a response and based on the defined answers it sends the next defined question or response to offer unlimited capabilities. The feature is especially useful with Batch Texting. The answer data can also drive an infinite number of actions such as updating Salesforce fields, creating tasks, alerting users. Refer to this detailed document for the full capabilities of this feature: [SMS Surveys/Chatbots](#)

Ringless Voicemail

360 SMS offers a separately purchased Ringless Voicemail feature that utilizes all the same SMS interfaces but instead of sending a text message, one picks a voice recording file or records a new voice file on-the-fly. This function works for both Single, Batch and triggers. Contact your salesperson to enable this feature, but no extra configuration is needed once enabled.

Verify Number

360 SMS offers a separately purchased **Verify Number** feature which provides a method of verifying that a phone field is a Mobile Number capable of receiving SMS or it sets a field indicating **Landline**. The feature is available as a single button on the page layout, as a batch button on list views and as a process builder trigger such as when the phone field is changed, or a lead is created. Contact your salesperson to enable this feature.

Drip Campaigns

Because of the ability to programmatically create **Scheduled SMS** records, 360 SMS has the unique ability to offer configurable SMS Drip Campaign functionality to send SMS as well as Ringless Voicemail. Contact the 360 SMS distributor Bolder CRM steve@boldercrm.com or text **DRIP** to **720.605.0632** for purchase/configuration info.

SMS Drip Campaigns can be invoked and more importantly **stopped** by any Salesforce event such as a reply to an SMS, or the click to a hyperlink in an SMS or a simple field change or record creation. A common use case is a Drip being assigned for new Lead creation. Then the Drip can be dynamically stopped when a successful Call is logged or a stage changes or the lead is converted. Only limited by your imagination.

Time Zone / Area Code Calculator

Salesforce has no features whatsoever for National/International firms working with customers across multiple time zones. This problem manifests itself most often with text-based **Event Reminders** because Salesforce stores all Dates/Times in GMT (-7hrs from Mountain). Thus, Salesforce programmers around the world struggle to communicate the Date/Time in the customers time zone. This separately purchased module adds a **Time Zone** and **Area Code** objects to the Salesforce org and triggerable functions to use the area code of a phone number to then lookup and set the default City, State, Country and most importantly Time Zone for new Leads or other uses.

Furthermore, a set of common Date/Time formulas converting any Date/Time field to Text are delivered for use in Merge Tags that reflect the Customers Time Zone rather than the Salesforce Date/Time field, e.g. Appt_Cust_Time, Appt_Cust_DayOfWeek, etc. The tool also dynamically handles Daylight Savings Time on a per time zone basis as states like Arizona and Hawaii don't do DST and Europe starts/ends DST on different dates than the USA.

Contact our 360SMS Value Add Reseller, Bolder CRM via steve@boldercrm.com or text **TIMEZONE** to **720.605.0632** for purchase/configuration instructions.

WhatsApp™

360 SMS offers seamless **WhatsApp** integration commonly used for “texting” customers in countries where their texting costs are quite high and MMS is not available such as in Asia, Africa, South America and even many parts of Europe. Also, most local country phone networks do not allow Country-to-Country texting so WhatsApp™ is the only choice for people texting friends in other countries.

As shown below, 360 SMS support staff takes care of establishing a WhatsApp business account for you and then issues a WhatsApp enabled number to your Org. Then it's just another number and channel to send a “text”.

If desired, one can easily customize Salesforce with preferences fields so that the customer always receives messages via WhatsApp instead of via traditional SMS.

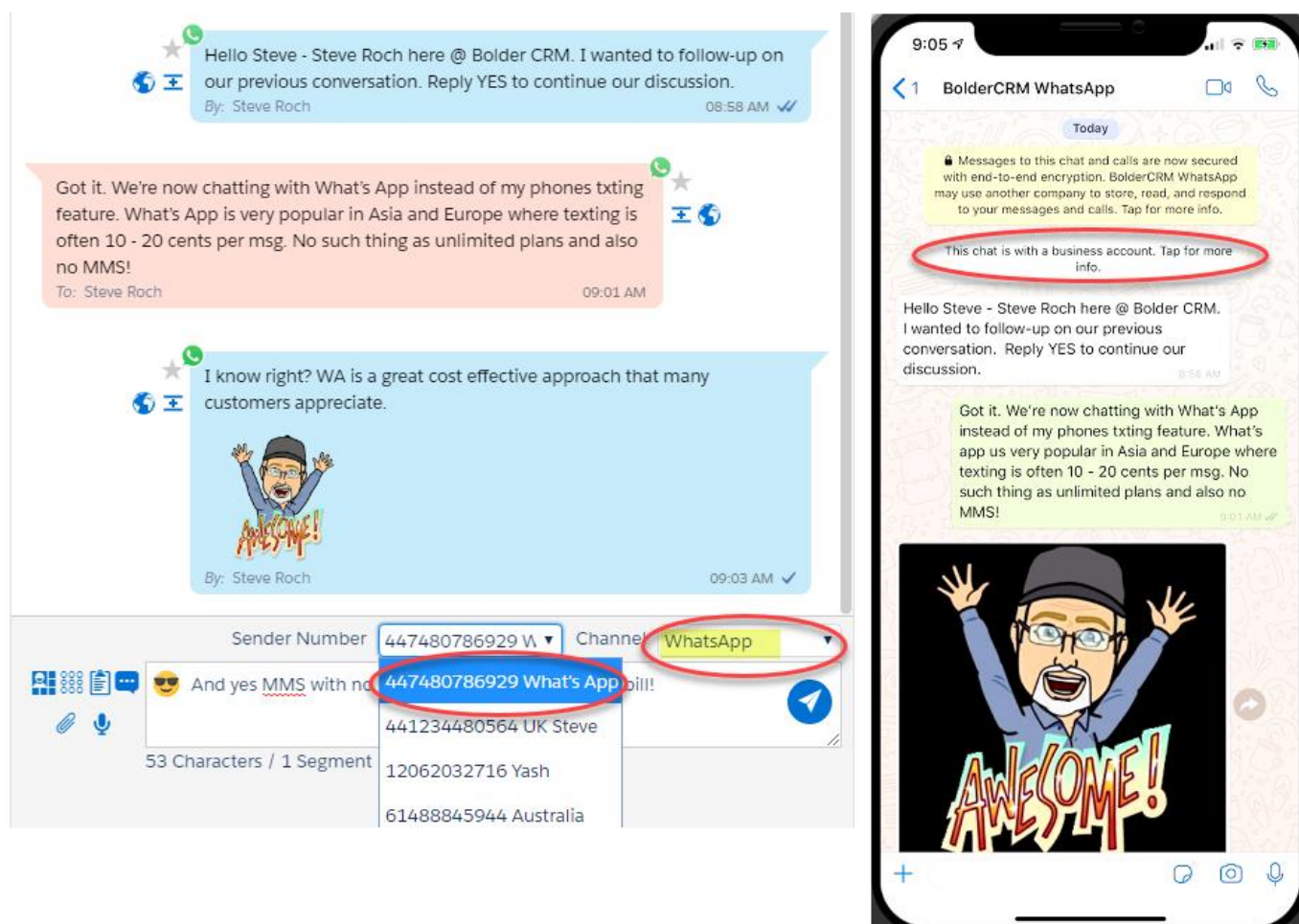


Figure 3 - WhatsApp "texting" is accomplished by choosing a WA enabled number and the channel

Salesforce Communities

360SMS works seamlessly with **Salesforce Communities** for almost all functionality. Screen captures on the next page show that the Incoming Alert, Send SMS button and Conversation View work exactly the same way in Communities as they do in regular Salesforce. In fact, one can barely tell that in the screen captures that this is taken from a Communities page. There is literally no extra work needed.

Since Communities does not allow custom buttons on List Views or Related Lists, the only missing functionality for Communities is the Batch SMS from List Views. However, as shown in Figure 4, the SMS from Reports functionality is indeed available for Communities if desired.

Further, because 360SMS is a native Salesforce app and all the transactional SMS History (In/Out) are native SF records they are subject to the same sharing and security rules that make Communities such a powerful application.

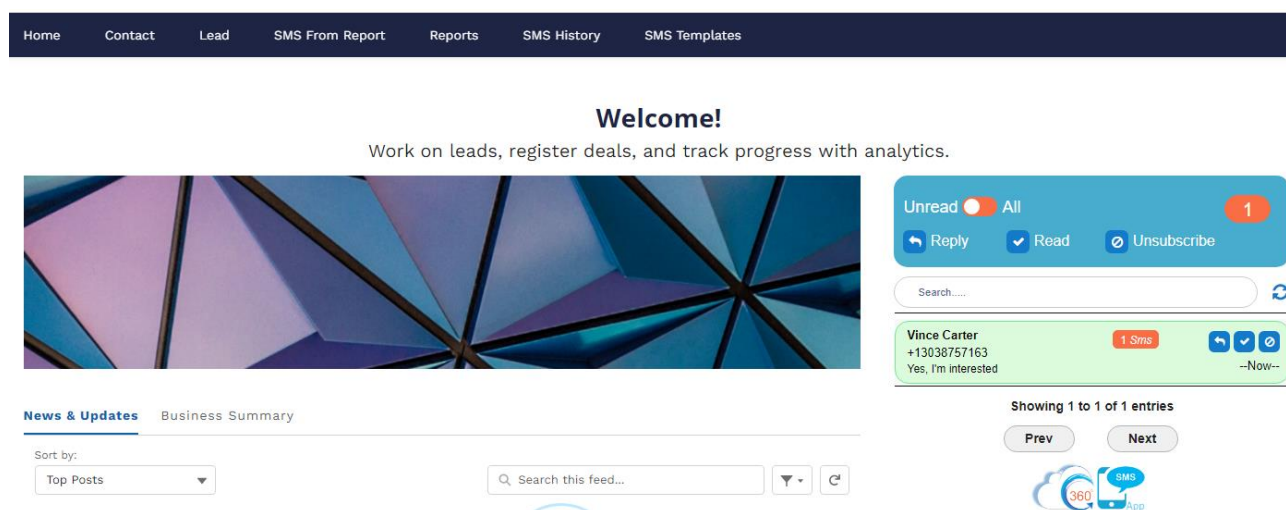


Figure 4 - Communities Home Page allows placement of the Incoming Alert just like regular SF

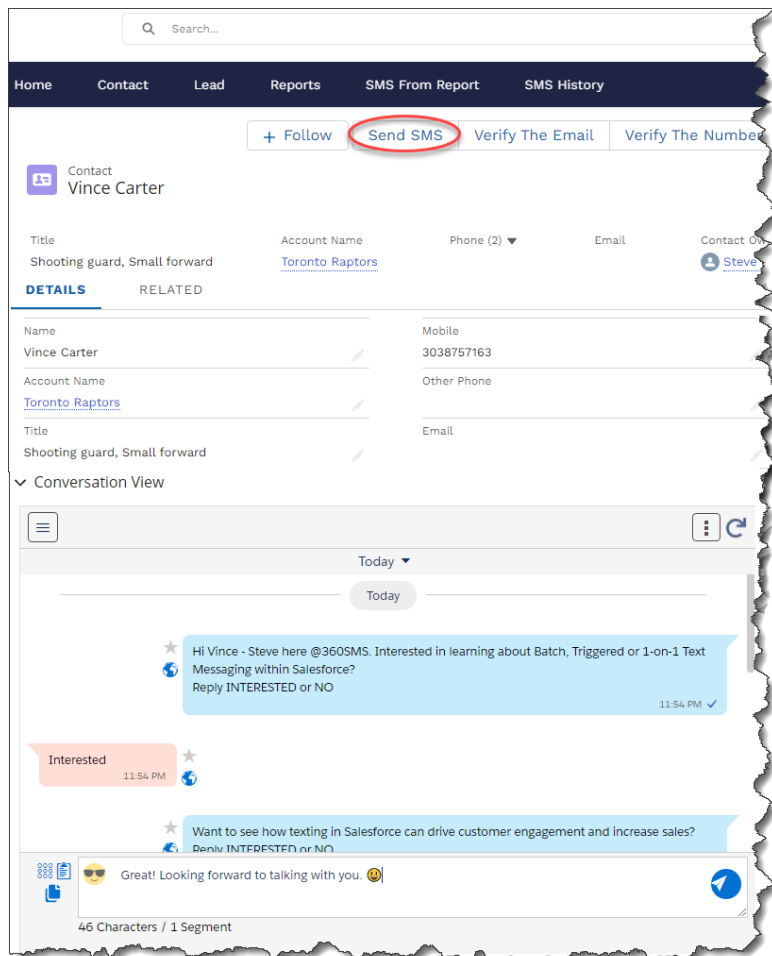


Figure 5 - Communities page layout fully supports SMS buttons and Convo View

Installation

Software/Hardware Requirements

360 SMS is a 100% Salesforce solution and thus requires no special hardware or other services to configure. It works on the following versions of Salesforce:

- Professional - although link clickthrough tracking is not available
- Developer
- Enterprise
- Performance
- Unlimited




The solution works in Salesforce Classic, Salesforce Lightning and Salesforce 1 automatically without any additional configuration.

The solution will send and receive text messages and attachments (MMS) from any text enabled device using industry standard SMS and MMS technology. Jump to the [How It Works](#) section for further explanations.

Installation to your Salesforce Org

You may install the 360 SMS solution to your Production or Sandbox from the Salesforce AppExchange. Simply search “360 SMS” within the AppExchange and follow the simple instructions from there.

NOTE: As with most Salesforce Apps, we do recommend that when prompted, you choose the “Install for All Users” option. The application is still controlled by Salesforce User Licensing and Permission Sets but choosing the “Install for All Users” options just makes the security management a little easier down the road, either option works fine though.

 <input type="radio"/> Install for Admins Only	 <input checked="" type="radio"/> Install for All Users	 <input type="radio"/> Install for Specific Profiles...
--	---	---

Basic & Trial Configuration

You can literally be sending and receiving your first SMS within 5 minutes using the following basic configuration steps to:

1. Initialize the Phone Number and Credits
2. Add the **Send SMS** button to your page layout(s) and/or add the **Conversation View** to the page layout

Verify Installation

You can verify that the application has been installed correctly as there will be a new “360 SMS” app in your applications list whether working from Classic or Lightning, [Figure 6](#) .

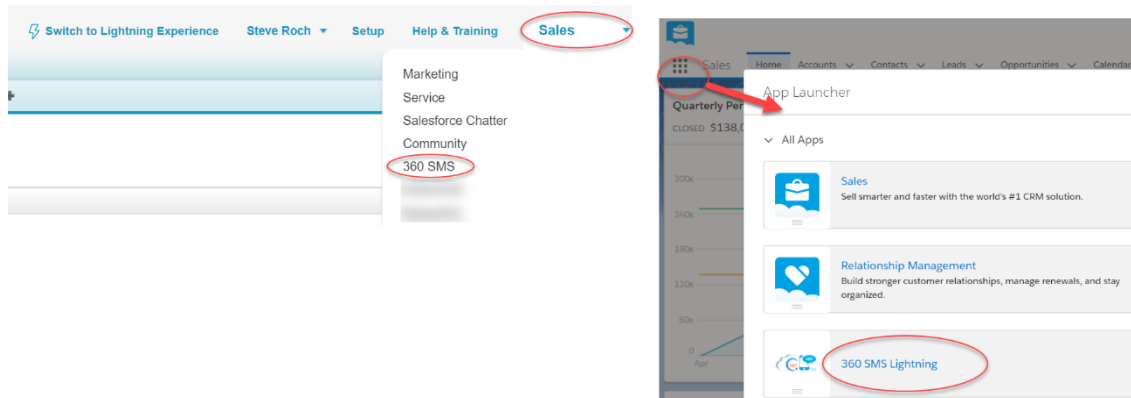


Figure 6 - 360 SMS application from either Classic or Lightning

Initialize the App with a Phone Number and SMS Credits

To send your first message, you must first establish an Outbound/Inbound phone number. During a **Trial Evaluation** a temporary number is automatically issued along with free outbound SMS credits. Purchasers of the solution will have previously supplied their own phone numbers to be SMS Enabled or purchased new numbers.

You must initialize the app to push the Phone Number(s) into your Salesforce Org with two easy steps:

1. Navigate to the 360SMS App
2. Choose the **SMS Setup** tab
3. Press the **Outgoing Setup** followed by the **Incoming Setup**, [Figure 7](#). This initializes the number to your Salesforce org, no other input is required.
4. **Developer Edition Note:** Salesforce Developer Edition has special restrictions imposed by Salesforce and thus requires an email to sales@360DegreeApps.com in order to establish the phone number and credits, otherwise you'll get an error like shown in .

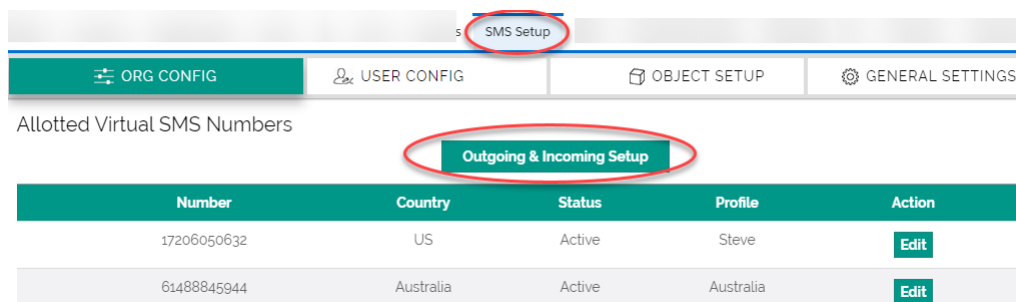


Figure 7 - Initialize the Phone Number and Credits

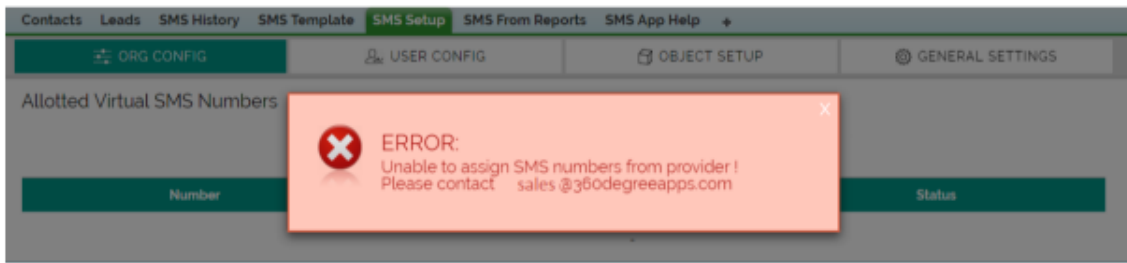


Figure 8 - Outgoing/Incoming Setup fails with Developer Edition - contact Sales@360DegreeApps.com

Configure Page Layouts

By default, the app comes completely configured for the Contact, Lead, Account, Opportunity and Case objects. Refer to Custom Objects section below for custom objects or other standard Salesforce objects.

Add Buttons, Related Lists and Opt-Out field

Repeat these instructions for each standard object that you want to send/receive text messages from.

