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.

Figure 1 - The SMS History record stores the click count and the hyperlink in the Message_URL object

Figure 2 - 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**" but any extra user license will do.

4. Link Tracking is <u>not</u> 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 so that it is easy to report those records <u>with</u> or <u>without</u> 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. Send an email 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

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:	✗

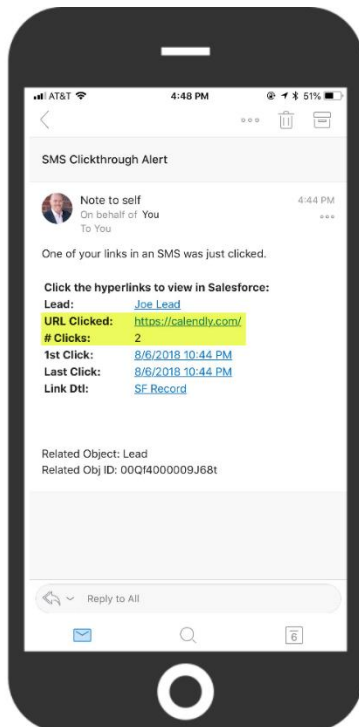*Figure 3 – Text, Email or Call your salesperson to enable Link Tracking*

Define a Clickthrough Email Alert

Since version **1.32**, 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.

Configure Salesforce "Sites" for Delivery Status and/or Link Tracking

360 SMS offers automatic updating of the Delivery Status of outbound SMS Messages as well as Hyperlink Clickthrough Tracking.

Because, these services are writing into your Salesforce system to update various fields, we 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 in **Figure 4** below.

Figure 4 - Incoming SMS Sites needed for Delivered Status and Link Tracking

To create a Salesforce Site follow these instructions:

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 6**. If no site has been previously created, you must create one, **Figure 5**.
3. From **Figure 6**, press **NEW** to create a new Site
4. Make the new Site look exactly as shown in **Figure 7.**
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 8.**
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 9** 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 [Check Availability]

☑ I have read and accepted the Salesforce Sites Terms of Use [Register My Salesforce Site Domain]

Figure 5 - 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

Create a new site named "Incoming SMS"

Sites (boldercrm.force.com)   [New]

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

Figure 6 - Create a new Site

Site Edit

New Site   Save   Cancel

Site Label	Incoming SMS
Site Name	Incoming_SMS
Site Description	Site used by 360SMS to update delivered status on SMS History and for the Link Tracking feature.
Site Contact	Steve Roch
Default Web Address	http://boldercrm.force.com/ IncomingSMS
Active	☑
Active Site Home Page	SiteLogin
Inactive Site Home Page	InMaintenance [Preview]
Site Template	SiteTemplate
Site Robots.txt	
Site Favorite Icon	
Analytics Tracking Code	
URL Rewriter Class	
Enable Feeds	☐
Clickjack Protection Level	Allow framing by the same origin only (recommended) ▼
Require Secure Connections (HTTPS)	☑
Upgrade all requests to HTTPS	☑
Enable Content Sniffing Protection	☑
Enable Browser Cross Site Scripting Protection	☑
Referrer URL Protection	☑
Guest Access to the Support API	☐

Save   Cancel

Figure 7 - Incoming SMS site for Delivery Status and Link Tracking

Figure 8 - Set the Site URL to the Incoming SMS site created in Figure 4

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 9** illustrates the steps as it's a long haul to get to Permission Sets since the Sites User isn't a standard Salesforce user.

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.

Because the Salesforce Sites technology requires a Salesforce License to function properly these features require the "**360 SMS Hyperlink Tracking License**".

Site Details

Incoming SMS

« Back to List: Sites

Site Detail　Edit　Public Access Settings ①　Login Settings　URL Redirects　Deactivate

Site Label	Incoming SMS
Site Description	Site used by 360SMS to update delivered status on SMS History and for the Link Tracking feature.
Active	✓

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

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

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

Profile Detail　Edit　View Users ②

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

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

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

User

Incoming SMS Site Guest User ④

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

User Detail　Edit　Sharing

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

Permission Set Assignments

Incoming SMS Site Guest User

Save　Cancel

Available Permission Sets ⑤ **Enabled Permission Sets**

Available Permission Sets		Enabled Permission Sets
Duplicate Check for Salesforce		SMS App Permission Set
Einstein Analytics for Sales Cloud	Add	
Inbox With Einstein Activity Capture	▶	
Inbox Without Einstein Activity Capture	◀	
Lookup Rollup Summaries - Configure Rollups	Remove	
Lookup Rollup Summaries - Process Rollups		
Sales Cloud User		
Sales User		
Salesforce Console User		
Standard Einstein Activity Capture		

Figure 9 - Put Incoming_SMS into the SMS App Permission Set

User

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

Configuring Bit.Ly Integration

360 SMS has automatic hyperlink conversion to Bit.Ly short links. This is highly useful when used in conjunction with the 360SMS Link Tracking feature as it disguises the rather long link that is manufactured by Salesforce to provide the necessary link tracking. Two steps are required below:

Link Tracking	
Link Tracking Status From Backend:	Enabled
Enable Link Tracking For Bitly:	✓
Bitly Generic Access Token:	....

