



## Batch Texting Techniques

There are three ways to send Batch Text Message aka Bulk SMS, Batch SMS with 360 SMS. This also applies to Batch MMS (sending of pictures):

1. **List Views** – the **Send SMS** button is placed on List Views or Related Lists
2. **SMS from Reports** – this is a unique feature only available from 360 SMS whereby you use standard Salesforce Reports to execute the batch SMS. This is the most robust method as SF Reports allow cross object queries and unlimited rows.
3. **Campaign** – Add the **Send SMS** button to the Campaign Page Layout and all Campaign Members can be sent a Template of your choosing.

**NOTE:** Regardless of which method used, records marked “SMS Opt-Out” are never sent via a Batch SMS even if the criteria defined did not explicitly exclude them. The opt-out’s are simply skipped.

### List Views

[Figure 1](#) shows a typical List View (query) and the process of pressing the Send SMS or Send MMS button, then choosing a template to send. Batch MMS works the same way, but offers the option to choose the files to send.

Note that when sending Batch MMS only one copy of the file is stored in the Salesforce DOCUMENT object and all the outbound messages reference it, so as to save on storage.

The screenshot shows the Salesforce interface for a 'Batch SMS Demo List' List View. The top navigation bar includes 'Home', 'Contacts', 'Leads', 'Cases', 'SMS Survey', 'SMS History', 'SMS Template', 'SMS Setup', and 'SMS From Reports'. Below the navigation bar, the List View title is 'Batch SMS Demo List' with options to 'Edit', 'Delete', or 'Create New View'. The List View table has columns for 'Action', 'Name', and 'Mobile'. The 'Send SMS' button is highlighted with a red circle and a red arrow. A 'Create Message' dialog box is open, showing '(Selected Contact: 4)' with a list of names: Christian Smith, Lincoln Smith, Lorie Smith, and Francis Smith. The dialog also has options for 'Survey' and 'Folder', and a 'Message' field containing a template: 'Hi {!Contact.firstname} - Are you interested in learning about batch, triggered or 1-on-1 text messaging from Salesforce? Reply INTERESTED, NO or STOP to be removed from this list. Cheers,'. The dialog has 'Cancel' and 'Send' buttons.

Figure 1 - Batch SMS from List View



To configure Batch SMS for a List View or Related List simply add the **Send SMS** button to your standard Search Layouts and/or Related Lists. Note that there are separate Send SMS buttons for Lightning so choose accordingly. See [Figure 2](#)

Quick Find / Search...

[Expand All](#) | [Collapse All](#)

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### Contact Search Layouts

Search layouts allow you to select the standard and custom fields that are displayed in the following search features:

- Search Results Columns for search and tagging. [View example](#)
- Lookup Dialogs that pop up when you click the magnifying glass on Lookup fields. [View example](#)
- Lookup Phone Dialogs that pop up when you click the magnifying glass on a SoftPhone dial pad. [View example](#)
- Recently viewed, modified, and created records lists displayed on tab home page. [View example](#)
- Search Results Filter Fields for search. [View example](#)
- Lookup Results Filter Fields. [View example](#)

Search layouts also allow you to select the standard and custom buttons that are displayed in the following search features:

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

Action	Layout	Columns Displayed	Buttons Displayed
Edit	Search Results	Name, Account Name, Mobile, Phone, Email, SMS Opt out, SMS Template	ActionGrid, DC Merge, <b>Send SMS</b> , Browse
Edit	Lookup Dialogs	Name, Account Name	N/A
Edit	Lookup Phone Dialogs	Name, Account Name, Phone, Mobile, Email	N/A
Edit	Contacts Tab	Name, Account Name, Mobile, Phone, Email, SMS Opt out, SMS Template	N/A
Edit	Contacts List View	N/A	New, Add to Campaign, Add to Campaign, Add to Call List, Send List Email, ActionGrid, DC Merge, <b>Send SMS</b> , Browse
Edit	Search Filter Fields	First Name, Last Name, Account Name, Mobile, Phone, Email	N/A
Edit	Lookup Filter Fields		N/A