1. Edit the Page Layout
2. Add the **Send SMS** button(s)
 - a. 360 SMS works for **Classic**, **Lightning** and **Salesforce1** the buttons/actions are slightly different for Lightning and Salesforce1 and are dragged into their appropriate locations from the “Mobile & Lightning Actions”
 - b. **Classic**: Drag the button named **tdc_tsw__Send_SMS** to your custom buttons section
 - c. **Lightning**: As shown in [Figure 10](#), drag the Quick Action button named **tdc_tsw__Send_SMS_SF1** into the “Salesforce Mobile and Lightning Experience Actions” section.
 - d. The only difference in these Send SMS buttons is whether they pop-up in dedicated pages or as Java Scrip pop-up windows but these named below are the best for Classic and Lightning/Salesforce1

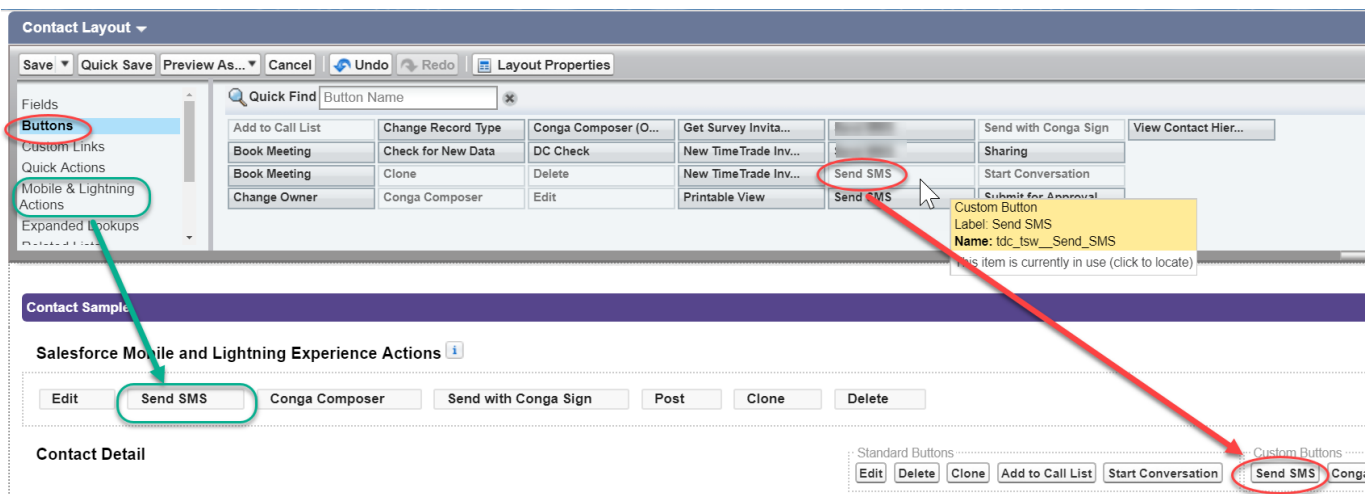


Figure 9 - Drag **Send SMS** buttons onto Classic, Lightning and Salesforce1 locations

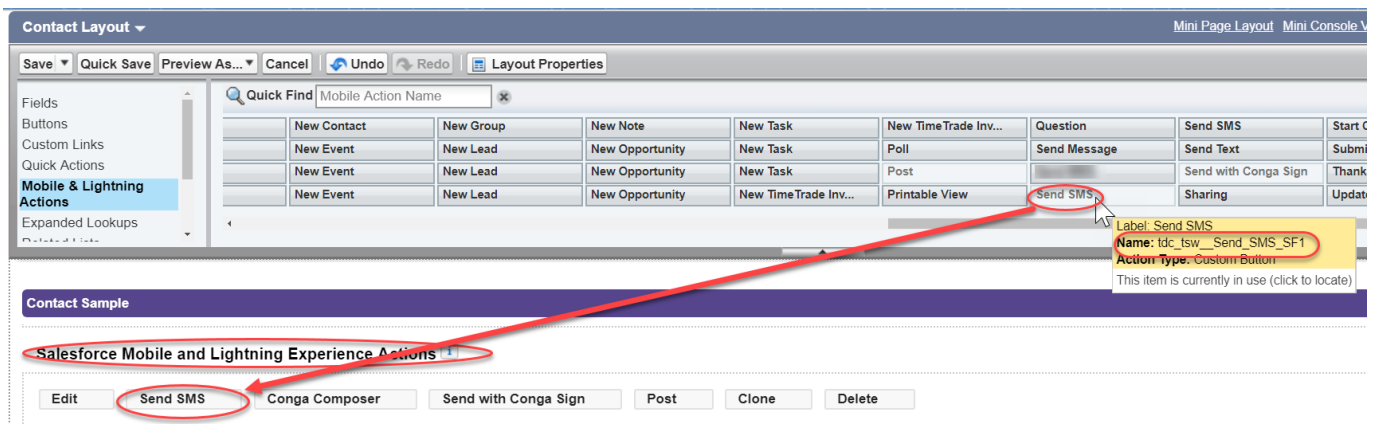


Figure 10 - Lightning & Salesforce1 button configuration

3. Drag the **SMS Opt Out** field onto your page layout, this is optional. It controls the automatic Opt-Out features of 360 SMS.
4. As shown in [Figure 11](#), add the **SMS History** related list to your page layout (this is optional if you are planning to use the Conversation View but still useful for other reasons). Modify the fields displayed as you see fit. We recommend the fields shown below and setting the sort to Create Date Descending.
5. Optionally, add the **Scheduled SMS** related list as this is often more important than the SMS History as far as usefulness.

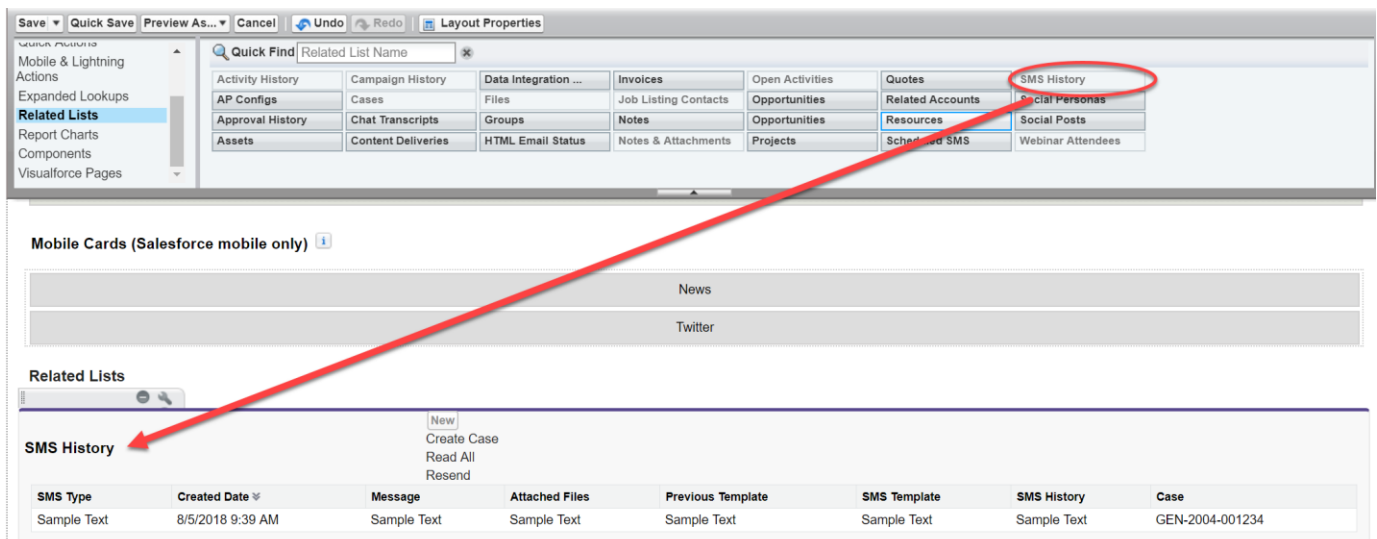


Figure 11 - SMS History related list

Conversation View Configuration

360 SMS comes with a pre-configured Conversation View Visualforce page for Contacts, Leads, Accounts, Opportunities and Cases. See the Custom Objects section below for custom objects. The Conversation View provides a nicer visual representation of the back and forth between the Salesforce user and customer. It is essentially just a visual representation of the **SMS History** related list.

To add the Conversation View to Contacts or Leads:

1. Add the SMS Conversation View – Visualforce page to your page layout, [Figure 13 \(Classic\)](#), [Figure 12 \(Lightning\)](#)
2. Add a new **Section** to your page layout and drag the **SMS Conversation View** Visualforce Page into that section
3. Use the wrench icon to set the page height to at least 500 pixels.
4. That's it, you're ready to text!

Lightning Note: The Conversation View can be dragged into any location on a Lightning Page Layout.

Salesforce Mobile Note: Because Salesforce Mobile now uses Lightning form factors you might consider creating a special Mobile App and Page Layout to place the Convo View. The conversation view renders automatically on the phone but with the new Phone Factor page layouts you can better control the phone experience.

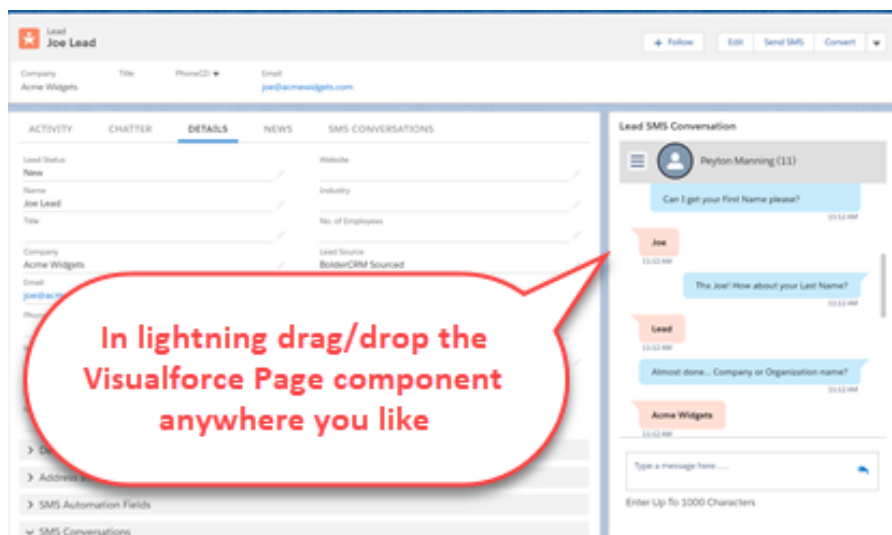


Figure 12 - Add the Conversation View VF page anywhere you like in Lightning

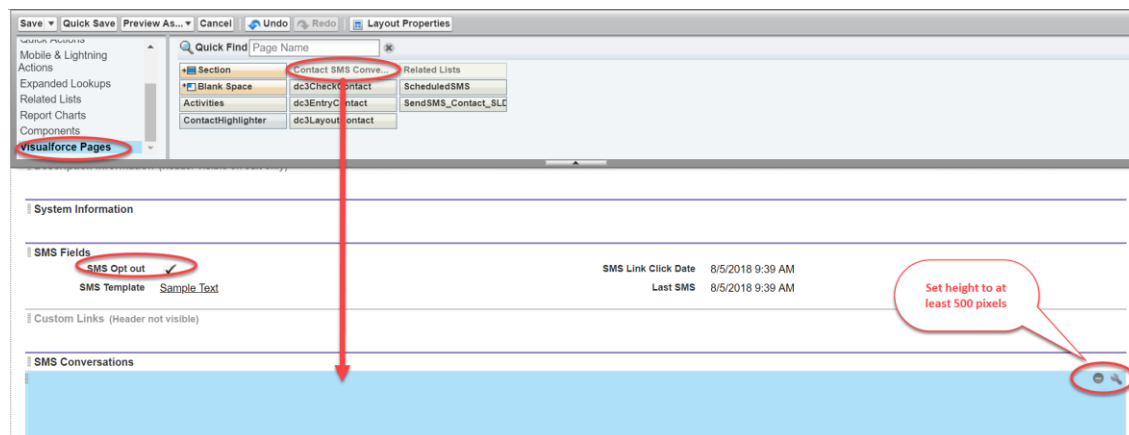


Figure 13 – Add the Conversation View to the Classic page layout.

Review/Edit designated Mobile Phone fields

1. As many organizations utilize different phone number fields for different purposes, 360 SMS is flexible to handle all situations. By default, the application chooses all the standard phone fields for Contacts and Leads.
2. The **Send SMS** interface will change if multiple phone fields are defined versus if just one field is defined. When multiple mobile phone fields are defined a pick list will be presented with a default field and the ability to choose different fields to send the SMS to. Otherwise if only one field is defined no pick list appears, [Figure 15](#).
3. To edit the defaults, simply delete the defined object definition and re-create it.
4. Obviously, only actual field(s) which hold mobile numbers should be defined, as sending to a land line will function the same way as from your own mobile phone, it just will not get delivered.

Link Objects to Phone API

Save **Reset** ☐ Allow Multiple Name Mapping

Name	Phone API	Default Phone API	Enable Scheduler
Contact	--None-- 1. mobilephone 2. homephone 3. assistantphone	mobilephone	<input checked="" type="checkbox"/>

Name	Name API	Phone API	Default Phone API	Enable Scheduler	Action
Case	1. CaseNumber	1. contact_mobile_number__c	contact_mobile_number__c	<input checked="" type="checkbox"/>	Edit Delete
Lead	1. Name	1. mobilephone	mobilephone	<input checked="" type="checkbox"/>	Edit Delete

Figure 14 - Define/Edit Phone Fields per Object

When multiple phone fields are defined a field pick list is displayed.

When only one mobile number field is defined, there is no pick list.

Figure 15 - Multiple Mobile Numbers defined (Contact) vs. only one field defined (Lead)

Batch SMS aka Bulk SMS

There are three ways to send Batch Text Message aka Bulk SMS, Batch SMS with 360 SMS:

1. **List Views** – the **Send SMS** button is placed on List Views or Related Lists
2. **Campaign** – Add the **Send SMS** button to the Campaign Page Layout and all Campaign Members can be sent a Template/iText of your choosing.
3. **SMS from Reports** – this is a unique feature only available from 360 SMS, whereby you use standard Salesforce Reports to execute the batch SMS. This is the most robust method as SF Reports allow cross object queries and unlimited rows.

NOTE: Regardless of which method used, records marked “SMS Opt-Out” are never sent via a Batch SMS even if the criteria defined did not explicitly exclude them. The opt-out’s are simply skipped.

List Views

[Figure 16](#) shows a typical List View (query) and the process of pressing the Send SMS button, then choosing a template to send.

Note that when sending an attachment only one copy of the file is stored in the Salesforce DOCUMENT object and all the outbound messages reference it, so as to save on storage.

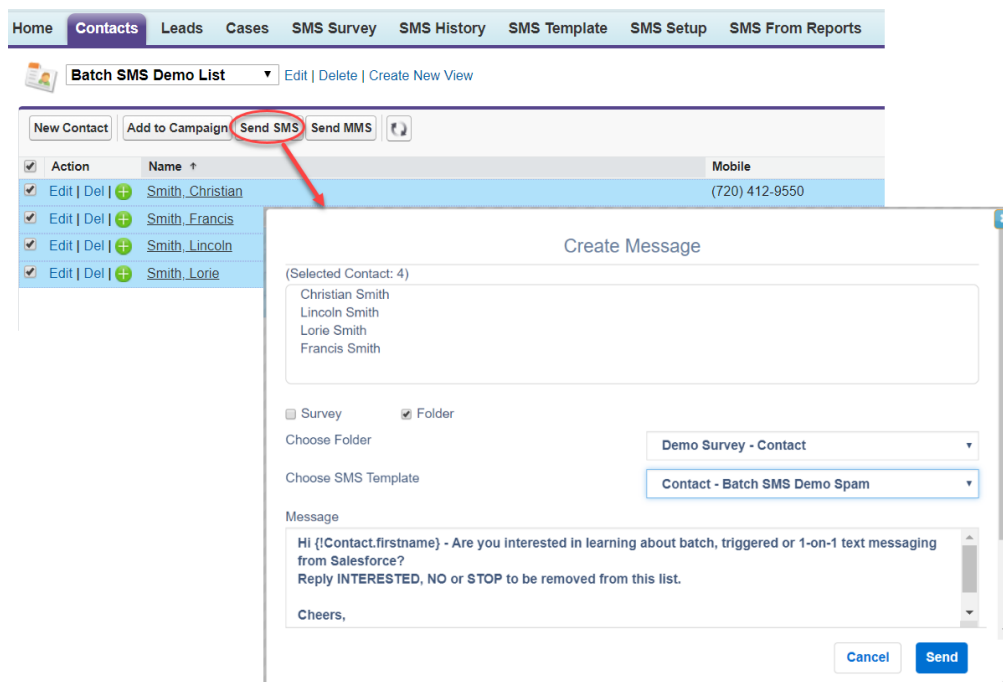




Figure 16 - Batch SMS from List View

To configure Batch SMS for a List View or Related List simply add the **Send SMS** button to your standard Search Layouts and/or Related Lists. Note that there are separate Send SMS buttons for Lightning so choose accordingly. See [Figure 17](#)

Quick Find / Search... 

[Expand All](#) | [Collapse All](#)



Lightning Experience Migration Assistant

Switch to the modern, intelligent Salesforce.

[Get Started](#)

Build

- Customize
 - Tab Names and Labels
 - Maps and Location
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Fields
 - Related Lookup Filters
 - Validation Rules
 - Triggers
 - Page Layouts
 - Field Sets
 - Compact Layouts
 - Search Layouts
 - Buttons, Links, and Actions
 - Record Types
 - Limits

Contact Search Layouts

Search layouts allow you to select the standard and custom fields that are displayed in the following search features:

- Search Results Columns for search and tagging. [View example](#)
- Lookup Dialogs that pop up when you click the magnifying glass on Lookup fields. [View example](#)
- Lookup Phone Dialogs that pop up when you click the magnifying glass on a SoftPhone dial pad. [View example](#)
- Recently viewed, modified, and created records lists displayed on tab home page. [View example](#)
- Search Results Filter Fields for search. [View example](#)
- Lookup Results Filter Fields. [View example](#)

Search layouts also allow you to select the standard and custom buttons that are displayed in the following search features:

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

Contact Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed
Edit	Search Results	Name, Account Name, Mobile, Phone, Email, SMS Opt out, SMS Template	ActionGrid, DC Merge, Send SMS , Browse
Edit	Lookup Dialogs	Name, Account Name	N/A
Edit	Lookup Phone Dialogs	Name, Account Name, Phone, Mobile, Email	N/A
Edit	Contacts Tab	Name, Account Name, Mobile, Phone, Email, SMS Opt out, SMS Template	N/A
Edit	Contacts List View	N/A	New, Add to Campaign, Add to Campaign, Add to Call List, Send List Email, ActionGrid, DC Merge, Send SMS , Browse
Edit	Search Filter Fields	First Name, Last Name, Account Name, Mobile, Phone, Email	N/A
Edit	Lookup Filter Fields		N/A

Campaigns

360 SMS provides a **Send SMS** button for the Campaign object to facilitate batch texting the contacts and leads in the Campaign Members object. As shown in [Figure 18](#), you simply press the button and it prompts you for to choose a template based on the Contact object and if the list also has Leads then it prompts for a lead-based Template.

Campaign Detail

Campaign Name List - Batch SMS Demo [View Hierarchy]
 Active ✓
 Parent Campaign
 Type List - Organic
 Description

[Edit](#) [Delete](#) [Clone](#) [Manage Members](#) [Advanced Setup](#) [Submit for Approval](#) [Send SMS](#)

Campaign Members

Action	Type	Status	Name	Mobile	Email
Edit Remove	Lead	OK to SMS	Joe Lead	(303) 875-7163	
Edit Remove	Contact	OK to SMS	John Smith		
Edit Remove	Contact	OK to SMS	Lincoln S.		
Edit Remove	Contact	OK to SMS	Francis S.		
Edit Remove	Contact	OK to SMS	Christian		
Edit Remove	Contact	OK to SMS	Lorie Sm		
Edit Remove	Contact	OK to SMS	Manav S		

Create Message

Contacts(6)

☒ Folder
Choose Folder: Demo Survey - Contact

Choose SMS Template: Contact - Batch SMS Demo Spam

Message:

Hi {{Contact.firstname}} - Are you interested in learning about batch, triggered or 1-on-1 text messaging from Salesforce?
Reply INTERESTED, NO or STOP to be removed from this list.

