



360 SMS - Email to SMS Configuration

360 SMS provides unique service that no other apps have, which is the ability 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).

Lead Detail

Lead Status: New

Name: John Smith

Title:

Company: BolderCRM

Email:

Phone:

Mobile: (303) 875-7163

▼ SMS Conversations

Search user...

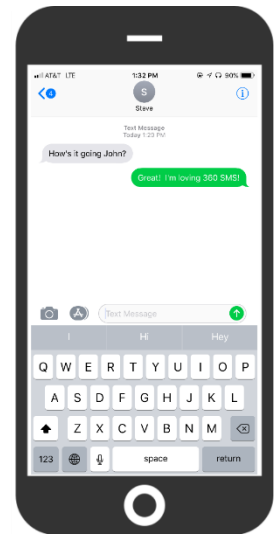
All Conversations (2)

Today, 17-Jul-2018

How's it going John?
By: Steve Roch
01:29 PM

Great! I'm loving 360 SMS!
To: Steve Roch
01:32 PM

Type a message here.....



From: steve@boldercrm.com

To: sms_incoming@r-oujzidkfmk9w7ng4c48epxcfd99ubw30a312go088t4f85a.f4-4lqreao.na59.apex.salesforce.com

Cc:

Bcc:

Subject: RE: Incoming Message Alert from 360 SMS

Great to hear. I'm replying from my email. So cool!

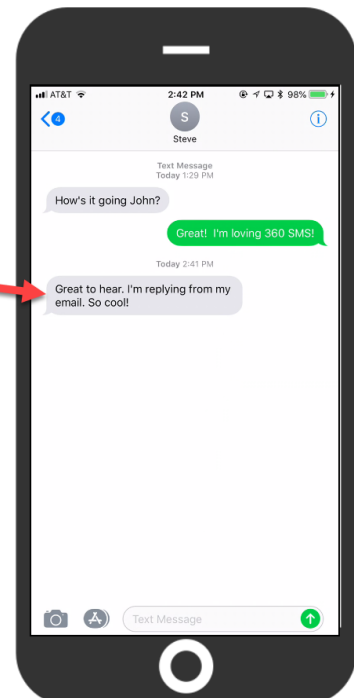
From: noreply@salesforce.com <noreply@salesforce.com> On Behalf Of Steve Roch
Sent: Tuesday, July 17, 2018 1:32 PM
To: Steve Roch <steve@boldercrm.com>
Subject: Incoming Message Alert from 360 SMS

Reply Above To Send Outbound

Message:
Great! I'm loving 360 SMS!

Click the hyperlinks to view in Salesforce:
Links: [Lead](#) or [Incoming Msg](#)
Sender: John Smith
Message: Great! I'm loving 360 SMS!

*** IMPORTANT - DO NOT MODIFY ***
Sender Number:+13038757163
To Number:+17206050632

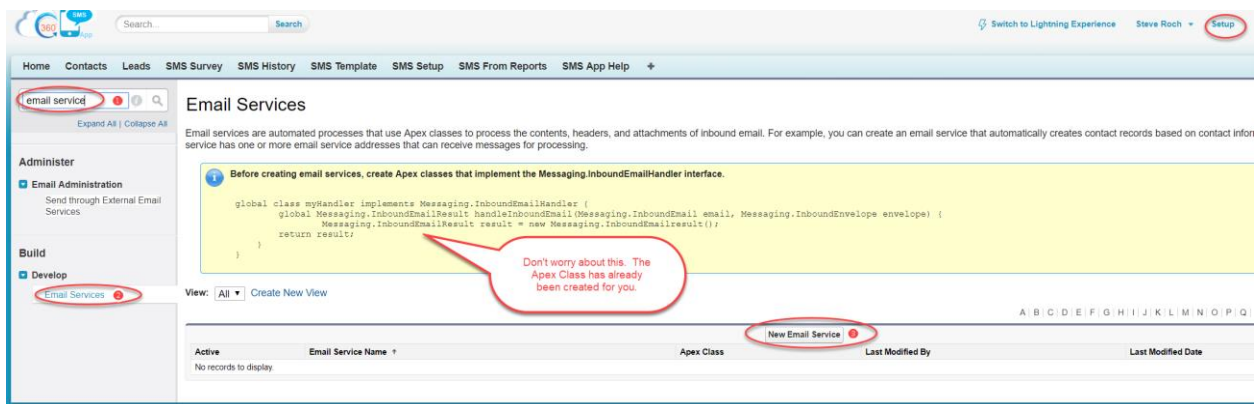




This document explains how to set up a Salesforce Email Service that facilitates this ability to REPLY to the Incoming Notification email.

Step 1: Create Email Service

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



4. Fill out the details as shown in the screen capture:

Email Service Name: 360 SMS Incoming
Apex class: ReplyFromEmailToSMS
Accept attachments: All
Active: True



5. 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 t

Email Service Information

Email Service Name: 360 SMS Incoming
Apex Class: ReplyFromEmailToSMS
Accept Attachments: All
Advanced Email Security Settings:
Accept Email From:
Convert Text Attachments to Binary Attachments:
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:
Route Error Emails to This Email Address:

Save Save and New Email Address Cancel

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

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: SMS_Incoming
Email address: SMS_Incoming
Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.
Active:
Context User: Steve Roch
Accept Email From: 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 Set-Up

The screenshot shows the Salesforce interface for setting up SMS. The top section, titled "Email Addresses", contains a table with the following data:

Action	Email Address Name	Email Address
View Edit	SMS_Incoming	sms_incoming@r-ojuzidkfmk9w7ng4c48epxcfd99ubw30a312go088t485a.f4-4griear...na59.apex.salesforce.com

A context menu is open over the email address, with "Copy email address" highlighted. Below this, the "SMS Setup" page is shown. The "SMS Setup" tab is selected, and the "GENERAL SETTINGS" sub-tab is active. The "Email To SMS" section is highlighted, showing the "Email Service Address" field with the value "sms_incoming@r-ojuzidkfmk9w7ng4c48epxcfd99ubw30a312go088t485a.f4-4griear...na59.apex.salesforce.com".

Step 2 (Optional): Edit Email Template

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 message 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



To edit the template:

1. Go to Salesforce Setup and type 'Email Templates' in the 'Quick Find' box.
2. Navigate to the:
Administrator -> Communication Templates -> Email Templates
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. This has been modified to fit on a phone 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 ' sending single emails. For mass 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
Edit Del	Chatter Incoming Template	Text	<input type="checkbox"/>
Edit Del	Incoming Message Alert	Custom	<input checked="" type="checkbox"/>
Edit Del	Uninstallation	HTML	<input checked="" type="checkbox"/>

Bolder CRM Recommended HTML Template

```
##### Reply Above To Send Outbound #####<br><br>
<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 hyperlinks 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>
<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>
```



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_Obj
ect_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>
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About the Author

Steve Roch, CEO of Bolder CRM 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. Bolder CRM is the exclusive distributor of 360 SMS in the United States and Canada.

Learn more about Steve and Bolder CRM at <https://www.BolderCRM.com>.