

Configuring the 360SMS Grid a.k.a. Conversation Manager

The 360SMS solution offers an optionally installed tool for easier management of Salesforce list data using an Excel-like paradigm. Originally, this tool was designed as a more robust method of handling Incoming SMS from large outbound SMS campaigns. However, the tool has evolved to work for many other use cases besides SMS.

The main features are a completely inline-editable grid (like an Excel Spreadsheet) with powerful filtering, grouping, batch actions and most importantly a side-panel for the selected row that allows one to manage multiple SMS conversations at once and quickly get to the underlying Record Detail to review and make quick updates without popping up the various Salesforce pages.

The tool reads your existing **List Views** for the given object but then provides this richer experience for working with records in lists. It also supports custom objects.

The screenshot shows the Salesforce interface with the 360SMS Conversation Manager. The main grid displays a list of contacts with columns for Action, Name, Account, Last SMS, City, State/Province, and Time Zone. The row for Blake Roller is selected, and a red arrow points from the 'Boulder' cell in the City column to the side panel. The side panel, titled 'SMS Detail', shows a list of conversations for the selected contact, including dates and times. A red circle highlights the 'Detail' tab in the side panel.

Action	Name	Account	Last SMS	City	State/Province	Time Zone
<input type="checkbox"/> View Edit	Steve Roch		04/16/2020 11:14 AM	Boulder	CO	Mountain
<input type="checkbox"/> View Edit	Gang Yue		04/16/2020 11:14 AM		CO	Mountain
<input type="checkbox"/> View Edit	Nicole Olsen		04/16/2020 10:40 AM	Ft. Collins	CO	Mountain
<input type="checkbox"/> View Edit	David Goad		04/16/2020 10:00 AM		MI	Eastern
<input type="checkbox"/> View Edit	Tim Schultz		04/16/2020 09:37 AM	Chicago	IL	Central
<input type="checkbox"/> View Edit	Kevin Zeigler		04/16/2020 08:00 AM		NY	Eastern
<input type="checkbox"/> View Edit	Sreeveni Kancharla		04/16/2020 08:00 AM		SC	Pacific
<input type="checkbox"/> View Edit	Kelly Beckendorf		04/16/2020 07:49 AM	Covington	LA	Central
<input type="checkbox"/> View Edit	Jonathan Rublee - UK		04/15/2020 05:46 PM			
<input type="checkbox"/> View Edit	Leigh Ann Wheeler		04/15/2020 09:54 AM	Orlando	FL	Eastern
<input type="checkbox"/> View Edit	Kavita Rao		04/14/2020 03:45 PM		GA	Eastern
<input checked="" type="checkbox"/> View Edit	Blake Roller		04/14/2020 02:21 PM	Boulder		
<input type="checkbox"/> View Edit	Chris Roch		04/14/2020 10:00 AM		CO	Pacific
<input type="checkbox"/> View Edit	Siddharth Sehgal		04/14/2020 03:37 AM			India
<input type="checkbox"/> View Edit	Jason Blais		04/13/2020 06:57 PM	Saint-Laurent	QC	Eastern
<input type="checkbox"/> View Edit	Jonathan Rublee		04/13/2020 06:06 PM	Philadelphia	PA	Eastern
<input type="checkbox"/> View Edit	Yash Bhatia		04/13/2020 12:57 PM		CA	India

Figure 1 - 360SMS Conversation Manager

The screenshot shows the Salesforce interface with the 360SMS Conversation Manager. The main grid displays a list of contacts with columns for Action, Name, Account, Last SMS, City, State/Province, and Time Zone. The row for Blake Roller is selected, and a red arrow points from the 'Boulder' cell in the City column to the side panel. The side panel, titled 'SMS Detail', shows a list of conversations for the selected contact, including dates and times. A red circle highlights the 'Detail' tab in the side panel. A red callout box with a white background and a red border points to the side panel, containing the text: "quick access to the full page layout of the selected record makes reviewing and updating records a snap!".