259 Characters / 2 Segments(Segment will depend on merge fields)

Leads(1)

☐ Folder
Choose Template: 1- Lead - First Touch

Message:

Hi {{Lead.firstname}} - Thx for your interest in 360 SMS. In a quick 30 min session I can jumpstart your evaluation, guaranteed! Book a mtg w/ me here:

[Cancel](#) [Send](#)

Figure 18 - Batch SMS from Campaigns - choose separate templates for Contacts vs. Leads

To configure simply add the **Send SMS** button to your Campaign page layout.

Note that the 2nd Send SMS button is for Salesforce1 and Lightning. It should be placed in its respective location in the **Salesforce Mobile and Lightning Experience Actions** section. The screen capture shows the placement of the button on the Classic Page Layout

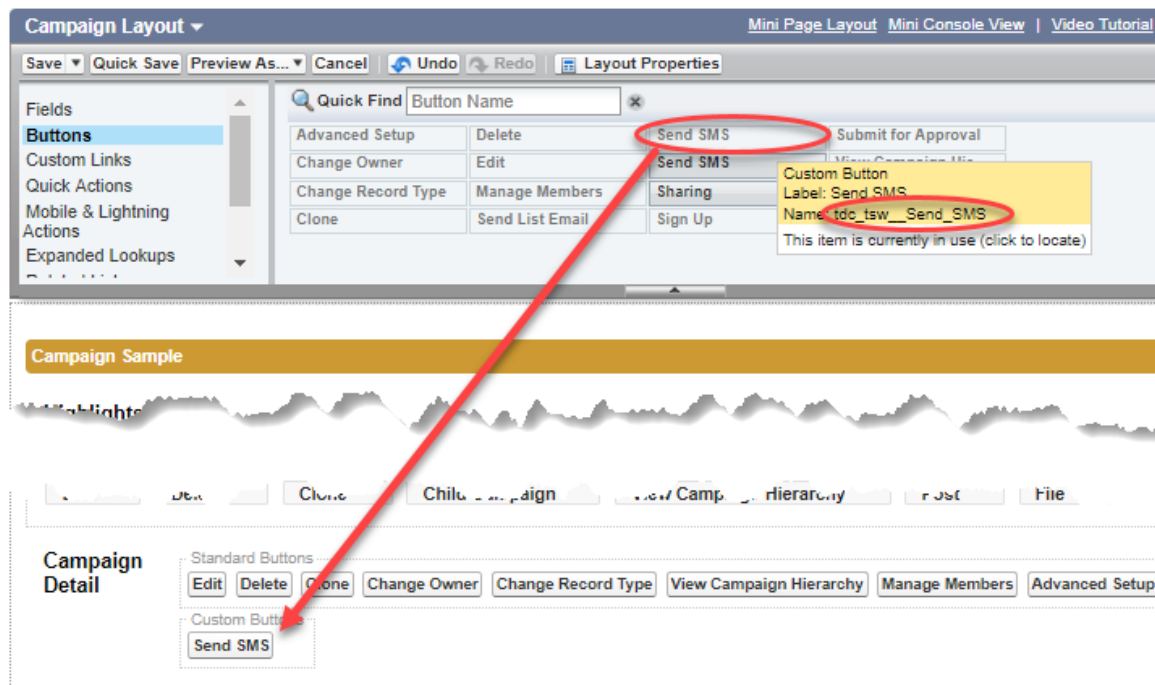
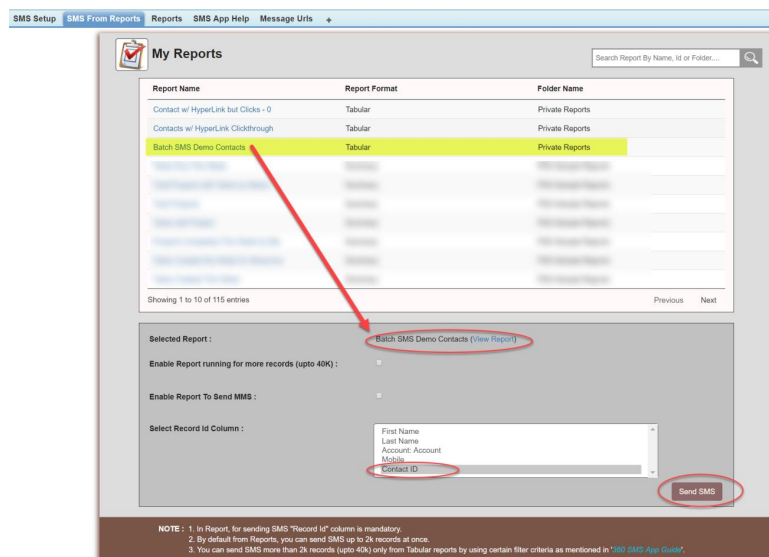


Figure 19 - Add the Send SMS button to the Campaign to Batch SMS the Campaign Members

SMS from Reports

No configuration is required for **SMS from Reports** feature but just for consistency the feature is documented partially here. Refer to the full section below titled [SMS from Salesforce Reports](#).

Many SMS apps can send Batch SMS from Campaigns and from List Views but those methods are limited by the Salesforce platform itself (200 selectable rows and no complex queries). Only 360 SMS has allows batch SMS from native Salesforce Reports, thus offering almost limitless records and complex cross-object reports.



Advanced Configuration

This section covers the additional features and functionality that make 360 SMS unique among Salesforce SMS Applications.

- Salesforce Communities
- General Settings
- Custom Object Configuration
- Security & Licensing
- User Configuration
- SMS Templates
- Incoming Alerts
- Reply to Email Alert – configuration
- Incoming Alert Email Templates
- MMS
- Hyperlink Click Tracking
- Salesforce Sites
- Delivery Status
- SMS from Salesforce Reports
- Send SMS with Process Builders or Flows

Salesforce Communities

360SMS works seamlessly with **Salesforce Communities** for almost all functionality. The screen captures below show that the **Incoming Alert**, **Send SMS** buttons and **Conversation View** work exactly the same way in Communities as they do in regular Salesforce. In fact, one can barely tell that in the screen captures that these are taken from a Communities page. There is literally no extra work needed!

Since Communities does not allow custom buttons on List Views or Related Lists, the only missing functionality for Communities is the Batch SMS from List Views. However, the **SMS from Reports** functionality is indeed available for Communities if desired.

Further, because 360SMS is a native Salesforce app and all the transactional SMS History (In/Out) are native SF records, they are subject to the same sharing and security rules that make Communities such a powerful application.

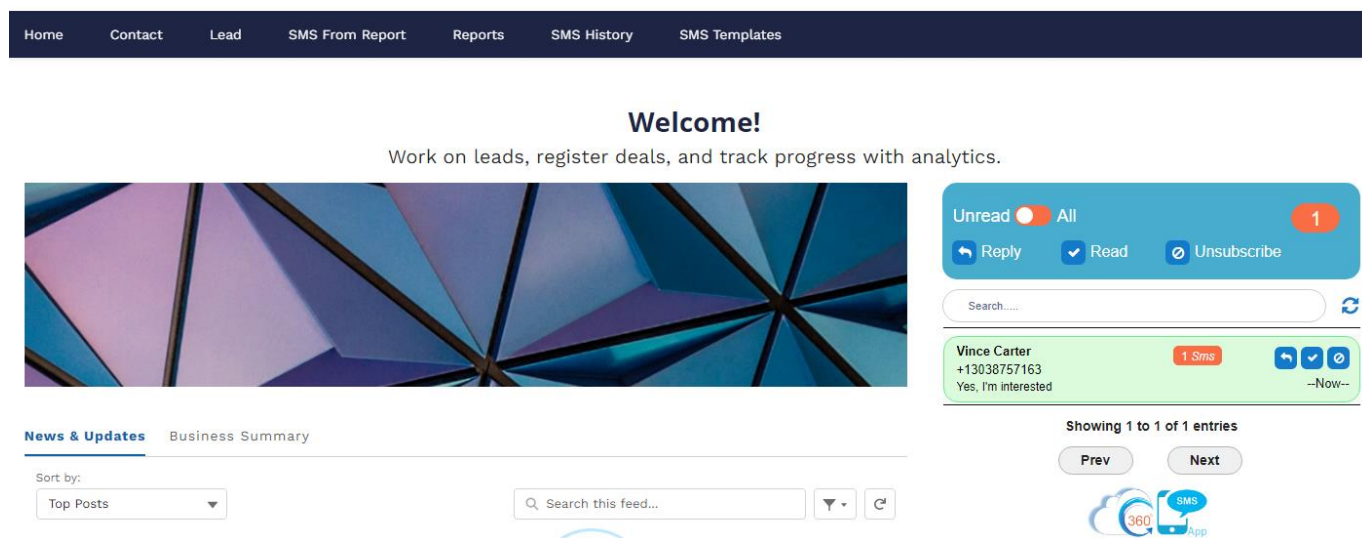


Figure 20 - Communities Home Page allows placement of the Incoming Alert just like regular SF

Search...

Home Contact Lead Reports SMS From Report SMS History

+ Follow **Send SMS** Verify The Email Verify The Number

Contact
Vince Carter

Title Shooting guard, Small forward Account Name [Toronto Raptors](#) Phone (2) Email Contact Owner [Steve](#)

DETAILS RELATED

Name	Vince Carter	Mobile	3038757163
Account Name	Toronto Raptors	Other Phone	
Title	Shooting guard, Small forward	Email	

Conversation View

Today

Today

Hi Vince - Steve here @360SMS. Interested in learning about Batch, Triggered or 1-on-1 Text Messaging within Salesforce?
Reply INTERESTED or NO 11:54 PM ✓

Interested 11:54 PM

Want to see how texting in Salesforce can drive customer engagement and increase sales?
Reply INTERESTED or NO

Great! Looking forward to talking with you. 😊

46 Characters / 1 Segment

Figure 21 - **Communities** page layout fully supports SMS buttons and Convo View

General Settings

Owner Details		
SMS App Owner Name:	Joe Administrator	The service user that all alerts and automated processes will run under, i.e. the Created By User. Defaults to the user that installed the app.
Subscription Keywords		
Re-Subscribe Keywords:	Start,Subs	Automatic Opt-Out handling. Incoming SMS with these keywords sets the Object.SMS_Opt_Out to False.
Unsubscribe Keywords:	Stop,Unsubscribe	Automatic Opt-Out handling. Incoming SMS with these keywords sets the Object.SMS_Opt_Out to True. Note that the STOP keyword unsubscribes the number at the Provider Level as well regardless of the Salesforce SMS_Opt_Out field value. Only the customer himself can re-enable themselves with the START keyword.
SMS Delivery Report Settings		
Site URL:	http://boldercrm.force.com/IncomingSMS	Although not required, Salesforce Sites technology is used to update the SMS_History.DeliveryStatus and is required for Link Clickthrough Tracking as well. See documentation for Sites configuration.
SMS Delivery Report Settings		
Set the default view:	My Conversation	Conversation View has the option to show conversations between the Contact/Lead between All salesforce users or only for the currently logged in user (My Conversation). This option controls the default behavior.
Settings for Incoming Alert SideBar		
Default View:	Unread Messages	Controls whether all inbound messages are displayed in the Side Panel Alert or just UnRead Messages.
Incoming Alert Color Changes to Yellow in:	60 mins	Controls the time duration at which the Inbound message will change colors
Incoming Alert Color Changes to Red in:	120 mins	Controls the time duration at which the Inbound message will change colors
Incoming Sidebar Automatic Refresh Time:	30 sec	Controls how often the Side Bar will poll and refresh itself looking for new incoming messages or changing colors of existing messages.
Enable Company Logo in Sidebar:	✓	When enabled works in conjunction with the "Selected Logo" option to allow one to use their company logo in the Side Panel rather than the default 360SMS logo.
Selected Logo	SMS App Logo	Define the logo that will be used in the side panel.
Enable Audio on Incoming Message:	✓	When enabled, plays a chime sound on the device when an incoming message arrives.
Enable Sharing for Incoming Messages:	X	When enabled, allows the SideBar to show more than just messages for the current user and instead utilizes pre-defined Salesforce Sharing Rules setup for the SMS History object.
Enable Reply Enable Read Enable Unsubscribe	✓	These options control the available buttons on the side panel.


General Settings continued

Email To SMS		
Email Service Address:	sms_incoming@r-ojuzidkfmk9w7ng4c48epxcfd99ubw30a312go088t4f85a.f4-4iqrieao.na59.apex.salesforce.com	When a Salesforce Email Service is configured this setting allows the Incoming Alert Email Notification to be replied to, which then sends the reply as an Outbound SMS to the customer, negating the need to login to Salesforce to reply to the customer. See documentation on setting up the email service.
Enable Dark Hour		
Enable Dark Hour for Automation:	X	When enabled, no triggered or scheduled outbound messages will go out during the time range. This is useful to give the appearance that the triggered messages are being sent from a real person rather than automation.
Starting Time:	10 PM	Start of the dark time period.
Ending Time:	6 AM	End of the dark time period.
Sending Time(Next Day):	8 AM	Sets the time at which all messages stopped during the dark hours will then be sent on the following day.
Link Tracking		
Link Tracking Status From Backend:	Enabled	Hyperlink Click Tracking is enabled in the back-end by writing to Sales@360degreeapps.com requesting it to be enabled. You will then be sent instructions for the additional configuration required. All clickthrough's are tracked in native Salesforce and thus reportable and triggerable.
Enable Link Tracking For Bitly:	✓	When enabled and when you have a Bit.Ly account, the hyperlink sent in an outbound message will be automatically transformed to a short bitly link on its way out. Thus, the customer only sees the short link, but internally you see the long link.
Bitly Generic Access Token:	***** ***	After setting up a Bit.Ly account, Bit.Ly supplies an API token which we use to facilitate the back and forth translation of the Bit.Ly link into friendly looking hyperlinks. You can use a free Bitly account for most purposes but note that bitly does have 1,000 api calls per hour limit that could impact batch texters, requiring upgrading to their paid accounts (https://dev.bitly.com/rate_limiting.html)
Exclude Domains:	calendly.com,google.com	Define a comma separated list of domains that should be excluded from link shortening.
Survey Settings		
Enable Survey:	✓	When enabled the Survey checkbox appears for the Send SMS dialog box enabling a pick list of pre-defined surveys to be chosen.
Template Folder		
Enable Folder:	✓	When enabled the Folder checkbox and pick list appears in the Send SMS dialog box allowing the user to narrow down their selection of templates by folders.
Pardot Enabled		
Pardot Enabled:	X	Feature enables an APEX trigger allowing Pardot, Marketo or Marketing Cloud to use their "Create Salesforce Task" features to trigger an SMS. Read more @ Pardot/Marketo/Marketing Cloud Integration . Feature enabled by writing to: support@360degreeapps.com

General Settings continued

Message Settings		
Restrict SMS Composing:	--None--	<p>Restrict Template Editing locks down the Send SMS message box after a template has been chosen but still allows free-form messages.</p> <p>Restrict Message Composing locks down the Send SMS message box completely, only allowing the use of Templates.</p> <p>Choosing either feature then allows the administrator to assign which Salesforce Security Profiles are restricted.</p>
Outgoing History Owner	Last Outgoing Sender	Assigns ownership of inbound messages for known phone numbers to either the SMS_History.Owner of the preceding Outbound Message (recommended) or to the record owner of the object that the Inbound message links to.
Incoming Owner for Incoming w/o Outgoing:	Default App Configuration	For unknown unsolicited inbound messages where the phone number is unknown in Salesforce, sets the SMS_Histor.Owner to the user defined in the "SMS App Owner Name" setting.
Task Creation Type:	One Day	<p>Works in conjunction with the next three settings to create a Salesforce TASK record in the Activity History. Choices are DEFAULT or ONE DAY (daily). If DEFAULT it creates one task per transaction which we DO NOT recommend.</p> <p>Instead consider the ONE DAY (daily) option which creates a single TASK on a per day, per SMS_History.Owner per Contact/Lead with all the SMS msgs concatenated into the Task.Comment. Thus you have a summary "SMS Conversation" record for the day in the Activity History for reporting and the visual reminder to look at the SMS Convo View.</p>
Create Task on Outgoing SMS:	✓	Governs the Task Creation Type above
Create Task on Incoming SMS:	✓	Governs the Task Creation Type above
Specify Task Subject:	SMS Convo	Sets the subject of the Salesforce TASK record only for the One Day choice
Create task while Auto-forwarding Emails:	✗	When Email Alert To Owner is enabled or when the Auto-Forward Email feature is enabled, this feature creates a Salesforce Task record for the notification email sent to the user. The task is linked to the Contact/Lead record or whatever record the incoming messages is linked to. Recommended OFF.
Relate incoming with last Outgoing:	✓	Use this important setting to relate all Incoming messages with the preceding Outbound message. Used for Incoming SMS_History.Owner notification, linking the inbound to the record that the Outbound was linked to (such as a Case) and highly useful when processing Inbound keywords to make sure that the answer to a question is in context to the question (template) being asked.
Enable User Signature:		When enabled appends a defined signature or message to the bottom of every outgoing SMS. When Enabled a 2 nd pop-up appears allow one to choose merge tag fields.
Enable Reply from User:		Used in conjunction with the Auto-Forward to Mobile feature. It appends a code to the bottom of forwarded messages so that the forwarded message can be replied to on that device even though the message comes from the Salesforce Sender Number. The reply first goes to Salesforce and then out to the customer similar to the "Email-to-SMS" feature.

Settings for Lead Convert Action		
Enable Trigger/Scheduler to relate SMS records to converted Contact/Account/Opportunity:	✓	When Leads are converted this feature allows any previous and unsent Scheduled SMS records to re-attach themselves to the Contact that is created in the Lead Conversion process. They will then be sent from the Contact at the previously defined date/time.
Run scheduler in Admin context to relate SMS records:	Daily Run	When leads are converted, the Lead.Owner executes the process and often does not have permissions to edit SMS_History records which he does not own himself, such as when another user is also texting the Lead. Therefore, when the lead is converted the other users SMS_History remains "stuck" on the converted lead. This setting is a workaround which runs under the context of the Sys Admin and resolves those orphaned SMS History records to the new Contact.
Omni Channel Configuration for SMS Routing		
Enable omni channel for incoming SMS Routing	✓	When enable works with Salesforce configured Omni-Channel queues to route new incoming SMS to queued Agents. It is expected that the SF admin already have a clear understanding of Salesforce's Omni-Channel feature and queues.
Queue name:	Support Queue	The name of the Salesforce queue holding the agents available for assignment.
Send text on accept:	✓	When the agent accepts the incoming SMS, the designated SMS Template fires, i.e. Hello <firstname> - <User.Firstname> here...
SMS template for accept:	StartChat Template	Designates the template that will fire off when the above setting is set.
Send text on end chat:	✓	Omni-channel SMS conversations are marked complete with an END CHAT button so that the next time the customer writes it will be a new conversation. When the Chat is ended an optional SMS template can be fired off.
SMS template for end chat	EndChat Template	Designates the template that will fire off when the above setting is set.
Object Configuration:	Case	Most commonly we see Omni-Channel used with Cases but Leads is also a common use case.
Link Unknown Incoming SMS		
Create Object and link unknown Incoming SMS	✓	When enabled will create a new parent record for an incoming SMS from a completely unknown number, aka an orphaned SMS History. Regardless whether a number exists in the system an incoming SMS always comes into Salesforce, this setting will create a stub of a Lead or Account/Contact. We recommend triggering an SMS Survey/Chatbot to then get the customers Full Name and other details, see the document: Surveys and Incoming Keyword Processing
Object to create for unknown incoming SMS	Lead	The object that will be created. Record will have first/last name as PhoneNumber and Unknown SMS.

