



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. See the **360 CTI** (Telephony) setup at the end of this document as well.

There are **three important steps** for onboarding new users discussed below. See page 6 to make numbers available for voice calling AFTER completing these three most important core steps.

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). 360CTI also requires this.
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 – Custom**” it might also be named “... - Cloned”
 - a. If using the 360CTI product also add the user to the “**CTI App Permission Set**”
 - b. Bolder CRM customers (LeftMain+, etc.) will use the “**SMS App Permission Set - Standard User**” and/or “**SMS App Permission Set – Admins**” respectively (see permission sets section below).
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. **CTI** numbers has its own section below on page 6.

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.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

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
Description Bespoke UX at Blazing Speed.							
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
Description This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...							
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 1 - 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.

Important: Bolder CRM customers such as Left Main, PropertyBase, etc. will use the Permission Sets named:

- “SMS App Permission Set - Standard User” - normal users
- “SMS App Permission Set – Admins” – allows admin of Drip Campaigns and other core admin objects

Clone the installed permission set if using custom objects. There is no harm in adding ALL users to the permission set regardless of their licensing status. Just saves time and prevents user error.

Action	Permission Set Label	Description
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.
Clone	Five9 Open CTI user	
Clone	Propertybase Webservices	This set includes all permissions needed to use Propertybase Webservices. More information: https://...
Clone	SMS App Permission Set	
Del Clone	SMS App Permission Set Cloned	360SMS - add all users to this PERMISSION SET because this org uses several custom objects.
Clone	SMS App Permission Set Community	
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.
Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce CMS with any endpoint.
Clone	Salesforce Console User	Enable Salesforce Console User
Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture
Clone	Universal Tagging	

Figure 2 - 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 4](#), 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 4](#).** 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 Template SMS History **SMS Setup** Conversation Mngr SMS From Reports SMS App Help Voice Drop Voice Templates +

ORG CONFIG USER CONFIG OBJECT SETUP GENERAL SETTINGS

Outgoing & Incoming Setup

Optional labeling of the number

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

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 Michael

18087077247 Kristen

18084313179 Debbie

18084313017 Chris

Type a message here.....

You Can Enter Up To 1000 Characters

Figure 3 - 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

Choose File No file chosen

Reset New Upload

Show 50 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"/>	Edit Delete
Steve Roch	17206050632 US	US			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete
Steve Roch	441234480564 UK	UK			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit Delete
Steve Roch	14092026301 US	US	7208837457	tyger.roch@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit Delete
Steve Roch	19166605210 US	US			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit Delete

Figure 4 - 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.



360 CTI Setup

Similar to the SMS user onboarding there are several steps for the user to make calls:

1. **Licensing** – CTI does not specifically need its own license, but the user must be licensed for the 360 SMS app.
2. **Permission Set** – Add the user to specifically named “**CTI App Permission Set**”
3. **Call Center** – 360 CTI uses the native Salesforce Softphone and thus its Call Center functionality. Users must be added to the Call Center that has been created and configured by your 360SMS Technical Support team.
4. **User Config** – Similar to SMS setup, you must go to the 360 CTI app and configure the user to the phone number explicitly or they must be a member of a Call Queue set up for that number.
5. **Call Queues** – if using Call Queues for a specific number, the user must be added to the specific Call Queue

