360 SMS

Configuration & User Guide

Contents – Sections are Hyperlinked for easy navigation

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Introduction

360 SMS is an easily implemented integration of inbound and outbound Text Messaging (SMS) capabilities within Salesforce as well as MMS (sending pictures and files). The 360 SMS features at a high level are:

- Individual one-on-one texting
- Batch texting from List Views and Reports
- Scheduled Texting
- Triggered automatic texting via native Salesforce Process Builders
- Surveys and Inbound Keyword processing to update Salesforce Fields or trigger additional messages
- Templates

The solution is 100% native Salesforce, meaning that no data is stored outside of Salesforce. 3rd party messaging services such as Twilio are invoked from the Salesforce environment but the messages (SMS) and/or attachments (MMS) are **never** stored on other servers besides within the native Salesforce.

The solution installs just a few custom objects, buttons and Visual Force pages which the administrator adds to the Page Layouts of key objects such as Contact and Lead.

When first installing the application either after purchase or as an evaluation, one or more phone numbers are provided to facilitate the outbound and inbound text messaging.

When evaluating the solution, a free temporary phone number and free outbound SMS credits are issued for 7 days. **From start to finish one can enable 360 SMS in Salesforce in just 2 minutes** by pressing two buttons (Outgoing Setup/Incoming Setup) to automatically issue the new phone number and credits and then adding the **Send SMS** button and **SMS History** related list to your Contact or Lead page layout. That's it! You should be texting in less than 2 minutes. Optionally, you can drag the SMS Conversation View Visualforce page to your Contact/Lead page layout to add even more value.

When purchasing, the customer may use their own phone numbers which are then "SMS Enabled" by us through your provider. We take care of everything.

The following pages document the basic installation and configuration of 360 SMS followed by an **Advanced Configuration** section which covers some of the more innovative features that differentiate 360 SMS from other solutions.

Installation

Software/Hardware Requirements

360 SMS is a 100% Salesforce solution and thus requires no special hardware or other services to configure. It works on the following versions of Salesforce:

- Professional - although link clickthrough tracking is not available
- Developer
- Enterprise
- Performance
- Unlimited

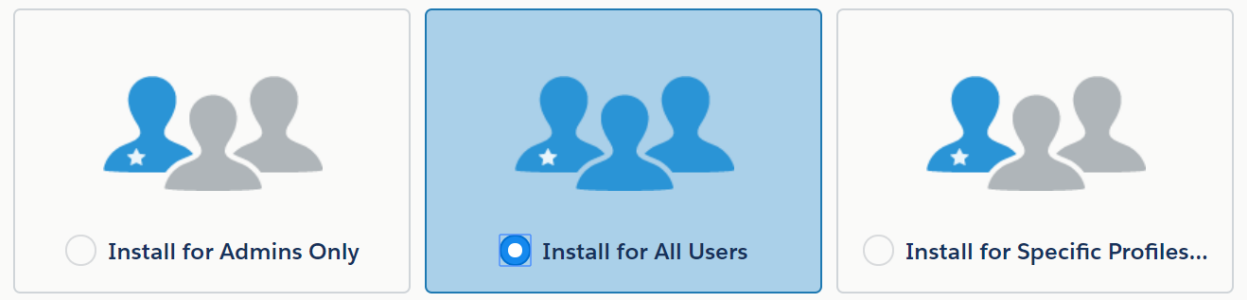
The solution works in Salesforce Classic, Salesforce Lightning and Salesforce 1 automatically without any additional configuration.

The solution will send and receive text messages and attachments (MMS) from any text enabled device using industry standard SMS and MMS technology. Jump to the *How It Works* section for further explanations.

Installation to your Salesforce Org

You may install the 360 SMS solution to your Production or Sandbox from the Salesforce AppExchange. Simply search "360 SMS" within the AppExchange and follow the simple instructions from there.

NOTE: As with most Salesforce Apps, we do recommend that when prompted, you choose the "Install for All Users" option. The application is still controlled by Salesforce User Licensing and Permission Sets but choosing the "Install for All Users" options just makes the security management a little easier down the road, either option works fine though.



Basic & Trial Configuration

You can literally be sending and receiving your first SMS within 2 minutes using the following basic configuration steps to:

1. Initialize the Phone Number and Credits
2. Add the **Send SMS** button to your page layout(s) and/or add the **Conversation View** to the page layout

Verify Installation

You can verify that the application has been installed correctly as there will be a new "**360 SMS**" app in your applications list whether working from Classic or Lightning, *Figure 1* .

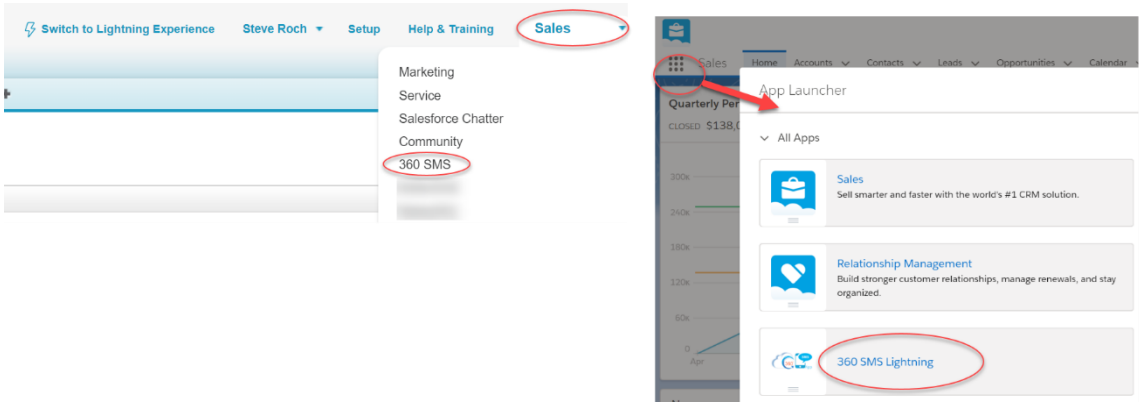


Figure 1 - 360 SMS application from either Classic or Lightning

Initialize the App with a Phone Number and SMS Credits

To send your first message, you must first establish an Outbound/Inbound phone number. During a **Trial Evaluation** a temporary number is automatically issued along with free outbound SMS credits. Purchasers of the solution will have previously supplied their own phone numbers to be SMS Enabled or purchased new numbers.

You must initialize the app to push the Phone Number(s) into your Salesforce Org with two easy steps:

1. Navigate to the 360SMS App
2. Choose the **SMS Setup** tab
3. Press the **Outgoing Setup** followed by the **Incoming Setup**, *Figure 2*. This initializes the number to your Salesforce org, no other input is required.
4. **Developer Edition Note**: Salesforce Developer Edition has special restrictions imposed by Salesforce and thus requires an email to sales@360DegreeApps.com in order to establish the phone number and credits, you'll get an error shown in *Figure 3* otherwise.