SF1 Push Notification Setup		
SF1 Push Notification Plugin:	Disabled	<p>The feature is more appropriately named “Create Chatter Messages” for inbound messages. This can be useful when working from Salesforce 1 on the phone and you want the Chatter Feed Push Notifications to buzz your phone for an incoming message. This uses the @Include syntax to chatter alert the Incoming SMS owner.</p> <p>Note though that, this creates a lot of clutter in the chatter feed. Instead consider a true push notification to the Phone and Desktop using the instructions in this document: Push Notifications for Incoming</p>
Email Alert		
Message URL email alert:	✓	When enabled and HyperLink Tracking is enabled, a customizable email alert will be sent to the SF User of an outbound SMS that has a hyperlink which is clicked. Great for taking quick action while the customer is on your web page.
Notification for Bulk SMS Fail		
Notification for Bulk SMS Fail %	50%	<p>A percentage threshold such that the defined percentage of SMS sent in your batch fail, the user executing the batch is notified via email as perhaps the wrong phone field was chosen or the Providers have blocked the number for spamming. Read the best practices for Batch SMS'ing: Batch Texting and Compliance Best Practices</p>
Setting to Enable/Disable Emoji's		
Enable Emoji	✓	<p>Some SF Admins want to discourage the use of emoji's. This simply removes the little Emoji button from the text editor interfaces of the Send SMS button and Conversation View.</p> <p>Note that users can still paste in Emoji's or use the Windows/Apple Keyboard commands () to access emoji's. Note also that according to the SMS global standard, an emoji is a special non-Ascii 128 character and thus breaks the message into 90 character segments rather than the standard 160.</p>
Setting for Relating Incoming to Record Owner		
Show Related Incoming to Record Owner		When enabled displays a checkbox on the Send SMS dialog (single and batch) so that marketers can send outbounds but have replies come back to the Contact/Lead.Owner rather than themselves.
Verify the Phone Settings		
Country Code		Defines the country code prefix for the phone field.
Re-Verify Number		Simple setting to control whether a previously verified number should be re-verified as this has a usage fee.
Setting to Enable/Disable SMS from Report Column Section		
When enabled the SMS from Report automatically detects the reports record ID column so you don't have to choose it.		

Custom Object Configuration

When configuring 360 SMS for additional standard objects or custom objects there are a few quick steps to perform:

1. Create a custom **Send SMS** button(s) and place them on the Page Layout and/or List View
2. Create a custom Conversation View Visualforce page, if desired
3. Add the object and designated mobile phone field to the 360 SMS Object Setup
4. Create a Lookup field to your custom object on the SMS_History object
5. Add the field named SMS_Opt_Out to your Custom Object

Button Creation

1. Create the button code using the Button Code Generator
 - a. Access the button code creator via the **SMS App Help** tab shown in [Figure 22](#), then define the Object and Button Type.
 - i. Detail Page Button – Single one-on-one SMS – this button goes on the page layout
 - ii. List View Button – used for Batch SMS – this button goes on the List View
 - b. Copy the code as shown in [Figure 22](#).
2. Proceed to Salesforce Setup and to your Object settings - [Figure 23](#)
 - a. As shown in [Figure 23](#), create a new button and paste in the Code from step 1b.
 - b. We recommend that you distinguish the api name of the button(s) between the Detail Page Button (single SMS) vs. the List View Button (Batch SMS), e.g. Send_SMS_Single, Send_SMS_Batch
3. Place the button on the page layout or List View (Batch SMS)

Figure 22 - Custom Button Code creator

Custom Object
Job Listing Contact

Standard Fields (4) | Custom Fields & Relationships (9) | Validation Rules (0) | Page Layouts (1) | Field Sets (1) | Compact Layouts (1) | **Buttons, Links, and Actions (10)** | Record Types (0)

Buttons, Links, and Actions New Action **New Button or Link**

Action	Label	Name	Description	Type
Edit	Accept	Accept		
Edit	Clone	Clone		
Edit	Delete	Delete		
Edit	Edit	Edit		
Edit	Job Listing Contacts Tab	Tab		
Edit	List	List		
Edit	New	New		
Edit Del	Send SMS	Send_SMS_ListView	Multi Select button for list view or related list, invokes 360 SMS Batch Send	List Button
Edit Del	Send SMS	Send_SMS_Single	Custom button code generated by 360SMS used for sending SMS to a single Job Listing Contact record	Detail Page Button
Edit	View	View		

Edit Job Listing Contact Custom Button or Link
Send SMS

Custom Button or Link Edit Save Quick Save Preview Cancel

Label:

Name:

Description:

Display Type:
☐ Detail Page Link [View example](#)
☒ **Detail Page Button** [View example](#)
☐ List Button [View example](#)

Behavior: **Execute JavaScript** [View Behavior Options](#)

Content Source: **OnClick JavaScript**

Select Field Type: Insert Field: Insert Operator:

```

{!REQUIRESCRIPT("/soap/ajax/31.0/connection.js")}
{!REQUIRESCRIPT("/js/functions.js")}
{!REQUIRESCRIPT("/resource/tdc_tsw__jQueryForPopup/jquery/jquery-1.8.2.min.js")}
{!REQUIRESCRIPT("/resource/tdc_tsw__jQueryForPopup/jquery/ui/jquery-ui-1.9.1.custom.min.js")}
{!REQUIRESCRIPT("/resource/tdc_tsw__jQueryForPopup/jquery/postmessage/jquery.ba-postmessage.js")}
{!REQUIRESCRIPT("/resource/tdc_tsw__jQueryForPopup/jquery/bbq/jquery.ba-bbq.min.js")}
requireCssFile("/resource/tdc_tsw__jQueryForPopup/jquery/ui/css/ui-lightness/jquery-ui-1.9.1.custom.min.css");
  
```

Detail Page or List Button and Behavior = JavaScript

Figure 23 - Defining a Salesforce Classic button for Detail Page or List View (Batch SMS)

Field Creation

- Create a Lookup Field on the **SMS_History** object referencing your custom object, e.g. SMS_History.**Job_Listing_Contact** in the example above.
 - IMPORTANT Custom Objects from Managed Packages:** Custom Objects of managed packages have a vendor prefix in their primary key which SHOULD NOT be used in the creation of the SMS History lookup field, e.g. **advpm__Matters__c** should be **Matters__c**
 - It is optional to allow the Related List to automatically be added to parent object page layout
- Create a field named exactly **SMS Opt Out** on your custom object. Its API name will become **SMS_Opt_Out__c** (this is required for the Convo View and Send SMS buttons. An error will pop-up if the field doesn't exist when trying to send an SMS. Place the field on the Page Layout, although it's optional.
- The **Scheduled SMS** and **Survey_Response** objects should also be modified as above to add a lookup field for your custom object just like the SMS History.

Conversation View Creation

Similar to button creation use the Visualforce Page Creator to create the VF code for your custom object, then copy/paste the code into a new VF page.

IMPORTANT: Grant permissions to your Visualforce page by cloning the **SMS App Permission Set** and then add the page in the Visualforce Pages section of the Permission Set. Refer to the [Security](#) section for more about Security and Permission Sets.

Figure 24 - Conversation View for a custom object

Copy this code and modify the StandardController object to create a custom object Conversation View page:

```
<apex:page standardController="CustomObjectAPIName" sidebar="false"
  docType="html-5.0" standardStylesheets="false" showHeader="false"
  applyHtmlTag="false" applyBodyTag="false">
  <tdc_tsw:SMS_Conversation_Component />
</apex:page>
```

Object Configuration

As noted in the basic configuration section, you need to define the object and its phone field(s) to enable Outbound/Inbound SMS to and from that object. With custom objects it is common to use a formula field that points back to the Contact.MobilePhone field. However, one may also use standard editable phone fields. The Phone API pick list displays formula fields of type **TEXT** and fields of type **PHONE**.

In [Figure 25](#) we have an object which is the child object of a **Job_Listing** object and a **Contact** object, in other words, many Contacts that might be interested in a **Job_Listing**. Thus, we have created a formula field named **Contact_Mobile_Number** which pulls from the Contact.MobileNumber.

leadsCasesSMS SurveySMS HistorySMS TemplateSMS SetupSMS From ReportsSMS App HelpMessage Urls+

ORG CONFIG

USER CONFIG

OBJECT SETUP

GENERAL SETTINGS

Link Objects to Phone API

SaveReset

☐ Allow Multiple Name Mapping

Name	Phone API	Default Phone API	Enable Scheduler
Job Listing Contact	--None--	--None--	<input type="checkbox"/>

Name	Name API	Phone API	Default Phone API	Enable Scheduler	Action	
Case	1. CaseNumber	Job Listing Contact Name	number__c	contact_mobile_number__c	<input checked="" type="checkbox"/>	<div>EditDelete</div>
Contact	1. Name	1. mobilephone	mobilephone	mobilephone	<input checked="" type="checkbox"/>	<div>EditDelete</div>
Lead	1. Name	1. mobilephone	mobilephone	mobilephone	<input checked="" type="checkbox"/>	<div>EditDelete</div>

Figure 25 - Define objects and phone fields

Allow Multiple Name Mapping

By default, the **Send To** field in a batch SMS from a particular object is the objects NAME field. Especially with custom Objects and objects that act as a bridge such as a **Job_Applicant** object (ContactId + JobId), we often see a useless auto-number being used for the Objects NAME field. **Allow Multiple Name Mapping** allows one to choose fields other than the objects NAME field so that a more useful display of fields appears in the Send To.

ORG CONFIG

USER CONFIG

OBJECT SETUP

GENERAL SETTINGS

Link Objects to Phone API

SaveReset

☒ Allow Multiple Name Mapping

Name	Name API	Phone API	Default Phone API	Enable Scheduler
Favorite Listing	--None--	--None--	pba__contactmobile_pb__c	<input type="checkbox"/>

Create Message

Send To (Selected Favorite Listing: 2)

LL-000537

LL-000548

Yash Bhatia1

Steve Roch

Instead

Sender Phone

1608352 Alex

Security & Licensing / Onboarding New Users and/or New Numbers

360 SMS utilizes standard Salesforce security and licensing to grant users access to the various objects, buttons and functionality required for texting.

There are three important steps for onboarding new users discussed below:

1. **Licensing** – you must grant the user a 360SMS license (even if that user is only taking actions that will trigger an SMS but not actually using the applications buttons or interfaces.
2. **Permission Sets** – like most Salesforce apps, you must add the user to the **SMS App Permission Set** or if using custom objects use the “**SMS App Permission Set – Cloned**”
3. **User Config** (Phone Number + User) – you must add the user to the SMS User Configuration which is their UserId + Phone number combination. No association to a number means no outgoing SMS, this is THE most common reason for triggered SMS failure.

Licensing

The application is licensed per user like most Salesforce Apps. Each user that needs to send an outbound SMS must be licensed. This includes users that are only triggering actions that result in a triggered SMS because Salesforce always uses the context of the current user to fire triggered anything. Additionally, the user must be licensed to see the Conversation View VisualForce page and the SMS_History related list.

Note for Trial/Evaluations: During the Trial/Evaluation of 360 SMS the application is licensed for unlimited users, so you can ignore this licensing section.

As with all managed and licensed Salesforce Apps, licensing is managed from the Installed Packages page within Salesforce Setup. Simply press the Manage Licenses and add the users.

The screenshot shows the Salesforce Setup interface for 'Installed Packages'. The left sidebar has a search bar with 'install' and a link to 'Installed Packages' circled in red. The main content area shows a table of installed packages. The '360 SMS' package is highlighted in yellow, and its 'Allowed Licenses' (5) and 'Used Licenses' (2) are circled in red.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses
Uninstall Manage Licenses	Skuid	Skuid, Inc.	10.0.6	skuid	Active	25	1
Uninstall	Arrow PSA	Appclipse, LLC.	1.3	apollo	Free	N/A	N/A
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A
Uninstall Manage Licenses	360 SMS	360 SMS APP	1.121	tdc_tsw	Active	5	2
Uninstall Manage Licenses	ActionGrid	ActionGrid	1.89.3	CRMC_PP	Active	5	2

Figure 26 - License Management for 360 SMS

Permission Set

The easiest security approach is to add Users to the **SMS App Permission Set** which is created at installation time. As this is a managed permission set it cannot be edited other than to Add Users.

Consider cloning this permission set and using your cloned version instead, especially if you are creating additional Conversation View Visualforce Pages. A cloned permission set is required if using custom objects because Salesforce does not allow the necessary modifications of adding the new custom object Conversation View VisualForce pages to the managed package permission set. Thus, when 360SMS configures your org for you, as a

best practice we ALWAYS create a cloned permission set and generally add all Users since licensing will override their final access.

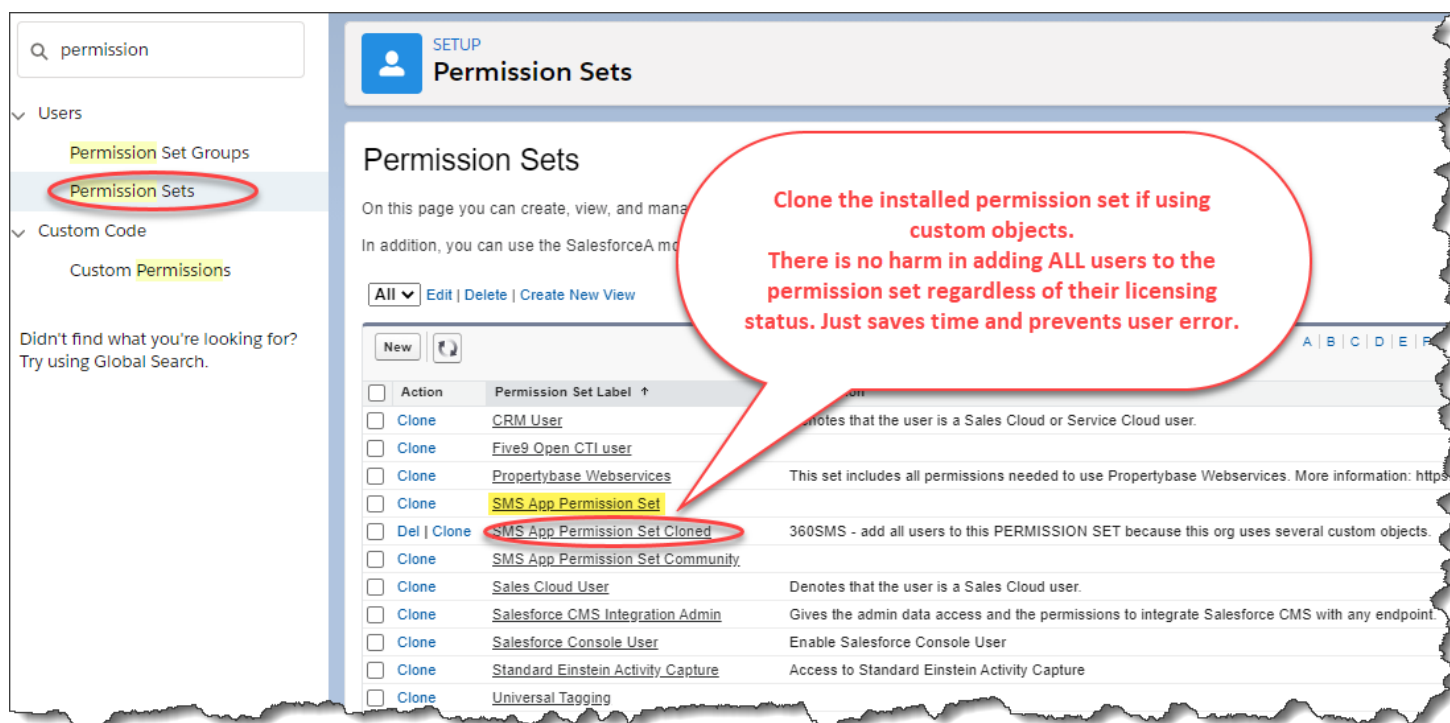


Figure 27 - Add Users to the SMS App Permission Set to grant them security to objects and functionality

User Configuration / Sender Number Pick List

In addition to Security, users must be configured in the 360 SMS **User Configuration** table. As shown in [Figure 29](#), each user must be matched to one or more phone numbers. Some organizations elect to use a single number where all users utilize the same number while other organizations assign numbers to departments or even each individual. If a user is assigned to more than one number, a Pick List appears for them to pick which number to use for Outbound messages. **The Sender Number pick list is controlled solely by the User Config table in [Figure 29](#).** If the user is only matched to one number, they never see the pick list.

Optionally, 360 SMS has a feature called “Sticky Sender” whereby a Salesforce formula field can be created on the Contact/Lead named specifically “Sticky_Sender”. This formula can define any business logic to default a Sender Number to the contact/lead. The most common use case is to default the sender number to the Contact.Owner.Phone or Contact.Owner.SMS_Number (custom field). The field can be labeled something like “Record Owner #” in this case and becomes a pick list choice when Batch Texting so that each contact gets the message from the respective record-based sender number.

The SMS Numbers are stored in the **ORG CONFIG** tab. You will be asked to press the Outgoing & Incoming Setup button whenever a new number is issued to your org and for other backend configured features. This process prompts for the Admin User Credentials which allow the number to be pushed into your org and for it to receive incoming SMS.

IMPORTANT Large Org Alert: Contact your Sales Rep or support@360degreeapps.com to enable an option that allows your developers to TRIGGER the creation of the User Configuration rows such as when adding new users based on various fields in your user table. In addition to the normal IMPORT options available for the User Config

there are also options such that when importing you can set custom settings to automatically License the users and add them to a defined permission set all in the import step.

SMS TemplateSMS HistorySMS SetupConversation MngrSMS From ReportsSMS App HelpVoice DropVoice Templates

ORG CONFIGUSER CONFIGOBJECT SETUPGENERAL SETTINGS

Allotted Virtual SMS Numbers

Outgoing & Incoming Setup

Show 5 Entries

Search By Number...

Number	Country	Status	Profile	Action
18087077534	US	Active	Michael	Edit
18087077247	US	Active	Kristen	Edit
voicedrop	US	Active		Edit
18084313179	US	Active	Debbie	Edit
18084313017	US	Active	Chris	Edit

Optional labeling of the number

Create Message

Sender Phone

18084313179 Debbie

18087077534 Michael

18087077247 Kristen

18084313179 Debbie

18084313017 Chris

Send To

C: Best Phone

Mobile/Phone Number

(425) 533-3875

Folder

--None--

Message

When the current user has access to more than one number defined in User Config they get a pick list. See next page

Sender Number

18084313179 De

18087077534 Michax.

18087077247 Kristen

18084313179 Debbie

18084313017 d

Figure 28 - Org Config can add an optional label to the number for easier multi-number management

Le SMS Setup CTI Setup

ORG CONFIG
USER CONFIG
OBJECT SETUP
GENERAL SETTINGS

Assign Virtual SMS Numbers to Users

[Download Sample File](#)

No file chosen

Show Entries
 Search By User or Number...

User	Number	Country	Auto Forward Mobile	Auto Forward Email	Email Alert To Owner	Default Sms Owner	Default Sender Number	Action
Tyger Roch	19543889461 US	US			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Steve Roch	17206050632 US	US			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Steve Roch	441234480564 UK	UK			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Steve Roch	14092026301 US	US	7208837457	tyger.roch@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Steve Roch	19166605210 US	US			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Figure 29 - User Configuration assigns numbers to each user and defines Alerts and SMS_History Ownership – full explanation of each field in the table below.

