Scheduled SMS with Process Builder/Flows

A common triggered SMS scenario is to trigger a **Scheduled SMS** for a **customer's birthday** or other life events such as a Home Purchase Anniversary or Loan Anniversary. Similarly, **Event Reminders** are a common use case for triggered Scheduled SMS but to keep this document shorter, please refer to the dedicated document named Triggered Scheduled SMS - Event Reminders if that's your goal. Scheduled SMS is also the foundation of **SMS Drip Campaigns** which also have their own dedicated document here: SMS Drip Campaigns.

While most SMS Apps now offer Scheduled SMS none offer **a truly triggerable process**. These competitor SMS Apps can of course trigger SMS and they can even use the Salesforce Process Builder "**Scheduled Actions**" feature to set a date/time of the SMS to send. However, the Salesforce "Scheduled Action" feature creates a "black box" situation where the SF User cannot see that the SMS is scheduled nor can the pending SMS be aborted.

This is the key differentiating feature of the 360SMS programmatic Scheduled SMS. 360 SMS is the **only** app which combines both the visible **Scheduled SMS** feature as a native Salesforce object and related list while also offering methods to programmatically create the **Scheduled SMS** record by simply setting the **Schedule Time** field using Process Builder or Flows. This method has the major advantage that the **Scheduled SMS** record is visible and can also be manually or programmatically deleted if the message needs to be cancelled. The benefit of visibly seeing the Scheduled SMS records and the ability to delete them is absolutely a huge differentiator for the platform.

The example below is a common scenario where the user sets the **Birthdate** field. This triggers a process builder to create a Scheduled SMS record for the customer. Furthermore, we document a method such that when the Scheduled SMS eventually is sent, we detect the outgoing SMS "Happy Birthday" template by ID and schedule the next Happy Birthday message for 1 year. With this method, birthday messages would be scheduled infinitely by simply setting the first one!
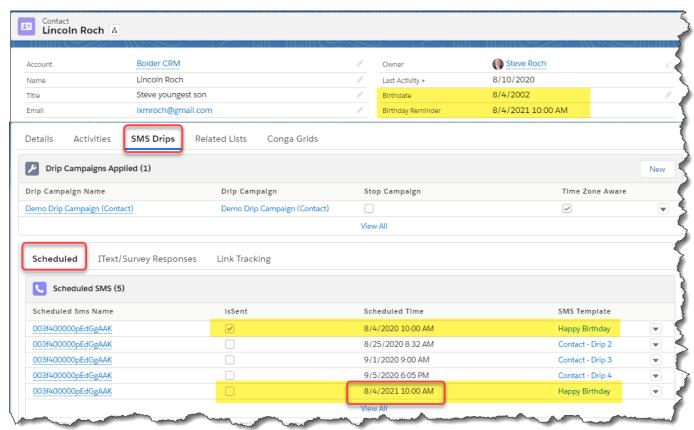
Figure 1 - Set the Birthdate field and trigger a Scheduled SMS on the customers birthday and all following birthdays in perpetuity
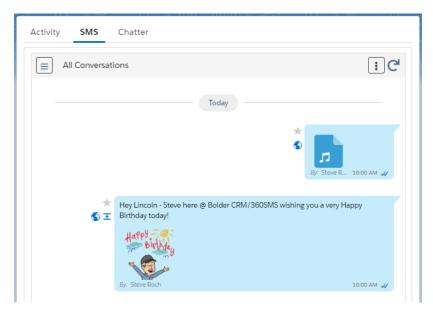

Figure 2 - Shows the triggered Scheduled SMS - you can even trigger scheduled Ringless Voicemail!

Steps to create a Happy Birthday Scheduled SMS

1. We recommend creating a field named **Birthday_Reminder__c** on your Contact/Lead object because it is always easier to verify your Date/Time field as a formula field first and then reference it in your process builder. See **Figures 3 & 4** below for a copy/pastable formula.

2. Now, create a process builder on the OnChange event of the Contact.Birthdate field as shown in **Figure 5**., i.e. the criteria of the process builder detects Birthday Is Not Blank and IsChanged.

3. Create the Immediate Action as shown in **Figure 5** and following the guidelines in the Sending SMS through Process Builder documentation with the notable exception that you use the extra field named **Scheduled Time**. Leaving off the scheduled time value simply sends the SMS immediately.

    a. Set your Scheduled Time field to your Birthday_Reminder field from Step 1

4. Pay special attention to also set the **CONTACT** field otherwise the Schedule SMS will not show up on the Contact → Scheduled SMS related list even though it will still be scheduled. The whole point is to be able to see and even possibly delete the Scheduled SMS related list record.
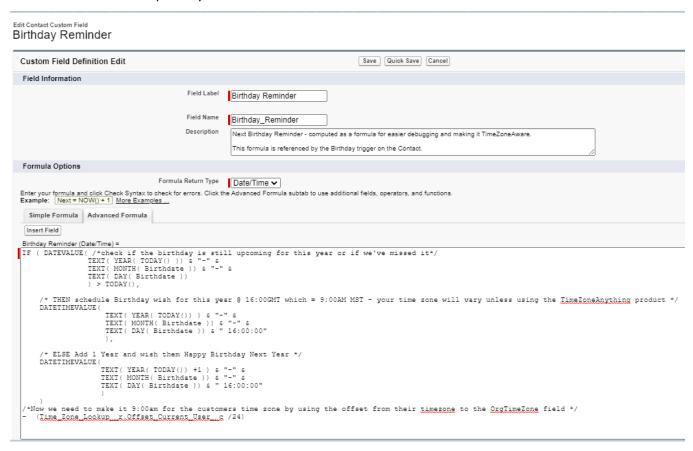