Action	Name	Account	Last SMS	City	State/Province	Time Zone
<input type="checkbox"/> View Edit	Steve Roch		04/16/2020 11:14 AM	Boulder	CO	Mountain
<input type="checkbox"/> View Edit	Gang Yue		04/16/2020 11:14 AM		CO	Mountain
<input type="checkbox"/> View Edit	Nicole Olsen		04/16/2020 10:40 AM	Ft. Collins	CO	Mountain
<input type="checkbox"/> View Edit	David Goad		04/16/2020 10:00 AM		MI	Eastern
<input type="checkbox"/> View Edit	Tim Schultz		04/16/2020 09:37 AM	Chicago	IL	Central
<input type="checkbox"/> View Edit	Kevin Zeigler		04/16/2020 08:00 AM		NY	Eastern
<input type="checkbox"/> View Edit	Sreeveni Kancharla		04/16/2020 08:00 AM		SC	Pacific
<input type="checkbox"/> View Edit	Kelly Beckendorf		04/16/2020 07:49 AM	Covington	LA	Central
<input type="checkbox"/> View Edit	Jonathan Rublee - UK		04/15/2020 05:46 PM			
<input type="checkbox"/> View Edit	Leigh Ann Wheeler		04/15/2020 09:54 AM	Orlando	FL	Eastern
<input type="checkbox"/> View Edit	Kavita Rao		04/14/2020 03:45 PM		GA	Eastern
<input checked="" type="checkbox"/> View Edit	Blake Roller		04/14/2020 02:21 PM	Boulder		
<input type="checkbox"/> View Edit	Chris Roch		04/14/2020 10:00 AM		CO	Pacific
<input type="checkbox"/> View Edit	Siddharth Sehgal		04/14/2020 03:37 AM			India
<input type="checkbox"/> View Edit	Jason Blais		04/13/2020 06:57 PM	Saint-Laurent	QC	Eastern
<input type="checkbox"/> View Edit	Jonathan Rublee		04/13/2020 06:06 PM	Philadelphia	PA	Eastern
<input type="checkbox"/> View Edit	Yash Bhatia		04/13/2020 12:57 PM		CA	India

Figure 2 - Grid allows quick access to the full page layout

Custom Object Configuration

There are two ways to work with custom objects using the 360SMS Conversation Manager.

1. Add objects to the object pick list
2. Create dedicated Visualforce pages that can then be exposed as Tabs, Utility Items, Dashboard elements or even on page layouts if desired.

Add objects to the Convo Mngr object pick list

You can quickly add objects to the Convo Mngr's object picklist by adding values to a custom Settings documented in [Figure 4](#) below.

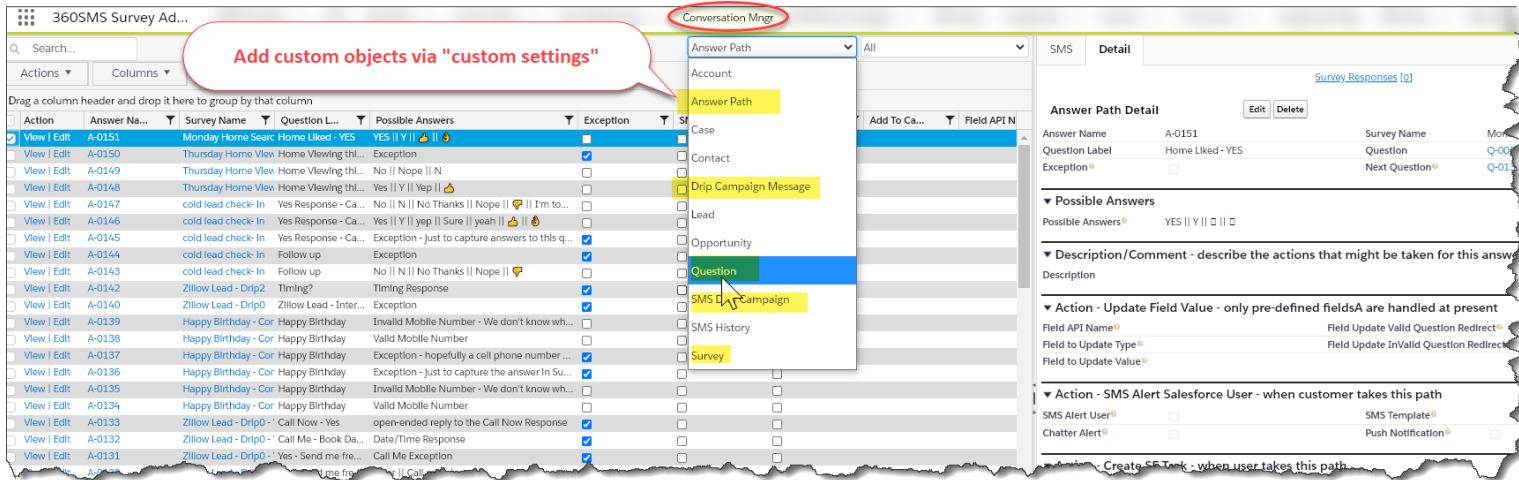


Figure 3 - Several custom objects have been added to the pick list to make editing data easier with the editable grid and side panel access