User Configuration Options Explained

Option	Definition
User	The Salesforce User. A single user may be related to multiple numbers in which case they will see a picklist of numbers to SEND SMS from, when sending outbound SMS.
Number	An SMS Enabled number purchased or ported from an existing Land Line to have its SMS Path enabled. Multiple users may be related to a single number and vice versa.
Country	Different numbers must be used for different countries (USA/Canada are the same). Phone number costs and the cost of outbound SMS msgs vary greatly by country.
Auto Forward Mobile	Allows inbound msgs to be forwarded to a personal mobile number. You cannot reply from your personal number though. Not recommended, as this also shows the forwarded SMS in the Convo View.
Auto Forward to Email	Allows inbound messages to be forwarded to an alternate email address other than the owner. Note that the Email Alert To Owner option already emails the owner so this is only for someone else.
Email Alert To Owner	When enabled a pre-defined (and customizable) email alert is sent to the SMS_History.Owner displaying the actual text message plus hyperlinks to the related Salesforce records. Utilizes a standard Salesforce Email Template which can be modified if desired. Review the "Reply to Email Alert" section to learn how users can reply to the alert to send an outbound SMS reply. Great for phone users that don't want to use Salesforce1 to reply.
Default SMS Owner	Resolves the SMS_History.Owner to this user when an Incoming message arrives without a previous Outbound message. Ownership rules are also governed by the preceding Outbound message or by the parent Objects owner field. Only one user per number can be designated as the Default SMS Owner.
Default Sender Number	In a multi-number situation, it can be advantageous to designate the default number for the user that has access to multiple numbers. Note that 360SMS also has a Record Based Sender Number where one creates a formula field named Sticky_Sender__c and if that field exists it uses that sender number.

SMS Templates

360 SMS provides robust SMS Templates for Individual Texting, Batch Texting and Programmatic triggered texting using Process Builders/Flows. The merge tag syntax is similar to Salesforce Email Templates so one can literally copy/paste existing email templates if desired.

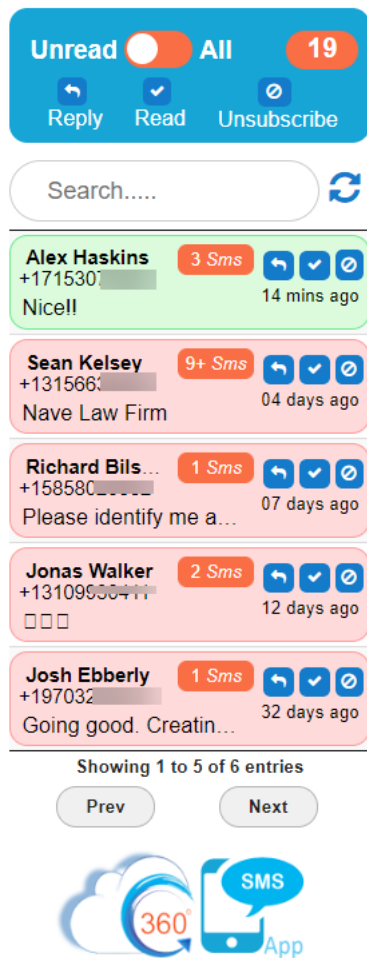
Unique to the 360 SMS application, templates can be categorized by:

- **Folders** – for easier management and selection from the Send SMS dialog
- **Record Type** – when assigned a record type, only templates matching the records Record Type appear in the picklist – great for enterprise orgs utilizing distinct record types and wanting to keep the list short
- **Status** – Those of type **Automation** do not show in the picklist but are available for process builder

The screenshot shows the 'SMS APP Message Template' interface. It includes fields for 'Template Name' (Contact - Demo Solicitation), 'Select Object' (Contact), and 'Select Status' (Active). A red callout points to the 'Select Status' dropdown, stating 'Filter out templates used in automation'. Below these is a 'Brief Description' field. A 'GENERATE FORMULA' section shows a list of merge tags for 'Contact', with 'Owner >' highlighted. A red callout points to this list, stating 'Pick merge tags and traverse up to 5 tables of Parent objects'. The 'Formula Value' field contains '{!Contact.owner.firstname}', with a red callout stating 'Copy/Paste tag into your message body.'. The 'TEMPLATE BODY' section shows a sample message: 'Hi {!Contact.firstname} - {!\$User.firstname} here @ 360SMS. Are you Interested In learning more about batch, automated and/or 1-on-1 texting from Salesforce? If so, book a demo here: {!\$User.meeting_link_demo__c}. Reply INTERESTED or NO'. Below this is a character count '240 Characters / 2 Segment'. At the bottom, there are 'Record Type' (Deutsch, Punjabi, Regular) and 'Folder' (Batch SMS) dropdowns. A red callout points to these, stating 'Further filter to the Template picklist by Record Type and Folders if desired.'

Figure 30 - 360 SMS Templates

Incoming Alerts



There are numerous ways to be alerted about incoming messages. First with a dashboard element that can be placed on:

- Salesforce Classic Dashboard
- Lightning Dashboard
- Lightning Utility Bar
- Salesforce Mobile Navigation Item

Secondly, an optional Sound Alert defaulted to ON in General Settings

Thirdly, via Automatic Incoming Notification email alerts, defined in the [User Configuration](#) section of this document.

The criteria that is used for the Incoming Alert is as follows:

1. SMS_History.Type = Incoming
2. SMS_History.Owner = Current User (or if sharing rules option is enabled those records as well).
3. SMS_History.Read = False (it hasn't been marked as read already)

Classic Home Page component

1. Salesforce Setup -> Search on the term "Home Page" and edit the Home Page Layout as shown in [Figure 31](#)
2. Enable the Incoming Alert component as shown in [Figure 32](#)
3. Press Next and arrange your Narrow Components with the Incoming Alert on top if desired.

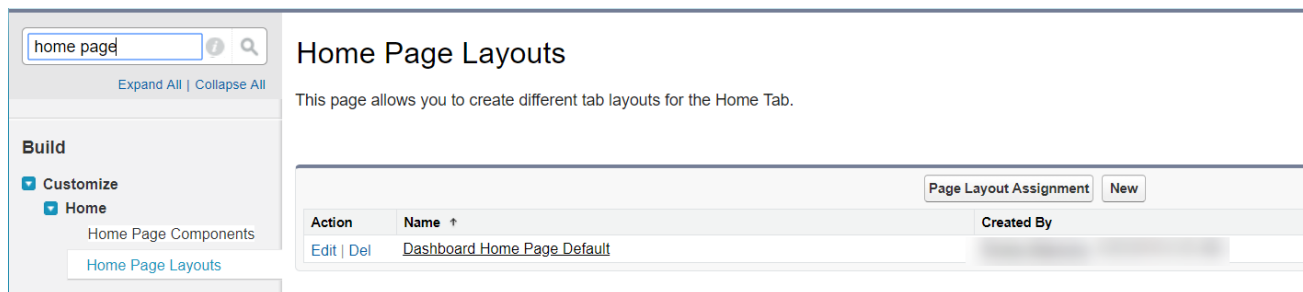


Figure 31 - SF Classic Home Page Layouts

Edit Home Layout Help for this Page

Step 1. Select the components to show Step 1 of 2

Choose the components to include on your home page layout.

Layout Name:

Select Wide Components to Show ! = Required Information

Items to Approve <input type="checkbox"/>	Calendar <input type="checkbox"/>
Tasks <input type="checkbox"/>	Dashboard Snapshot <input checked="" type="checkbox"/>
Paused Flow Interviews <input type="checkbox"/>	AG_Home <input type="checkbox"/>
DC Home Search <input type="checkbox"/>	

Select Narrow Components to Show

Create New... <input checked="" type="checkbox"/>	Recent Items <input checked="" type="checkbox"/>
Messages & Alerts <input type="checkbox"/>	Custom Links <input type="checkbox"/>
Tags <input type="checkbox"/>	Incoming Alert <input checked="" type="checkbox"/>

Next Cancel

Figure 32 – Enable the Incoming Alert Component

Items in the “Narrow Components” section can display on all Salesforce pages when the User Interface setting for Side Panels is enabled. Go to Settings, then search “User Interface” and turn on Show Custom Sidebar Components on All Pages as shown in [Figure 33](#).

Expand All | Collapse All

Build

☒ Customize

User Interface

Modify your organization's user interface with the following settings:

User Interface

- ☒ Enable Collapsible Sections
- ☒ Show Quick Create
- ☒ Enable Hover Details
- ☒ Enable Related List Hover Links
- ☐ Enable Separate Loading of Related Lists
- ☒ Enable Separate Loading of Related Lists of External Objects i
- ☒ Enable Inline Editing
- ☒ Enable Enhanced Lists
- ☒ Enable the Salesforce Classic 2010 User Interface Theme
- ⚠ Some features like Chatter require the Salesforce Classic 2010 user interface.
- ☐ Disable Navigation Bar Personalization in Lightning Experience
- ☒ Enable Tab Bar Organizer
- ☒ Enable Printable List Views
- ☒ Enable Customization of Chatter User Profile Pages i
- ☒ Enable Salesforce Notification Banner

Sidebar

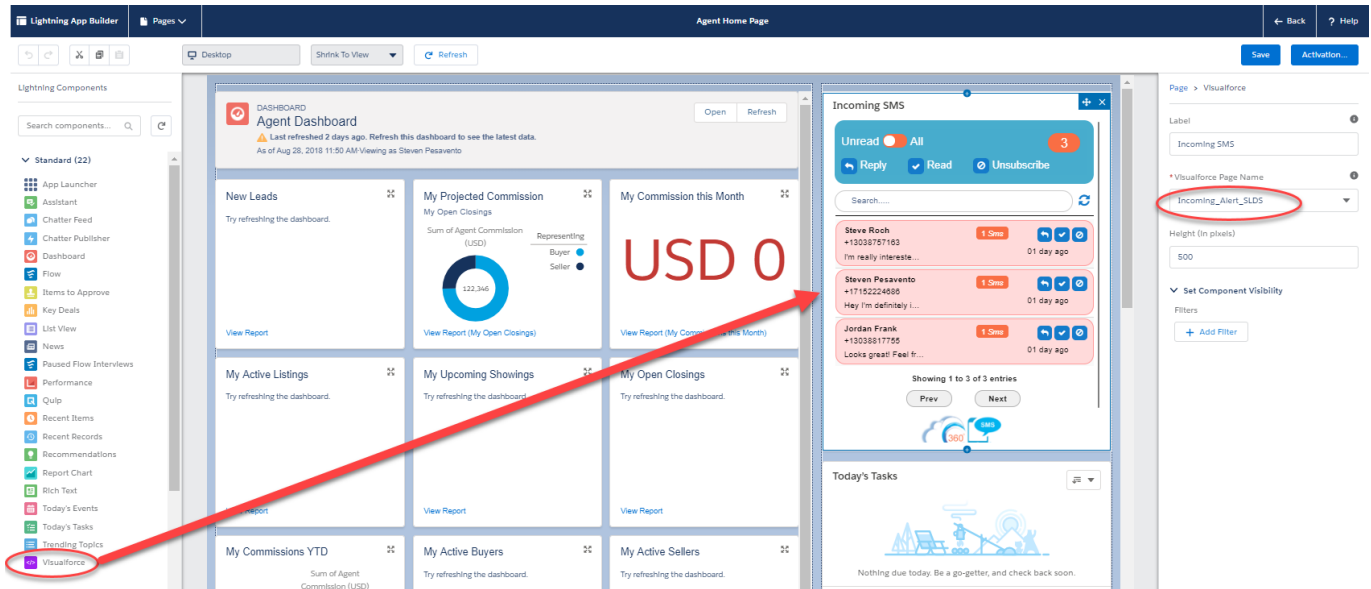
- ☒ Enable Collapsible Sidebar
- ☒ Show Custom Sidebar Components on All Pages

Figure 33 - Turn on Sidebar Components to see the Inbound Alert on all pages

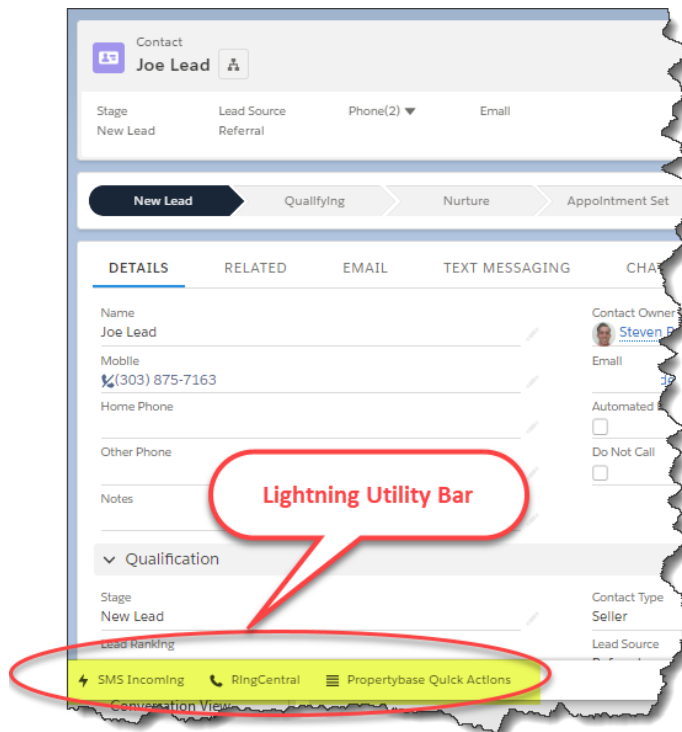
Lightning Home Page Component

With Lightning, the dashboards are modified via the **Lightning AppBuilder**.

1. Salesforce Settings → search Lightning AppBuilder or while on the actual dashboard choose Edit Page which will open the Lightning AppBuilder for that page.
2. Choose whichever dashboard you want
3. Choose the VisualForce component and drag it into the desired location
4. The Incoming SMS dashboard component is named **Incoming_Alert_SLDS**, set its height to at least 500 pixels.



Lightning Utility Bar Component



Salesforce Lightning has a feature called the **Utility Bar** which allows one to place dashboard components like the SMS Incoming Alert onto the utility bar for quick access.

To configure:

1. Salesforce Setup – then search **App Manager**
2. Choose the App that you want it to appear on
3. Select the Utility Bar option
4. Add a new Utility Bar item using the ADD button
5. Choose the Lightning Component named **Incoming_Alert_SLDS**
6. The Sound chime for an incoming SMS only rings if you are using the SF app with a utility bar defined.

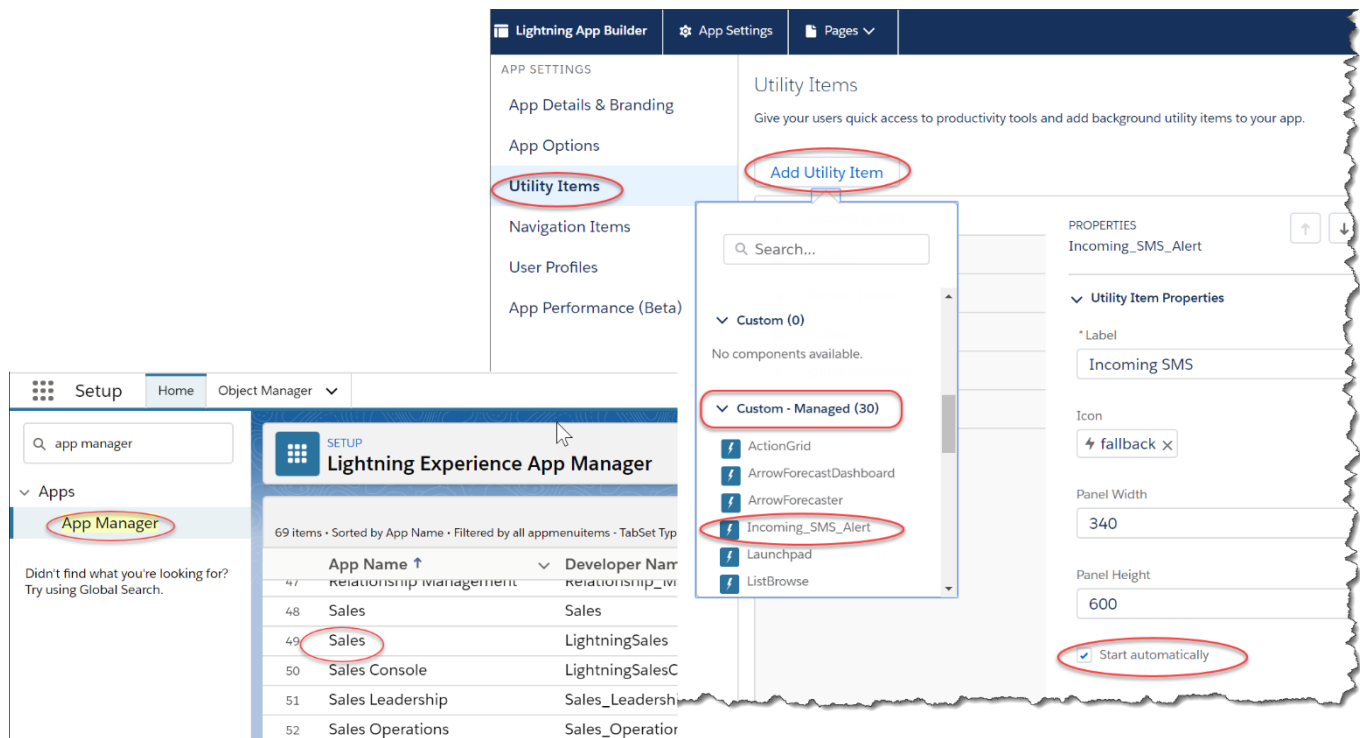


Figure 34 - Configure Lightning Utility Bar for an App

Incoming Alert for Salesforce Mobile (aka Salesforce1)

The Incoming Alert component can also be added to the Salesforce Mobile navigation via these steps:

1. Salesforce Setup → Salesforce Navigation
2. Add the Incoming Alert component to the Mobile Navigation as shown in [Figure 36](#)
3. **IMPORTANT** – since SF Summer 2019 release – Salesforce recommends creating a separate Mobile specific APP using Application Manager and therefore the Incoming Alert should be defined as a Navigation item in the App like a tab in the browser. Then when saving the App it asks to define the Supported Form Factors with choices:
 - a. **Desktop and Phone**
 - b. **Phone**