1. **Create a Remote Site**:
    a. Go to Salesforce Setup and use Quickfind to get to the Remote Site Settings as shown below.
    b. Create the Remote Site as shown in the screen capture
        i. Remote Site Name: bitlyRemote_360SMS
        ii. Remote Site URL: https://api-ssl.bitly.com
        iii. Active: True

2. **Use an existing Bit.Ly Account or Create a new free account**
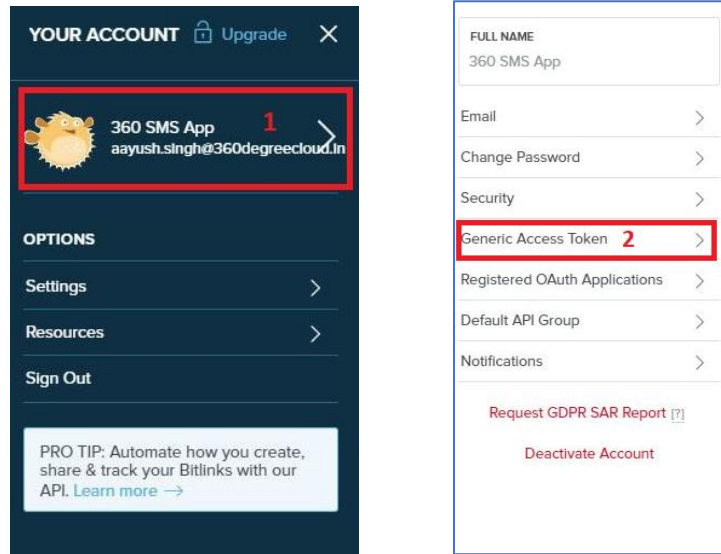   a. Go To: https://bitly.com/ and Sign Up
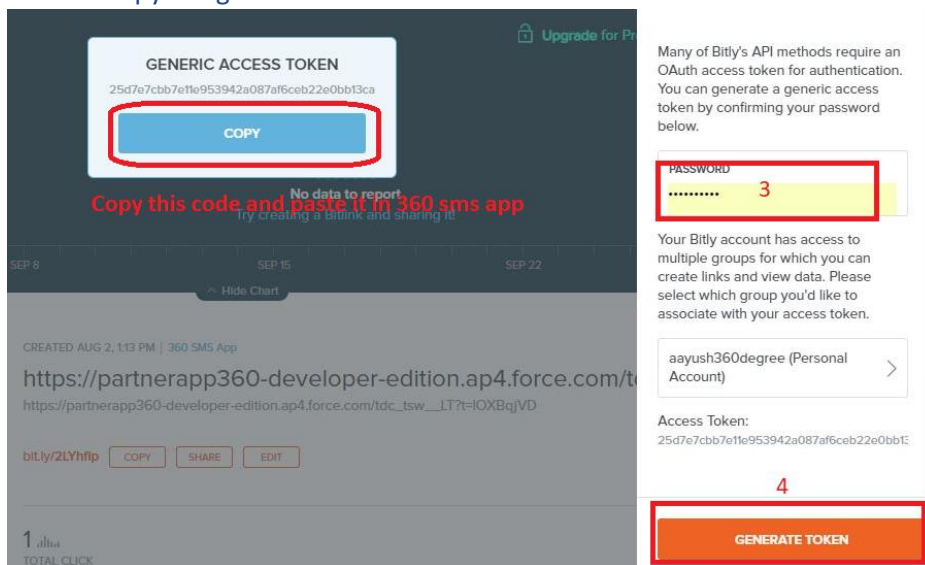   b. Click on the hamburger icon on the top right side.
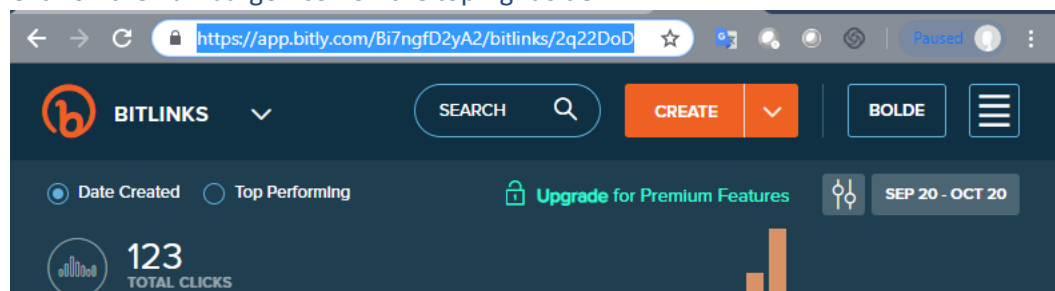
    c. Your profile will appear, drill down into your profile

d. Then click on the generate access token.

e. Copy the generated access token.

f. After creating the token you need to add the token to the General Settings Bit.Ly section
    i. In SMS SETUP → GENERAL SETTING
    ii. Paste in the token into the **Bit.Ly Generic Access Token** area, Figure 11

Link Tracking	
Link Tracking Status From Backend ⓘ :	Enabled
Enable Link Tracking For Bitly ⓘ :	✓
Bitly Generic Access Token ⓘ :	....

Figure 11 - Link Tracking Section of General Settings

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.