### 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.

Q Search			^	Contact	Rece	ent SMS	SMS Detail
Actions 🔻	Columns 🔻						☐ All Conversations
Drag a column h	eader and drop it here	to group by that colum	n				S
Action	Name	Account	▼ Last SMS	T City	State/Province	Time Zone	By: Steve Roch 02:20 PM
View   Edit	Steve Roch		04/16/2020 11:14	AM Boulder	CO	Mountain	
View   Edit	Gang Yue		04/16/2020 11:14	AM	CO	Mountain	
View   Edit	Nicole Olsen		04/16/2020 10:40	AM Ft. Collins	CO	Mountain	11-27-1990 × To: Steve Roch 02:20 PM • 6
View   Edit	David Goad		04/16/2020 10:00	AM	MI	Eastern	
View   Edit	Tim Schultz		04/16/2020 09:37	AM Chicago	IL	Central	
View   Edit	Kevin Zeigler		04/16/2020 08:00	AM	NY	Eastern	Sorry that date format won't work. I need the date in YYYY-MN
View   Edit	Sreeveni Kancharla		04/16/2020 08:00/	AM	SC	Pacific	DD format, e.g. 1964-05-21
View   Edit	Kelly Beckendorf		04/16/2020 07:49	AM Covington	LA	Central	
View   Edit	Jonathan Rublee - Uk	<	04/15/2020 05:46	PM			Reply with the date or keyword EXIT By: Steve Roch 02:20 PM
View   Edit	Leigh Ann Wheeler		04/15/2020 09:54	AM Orlando	FL	Eastern	By: Steve Roch 02:20 PM
View   Edit	Kavita Rao		04/14/2020 03:45	PM	GA	Eastern	
View   Edit	Blake Roller		04/14/2020 02:21	PM Boulder			1990-11-27 🖈
View   Edit	Chris Roch		04/14/2020 10:00	AM	CO	Pacific	To: Steve Roch 02:21 PM \Xi 🌍
View   Edit	Siddharth Sehgal		04/14/2020 03:37	AM		India	
View   Edit	Jason Blais		04/13/2020 06:57	PM Saint-Laurent	QC	Eastern	
View   Edit	Jonathan Rublee		04/13/2020 06:06	PM Philadelphia	PA	Eastern	Birthday updated to 11/27/1990 and I even scheduled an SM
View   Edit	Yash Bhatia		04/13/2020 12:57	PM	CA	India	🌀 🛨 birthday wish for you.