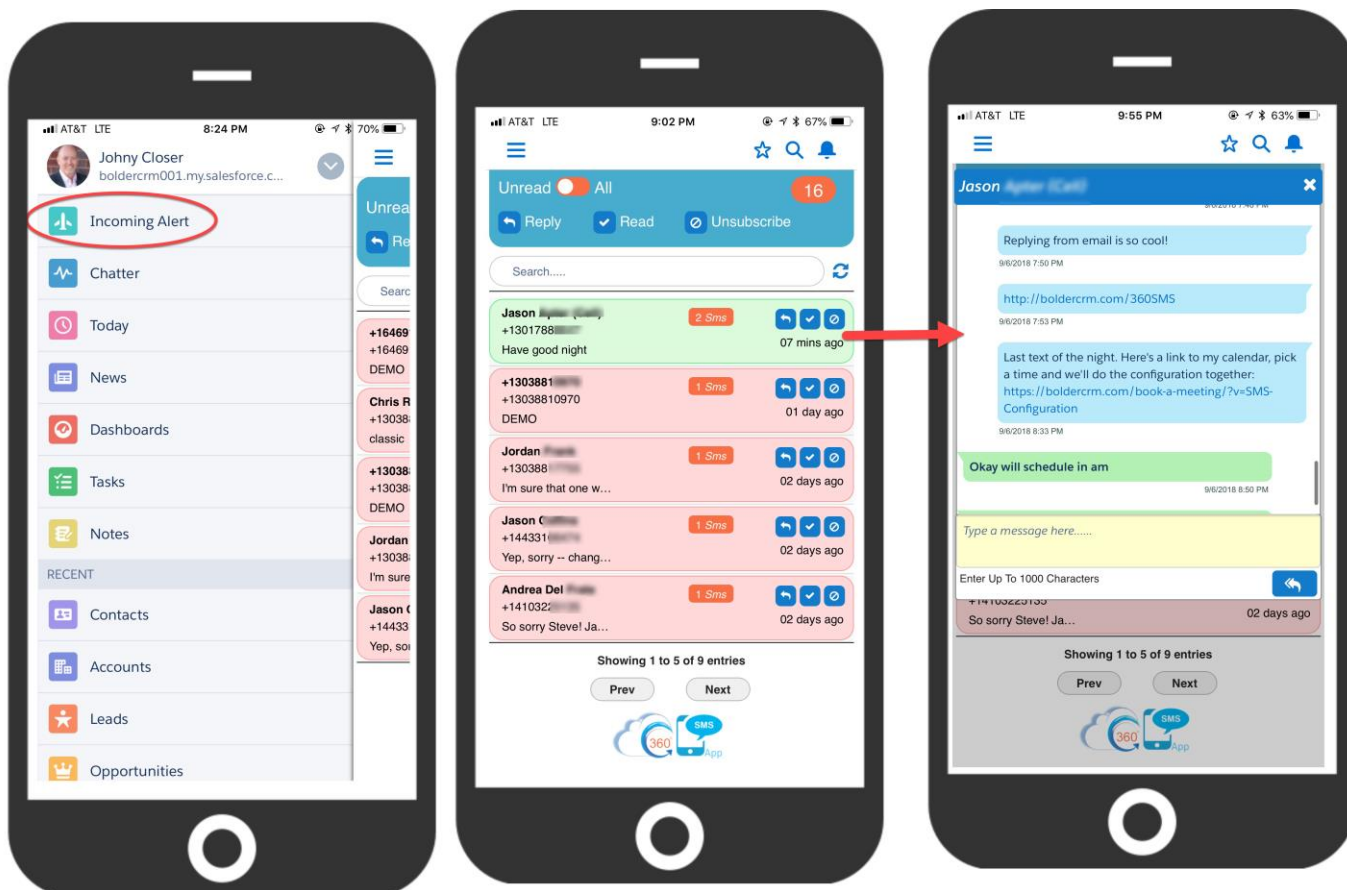


Figure 35 - The incoming alert component works seamlessly on Salesforce1

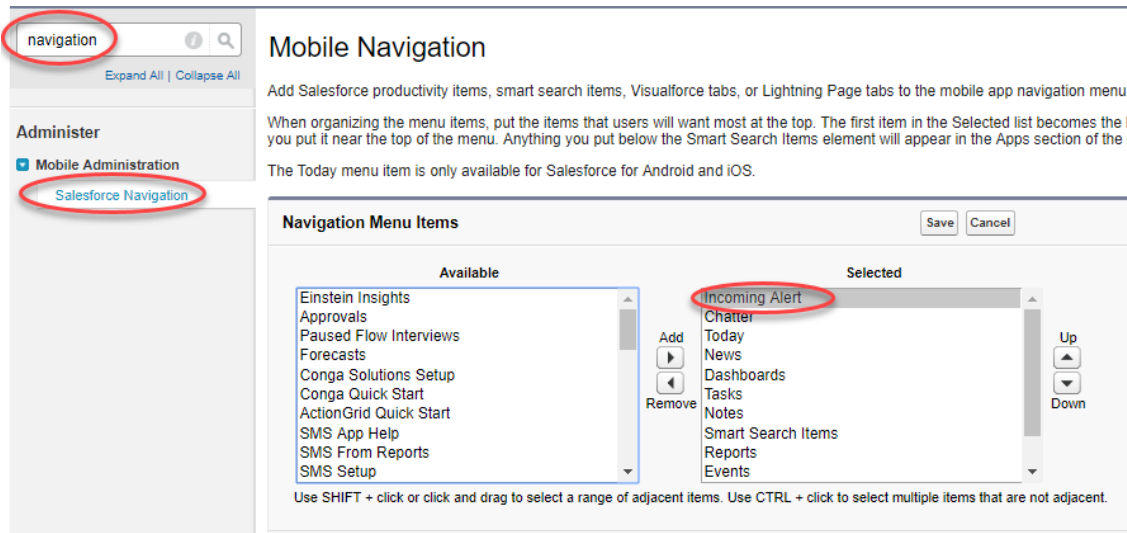


Figure 36 – Configure **Salesforce Navigation** to add the Incoming Alert to the Salesforce1 Navigation

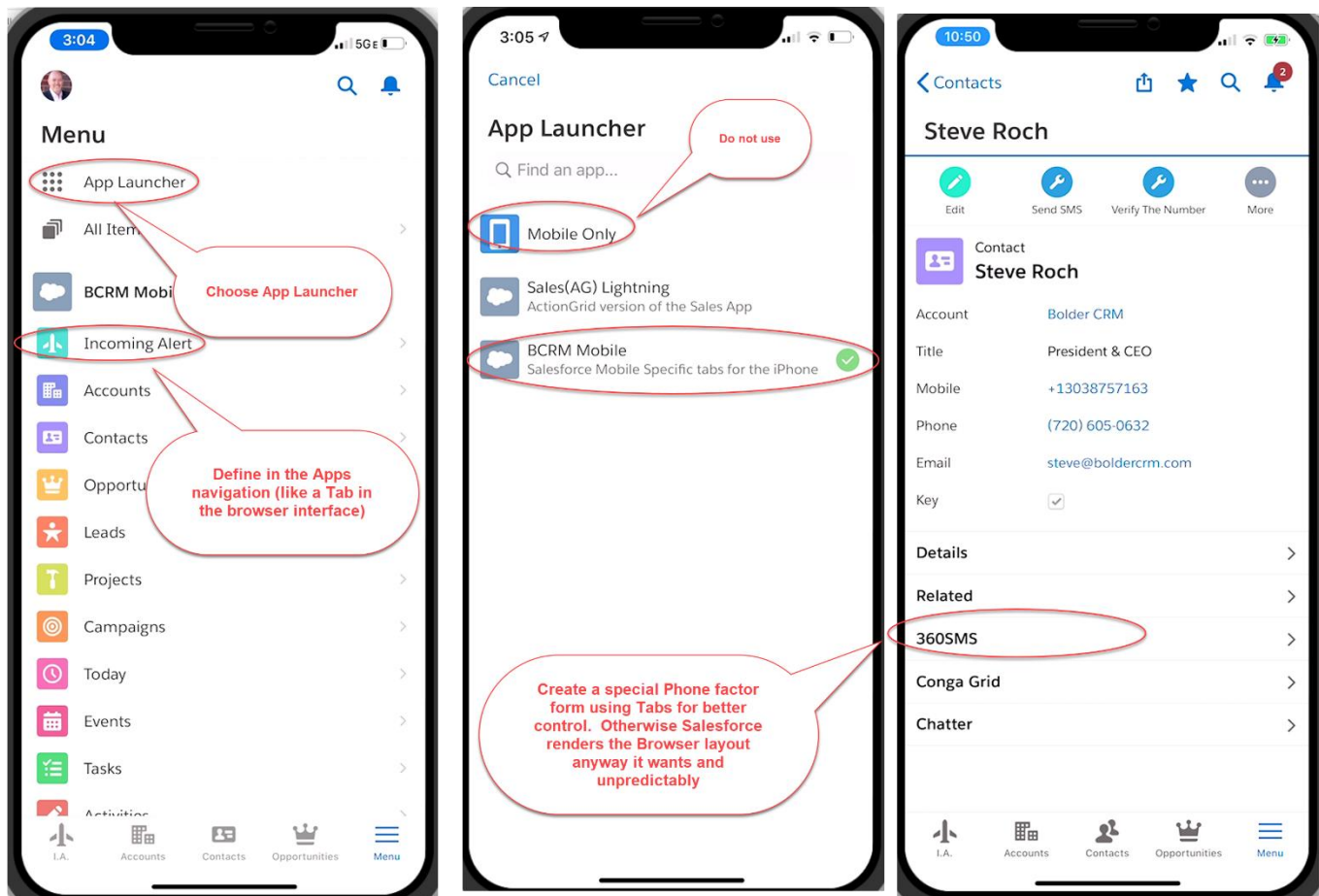


Figure 37 - Per Salesforce recommendations - define a Mobile app and add Incoming Alert as the first tab then all your other objects that you want to access. Also consider creating a separate PHONE factor for your contact/lead lightning page layout so you can better control where your SMS Conversation View displays

Reply to Email Alert Configuration

360 SMS provides the unique capability to REPLY to the Incoming SMS Notification email and have the text of that reply be sent as an Outbound SMS to the customer. This adds great value to users that may be on their phones and don't want to use the Salesforce1 Mobile app to respond (even though the Incoming Notifications makes that extremely easy as well).

This section explains how to set-up the standard Salesforce Email Service that facilitates this feature.

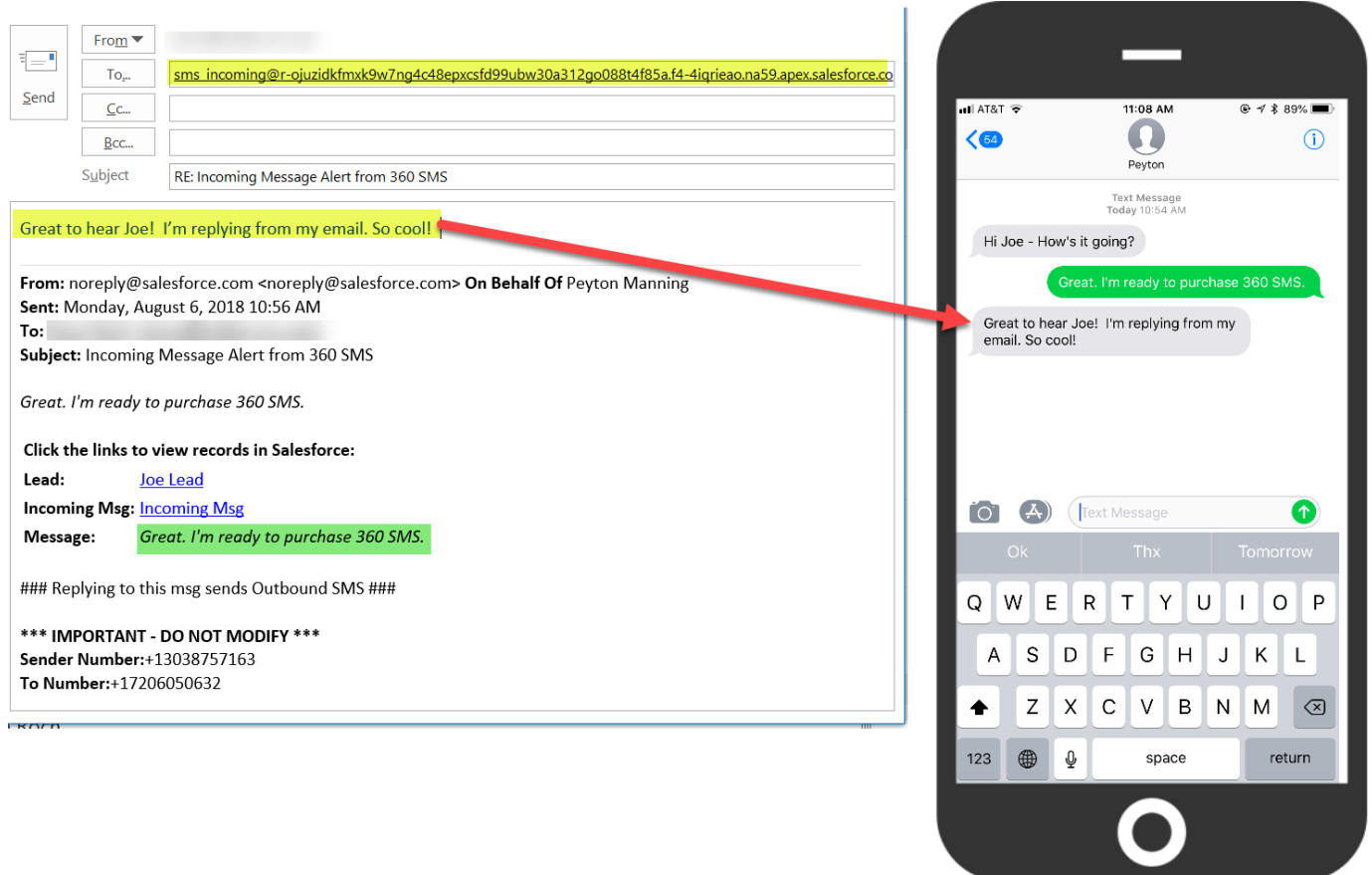
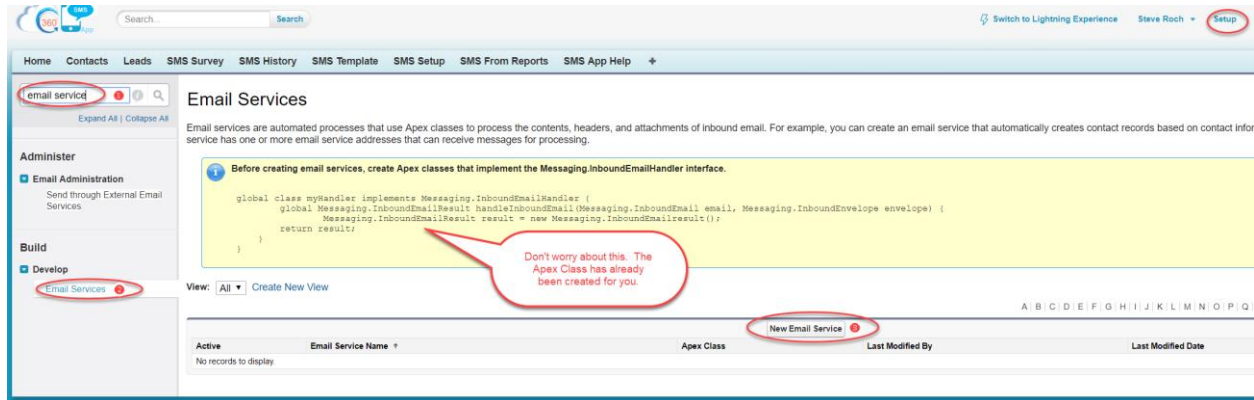


Figure 38 - Reply to email from your desktop or phone sends an outbound SMS to customer

Creating the 360 SMS Email Service

1. Go to Salesforce setup and type 'Email services' in the 'Quick Find' box and Setup -> Develop -> Email Services
2. Click on 'New Email Service'



3. Fill out the details as shown in Figure 39:
Email Service Name: 360 SMS Incoming
Apex class: ReplyFromEmailToSMS
Accept attachments: All
Active: True

4. Click on 'Save and New Email Address'

Email Service

Email services let you use Apex classes to process the contents, headers, and attachments of inbound email. Use the settings below.

Save Save and New Email Address Cancel

Email Service Information

Email Service Name: 360 SMS Incoming

Apex Class: ReplyFromEmailToSMS

Accept Attachments: All

Advanced Email Security Settings

Accept Email From: [Empty text box]

Convert Text Attachments to Binary Attachments: [Unchecked]

Active: ☒

Failure Response Settings

Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below.

Over Email Rate Limit Action: Discard message

Deactivated Email Address Action: Discard message

Deactivated Email Service Action: Discard message

Unauthenticated Sender Action: Discard message

Unauthorized Sender Action: Discard message

Enable Error Routing: [Unchecked]

Route Error Emails to This Email Address: [Empty text box]

Save Save and New Email Address Cancel

Figure 39 - Define the 360 SMS Email Service

6. Now enter the following details and Save
Email Address Name: SMS_Incoming
Email Address: SMS_Incoming
Active: True
Context User : Usually an Admin or Service User
Accepted Email From: Comma separated list of user emails or leave it empty for all users

Email Service Address

Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.

Email Service Information	
Email Service Name	360 SMS Incoming
Accept Email From	All email addresses (subject to security settings)

Email Address Information	
Email Address Name	<input type="text" value="SMS_Incoming"/>
Email address	<input type="text" value="SMS_Incoming"/> <small>Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.</small>
Active	<input checked="" type="checkbox"/>
Context User	<input type="text" value="Steve Roch"/>
Accept Email From	<input type="text" value="steve@boldercrm.com"/>

Save Save and New Cancel

Name cannot begin with a numeral (i.e. 360_SMS_Incoming won't work)

7. Now, we must copy the email address generated in Step 6 to the 360SMS General Settings.

Email Addresses			New Email Address
Action	Email Address Name	Email Address	
View Edit	SMS_Incoming	sms_incoming@r-qjuzidkfm9w7ng4c48epxcfd99ubw30a312qo08814f85a.f4-4igrie...na59.apex.salesforce.com	

Open link in new tab
Open link in new window
Open link with...
Open link in incognito window
Save link as...
Copy email address

SMS Setup
SMS From Reports
SMS App Help

1
ORG CONFIG
USER CONFIG
OBJECT SETUP
2 GENERAL SETTINGS

SMS Subscription

Save Cancel

Owner Details
SMS App Owner Name : Steve Roch

Enable Sharing for Incoming Messages :

Enable Reply :
Enable Read :
Enable Unsubscribe :

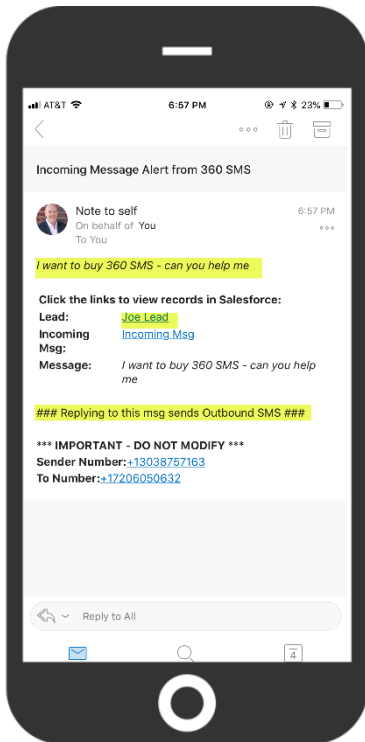
Email To SMS
Email Service Address : sms_incoming@r-qjuzidkfm9w7ng4c48epxcfd99ubw30a312qo08814f85a.f4-4igrie...na59.apex.salesforce.com

Enable Dark Hour

Figure 40 - General Settings - Email To SMS

8. That's it! You may not reply to your Incoming Alert Emails and your reply text will be sent as an Outbound SMS.

Incoming Email Alert Email Templates



The 360 SMS Incoming Notifications uses standard Salesforce Email Templates that are installed with the product. You may optionally edit these templates for your own purposes.

IMPORTANT:

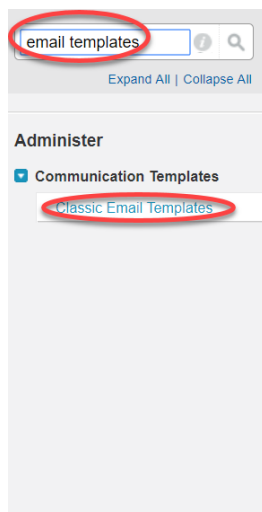
The algorithm to process the Reply Email looks for two specific strings in the email (**Sender Number:** and **To Number:**). Even though you may be tempted to change these, the labels and even the lack of space after the colons are important to parse out the messages. You also **cannot** use these labels (Sender Number & To Number) anywhere else in the HTML as these are used to find the key info after the colon.

