



## Scheduled SMS with Process Builder

A common Triggered SMS scenario is to trigger the creation of a Scheduled SMS on a customer's 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.

The screenshot displays the Salesforce CRM interface for a contact named Lorie Roch. The Birthdate field is set to 3/24/1964. The SMS SCHEDULED tab is active, showing a table of scheduled messages. The first row shows a scheduled SMS for 3/24/2019 9:00 AM with the message text "Hi {Contact.firstname} - Just wanted to wish you a Happy Birthday!!!!" and the template "Happy Birthday".

ACTION	DATE/TIME	ISSENT	MESSAGE TEXT	SMS TEMPLATE	SURVEY QUESTION	CREATED DATE	CREATED BY
<a href="#">View</a> <a href="#">Edit</a>	3/24/2019 9:00 AM	<input type="checkbox"/>	Hi {Contact.firstname} - Just wanted to wish you a Happy Birthday!!!!	Happy Birthday		1/7/2019 1:46 PM	Steve Roch
<a href="#">View</a> <a href="#">Edit</a>	11/29/2018 10:24 AM	<input checked="" type="checkbox"/>	Hi {Contact.firstname} - Steve Roch here @ Bolder CRM (360SMS). Just checking in to see if we can get that			11/29/2018 10:23 AM	Steve Roch
<a href="#">View</a> <a href="#">Edit</a>	10/7/2018 8:40 PM	<input checked="" type="checkbox"/>	Hi {Contact.firstname} - Steve here @ BolderCRM/360SMS. Great meeting you at DF18. Interested in learning more			10/7/2018 8:37 PM	Steve Roch

Figure 1 - Set the Birthdate field and trigger a Scheduled SMS on the customer's 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**.
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.

The screenshot shows the Salesforce Process Builder interface. On the left, a flowchart shows a trigger 'Birth Date Set' leading to an immediate action 'Set Birthday SMS'. A red circle highlights the 'Birth Date Set' trigger, and a red arrow points from this trigger to the 'Create a Record' configuration panel on the right.

The 'Create a Record' panel is configured as follows:

- Action Name:** Set Birthday SMS
- Record Type:** Scheduled SMS
- Set Field Values:**

Field *	Type *	Value *
Scheduled Sms Name	Field Reference	[Contact].Id
Related Object Id	Field Reference	[Contact].Id
Phone Api	Field Reference	[Contact].MobilePhone
Sender Number	Field Reference	[Contact].SMS_Sender...
SMS Template	ID	a08f40000Jz4M3AAJ
Scheduled Time	Formula	/* The Birthdate is actua...
Contact	Field Reference	[Contact].Id

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



```

/* The Birthdate is an actual DOB so need to convert to the upcoming date */
/* 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.

The screenshot shows the 'Process Builder' interface for the 'SMS History - Master Updater Process'. The flowchart on the left includes three decision diamonds: 'Contact - Incoming', 'Contact - Outgoing', and 'Birthday SMS - Renew for Next Year'. The 'Birthday SMS - Renew for Next Year' diamond is circled in red. A red arrow points from this diamond to the 'Define Criteria for this Action Group' panel on the right. In this panel, the 'Criteria Name' is 'Birthday SMS - Renew for Next Year', and the 'Criteria for Executing Actions' is set to 'Formula evaluates to true'. The 'Build Formula' section contains the following text:

```

/*.....
When the Happy Birthday Template is sent, schedule another one for next year
a08f400000jz4M3AAJ = Happy Birthday SMS Template
/*.....
[tdc_tsw__Message__c].Name = 'Outgoing' &&
[tdc_tsw__Message__c].tdc_tsw__SMS_Template__c = 'a08f400000jz4M3AAJ'

```

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 [ActionGrid™](#), 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 <https://www.BolderCRM.com> and <https://www.linkedin.com/in/steveroch/>