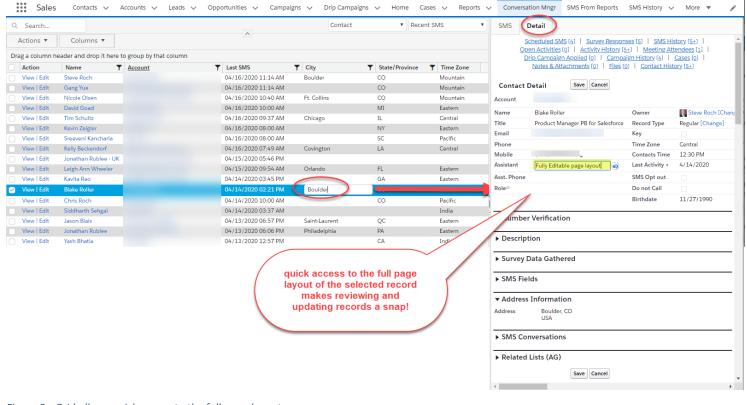


Figure 2 - Grid allows quick access to the full page layout

# **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.

3605	SMS Survey Ad					Com	nversation Mngr						
Actions  Columns Actions Actio						Ar	nswer Path 🗸	All	~	SMS Detail			
						Ac	ccount				Survey Responses [0]		
ag a column l	header and drop it	there to group by that	at column			Ar	nswer Path			Answer Path Deta	il Edit Delete		
Action	Answer Na 🔻	🕇 Survey Name 🗡	Question L	Possible Answers	▼ Exception ▼	T SI		Add To Ca	Fleid API N	Answer Path Deta			
Vlew   Edlt	A-0151	Monday Home Sear	rc Home Liked - YES	YES    Y    👍    👌			ase		·	Answer Name	A-0151	Survey Name	Mor
Vlew   Edlt	A-0150	Thursday Home Vie	w Home Viewing thi	Exception			ontact			Question Label	Home Liked - YES	Question	Q-00
/lew   EdIt	A-0149	Thursday Home Vie	w Home Viewing thi	No    Nope    N	0		intact			Exception <sup>©</sup>		Next Question®	Q-01
/lew   Edlt	A-0148	Thursday Home Vie	M Home Viewing thi	I Ves    Y    Yep    📥		Dr	rip Campaign Message						
/lew   EdIt	A-0147	cold lead check- In	Yes Response - Ca	No    N    No Thanks    Nope    👎    I'm to		Ο.				<ul> <li>Possible Answers</li> </ul>	à		
lew   Edlt	A-0146	cold lead check- In	Yes Response - Ca.	Ves    Y    yep    Sure    yeah    👍    💧		- Lea	iad (			Possible Answers	YES    Y    C    C		
lew   Edlt	A-0145	cold lead check- In	Yes Response - Ca	Exception - Just to capture answers to this q.	4 🗹	0.	pportunity						
/lew   EdIt	A-0144	cold lead check- In	Follow up	Exception			pportunity			<ul> <li>Description/Con</li> </ul>	nment - describe the actions	that might be taken for th	his an
lew   Edlt	A-0143	cold lead check- In	Follow up	No    N    No Thanks    Nope    👎			uestion			Description		-	
/lew   Edlt	A-0142	Zillow Lead - Drip2	Timing?	Timing Response									
/lew   Edlt	A-0140	Zillow Lead - Drip0	Zillow Lead - Inter	r Exception			MS E			Action - Update I	Field Value - only pre-defined	fieldsA are handled at pr	resent
/lew   EdIt	A-0139	Happy Birthday - Cor	🗴 Happy Birthday	Invalid Mobile Number - We don't know wh.	A	10 51	MS History			Field API Name®	51	Field Update Valid Question Re	
/lew   EdIt	A-0138	Happy Birthday - Cor	r Happy Birthday	Valid Mobile Number	0		NO TISLOTY			Field to Update Type®		Field Update InValid Question	
'lew   Edlt	A-0137	Happy Birthday - Cor	🖌 Happy Birthday	Exception - hopefully a cell phone number	🔽	🗆 Su	urvey			Field to Update Value®		Held opdate Invalia gaostion	Reune
'lew   Edlt	A-0136	Happy Birthday - Cor	🕫 Happy Birthday	Exception - Just to capture the answer In Su.	han 🗹					field to opauto varao			
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lew   Edlt	A-0134	Happy Birthday - Cor	r Happy Birthday	Valid Mobile Number			0				L'Salesionee open miteri eas.		
'lew   Edit	A-0133	Zillow Lead - Drip0 -	- ' Call Now - Yes	open-ended reply to the Call Now Response	é 🔽					* SMS Alert User®		SMS Template®	
/lew   EdIt	A-0132	Zillow Lead - Drip0	-' Call Me - Book Da	Date/Time Response			0			Chatter Alert®		Push Notification®	
/lew   Edlt	A-0131	Zillow Lead - Drip0	· Yes - Send me fre	Call Me Exception							FT-k - when user takes this		

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

Q custom setting	Custom Settings
Custom Settings	
Didn't find what you're looking for?	Custom Settings Use custom settings to create and manage custom data at the org
Try using Global Search.	View: All  Create New View Setup Custom Settings
	Action Label + Manage Manage

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 you 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 <u>ActionGrid</u><sup>™</sup>, acquired by Conga in April-2016 and now renamed <u>Conga Grid</u><sup>™</sup>. Bolder CRM is the exclusive distributor of 360 SMS in the United States, Canada and the United Kingdom.

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