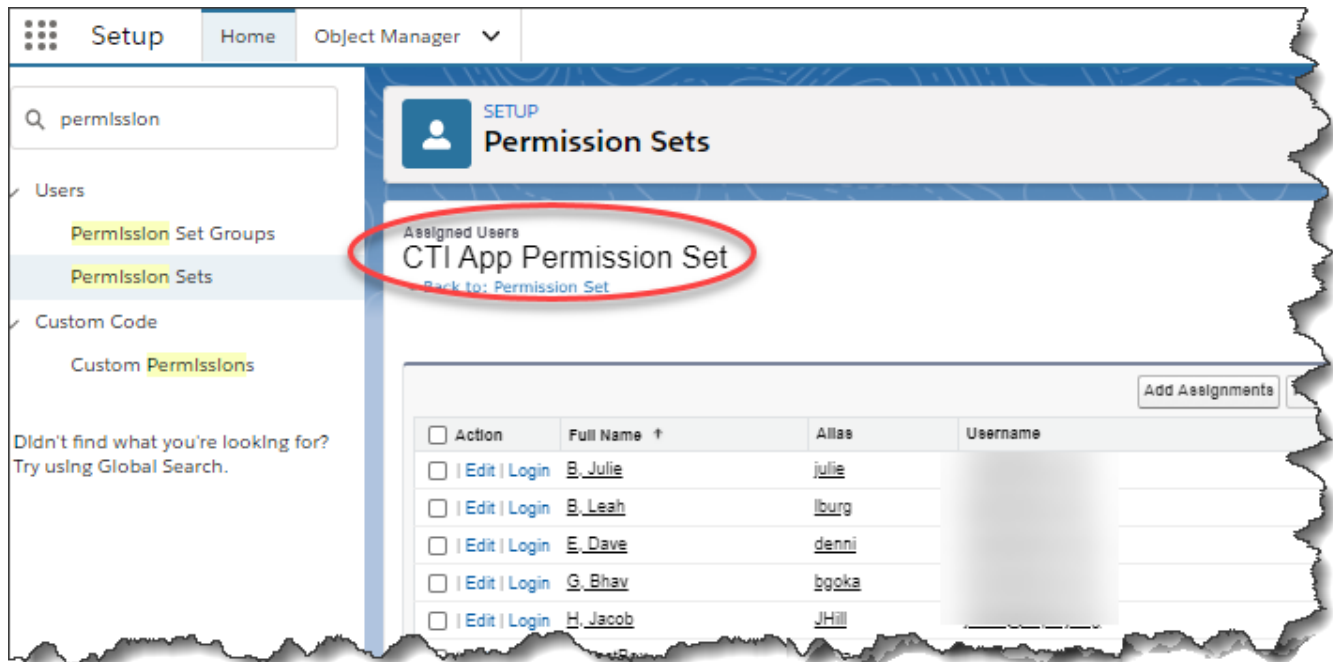


Figure 5 - We recommend adding all users to the permission set as it's their CTI Setup in the next step that gives them access to calling - the permission set will let other users listen to any logged Recordings of the calls, plus it's a common step that is accidentally skipped when actually assigning a user to the number.



Setup Home Object Manager

Call Center

Feature Settings

Service

Call Center

Call Centers

Directory Numbers

Softphone Layouts

Didn't find what you're looking for? Try using Global Search.

Call Centers

Call Center 360CTI

All Call Centers » 360CTI

Call Center Detail

Edit Delete Clone

General Information

InternalName	Adapter360CTI
Display Name	360CTI
CTI Adapter URL	https://tdc-cti.um5.visual.force.com/apex/NewCTIPage
CTI Adapter URL2	https://tdc-cti.um5.visual.force.com/apex/NewCTIPage
Timeout	10000
Use CTI API	true

Provider Caller No.

Call Center Users

Manage Call Center Users

Call Center Users by Profile

/ User	1
Referral Officer	1
Total	2

Call Center 360CTI: Manage Users

All Call Centers » 360CTI » Manage Users

View: All Create New View

Add More Users Remove Users

Action	Full Name ↑	Alias	Username
<input type="checkbox"/> Remove	E. Dave	denni	
<input type="checkbox"/> Remove	H. Jacob	J.Hill	
<input type="checkbox"/> Remove	P. Joe	jores	
<input type="checkbox"/> Remove	R. Stevie	stroch	
<input type="checkbox"/> Remove	W. Glenn	gweav	

Figure 6 - Assign the users to the Salesforce Call Centers - there is no harm adding all users as the number assignment ultimately controls the soft phone.



360 CTI

CTI Setup IVR CTI Dialer Voice Template Caller Lists

USER CONFIG INCOMING SETUP

Assign Virtual CTI Numbers to Users

Download Sample File

Upload CTI Setup **New**

Show 5 Entries

If you've been issued a new number first press here to "sync" it to your org.

Add a user

User	Number	Country	Auto Forward Mobile	Recording	Default Mute	Notify In Call	Voicemail Type	Voicemail	Default Caller Number	Action
Dave E	4474765	UK		Both	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	Voice : Male Message : Hi! I am not available at the moment, please leave a message after the beep!	<input checked="" type="checkbox"/>	Edit Delete
Glenn W	4474461	UK		Both	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	Voice : Male Message : Hi! you've reached Glenn from [redacted] Im Sorry I am not available at the moment, please leave a message after the beep and i will get back to you as soon as i can. Thank you	<input checked="" type="checkbox"/>	Edit Delete
Joe P	4474012	UK		Both	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	Voice : Male Message : Hi! I am not available at the moment, please leave a message after the beep!	<input checked="" type="checkbox"/>	Edit Delete

Showing 1 to 3 of 3

Figure 7 - Lastly, if you have previously requested that the number be CTI Enabled then you can now assign the user to the number

Setup Home Object Manager

que

Users

Queues

Data

Mass Transfer Approval Requests

Feature Settings

Service

Customer Contact Requests

Environments

Jobs

SETUP Queues

Queues

Queues allow groups of users to manageworkload more specify the set of objects that are supp queue, as well

View: All Edit Create New View

Action	Label	Queue Name
Edit Del	325 9News	X325_9News
Edit Del	360CTI Call Queue	X360CTI_Call

Edit Queue 325 9News

Queue Edit

Queue Name and Email Address

Enter the name of the queue and the email address to use when sending notifications (for example, when a case has been p

Label 325 9News

Queue Name X325_9News

Supported Objects

Available Objects

Conga Grid View
Grid Cache Item
Grid Default
Image
Layout
Lead
SMS History

Selected Objects

Task
IVR Number
IVR Queue User Management

Queue Members

Search: Users for Find

Available Members

User: Joe StandardUser
User: Josh Rodgers

Selected Members

Stephanie Betters
Steve Roch
Yash Bhalie

Add

Figure 8 - Add Users to Call Queues



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 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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