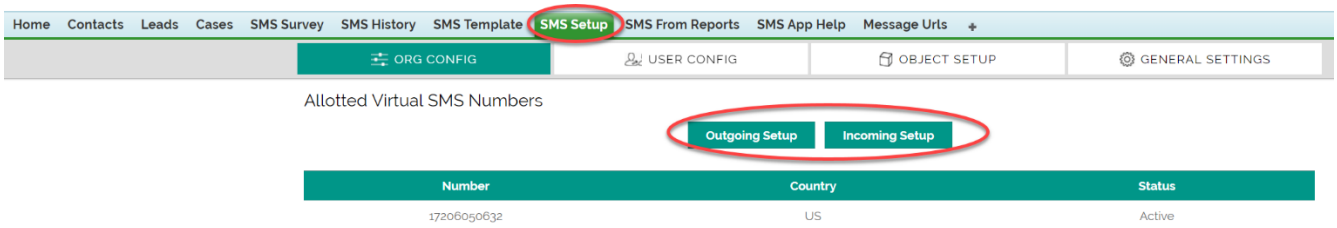


Figure 2 - Initialize the Phone Number and Credits

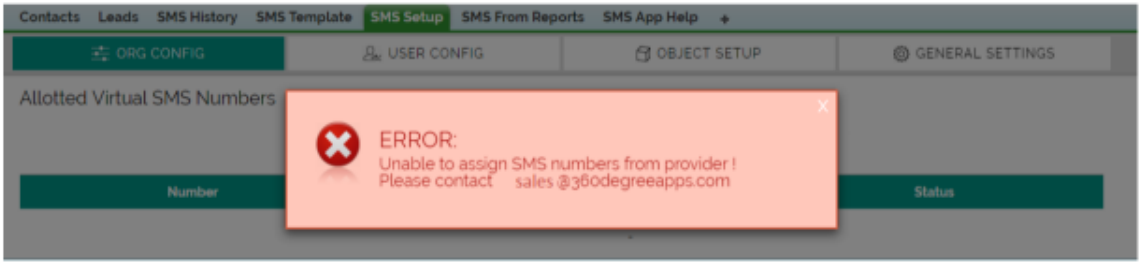


Figure 3 - Outgoing/Incoming Setup fails with Developer Edition - contact Sales@360DegreeApps.com

Configure Page Layouts

By default, the app comes completely configured for the Lead, Contact and Account objects. Refer to the *Custom Object Configuration* section for additional standard and custom objects.

Add Buttons and Related Lists

Repeat these instructions for each standard object that you want to send/receive text messages from.

1. Edit the Page Layout

2. Add the **Send SMS** button(s)
    a. 360 SMS works for **Classic**, **Lightning** and **Salesforce1** the buttons/actions are slightly different for Lightning and Salesforce1 and are dragged into their appropriate locations from the "Mobile & Lightning Actions"
    b. **Classic**: Drag the button named **tdc_tsw__Send_SMS** to your custom buttons section
    c. Note that you must make a request to Sales@360DegreeApps.com to enable the **Send MMS** buttons shown in *Figure 4*, thus the Send MMS button may not be in your button list immediately.
    d. **Lightning**: As shown in *Figure 5*, drag the Quick Action button named **tdc_tsw__Send_SMS** into the "Salesforce Mobile and Lightning Experience Actions" section.

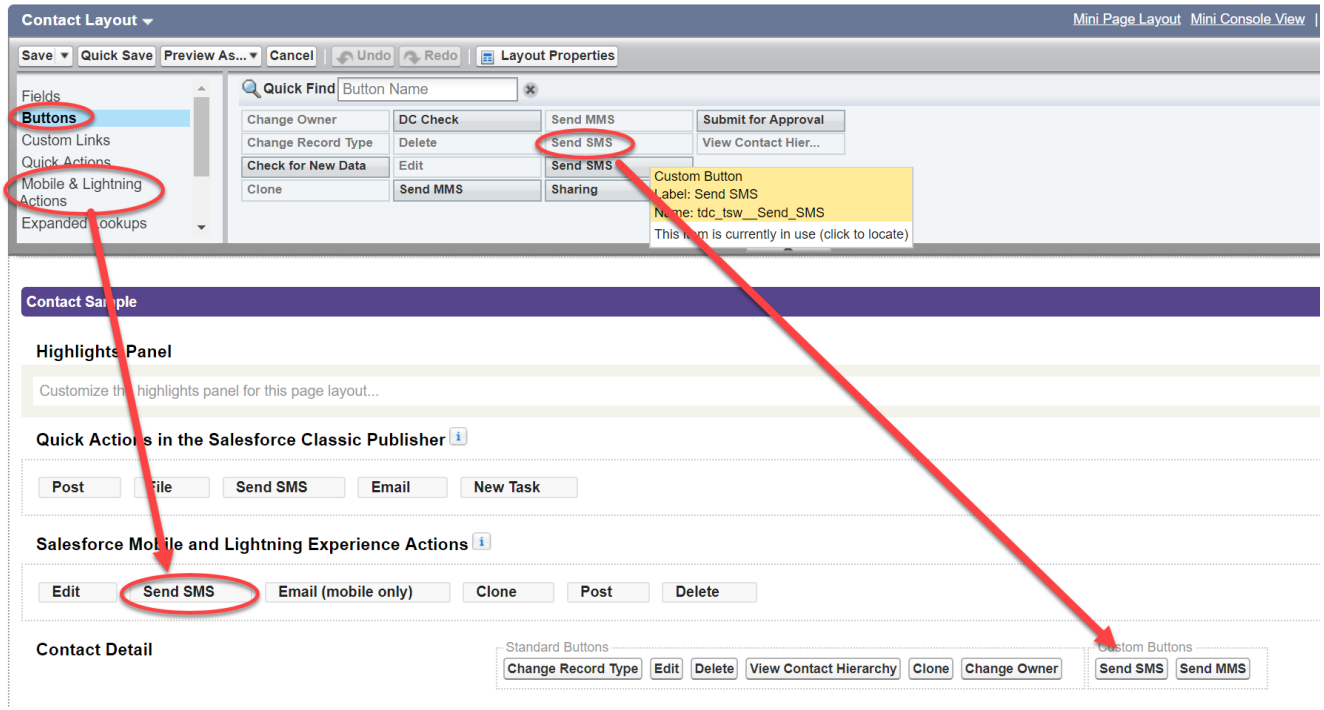


*Figure 4 - Drag **Send SMS** buttons onto Classic, Lightning and Salesforce1 locations*

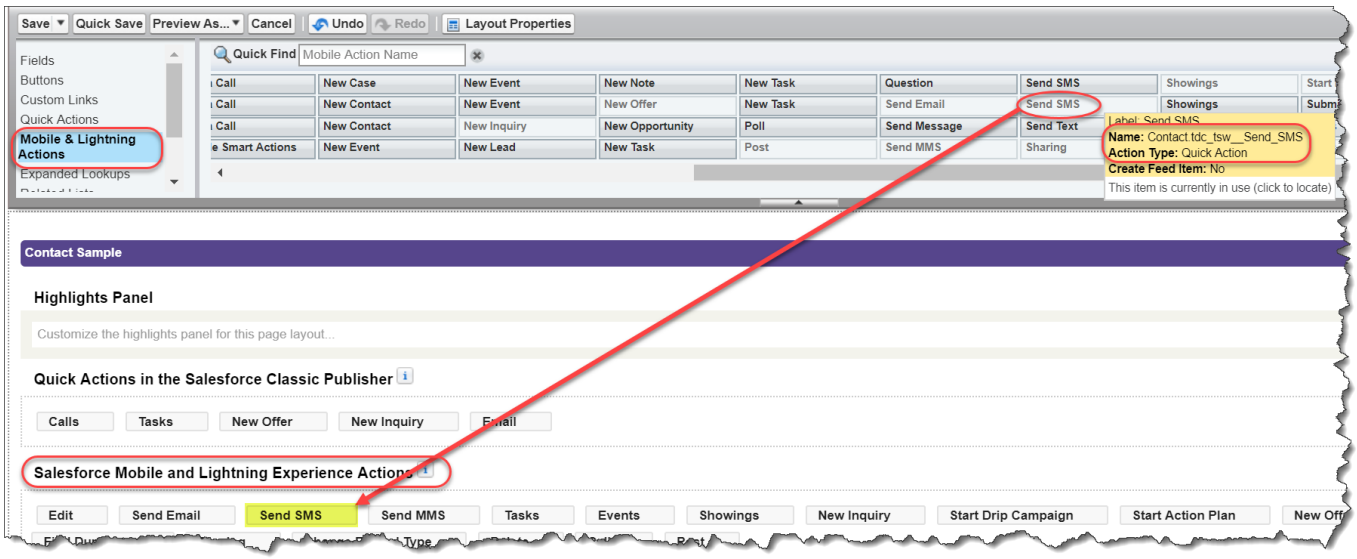


Figure 5 - Lightning & Salesforce1 button configuration

3. Drag the **SMS Opt Out** field onto your page layout, this is optional. It controls the automatic Opt-Out features of 360 SMS.