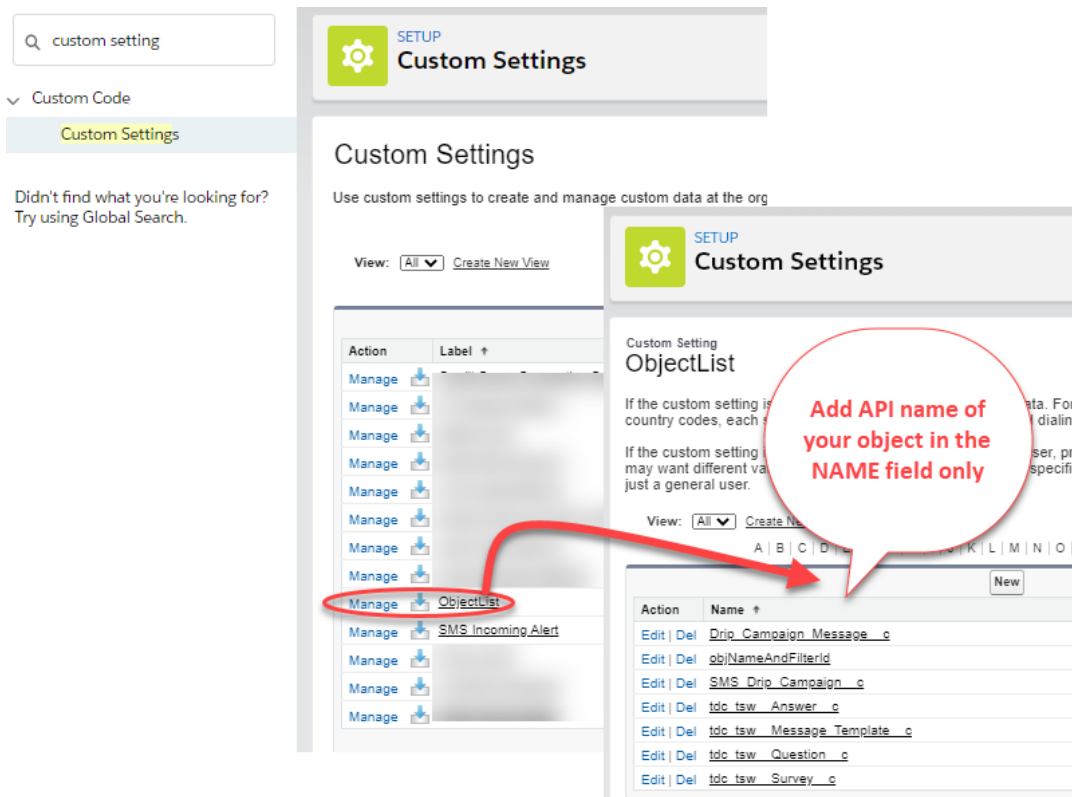


Figure 4 - Add custom objects using the ObjectList custom setting in Salesforce Setup

Creating a dedicated tab for a Custom Object

Often you may just want a single object in dedicated tab or other location that supports VisualForce Pages in Salesforce. Simply create a Custom VisualForce page substituting the objectApiName for the name of your object and then create a corresponding tab referencing the VF Page.

```
<apex:page showHeader="true" sidebar="false" >
<tdc_GridView:GridView objectApiName="SMS_Drip_Campaign_c"></tdc_GridView:GridView>
</apex:page>
```

Override an existing Tab to use the SMS Grid

In the rare case when you may want to completely override an existing tab to replace the list view experience with the 360SMS Conversation Manager the following Visualforce page can be created. Again, substituting the **ObjectName** for defined in the StandardController for your object.

This would only be used in the case where you already have a regular tab for an Object but when they click the standard tab you want the convo manager instead. We cannot see to many use cases for this because then you would have no method to edit the actual list views that Convo Manager feeds off of. Instead we would keep the standard tab and create the new tab with a slightly different name.

```
<apex:page title="Case" standardController="ObjectName" recordSetVar="recodvar" showHeader="true"
extensions="tdc_gridview.TabOverride" sidebar="false" >
<apex:include pageName="{!pageName}"/>
</apex:page>
```

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.

Learn more about Steve and Bolder CRM at <https://boldercrm.com/360SMS> and <https://www.linkedin.com/in/steveroch/>

Call/Text: [+1 720.605.0632](tel:+17206050632) or [+44 1234 480 564](tel:+441234480564) or [+61 488 845 944](tel:+61488845944)

WhatsApp: [+1 303.800.3258](tel:+13038003258) or [click here](#) initiate a WhatsApp convo with Steve

Email: steve@boldercrm.com