

## Scheduled SMS with Process Builder

A common Triggered SMS scenario is to trigger the creation of a Scheduled SMS on a customers birthday or with Event Reminders. While many other SMS applications offer Scheduled SMS the process is manual. These other applications can of course trigger SMS and even use the Salesforce Process Builder "Scheduled Actions" feature but this creates a "black box" situation where the Salesforce User cannot see that the SMS is scheduled nor can the Scheduled SMS be aborted.

360 SMS on the other hand is the only application which combines both the visible Schedule SMS feature which is in a native Salesforce object unlike one major competitor but it now also offers a method to programmatically create the Schedule SMS record by setting the **Schedule Time** using Process Builder. This method has the major advantage that the Scheduled SMS is visible and can also be manually or programmatically deleted if some event needs to do so.

The example below is a common scenario where the user sets the Customer Birthdate field. This triggers a process builder to create a Scheduled SMS 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. In this method, birthday messages would be scheduled for infinity by simply setting the first one.

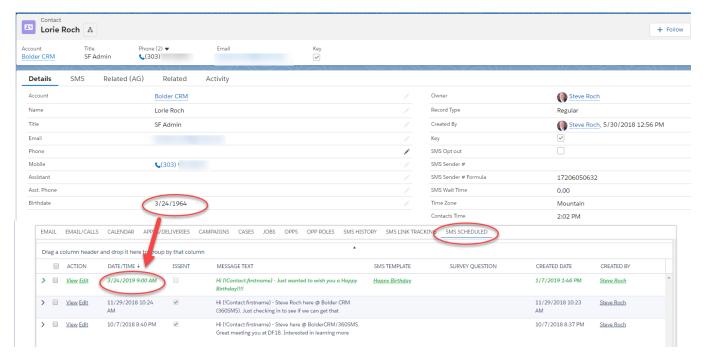


Figure 1 - Set the Birthdate field and trigger a Scheduled SMS on the customers birthday and all following birthdays in perpetuity



## Steps to create a Happy Birthday Scheduled SMS

- 1. Create a process builder on the OnChange event of the Contact. Birthdate field as shown in Figure 2.
- Create the Immediate Action as shown following the guidelines in the "Sending SMS from Process
  Builder" documentation with the major exception that you use the extra field named Scheduled Time.
  Leaving off the scheduled time value sends the SMS immediately.
- 3. Note that the formula takes into account if the customers birthday has already passed for this year. If so, it sets the year for the following year.
- 4. Set the **Scheduled Time** as a Formula field shown for easy copy/pasting in **Figure 3**.
- 5. Pay special attention to also set the CONTACT field otherwise the Schedule SMS won't show on the Contact Related List.

## Steps for creating an infinite Happy Birthday campaign

- 1. In addition to the initial Birthday Wish, why not consider a simple step to make the birthday wish perpetual.
- 2. Simply add a process builder to the SMS History object as shown in **Figure 4**.
- 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.

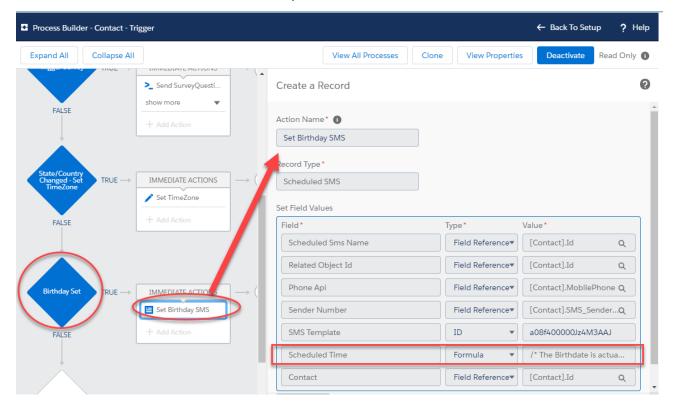


Figure 2 – Birth Date Set so trigger - SMS Happy Birthday Wish



```
^{\prime \star} The Birthdate is an actual DOB so need to convert to the upcoming date ^{\star \prime}
/* SF wants dates in format DATETIMEVALUE("2019-03-24 16:00:00")
IF ( /* Birthday has already passed for this year then add 1 year for next year */
       DATETIMEVALUE (
             TEXT(YEAR(TODAY())) & "-" &
             TEXT(MONTH([Contact].Birthdate )) & "-" &
             TEXT(DAY([Contact].Birthdate)) & " 16:00:00"
              /* 4:00PM GMT = 9:00AM MST */
       ) > NOW(),
/* THEN schedule the Birthday wish for this year */
       DATETIMEVALUE (
           TEXT (YEAR (TODAY ())) & "-" &
           TEXT(MONTH([Contact].Birthdate )) & "-" &
           TEXT(DAY([Contact].Birthdate)) & " 16:00:00"
           /*4:00PM GMT = 9:00AM MST */
/* ELSE Add 1 Year and wish them Happy Birthday Next Year */
       DATETIMEVALUE (
              TEXT (YEAR (TODAY ()) +1) & "-" &
              TEXT(MONTH([Contact].Birthdate )) & "-" &
              TEXT(DAY([Contact].Birthdate)) & " 16:00:00"
```

Figure 3 - Scheduled Time formula – paste this exact text into your Scheduled Time field formula in the process builder.

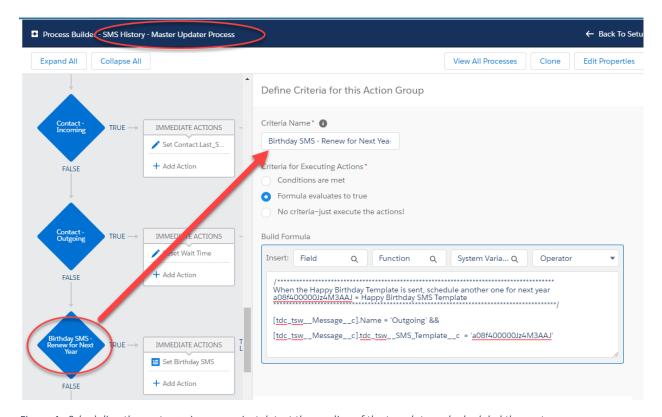


Figure 4 - Scheduling the next year is a snap - just detect the sending of the template and scheduled the next one.



## **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>, acquired by Conga in April-2016. 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 <a href="https://www.BolderCRM.com">https://www.BolderCRM.com</a> and <a href="https://www.linkedin.com/in/steveroch/">https://www.linkedin.com/in/steveroch/</a>