4. As shown in *Figure 6*, add the **SMS History** related list to your page layout (this is optional if you are planning to use the Conversation View but still useful for other reasons). Modify the fields displayed as you see fit. We recommend the fields shown below and setting the sort to Create Date Descending.

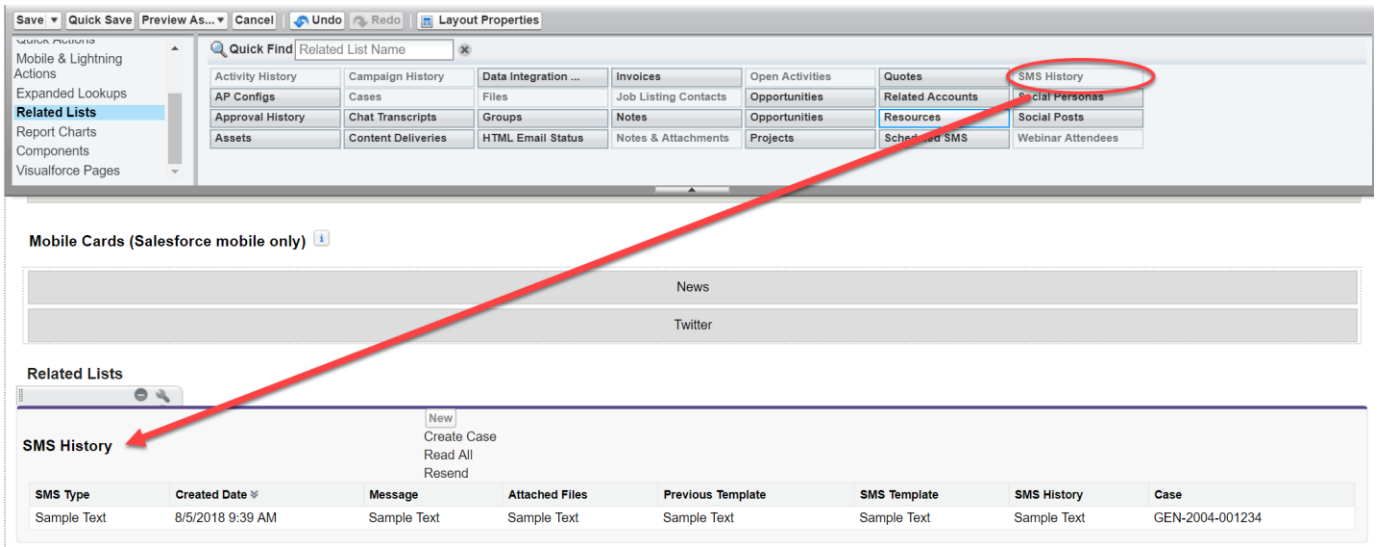


Figure 6 - SMS History related list

Conversation View Configuration

360 SMS comes with a pre-configured Conversation View Visualforce page for Contacts and Leads (jump to the *Custom Object Configuration* section for additional standard objects and custom objects). The Conversation View provides a nicer visual representation of the back and forth between the Salesforce user and customer. It is essentially just a visual representation of the SMS History related list. See *Figure 7.*

To add the Conversation View to Contacts or Leads:

1. Add the SMS Conversation View – Visualforce page to your page layout, *Figure 8.*
2. Add a new **Section** to your page layout and drag the **SMS Conversation View** Visualforce Page into that section
3. Use the wrench icon to set the page height to at least 500 pixels.
4. That's it, you're ready to text!

Lightning Note: The Conversation View can also be dragged into any location on a Lightning Page Layout and because it dynamically renders it displays nicely within Salesforce1 as well.

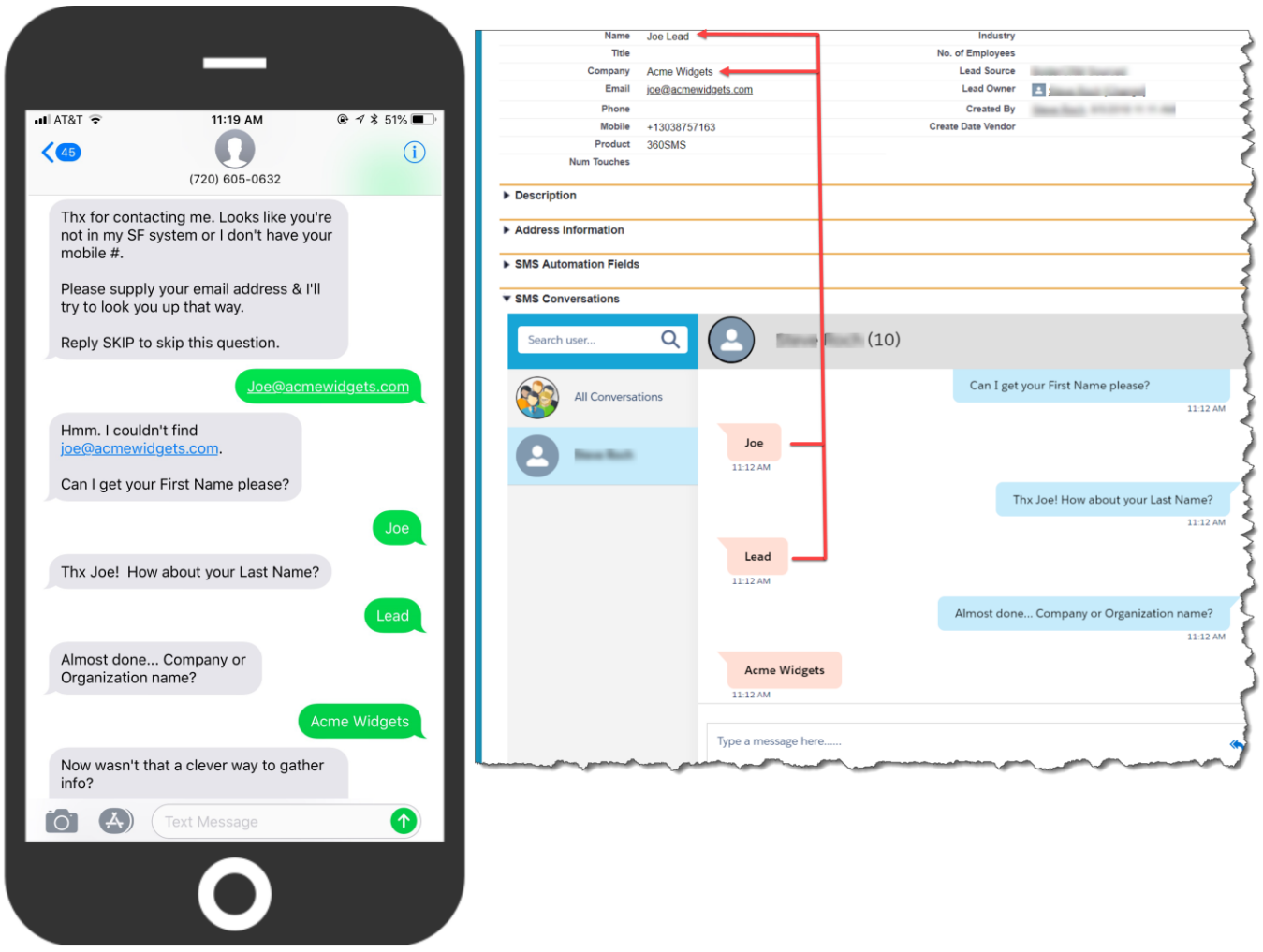


Figure 7 - 360 SMS Conversation View – in this case capturing information via an automated survey