Figure 3 - Create a Birthday Reminder formula field to hold your date/time logic - see figure 3 for the copy/pastable code

```
IF ( DATEVALUE( /*check if the birthday is still upcoming for this year or if we've missed it*/
            TEXT( YEAR( TODAY() )) & "-" &
            TEXT( MONTH( Birthdate )) & "-" &
            TEXT( DAY( Birthdate ))
            ) > TODAY(),

    /* THEN schedule Birthday wish for this year @ 16:00GMT which = 9:00AM MST (-7 hrs). */
    /* Your time zone will vary unless using the TimeZoneAnything product */
    DATETIMEVALUE(
                TEXT( YEAR( TODAY()) ) & "-" &
                TEXT( MONTH( Birthdate )) & "-" &
                TEXT( DAY( Birthdate )) & " 16:00:00"
                ),

    /* ELSE Add 1 Year and wish them Happy Birthday Next Year */
    DATETIMEVALUE(
                TEXT( YEAR( TODAY() ) +1 ) & "-" &
                TEXT( MONTH( Birthdate )) & "-" &
                TEXT( DAY( Birthdate )) & " 16:00:00"
                )
    )

/* Only use this if you also have the TimeZone Anything™  otherwise just delete below */
/* To make it 9:00am for the customers time zone use the OrgTimeZone to offset our time */
/* from their time.  */

-   (Time_Zone_Lookup__r.Offset_Current_User__c /24)
```

Figure 4 - Scheduled Time formula – paste this exact text into your Scheduled Time field formula in the process builder.
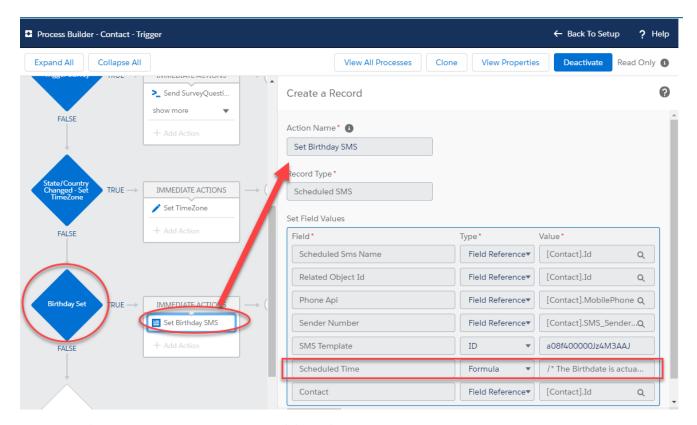

Figure 5 – Birth Date is set so trigger - SMS Happy Birthday Wish

Steps for creating an perpetual Happy Birthday campaign

1. In addition to the initial Birthday Wish, why not consider a simple step to make the birthday wish perpetual, i.e. set it once and have it trigger every year from now until you end your Salesforce contract or you delete the Scheduled SMS record.

2. Simply add a process builder to the **SMS History** object as shown in **Figure 6**.

3. Detect an Outgoing SMS with the specific ID of the Happy Birthday SMS Template and repeat the creation of the Scheduled SMS record from Step 2.

   a. Your Birthday_Reminder formula field will have already incremented to the next year so you can re-use it or just to show another formula example you can set the Scheduled_Time with a process Builder formula as shown in Figure 7.
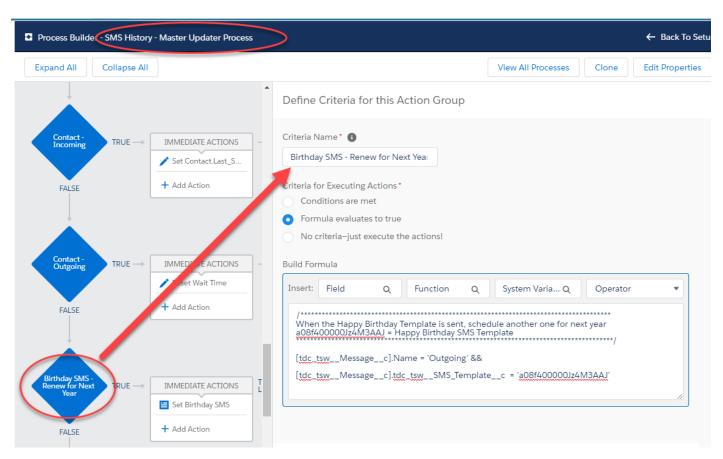

Figure 6 - Scheduling the next year is a snap - just detect the sending of the template and scheduled the next one.

Below is the copy/pasteable code for the perpetual Scheduled Happy Birthday where you detect the Outbound SMS History birthday wish being sent as shown in **Figure 6** and therefore you know that today must be their birthday so you schedule another SMS advancing the Scheduled Time by one year or

```
/* add one year to today then recompile a date in YYYY-MM-DD HH:MM:SS format */
DATETIMEVALUE(
                TEXT(YEAR(TODAY())+1) & "-" &
                TEXT(MONTH(TODAY() )) & "-" &
                TEXT(DAY(TODAY())) & " 16:00:00"
/*  16:00PM GMT = 9:00 MST */
                )
```

Figure 7 - formula for adding 1 year to today or you can also just reference the Birthday_Reminder__c since it will have already advanced to the next year

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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