Sender Number:+13038757163

To Number:+17206050632

Edit the Template

1. Go to Salesforce Setup and type 'Email Templates' in the 'Quick Find' box.
2. 360 SMS uses the template named **Incoming Message Alert** for the incoming email notification.
3. Edit the **Incoming Message Alert** as desired, specifically the HTML version
4. We suggest editing the **Incoming Message Alert** with the suggested code snippet we have provided below. This has been modified to fit on a phone, uses HTML table tags for nicer formatting and has some fixes to the hyperlinks.



Email folder

Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template. You emails, only text, HTML, and Custom templates may be used.

Folder: Email folder Edit | Create New Folder

A | B | C | D | E | F | G

Action	Email Template Name ↑	Template Type	Available For Use	Description
Edit Del	360 SMS - Demo ReTry	Custom	✓	
Edit Del	360SMS - Differentiators	Custom	✓	List of 360 SMS differentiators
Edit Del	360SMS - Pitch #3	Custom	✓	3rd pitch to old leads
Edit Del	360SMS - Retry #2	Custom	✓	Version 2 of the 360SMS old leads reach out
Edit Del	Chatter Incoming Template	Text	<input type="checkbox"/>	
Edit Del	Incoming Message Alert	Custom	✓	
Edit Del	SMS Clickthrough Alert	Custom	✓	
Edit Del	Uninstallation	HTML	✓	

Figure 41 - Edit the default email template for Incoming Message Alerts

Recommended HTML Template (copy/paste this code)

```
<b>Message:</b><br>
<i> {!tdc_tsw__Message__c.tdc_tsw__Message_Text_New__c}</i>
<br><br>
<table border="0">
  <tr><td colspan="2"><b>Click the links to view in Salesforce:<b></td></tr>
  <tr><td valign="top"><b>Links:</b></td><td
  valign="top">{!tdc_tsw__Message__c.tdc_tsw__Related_Object_Id_URL__c} or <a
  href="https://login.salesforce.com/{!tdc_tsw__Message__c.Id}" target="_blank">Incoming Msg</a></td></tr>
  <tr><td valign="top"><b>Sender:</b></td><td
  valign="top">{!tdc_tsw__Message__c.tdc_tsw__Sender_Name__c}</td></tr>
  <tr><td valign="top"><b>Message:</b></td><td
  valign="top"><i>{!tdc_tsw__Message__c.tdc_tsw__Message_Text_New__c}</i></td></tr>
</table>
<br>
##### Reply To Send Outbound #####<br><br>
<b>*** IMPORTANT - DO NOT MODIFY ***</b><br>
<b>Sender Number:</b>{!tdc_tsw__Message__c.tdc_tsw__Sender_Number__c} <br>
<b>To Number:</b>{!tdc_tsw__Message__c.tdc_tsw__ToNumber__c}<br>
```

Default Out-of-Box Email Template (in case you need to revert back)

```
##### Reply Above #####<br><br>
Hello, <br><br>
You have received an incoming message. <br><br>
<i>{!tdc_tsw__Message__c.tdc_tsw__Message_Text_New__c}</i> <br><br>

To view the message, click
<a href="https://login.salesforce.com/{!tdc_tsw__Message__c.Id}" target="_blank">Here</a><br><br>
To view associated record, click
<a href="https://login.salesforce.com/{!tdc_tsw__Message__c.tdc_tsw__Related_Object_Id__c}"
target="_blank">Here</a><br><br>
<b>More Details:</b> <br>
<b>Sender Name:</b>{!tdc_tsw__Message__c.tdc_tsw__Sender_Name__c} <br>
<b>Sender Number:</b>{!tdc_tsw__Message__c.tdc_tsw__Sender_Number__c} <br>
<b>To Number:</b>{!tdc_tsw__Message__c.tdc_tsw__ToNumber__c}<br><br><br>

Thanks , <br><br>

360 SMS App for Salesforce <br><br>
```

MMS – Sending Pictures/Files

MMS (Multi-Media Message Service) is the industry standard term for sending/receiving pictures via text messaging.

360 SMS allows for both Outgoing and Incoming MMS. Attached files are stored natively in Salesforce in the SMS_History.Attached_Files field which uses the native Salesforce **Document** object. The attached files display directly on the Conversation View as well. See [Figure 42](#).

Key Information:

1. The Attach Files button is available from all the various methods of sending an SMS whether that be from a button or conversation view or the SMS from Reports.
2. Batch MMS stores only a single copy of the File(s) for efficient storage, then all the SMS_History records point to this single file.
3. Expose the SMS_History.Attached_Files field on your SMS History Related List (optional if using Convo View)
4. **IMPORTANT:** MMS requires Content-Delivery to be enabled. Create a Case with Salesforce if Content Delivery is not enabled.
5. File Types Supported by the MMS standard and thus the 360SMS application:
 - a. .jpeg
 - b. .gif
 - c. .png
 - d. .bmp
 - e. .mpeg - videos are allowed but keep them small – consider sending a hyperlink instead. Each phone provider controls whether to deliver a video based on it's size and since you will not know your customers phone provider we do not recommend sending videos.
 - f. .pdf - although the interface lets you choose PDF's most mobile phone providers now block PDF. Since you will not know your customers phone provider, we recommend a hyperlink to the PDF or a Picture is better. Note that the WhatsApp channel does indeed support PDF.
 - g. .vcf – vCards, also known as Virtual Contact Files, are a standardized file format for sending business/contact information which can be easily imported into address/contact books. At present one cannot manually select the file type of .vcf but many customers programmatically send the current Users Picture or VCard. More in the [Sending SMS with Process Builder](#) guide.
6. File Size limits are imposed by the phone providers – most recommend file sizes of 1mb or less. Below is a list of file sizes limits issued by a few USA providers as of **5.1.2020**. However, since you will not know your customers provider, take care to use relatively small files.
 - a. AT&T 1.4 MB
 - b. Sprint 1.4 MB
 - c. T-Mobile 0.675 MB
 - d. Verizon 0.675 MB
7. MMS is Country specific; many countries do not support MMS. USA/Canada supports MMS.











-
- Verizon LTE 9:24 AM 96%
- < (708) 637-5814 >
- Reminder-- My Window Works is looking forward to our 1:00pm visit tomorrow!
- Yesterday 1:02 PM
- WINDOW WORKS**
Quality Windows and Siding • Made Easy!
- Today 9:00 AM
- Reminder-- James McCann from My Window Works is looking forward to our 1:00PM visit today! For your comfort and protection, a picture of James is attached.
- 
-   Text Message 
-   Apple Pay     

Figure 42 - MMS stores attachments in native Salesforce Documents object, easily accessible from Convo View or Related List

Hyperlink Clickthrough Tracking

360 SMS provides the unique ability to send links via SMS and have the clickthrough's tracked against the SMS History record. The clickthrough statistics are stored in the **Message URL** related list of the outbound **SMS History**. One can write powerful reports and Process Builder automations based on this data, making 360 SMS truly unique in its SMS Marketing abilities.

SMS History Detail

SMS Type: Outgoing

To Number: +13038757163 %

Sender Number: 17206050632 %

Created Date: 3/26/2020 10:18 AM

Created By: Steve Roch, 3/26/2020 10:18 AM

Error Code:

Error Message:

Owner: Steve Roch [Change]

Delivery Status: **Delivered**

Message Segment: 2

Clicks: 2

Last Click: 27-Mar-2020 9:30 AM Mountain Standard Time(MST)

Source: ContactList View

Message & Template

Message: Hi Steve - Are you interested in learning about batch, triggered or 1-on-1 text messaging from Salesforce? Reply INTERESTED or NO

Cheers,
Steve @ Bolder CRM
Phone: (720) 605-0632
Learn more at: <https://boldercrm.com/360SMS>

SMS Template: Contact - Batch SMS Demo Spam

Linkages (Objects/Records the Message is linked to)

MMS

Message Urls

Action	Message Url Name	Url	Clicks	First Click	Last Click	Created Date
Edit Del	L-2380	https://boldercrm.com/360SMS	2	3/26/2020 10:25 AM	3/27/2020 9:30 AM	3/26/2020

SMS History

Action	SMS Type	Created Date	Message
Edit Del	Incoming	3/27/2020 9:31 AM	Interested

Mobile Phone Screen:

Text Message
Yesterday 10:18 AM

Hi Steve - Are you interested in learning about batch, triggered or 1-on-1 text messaging from Salesforce?
Reply INTERESTED or NO

Cheers,
Steve @ Bolder CRM
Phone: (720) 605-0632
Learn more at: <https://boldercrm.com/360SMS>

Reply 9:31 AM

Interested

Figure 43 - The SMS History record stores the click count and the hyperlink in the Message_URL object

Click Count

Hi Steve - Are you interested in learning about batch, triggered or 1-on-1 text messaging from Salesforce?
Reply INTERESTED or NO

Cheers,
Steve @ Bolder CRM
Phone: (720) 605-0632
Learn more at: <https://boldercrm.com/360SMS>

By: Steve Roch 10:18 AM

Interested
To: Steve Roch 09:31 AM

Today

Figure 44 - In the convo view the click count is displayed as a red number on the Globe Icon that allows you to also drill-down into the underlying SMS History record

Key Points:

1. You must write to support@360degreeapps.com and your account manager to request that **Link Tracking** be enabled, plus you will need a spare 360 SMS license as noted in item 3 below.
2. Link Tracking uses the standard Salesforce **Sites** technology that must be configured to communicate the clickthrough data back into Salesforce. Thus, Sites must be setup as documented in the next section. The Sites technology also facilitates **Delivery Reporting**.
3. Because the Salesforce Sites technology requires a Salesforce License to function properly, the feature requires the “**360 SMS Hyperlink Tracking License**”.
4. Link Tracking is not supported on **Salesforce Professional or Group Edition** because these versions do not support the Salesforce Sites technology.
5. When Link Tracking is enabled, an outbound SMS with a link always creates a **Message URL** record even before it is clicked, so that it is easy to report those records with or without a clickthrough. The **Clicks** Count will simply remain at 0 if never clicked.
 - a. Since the Message_URL table is native Salesforce and is updated each time the link is clicked in real-time, it is a huge benefit for Process Builder developers who commonly do the following with a simple trigger on the Clicks [count] changing from 0 to >0. **Examples:**
 - i. Create a scheduled Task for the Contact.Owner - “call this hot lead”
 - ii. Increase/Increment a Lead Score or change a Lead.Status
 - iii. Stop or Start an SMS Drip Campaign
 - iv. Trigger an email to the customer with even more information
6. When enabled in SMS Setup → General Settings an automatic email is sent to the SMS_History.Owner when his/her link is clicked. See next section for more detail on this useful feature.
7. **Bit.Ly** Support: When combined with the optional Bit.Ly integration, regular links entered into outbound messages convert to a shortened Bitly link automatically. The customer sees only the Bitly shortened link but within the SMS History the SF user sees the actual link.
 - a. The Bit.ly integration is not required. However, without Bitly turned on the links go out converted to a trackable link that is indecipherable but typically too weird looking for most customers.
 - i. Here’s an example of a trackable but non-Bitly shortened link:
https://boldercrm.secure.force.com/IncomingSMS/tdc_tsw_LT?t=SFGoXWXW
 - b. You must setup a free or paid Bitly account using these [instructions](#).
 - c. If you paste in a manually created Bitly link into your message while the automatic Bitly integration is enabled, 360SMS knows to **NOT** re-Bitly this link and will disable its creation of the Message_URL. This is deliberate as you are wanting to track the link up on the Bitly server even though Bitly’s reporting is much less robust than 360/Salesforce. We do not recommend this.
8. Tiny URL support: An alternative to Bitly is TinyURL. Write to support@360degreeapps.com to activate this method.
9. Only one link can be sent and tracked per outbound SMS.

Link Tracking	
Link tracking status from backend: ?	Enabled
Enable link tracking for Bitly: ?	✓
Bitly generic access token: ?	*****
Enable link tracking for Tiny URL: ?	X

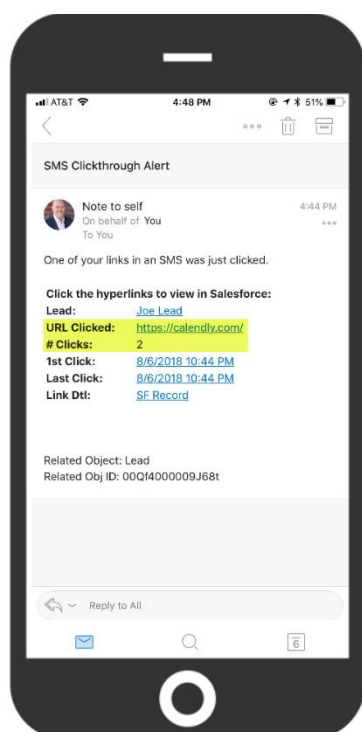
Figure 45 – Text, Email or Call your salesperson to enable Link Tracking

Define a Clickthrough Email Alert

The system offers an automatic email alert if one of your links in an SMS was clicked. Enable this feature in the **General Settings** as shown below. The Email Template that is used is also customizable as it is a native Salesforce Email Template which can be edited, see below.

Email Alert


Message URL Email Alert:  



Custom Email Template

message url Alert (Managed)

Preview your email template below.

 This Email Template is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Email Template Detail

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Clone

Folder	Email folder
Email Template Name	message url Alert
Template Unique Name	message_url_Alert
Namespace Prefix	tdc_tsw
Installed Package	360 SMS
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Author	Steve Roch [Change]
Description	Used to Send Url click through alert to Owner
Created By	Steve Roch 11/13/2018 11:00 AM

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject

SMS Clickthrough Alert

HTML Preview

One of your links in an SMS was just clicked.

Click the hyperlinks to view in Salesforce:

{!tdc_tsw_Message_Url_c.tdc_tsw_Related_Object_c}.
[{!tdc_tsw_Message_Url_c.tdc_tsw_Sender_Name_c}](#)
[{!tdc_tsw_Message_Url_c.tdc_tsw_UrlLink_c}](#)
[{!tdc_tsw_Message_Url_c.tdc_tsw_Clicks_c}](#)
[{!tdc_tsw_Message_Url_c.tdc_tsw_First_Click_tz_c}](#)
[{!tdc_tsw_Message_Url_c.tdc_tsw_Last_Click_tz_c}](#)
[SF Record](#)

Salesforce Sites

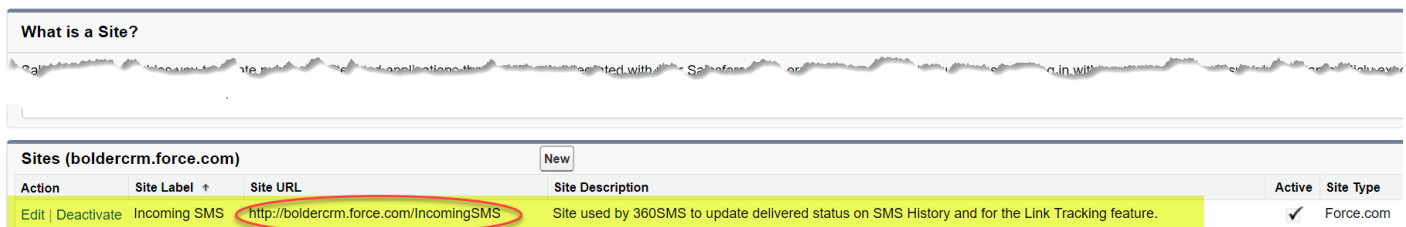
360 SMS offers automatic **Hyperlink Click Tracking** as well as updating of the **Delivery Status** of outbound SMS Messages as well using standard Salesforce Sites technology. Because the Salesforce Sites technology requires a Salesforce License to function properly these features are require the “**360 SMS Hyperlink Tracking License**”, contact sales@360DegreeApps.com.

Because, these services are writing into your Salesforce system to update various fields, we must use the standard Salesforce **Sites** technology to create this communication channel. The site runs as its own user profile so we must also give it security access via the standard **SMS App Permission Set**.

Note: Sites are not supported in **Salesforce Professional Edition** and thus Delivery Status and Link Tracking are not available for Professional Edition.

When we’re all done, we’ll have something like shown

Sites



The screenshot shows the Salesforce 'Sites' page for the org 'boldercrm.force.com'. At the top, there's a 'What is a Site?' section. Below it, a table lists the sites. One site is listed: 'Incoming SMS' with the URL 'http://boldercrm.force.com/IncomingSMS', which is circled in red. The site is active and of type 'Force.com'.

Sites (boldercrm.force.com)					
Action	Site Label ↑	Site URL	Site Description	Active	Site Type
Edit Deactivate	Incoming SMS	http://boldercrm.force.com/IncomingSMS	Site used by 360SMS to update delivered status on SMS History and for the Link Tracking feature.	✓	Force.com

Figure 46 - Incoming SMS Sites needed for Delivered Status and Link Tracking

Create a Salesforce Site:

1. Go to Setup → Quick Find → **Sites**
2. You may or may not have a primary site already created for your org such as shown in [Figure 48](#). If no site has been previously created, you must create one, [Figure 47](#).
3. From [Figure 48](#), press **NEW** to create a new Site
4. Make the new Site look exactly as shown in [Figure 49](#).
5. When the Incoming SMS site has been created, copy its Site URL and paste it into the **SMS Set-up → General Settings → Site URL**, as shown in [Figure 50](#).

6. The new **Incoming SMS** site runs under its own **security profile** and thus we must give it access to all the various 360SMS items by putting it into the same Permissions Set as regular users, see [Figure 51](#) for the steps to get there

Sites

To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com such as 'mycompanyportal.'

You cannot modify your Salesforce site domain name after the registration process.

http://boldercrm .force.com

☒ I have read and accepted the Salesforce [Sites Terms of Use](#)

Figure 47 - Salesforce Sites - no previous site has been created so we must make one for the first time.

Sites

Create your Force.com Sites

Your Salesforce site domain name is **boldercrm.force.com**
[Salesforce Sites Terms and Conditions](#)

Sites (boldercrm.force.com)

Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
No records to display					

Create a new site named "Incoming SMS"

Figure 48 - Create a new Site

Site Edit

New Site

SaveCancel

Site LabelIncoming SMS*i*

Site NameIncoming_SMS*i*

Site Description

Site used by 360SMS to update delivered status on SMS History and for the Link Tracking feature.

Site ContactSteve Roch*i*

Default Web Addresshttp://boldercrm.force.com/IncomingSMS*i*

Active☒ *i*

Active Site Home PageSiteLogin*i*

Inactive Site Home PageInMaintenance*i* [Preview]

Site TemplateSiteTemplate*i*

Site Robots.txt*i*

Site Favorite Icon*i*

Analytics Tracking Code*i*

URL Rewriter Class*i*

Enable Feeds☐

Clickjack Protection LevelAllow framing by the same origin only (recommended) *i*

Require Secure Connections (HTTPS)☒ *i*

Upgrade all requests to HTTPS☒ *i*

Enable Content Sniffing Protection☒ *i*

Enable Browser Cross Site Scripting Protection☒ *i*

Referrer URL Protection☒ *i*

Guest Access to the Support API☐ *i*

SaveCancel

Figure 49 - Incoming SMS site for Delivery Status and Link Tracking

SMS History SMS Template **SMS Setup** SMS From Reports SMS App Help +

ORG CONFIG USER CONFIG OBJECT SETUP GENERAL SETTINGS

SMS Subscription

Edit

Owner Details

SMS App Owner Name : Steve Roch

Subscription Keywords

Re-Subscribe Keywords : Start,Subs

Unsubscribe Keywords : Stop,Unsubscribe

SMS Delivery Report Setting

Site URL : <http://boldercrm.force.com/incomingSMS>

Keywords To Create New Lead and Case

Figure 50 - Set the Site URL to the Incoming SMS Site which was just created

Security for Salesforce Sites

Because the Incoming_SMS site accesses Salesforce like other users, we must give the **Incoming_SMS** site user the same permissions that a regular user would have. We do this by adding the Site/User to the out-of-box 360SMS Permission Set (**SMS App Permission Set**). [Figure 51](#) illustrates the steps as it's a long haul to get to Permission Sets from the Sites record.