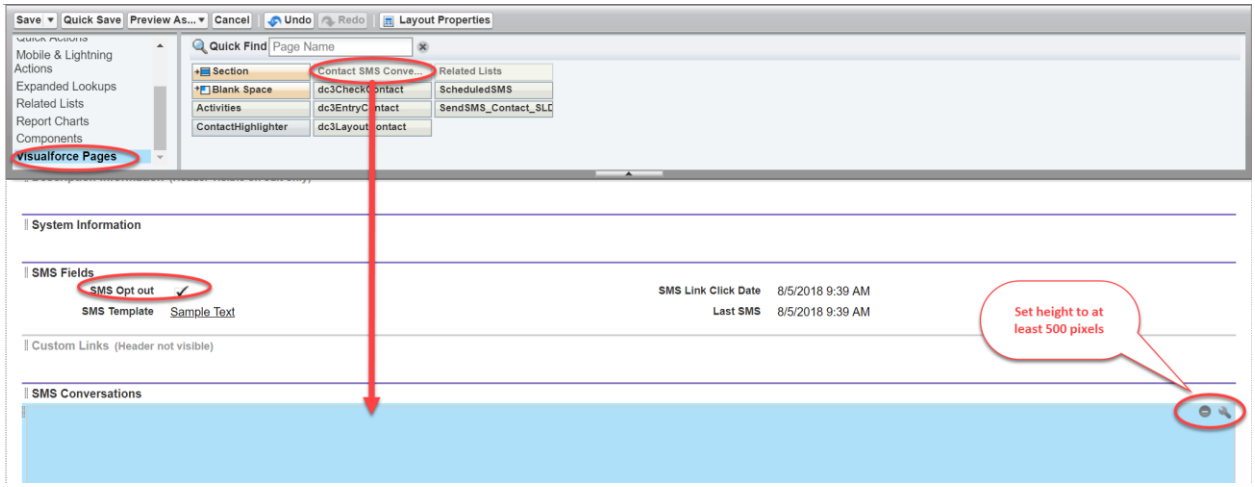


Figure 8 - Adding Conversation View to the page layout

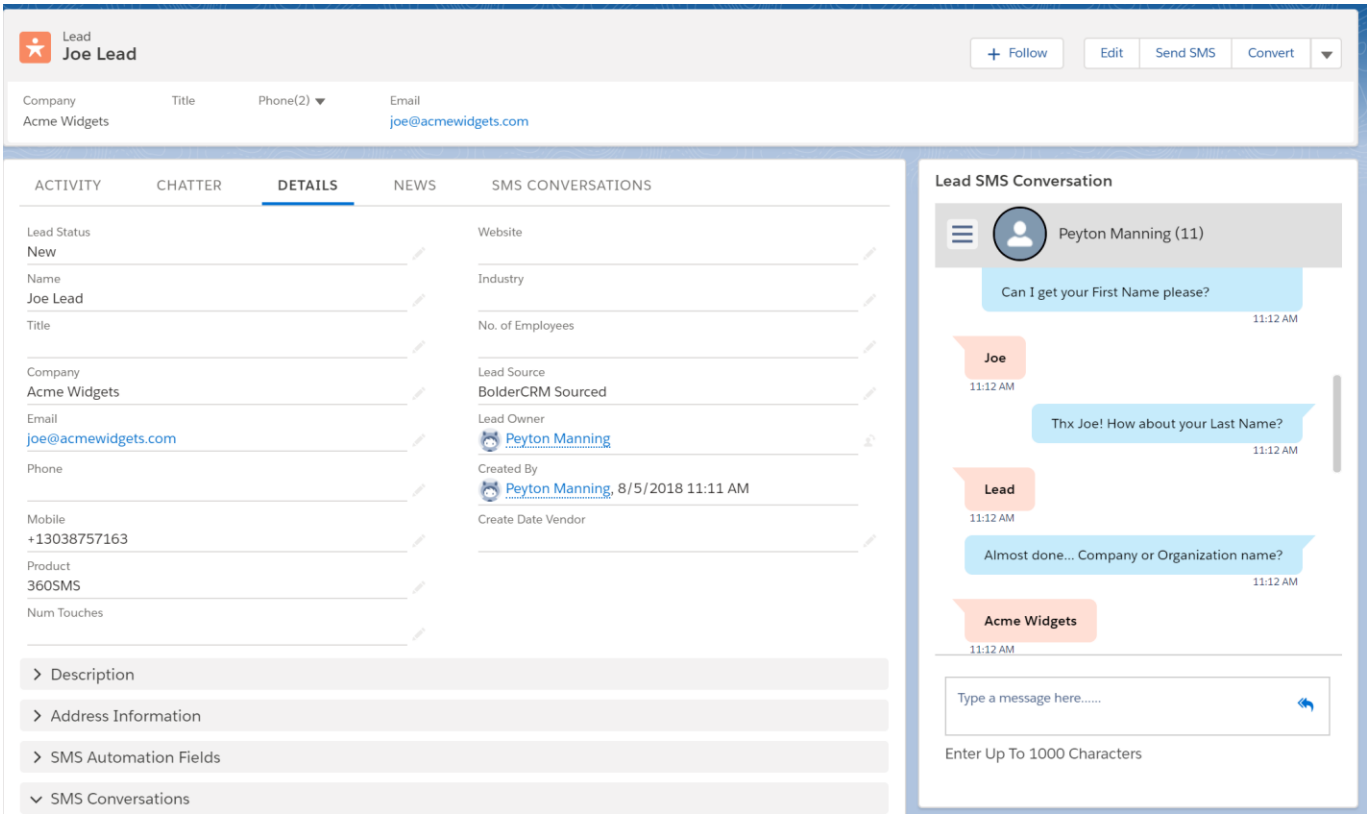


Figure 9 - Add the Conversation View VF page anywhere you like in Lightning

Review/Edit designated Mobile Phone fields

1. As many organizations utilize different phone numbers for different purposes, 360 SMS is flexible to handle all situations. By default, the application chooses all the standard phone fields for Contacts and Leads.
2. The **Send SMS** interface will change if multiple phone fields are defined versus if just one field is defined. When multiple mobile phone fields are defined a pick list will be presented with a default field and the ability to choose different fields to send the SMS to. Otherwise if only one field is defined no pick list appears, *Figure 11*.
3. To edit the defaults, simply delete the defined object definition and re-create it.
4. Obviously, only actual field(s) which hold mobile numbers should be defined, as sending to a land line will function the same way as from your own mobile phone, it just will not get delivered.

