

Troubleshooting Programmatic SMS

This section covers some basic troubleshooting techniques for triggered SMS. Debugging process builders and flows is intense and tedious work involving the customer's business logic and thus even though it is common for the customer to think the platform is misbehaving there is **always** an answer in the coding or with the Salesforce users that are triggering the process. As a result, technical support cannot debug process builders or flows. Consulting agreements are available though.

1. **Business Logic/Configuration** – Always assume that your SMS is not firing because of a **problem with your business logic**, its parameters or with the user or sender number triggering the process. You'll save yourself a lot of grief focusing your efforts on these items rather than thinking the platform isn't working.
2. **Criteria** – Most issues around an SMS not firing are due to incorrect business logic for the criteria within the Process Builder/Flow. First, remove or minimize your criteria to see if the SMS will fire without the criteria. Of course, this is not always practical but somehow eliminate the criteria as the culprit first.
3. **Trigger User** – Many problems arise when the Salesforce user that is making the change or creating the record that triggers the Process Builder/Flow **does not** have a 360 SMS License or the user is not associated to the Sender Number in the SMS Setup → **User Config**.
 - a. Check the Created By or Last Modified user of the record to make sure they are licensed and that the sender number being used is associated for this user in the User Config table. This is the #1 source of "my SMS is not firing"
4. **Malformed or Invalid Sender Number** – Commonly we'll see Scheduled SMS's look as if they are sent (isSent=True) but no SMS_History. The most common culprit is an invalid or malformed SenderNumber. Note that the value of **Sticky_Sender** for most orgs is a formula based on the field Record.SMS_Last_Sender_Number__c or if this value is null it will get the number from Record.Owner → User.Phone. Thus, the most common problem is a User.Phone that is not a valid SenderNumber (often it will hold their personal cell phone number) or someone has imported Leads with a Last Sender Number that is not a proper 360 Sender Number in the proper format of 19998887777. The number must have the country code (1 for USA) and have no punctuation.
 - a. **Note:** The triggering user still must have access to the SenderNumber (SMS User Config) either explicitly or via the All Users (see item 3 above).
5. **Use the Scheduled Time feature** – A fantastic troubleshooting technique is to set the Scheduled_SMS.Schedule_Time field as documented in Method #1 above. Even if you want your SMS to fire immediately set the Scheduled Time field to formula NOW() or NOW() + (1/60/24) (i.e. Salesforce date math is always in days so:
1 min ÷ 60 min/hr ÷ 24hrs/day)
6. **Salesforce Scheduled Actions** – It is quite difficult to troubleshoot the Scheduled Actions of a Process Builder since you can't physically see whether or not your Scheduled Action has fired.



- a. Consider temporarily changing your logic to use the **Scheduled Time** field in method #1 to “schedule” the SMS as a Scheduled SMS related list item rather than using the Scheduled Action. This confirms whether your criteria is the problem or something else.
- 7. **Object + Template** mismatches – Remember that when using Method #1, the Scheduled SMS Name value is the Id of the object which must match the object of the SMS Template or (Survey) Question parameter. Object Id + Template Id mismatches are common problems.
- 8. **Integration Users** – commonly customers will have integration processes like Pardot/Marketo or website driven processes that create or update records under the context of the **Site Guest User**. Since this is not a traditional user it can create problems as the user cannot be assigned a license in the traditional way and people commonly forget to create the necessary User Config record associating the User + Sender Number.
 - a. You may need to Contact technical support as licensing for Site Guest Users and other integration users can sometimes be complicated due to how Salesforce treats these “users.”
- 9. **App User** – the system administrator that installed the app is the **Created By** user for all incoming SMS History records. Often the original system administrator will give up his license or will neglect to assign himself to all the possible sender numbers that might be used.
 - a. This is especially the case when triggering off of the SMS History or Survey Response objects where the App User is always the CreatedBy or LastModified User.
 - b. You can reassign the SMS App User by having another Sys Admin user press the Incoming/Outgoing Setup button and changing the App User in SMS Setup → General Settings.
 - c. **Hyperlink Click Triggers** – If triggering off the SMS History or **Message URL** object (the object that holds the click count to trackable links sent to customers), pay special that this user is the special “**Incoming SMS Site Guest User**” created when Hyperlink tracking was set up for your org. In other words, when a hyperlink is clicked this is the user that updates the click count. That user is already licensed but admins commonly forget to associate this user to a one or more sender numbers.

User	Number	Country
Incoming SMS Site Guest User	17206050632 Steve	US

- 10. **Salesforce Record Ids** - When using Salesforce record ID values in your criteria be aware that Salesforce Classic will often present only the 15 character ID of the record in the URL whereas the actual value is almost always stored in the database as an 18 character ID.



- a. This is common when detecting an Inbound SMS responding to a particular Survey Question or Template where you might be taking some sort of action on the answer based on that particular question/template (since the Incoming SMS inherits it's previous Outbound QuestionId or TemplateId).
- b. Either always compare an 18-character Id to an 18-Character Id or compare the first 15 characters to a 15-character Id.
`LEFT(somefield, 15) = '003f400000P3noE` - where we've stripped off the last 3 characters

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