Additionally, the Site User must be assigned a 360 SMS license. As the Site User is a special kind of user you do this from the same Site User record where the Permissions Sets were just added. [Figure 52](#) illustrates that you use the Managed Packages related list to then Assign Licenses to the Site User.

Because the Salesforce Sites technology requires a Salesforce License to function properly these features require the “**360 SMS Hyperlink Tracking License**”, contact sales@360DegreeApps.com.

Site Details

Incoming SMS

« Back to List: Sites

Site Detail

Site Label	Incoming SMS
Site Description	Site used by 360SMS to update delivered status on SMS History and for the Link Tracking feature.
Active	<input checked="" type="checkbox"/>

Edit Public Access Settings¹ Login Settings URL Redirects Deactivate

Profile

Incoming SMS Profile

« Back to List: Visualforce Pages

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile to match their needs.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more changes.

Login IP Ranges [0] | Enabled Apex Class Access [128] | Enabled Visualforce Page Access [50] | Enabled Lightning Component Access [0]

Profile Detail

Name	Incoming SMS Profile
User License	Guest User License
Description	
Created By	Steve Roch, 7/23/2018 12:15 PM

Edit View Users²

Incoming SMS Profile

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile device.

Action	Full Name ↑	Alias	Username
Edit	Site Guest User, Incoming SMS ³	guest	incoming_sms@boldercrm.force.com

User

Incoming SMS Site Guest User

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0]

User Detail

Name	Incoming SMS Site Guest User
Alias	guest
Email	steve@boldercrm.com
Username	incoming_sms@boldercrm.force.com
Nickname	Incoming_SMS ⓘ

Edit Sharing

Permission Set Assignments

Incoming SMS Site Guest User

Save Cancel

Available Permission Sets

- Duplicate Check for Salesforce
- Einstein Analytics for Sales Cloud
- Inbox With Einstein Activity Capture
- Inbox Without Einstein Activity Capture
- Lookup Rollup Summaries - Configure Rollups
- Lookup Rollup Summaries - Process Rollups
- Sales Cloud User
- Sales User
- Salesforce Console User
- Standard Einstein Activity Capture

Add Remove

Enabled Permission Sets

- SMS App Permission Set⁵

Figure 51 – Put the Incoming_SMS special service user into the SMS App Permission Set

Incoming SMS Site Guest User

[Permission Set Assignments \[1\]](#) | [Permission Set Assignments: Activation Required \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [User Skills \[0\]](#)

User Detail

[Edit](#) [Sharing](#)

Name Incoming SMS Site Guest User

User License Guest License

Alias guest

Profile Incoming SMS Profile

Email

Active

Managed Packages

[Assign Licenses](#)

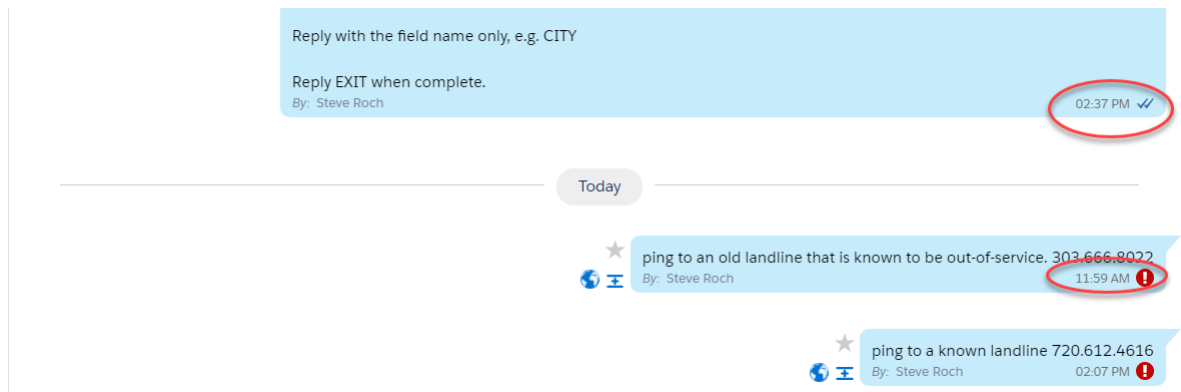
Action	Package Name	Status	Expiration Date
	SalesforceIQ Inbox	Free	Does not Expire
	360 SMS	Active	Does not Expire
	Salesforce Connected Apps	Free	Does not Expire
	Salesforce and Chatter Apps	Free	Does not Expire
	360 MMS	Active	Does not Expire
	List Browse	Free	Does not Expire
	Highlighter	Active	Does not Expire
	Duplicate Check for Salesforce1	Active	Does not Expire

Figure 52 - The Site user must also be assigned a 360SMS license - do this from the Managed Packages related list on the Site User record

Delivery Status

360 SMS updates the SMS History.Delivery Status field with values of **SENT** or **DELIVERED** when the Sites Configuration above has been configured and licensed. This facilitates delivery reporting.

When the outbound message is initially sent, the Delivery Status = Sent, then afterwards many but not all providers report back a delivery Status of DELIVERED or an Error Code. The Conversation View shows a fully delivered message as a double-checkmark (✓✓). A single checkmark means it was sent but not confirmed as delivered and the red exclamation indicates that it absolutely was not delivered because of an error.



IMPORTANT NOTE: Just like your own mobile phone, the delivery status may not be updated instantly or ever. If the destination phone is turned off or in Airplane mode, the texting aggregator continues to try to deliver the message for several hours. It may take 24 hours for the Delivery Status to update and depending on the destination provider **it may never update**. Delivery reporting is handled differently by each individual phone carrier (ATT, T-Mobile, Verizon, Mom&Pops Cheapo Phone Company) which then reports back up to the Texting Aggregator who in turn reports it to the 360 SMS platform. Therefore, **deliver reporting will never be completely accurate** but 360 SMS is the only platform that even attempts delivery reporting. The one exception is when reporting actual errors such as Landline. **An actual error is usually returned within seconds of sending.**

360 SMS SMS History

	Created Date	SMS Ty...	Deliv...	Delivery Status	Error Code	Error Message	To Number
1	6/8/2020 7:19 AM	Outgoing		Undelivered	30006		(949) 639-
2	6/8/2020 6:53 AM	Outgoing		Undelivered	30005		(303) 554-
3	6/8/2020 6:50 AM	Outgoing		Undelivered	30005		(303) 666-
4	6/8/2020 6:44 AM	Outgoing		Undelivered	30005		(303) 666-
5	6/4/2020 11:50 AM	Outgoing		Undelivered	21211		+1
6	6/3/2020 10:50 AM	Outgoing		Undelivered	21211		+1
7	6/1/2020 3:50 PM	Outgoing		Undelivered	21604		
8	6/1/2020 1:20 PM	Outgoing		Undelivered	21604		
9	5/29/2020 10:50 AM	Outgoing		Undelivered	21604		
10	5/28/2020 12:20 PM	Outgoing		Undelivered	30008		+140252
11	4/17/2020 12:50 PM	Outgoing		Sent		A 'To' phone number is required.	
12	4/17/2020 10:06 AM	Outgoing		Sent		A 'To' phone number is required.	
13	4/16/2020 10:59 AM	Outgoing	✓	Delivered	30008		+197043
14	4/15/2020 5:46 PM	Outgoing		Undelivered	30005		+44020805
15	4/14/2020 12:50 PM	Outgoing		Sent		A 'To' phone number is required.	
16	4/3/2020 10:38 AM	Outgoing		Undelivered	63003		5939984172
	3/25/2020 8:50 AM	Outgoing		Sent		Number: +441234480564 has not been enabled for MMS	9181305022

Filter by Owner
All sms history

Matching these filters

1. SMS Type equals Outgoing

2. Error Code not equal to

3. Error Message not equal to

Add Filter Remove All

Filter Logic 1 Remove

1 AND (2 OR 3)

Figure 53 - Delivery Status is updated when the Salesforce Site has been configured

The platform returns **error codes** and/or an accompanying **error message** from the texting aggregators into the SMS History record when the message is **definitely NOT delivered**. Below is a table of common Error Code and

Error Message values. Clever developers often put process builder triggers on the update to the SMS_History.Error_Code or Error_Message field to either pro-actively notify the user or even migrate the MobilePhone field value to another field when they know it's a land line. Use standard Salesforce List Views or Reports to create Delivery Reports using the criteria shown in [Figure 53](#).

Consider using the 360SMS [Verify Number](#) module referenced above to “clean” your numbers before use. Note that we are billed and therefore you are billed for every outgoing message **REGARDLESS of delivery**.

Error Code	Error Message	Details
30003	Unreachable destination handset	The destination carrier is reporting the 'To Number' is unreachable - the device is likely powered down, out of the service area, or may not accept your messages. Often the msg will still be delivered.
30004	Message blocked	Your message has been blocked from reaching the destination. Usually this indicates a Frequency or Content block. Refer to this Compliance Best Practices document for a deep discussion on this topic.
*30005	Unknown destination handset	The destination carrier is reporting that the ToNumber is unknown, or no longer in service. This is probably a Landline.
30006	Landline or unreachable carrier	The number is definitely a landline or other non-SMS enabled number. The 30005 is the more common error though. Only the VTP module reliably identifies Land Lines from Mobiles.
30007	Carrier Violation	The destination carrier is filtering out your messages for delivery, i.e. your number has been temporarily blocked due to a Frequency or Content block. Refer to this Compliance Best Practices document for a deep discussion on this topic.
30008	Unknown error	The destination carrier has returned a generic error message.
21211	Invalid To Number	Invalid 'To' Phone Number – usually this means that you supplied a blank or completely bad phone number
21604	Blank To Number	The destination 'To' phone number is required to send an SMS . You attempted to send an SMS to a blank number
21610	SMS cannot be sent because the user has replied with STOP	You tried to send the message to a number that is “Hard Unsubscribed” at the provider level regardless of the Contact.SMS_Opt_Out checkbox.
21621	MMS not enabled	You attempted to send an MMS (picture) with a Sender Number that is not enabled for MMS.
21614	Not a mobile number	Similar to 30006 but the number is specifically not a mobile number
	To number: xxx-xxx-xxxx, is not a mobile number	Same as a 30005 but sometimes no error code is returned.

Bitly and Tiny URL Integration

360 SMS has automatic hyperlink conversion to **Bitly™** or **TinyURL™** shortened links. Automatic Link Shortening is highly useful when used in conjunction with the [360SMS Link Tracking](#) feature as it has several powerful features:

- It shortens the link reducing your total message length. The customer sees only the short link while the Salesforce user sees the full friendly link that was sent.
- It disguises the rather long and cryptic link that is otherwise sent when hyperlink tracking is enabled. Here's an example of a trackable but non-Bitly shortened link:
https://boldercrm.secure.force.com/IncomingSMS/tdc_tsw__LT?t=SFGoXWXW
- MOST IMPORTANTLY**, the links are unique to each outbound SMS, greatly improving deliverability with Batch SMS because it tricks the providers looking to Content Block messages that are all the same. More on using hyperlinks to increase deliverability here: [Batch Texting](#) and [Compliance Best Practices](#).

SMS from Salesforce Reports

360 SMS is unique among SMS apps with its ability to use the native Salesforce Reports to execute Batch SMS. Many apps can send Batch SMS from Campaigns and from List Views, but List Views have two major limitations:

1. Limited to 250 rows of selectable data
2. No ability to do complex cross object queries such as “Contacts that were sent an SMS using Template = XYZ and which have ClickCount = 1 for the HyperLink Tracking”

Key Points:

1. When using reports with multiple objects the primary object must be the object you’ll be texting from. Primarily it must expose its Record ID field, e.g. Contact ID
2. Supports Tabular Reports and Summary Reports
 - a. **Tabular Reports**
 - i. By default, the feature sends messages for the first 2,000 records then stops.
 - ii. Use the “**Enable Reports Running for more Records (up to 40K)**” checkbox in the reports interface to go beyond 2,000 records. As of this writing the label is actually wrong, you can send SMS to unlimited records.
 - iii. See the “**Sending > 2,000 Records**” section below for a required special field on the report
 - iv. Sending large batches can take between 3 – 5 minutes
 - b. **Summary Reports**
 - i. Summary reports can only send up to 2,000 records due to Salesforce limitations

SMS Setup SMS From Reports Reports SMS App Help Message Urls +

My Reports

Search Report By Name, Id or Folder...

Report Name	Report Format	Folder Name
Contact w/ HyperLink but Clicks - 0	Tabular	Private Reports
Contacts w/ HyperLink Clickthrough	Tabular	Private Reports
Batch SMS Demo Contacts	Tabular	Private Reports

Showing 1 to 10 of 115 entries Previous Next

Selected Report : Batch SMS Demo Contacts (View Report)

Enable Report running for more records (upto 40K) : ☐

Enable Report To Send MMS : ☐

Select Record Id Column :

- First Name
- Last Name
- Account: Account
- Mobile
- Contact ID

Send SMS

NOTE :

1. In Report, for sending SMS "Record Id" column is mandatory.
2. By default from Reports, you can send SMS up to 2k records at once.
3. You can send SMS more than 2k records (upto 40k) only from Tabular reports by using certain filter criteria as mentioned in "360 SMS App Guide".

Figure 54 - SMS from Reports screen - pick your report first, then define your Record ID column and Send SMS!

Figure 55 - After the Send SMS button is pressed, choose a template

Sending More Than 2,000 Records

When using the **Enable Reports Running for more Records** option your report must have a special custom field of type AutoNumber named specifically **Filter Number** and the report must be sorted by this AutoNumber field in Ascending order as the reports primary sort field. This allows the proprietary feature to loop through the records correctly.

The field label and name must be named specifically **Filter Number** and the format and starting number needs to be EXACTLY as shown in [Figure 56](#) and the “Generate Auto Number for existing records” must be checked and starting at number 1.

Important Note: When sending batches greater than 500, you should also follow the Batch Texting and Compliance best practices. These referenced documents below will greatly help you remain compliant and make sure your messages are not blocked by the providers. Pay close attention to the Auto-Routing feature which allows you to purchase inexpensive Long Codes to disperse your messages across multiple numbers or use the Sticky_Sender formula field mentioned in the Batch Texting document. Both methods circumvent the need for expensive Short Codes which make no mistake offer great value but are often beyond the budget of many customers.

- [Batch Texting](#)
- [Batch Texting - Auto-Routing](#)
- [Compliance Best Practices](#)

[Figure 57](#) shows an example report that returns 64,000 records for batch texting. In this scenario we used the Auto-Routing feature to disperse the messages among 20 separate long codes so that on average if 2 messages are sent every 1 second dispersed between 20 numbers we’ll send at 144,000 per hour.

Step 2. Enter the details

Field Label ⓘ

Display Format Example: A-{0000} [What Is This?](#)

Starting Number

☒ Generate Auto Number for existing records

Field Name ⓘ

Description

Help Text

External ID ☐ Set this field as the unique record identifier from an external system

Must generate for existing records

Figure 56 - A special AutoNumber field for the object must exist on the report and the report must be sorted in Ascending order by this field as the primary sort

REPORT ▾
Batch 1 SMS Memorial Day ✎ **Contacts & Customers**

OUTLINE FILTERS 4 ⓘ Previewing a limited number of records. Run the report to see everything.

Filters

- Add filter...
- Show Me All customers
- Created Date Jan 1, 2018 - May 31, 2019
- Customer: Mobile Phone 1 not equal to ""
- Mobile Opt Out equals False
- Filter Number greater than 0**

	First Name ▾	Last Name ▾	Customer: Mobile Phone 1 ▾	Customer ID ▾	Filter Number ↑ ▾	Mobile Opt Out ▾
1				0010z00001QtI2H	110613	<input type="checkbox"/>
2				0010z00001QtI6E	110639	<input type="checkbox"/>
3				0010z00001QtI6T	110641	<input type="checkbox"/>
4				0010z00001QtI6Y	110642	
5				0010z00001QtI6d	1106	
6				0010z00001QtI6n	11	
7				0010z00001QtI6s	11	
8				0010z00001QtI6x	11	
9				0010z00001QtI77	110647	
10				0010z00001QtI7H	110648	<input type="checkbox"/>
11				0010z00001QtI7R	110649	<input type="checkbox"/>
12				0010z00001QtI7W	110650	<input type="checkbox"/>

Must be exactly this field name and this filter criteria

Must be sorted by the Filter Number field.

Figure 57 - The report must filtered on the Filter_Number field > 0 and Sorted by the Filter_Number in Ascending Order

Send SMS with Process Builder or Flows

Salesforce Process Builder and Flows is a no-coding method to easily handle triggering Outbound Text Messages as well as to process Incoming Messages based on Keywords or other factors. A complete and continuously updated version of everything you need to know about automating SMS can be found in these documents:

- [Sending SMS through Process Builder](#)
- [Triggered Scheduled SMS w/ Process Builder](#)
- [Triggered Scheduled SMS - Event Reminders](#)
- [Surveys and Incoming Keyword Processing](#)

One can literally trigger on any object. Common use cases:

Lead/Contact – Common use cases are when leads are created or when various fields change, and you want to trigger an Outbound SMS.

New Lead Introductions – place a trigger on the new lead creation and even send the Lead.Owner's vCard, Picture or meeting links dynamically as an attachments or referenced fields from the USER object. With VCard's the customer can quickly add you to their phone. Consider triggering a Ringless Voicemail as well.

Birthday SMS – place a trigger on the Contact.Birthday field to schedule an SMS automatically every year – read about this specific use case in [Scheduled SMS with Process Builders](#)

Meeting Reminders – place a trigger on the Salesforce EVENT object or custom Appointment objects such as with Salesforce Field Service. Read about this specific use case in [Triggered Scheduled SMS - Event Reminders](#)

Custom Objects – Similar to Lead/Contact use cases. 360 SMS supports triggered messages from any custom object and its SMS Templates and Surveys support all custom objects.

SMS_History – Ownership/Notification overrides. Commonly, customers have complex business rules that dictate changing the default platform behavior of an incoming message inheriting from its preceding outbound (including the Owner field). Thus, customers place triggers on either the Outgoing, Incoming or both to re-route based on their custom business logic.

SMS_History – Especially useful for incoming SMS – read the message and do something else based on the Incoming Message, either updating the Salesforce record or sending out some other question based on the reply. Useful for Surveys, i.e. Reply with INTERESTED or NO and then SMS_History.Message = INTERESTED updates a field or status in the corresponding Salesforce record but for this case you should really just use the 360 SMS iText functionality (aka Surveys/Chatbots) which is a no coding approach to this sort of use case. Read more about iText in [Surveys & Incoming Keyword Processing](#).

Survey_Response – Although 360SMS has a dedicated **Survey Action Handler** product now for taking common actions on iText/Survey question responses, one can certainly do it themselves with triggers on the incoming Survey Response object.

About the Author

This document and most other 360 SMS documentation is maintained by our investment partner Steve Roch, CEO of Bolder CRM. Steve is an SMS Industry expert having worked or consulted with the top three SMS Apps on the Salesforce AppExchange and also having built the popular Salesforce app [ActionGrid™](#), acquired by Conga in April-2016 and now renamed [Conga Grid™](#). Bolder CRM is the exclusive distributor of 360 SMS in the United States, Canada and the United Kingdom.

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