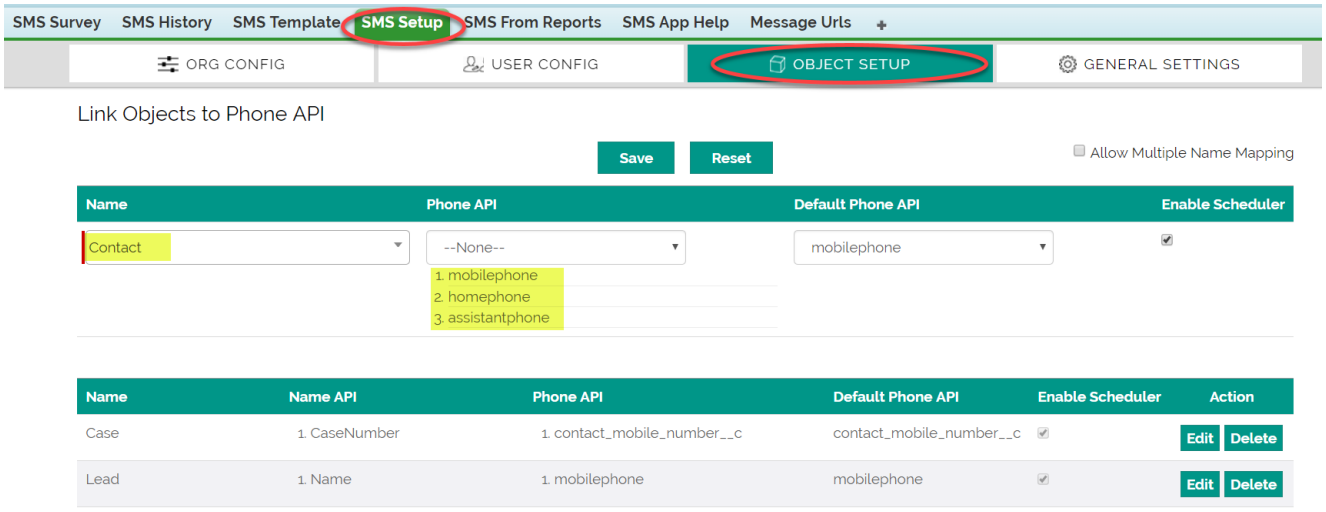


Figure 10 - Define/Edit Phone Fields per Object

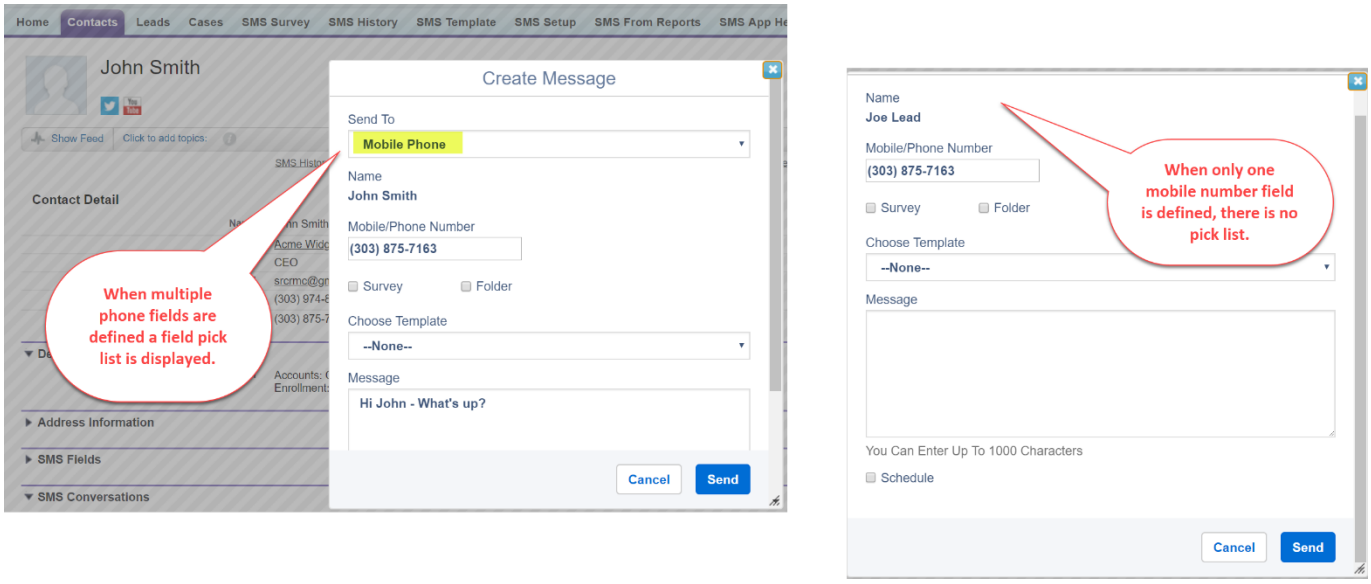


Figure 11 - Multiple Mobile Numbers defined (Contact) vs. only one field defined (Lead)

Batch SMS aka Bulk SMS

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 12 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.

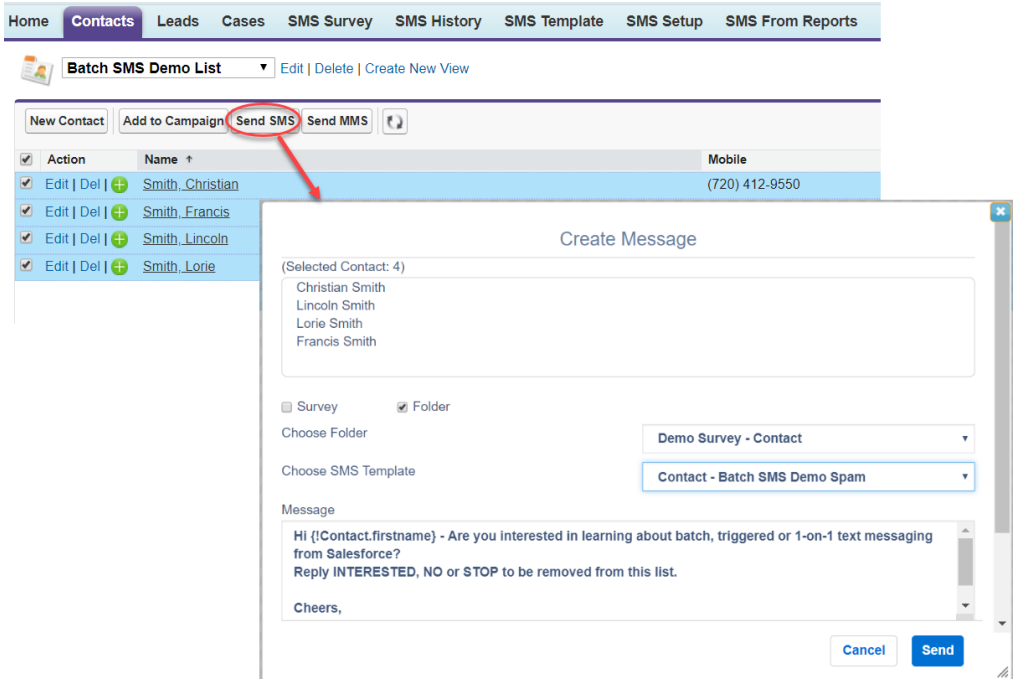


Figure 12 - Batch SMS from List View

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 13*

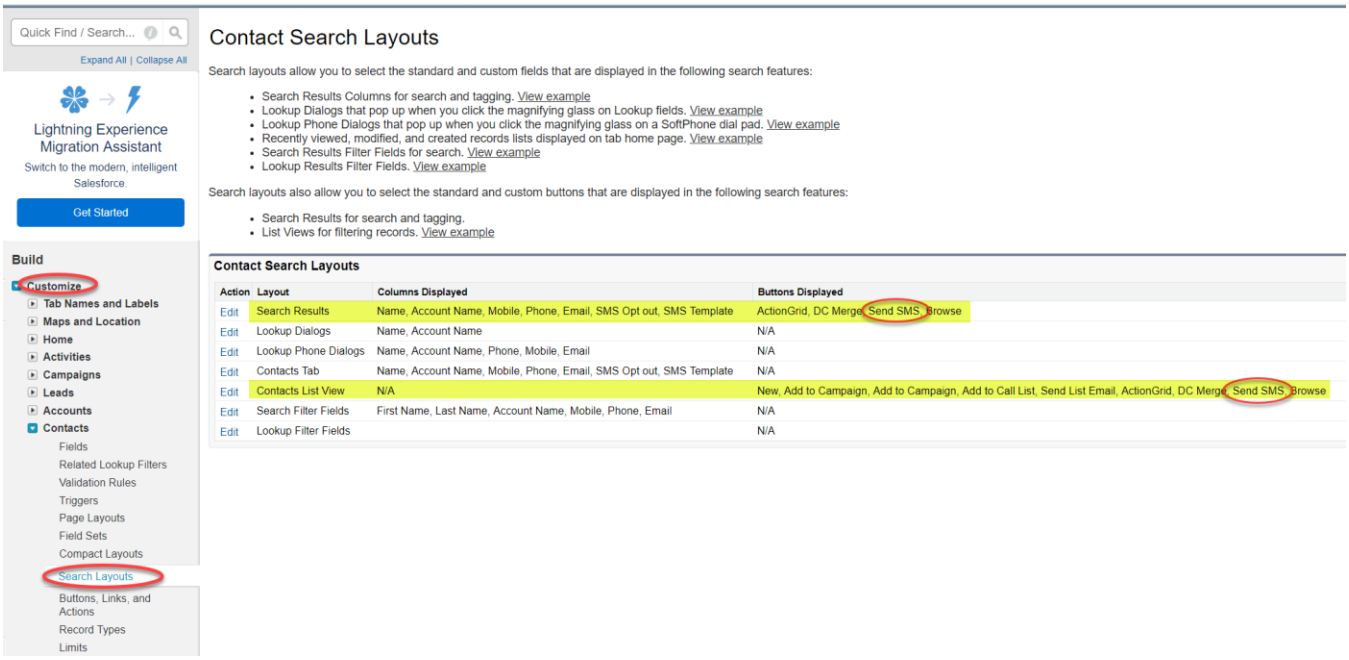


Figure 13 - Add the batch SMS buttons to the object Search Layouts

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 14*, 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.