**Build**

- Customize
- ▾ Tab Names and Labels
- ▾ Maps and Location
- ▾ Home
- ▾ Activities
- ▾ Campaigns
- ▾ Leads
- ▾ Accounts
- Contacts
  - Fields
  - Related Lookup Filters
  - Validation Rules
  - Triggers
  - Page Layouts
  - Field Sets
  - Compact Layouts
  - Search Layouts
  - Buttons, Links, and Actions
  - Record Types
  - Limits

Figure 2 - Add the batch SMS buttons to the object Search Layouts



## SMS from Salesforce Reports

360 SMS is unique among SMS apps with its ability to use the native Salesforce Reports to execute Batch SMS. Many apps can send Batch SMS from Campaigns and from List Views, but List Views have two major limitations:

1. Limited to 250 rows of selectable data
2. No ability to do complex cross object queries such as “Contacts that were sent an SMS using Template = XYZ and which have ClickCount = 1 for the HyperLink Tracking”

[Figure 3](#) and [Figure 4](#) on the following pages show the SMS from Reports interface.

### Key Points:

1. When using reports with multiple objects the primary object must be the object you’ll be texting from. Primarily it must expose its Record ID field, e.g. Contact ID
2. Supports Tabular Reports and Summary Reports
  - a. **Tabular Reports**
    - i. By default, the feature sends messages for the first 2,000 records then stops.
    - ii. Use the “**Enable Reports Running for more Records (up to 40K)**” checkbox in the reports interface to go beyond 2,000 records. As of this writing the label is actually wrong, you can send SMS to unlimited records.
    - iii. Obviously sending batches greater than 10,000 can take between 3 – 5 minutes so be patient.
  - b. **Summary Reports**
    - i. Summary reports can only send up to 2,000 records due to Salesforce limitations



### My Reports

Search Report By Name, Id or Folder...

Report Name	Report Format	Folder Name
Contact w/ HyperLink but Clicks - 0	Tabular	Private Reports
Contacts w/ HyperLink Clickthrough	Tabular	Private Reports
<b>Batch SMS Demo Contacts</b>	Tabular	Private Reports
...	...	...

Showing 1 to 10 of 115 entries Previous Next

**Selected Report :** Batch SMS Demo Contacts (View Report)

**Enable Report running for more records (upto 40K) :**

**Enable Report To Send MMS :**

**Select Record Id Column :**

- First Name
- Last Name
- Account: Account
- Mobile
- Contact ID**

**Send SMS**

**NOTE :**

1. In Report, for sending SMS "Record Id" column is mandatory.
2. By default from Reports, you can send SMS up to 2k records at once.
3. You can send SMS more than 2k records (upto 40k) only from Tabular reports by using certain filter criteria as mentioned in '360 SMS App Guide'.

Figure 3 - SMS from Reports screen - pick your report first, then define your Record ID column and Send SMS!



**Report Name**

Batch SMS Demo Con

Tasks Due This Week

Total Projects with Tas

Total Projects

Tasks with Project

Projects Completed TI

Tasks Created this We

Tasks Created This W

Tasks Completed this

Tasks Completed This

Showing 11 to 20 of 123

**Selected Report :**

### Create Message

Send To (Selected Contact: 4)

Survey  Folder

Choose Template: Contact - Demo Solicitation

Message

Hi {!Contact.firstname} - Hope your summer is going well. Want to schedule a 360 SMS demo?  
Reply with DEMO or NO.

115 Characters / 1 Segment(Segement will depend on merge fields)

Schedule

Cancel Send

Figure 4 - After the Send SMS button is pressed, choose a template



## Campaigns

360 SMS provides a **Send SMS** button for the Campaign object to facilitate batch texting the contacts and leads in the Campaign Members object. As shown in [Figure 5](#), you simply press the button and it prompts you for to choose a template based on the Contact object and if the list also has Leads then it prompts for a lead-based Template.