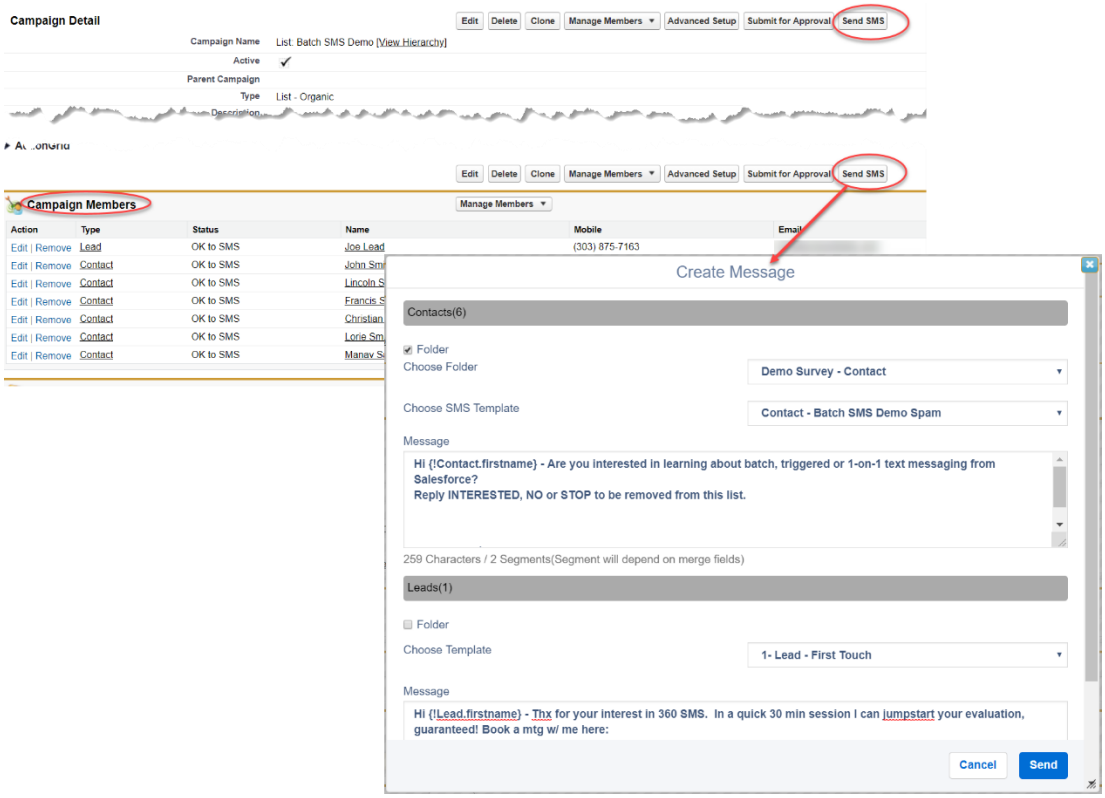


Figure 14 - Batch SMS from Campaigns - choose separate templates for Contacts vs. Leads

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

Note that the 2nd 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

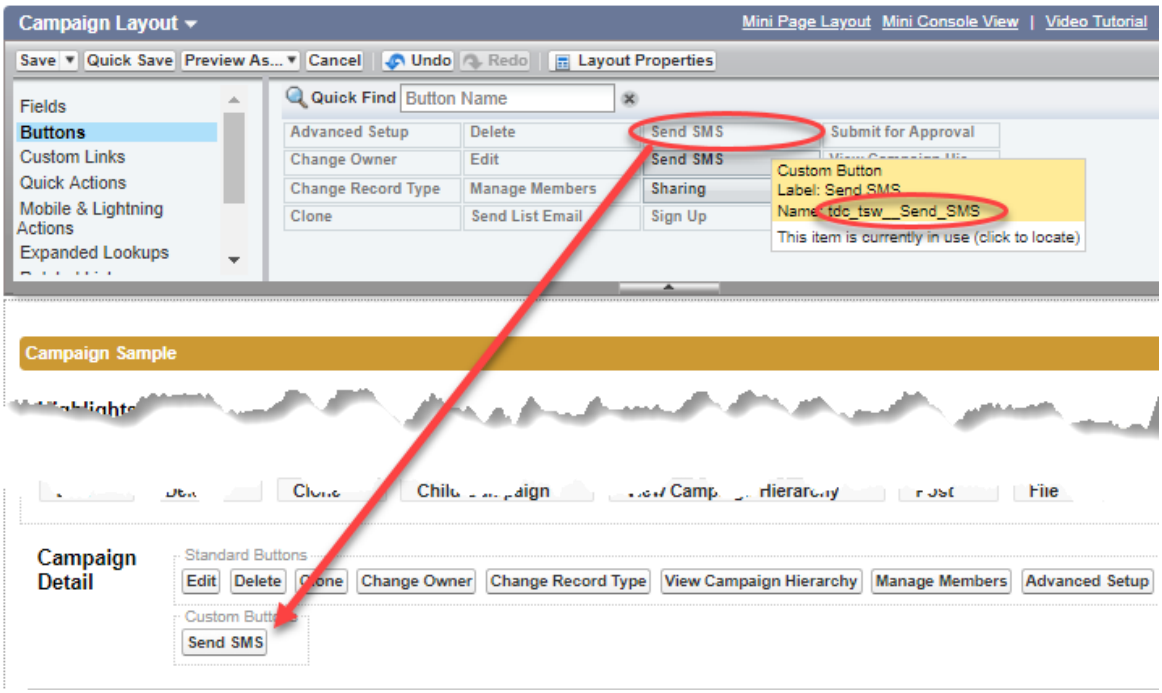


Figure 15 - Add the Send SMS button to the Campaign to Batch SMS the Campaign Members

How It Works

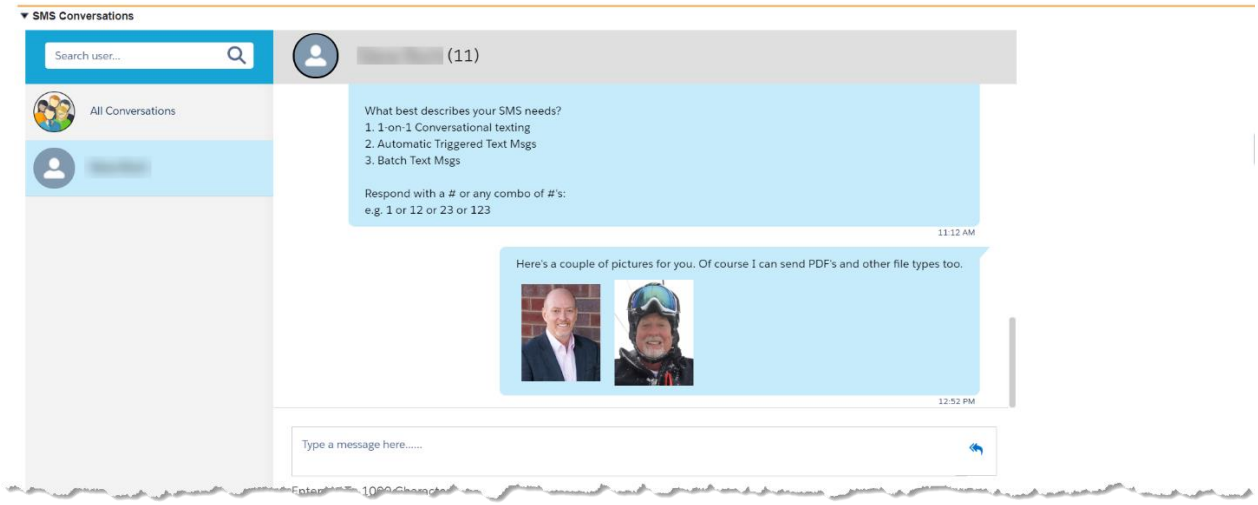
Now that you have configured the basics, you can send an Outbound SMS either via the **Send SMS** button or via the **Conversation View**. Either method writes a record to the SMS History related list for the object it was initiated from. The outbound messages are designated with Type = Outgoing.