The screenshot shows the Salesforce interface for Campaigns. At the top, the 'Campaign Detail' section for 'List - Batch SMS Demo' includes buttons for 'Edit', 'Delete', 'Clone', 'Manage Members', 'Advanced Setup', 'Submit for Approval', and 'Send SMS'. Below this is the 'Campaign Members' section, which contains a table of members and another 'Send SMS' button. A 'Create Message' dialog box is open, showing two sections: 'Contacts(6)' and 'Leads(1)'. The 'Contacts' section has a checked 'Folder' dropdown set to 'Demo Survey - Contact' and an 'SMS Template' dropdown set to 'Contact - Batch SMS Demo Spam'. The message text is: 'Hi {!Contact.firstname} - Are you interested in learning about batch, triggered or 1-on-1 text messaging from Salesforce? Reply INTERESTED, NO or STOP to be removed from this list.' The 'Leads' section has an unchecked 'Folder' dropdown set to '1- Lead - First Touch' and a message text: 'Hi {!Lead.firstname} - Thx for your interest in 360 SMS. In a quick 30 min session I can jumpstart your evaluation, guaranteed! Book a mtg w/ me here:'. The dialog box has 'Cancel' and 'Send' buttons at the bottom right.

Figure 5 - Batch SMS from Campaigns - choose separate templates for Contacts vs. Leads

To configure simply add the **Send SMS** button to your Campaign page layout.

Note that the 2<sup>nd</sup> Send SMS button is for Salesforce1 and Lightning. It should be placed in its respective location in the **Salesforce Mobile and Lightning Experience Actions** section. The screen capture shows the placement of the button on the Classic Page Layout

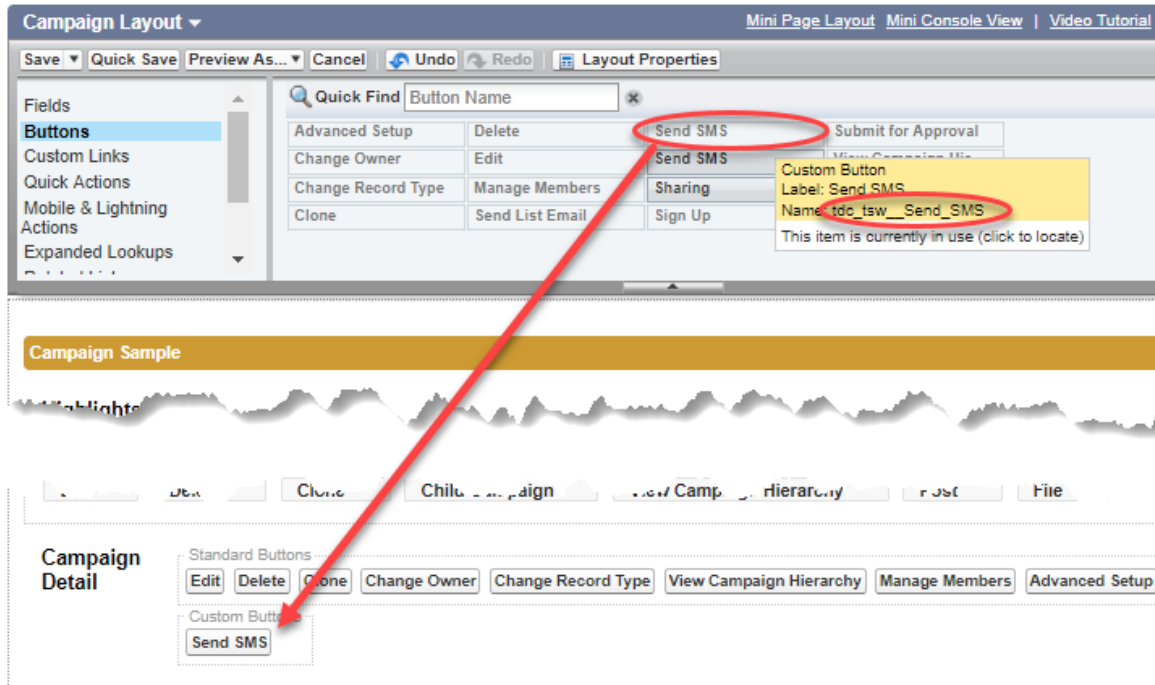


Figure 6 - Add the Send SMS button to the Campaign to Batch SMS the Campaign Members