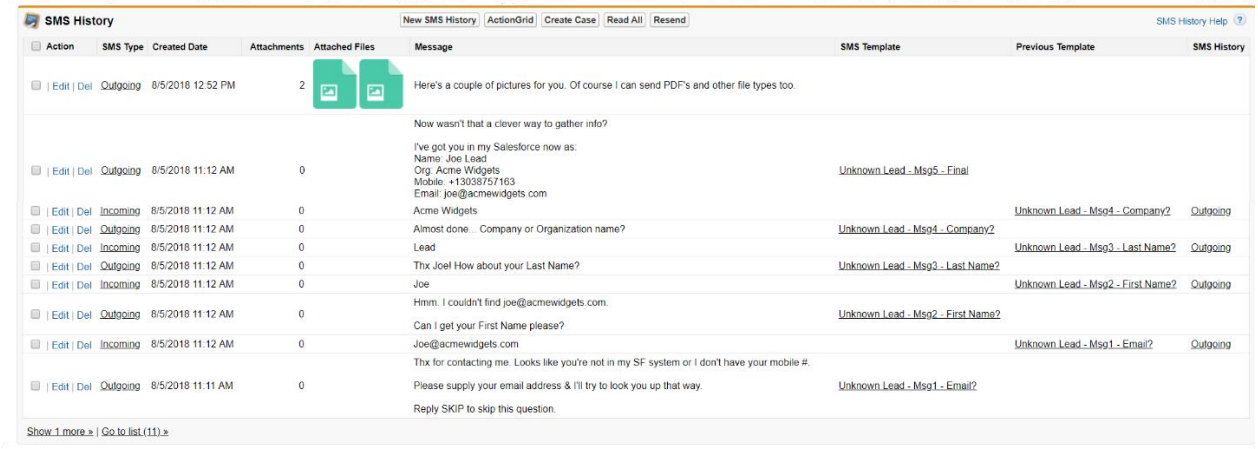
Inbound Messages automatically resolve to whatever objects are defined in the Object Setup (by default the app is configured for Contacts and Leads). The inbound number will match to the designated fields defined in Object Setup and create an SMS History record of Type = Incoming. It automatically handles various phone formats.

NOTE: ***Storing both the Outgoing and Incoming in a single SMS History object is an important differentiator for 360SMS as it makes reporting and automations significantly easier than with other SMS applications.***

There are numerous settings which govern things such as SMS History.Owner (who gets notified when an incoming message arrives) and an important setting which links the Incoming Message to its preceding Outbound message. Review the General Settings section to see them all.

The linking of Incoming messages to their preceding Outgoing message is an important setting when working from non-primary objects such as the Case object and Custom Objects, as the incoming message will automatically resolve to the specific Case or Custom Object from which the outbound was sent. Additionally, this setting controls the SMS_History.Owner so that the outbound owner will be notified when his/her message is answered regardless of the parent object records ownership.





Advanced Configuration

This section covers the additional features and functionality that make 360 SMS unique among Salesforce SMS Applications.

- General Settings
- Custom Object Configuration
- Security & Licensing
- User Configuration
- SMS Templates
- Incoming Alerts
- Reply to Email Alert – configuration
- Incoming Alert Email Templates
- MMS
- Hyperlink Click Tracking
- Salesforce Sites
- Delivery Status
- SMS from Salesforce Reports
- Send SMS with Process Builders or Flows

General Settings

Owner Details		
SMS App Owner Name:	Joe Administrator	The service user that all alerts and automated processes will run under, i.e. the Created By User. Defaults to the user that installed the app.
Subscription Keywords		
Re-Subscribe Keywords:	Start,Subs	Automatic Opt-Out handling. Incoming SMS with these keywords sets the Object.SMS_Opt_Out to False.
Unsubscribe Keywords:	Stop,Unsubscribe	Automatic Opt-Out handling. Incoming SMS with these keywords sets the Object.SMS_Opt_Out to True. Note that the STOP keyword unsubscribes the number at the Provider Level as well regardless of the Saleforce SMS_Opt_Out field value. The customer himself can only re-enable themselves with the START keyword.
SMS Delivery Report Settings		
Site URL:	http://boldercrm.force.com/IncomingSMS	Although not required, Salesforce Sites technology is used to update the SMS_History.DeliveryStatus and is required for Link Clickthrough Tracking as well. See documentation for Sites configuration.
SMS Delivery Report Settings		
Set the default view:	My Conversation	Conversation View has the option to show conversations between the Contact/Lead between All salesforce users or only for the currently logged in user (My Conversation). This option controls the default behavior.
Settings for Incoming Alert SideBar		
Default View:	Unread Messages	Controls whether all inbound messages are displayed in the Side Panel Alert or just UnRead Messages.
Incoming Alert Color Changes to Yellow in:	60 mins	Controls the time duration at which the Inbound message will change colors
Incoming Alert Color Changes to Red in:	120 mins	Controls the time duration at which the Inbound message will change colors
Incoming Sidebar Automatic Refresh Time:	30 sec	Controls how often the Side Bar will poll and refresh itself looking for new incoming messages or changing colors of existing messages.
Enable Company Logo in Sidebar:	✔	When enabled works in conjunction with the "Selected Logo" option to allow one to use their company logo in the Side Panel rather than the default 360SMS logo.
Selected Logo	SMS App Logo	Define the logo that will be used in the side panel.
Enable Audio on Incoming Message:	✔	When enabled, plays a chime sound on the device when an incoming message arrives.
Enable Sharing for Incoming Messages:	✗	When enabled, allows the SideBar to show more than just messages for the current user and instead utilizes pre-defined Salesforce Sharing Rules setup for the SMS History object.
Enable Reply Enable Read Enable Unsubscribe	✔	These options control the available buttons on the side panel.

General Settings continued

Email To SMS		
Email Service Address:	sms_incoming@r-ojuzidkfmxk9w7ng4c48epxcsfd99ubw30a312go088t4f85a.f4-4iqrieao.na59.apex.salesforce.com	When a Salesforce Email Service is configured this setting allows the Incoming Alert Email Notification to be replied to, which then sends the reply as an Outbound SMS to the customer, negating the need to login to Salesforce to reply to the customer. See documentation on setting up the email service.
Enable Dark Hour		
Enable Dark Hour for Automation:	✗	When enabled, no triggered or scheduled outbound messages will go out during the time range. This is useful to give the appearance that the triggered messages are being sent from a real person rather than automation.
Starting Time:	10 PM	Start of the dark time period.
Ending Time:	6 AM	End of the dark time period.
Sending Time(Next Day):	8 AM	Sets the time at which all messages stopped during the dark hours will then be sent on the following day.
Link Tracking		
Link Tracking Status From Backend:	Enabled	Hyperlink Click Tracking is enabled in the back-end by writing to Sales@360SMSApp.com requesting it to be enabled. You will then be sent instructions for the additional configuration required. All clickthrough's are tracked in native Salesforce and thus reportable and triggerable.
Enable Link Tracking For Bitly:	✔	When enabled and when you have a Bit.Ly account, the hyperlink sent in an outbound message will be automatically transformed to a short bit.ly link on its way out. Thus, the customer only sees the short link, but internally you see the long link.
Bitly Generic Access Token:	**********	After setting up a Bit.Ly account, Bit.Ly supplies an API token which we use to facilitate the back and forth translation of the Bit.Ly link into friendly looking hyperlinks.
Survey Settings		
Enable Survey:	✔	When enabled the Survey checkbox appears for the Send SMS dialog box enabling a pick list of pre-defined surveys to be chosen.
Template Folder		
Enable Folder:	✔	When enabled the Folder checkbox and pick list appears in the Send SMS dialog box allowing the user to narrow down their selection of templates by folders.

General Settings continued

Message Settings		
Restrict SMS Composing:	--None--	Restrict Template Editing locks down the Send SMS message box after a template has been chosen but still allows free-form messages. Restrict Message Composing locks down the Send SMS message box completely, only allowing the use of Templates.
Outgoing History exists for Number:	Last Outgoing Sender	Assigns ownership of inbound messages for known phone numbers to either the SMS_History.Owner of the preceding Outbound Message (recommended) or to the record owner of the object that the Inbound message links to.
Outgoing History does not exist for Number:	Default App Configuration	For unknown unsolicited inbound messages where the phone number is unknown in Salesforce, sets the SMS_Histor.Owner to the user defined in the "SMS App Owner Name" setting.
Create task while Auto-forwarding Emails:	✗	When **Email Alert To Owner** is enabled or when the **Auto-Forward Email** feature is enabled, this feature creates a Salesforce Task record for the notification email sent to the user. The task is linked to the Contact/Lead record or whatever record the incoming messages is linked to.
Relate incoming with last Outgoing:	✔	Use this important setting to relate all Incoming messages with the preceding Outbound message. Used for Incoming SMS_History.Owner notification, linking the inbound to the record that the Outbound was linked to (such as a Case) and highly useful when processing Inbound keywords to make sure that the answer to a question is in context to the question (template) being asked.
Enable SF1 push notification:	✔	The feature is more appropriately named “Create Chatter Messages” for inbound messages. This can be useful when working from Salesforce 1 on the phone as the users will just see all the Inbound Messages in the Chatter feed.
Keyword for reply from Chatter:	#Reply	When the "Enable SF1 push notifications" is enabled (Chatter messaging posting for Inbounds msgs), then one can use the hashtag plus keyword syntax to comment in the Chatter Feed and it will send an Outbound SMS. e.g. For an inbound message in the chatter feed, reply to the post with #reply <your message>. The text after the #reply is sent as outbound SMS.
Settings for Lead Convert Action		
Enable Trigger/Scheduler to relate SMS records to converted Contact/Account/Opportunity:	✔	When Leads are converted this feature allows any previous and unsent Scheduled SMS records to re-attach themselves to the Contact that is created in the Lead Conversion process. They will then be sent from the Contact at the previously defined date/time.
Run scheduler in Admin context to relate SMS records:	Daily Run	When leads are converted, the Lead.Owner executes the process and often does not have permissions to edit SMS_History records which he does not own himself, such as when another user is also texting the Lead. Therefore, when the lead is converted the other users SMS_History remains "stuck" on the converted lead. This setting is a workaround which runs under the context of the Sys Admin and resolves those orphaned SMS History records to the new Contact.

Custom Object Configuration

When configuring 360 SMS for additional standard objects or custom objects there are a few quick steps to perform:

1. Create a custom **Send SMS** button(s) and place them on the Page Layout and/or List View
2. Create a custom Conversation View Visualforce page, if desired
3. Add the object and designated mobile phone field to the 360 SMS Object Setup
4. Create a Lookup field to your custom object on the SMS_History object
5. Add the field named SMS_Opt_Out to your Custom Object

Button Creation

1. Create the button code using the Button Code Generator
    a. Access the button code creator via the **SMS App Help** tab shown in *Figure 16*, then define the Object and Button Type.
        i. Detail Page Button – Single one-on-one SMS – this button goes on the page layout
        ii. List View Button – used for Batch SMS – this button goes on the List View
    b. Copy the code as shown in *Figure 16.*

2. Proceed to Salesforce Setup and to your Object settings - *Figure 17*
    a. As shown in *Figure 17*, create a new button and paste in the Code from step 1b.
    b. We recommend that you distinguish the api name of the button(s) between the Detail Page Button (single SMS) vs. the List View Button (Batch SMS), e.g. Send_SMS_Single, Send_SMS_Batch

3. Place the button on the page layout or List View (Batch SMS)

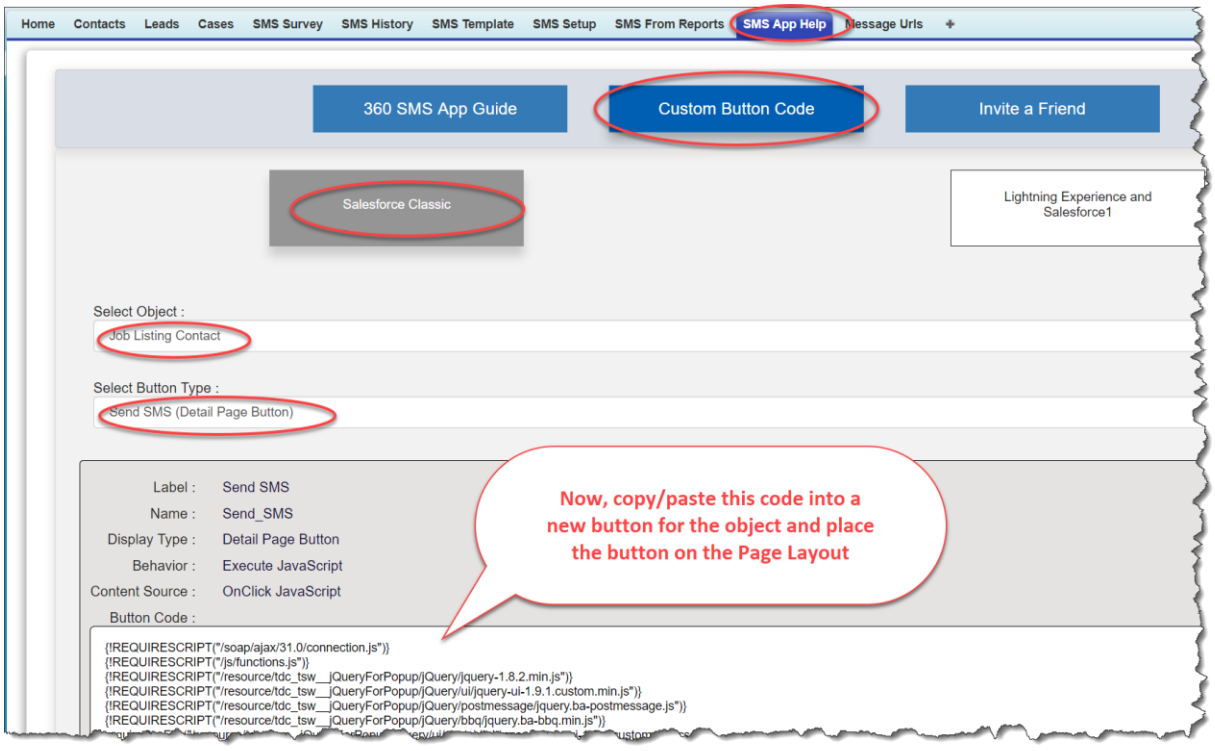


Figure 16 - Custom Button Code creator

Figure 17 - Defining a Salesforce Classic button for Detail Page or List View (Batch SMS)

Field Creation

1. Create a Lookup Field on the **SMS_History** object referencing your custom object, e.g. SMS_History.Job_Listing_Contact in the example above.
    a. This will automatically add the field to the SMS History page layouts and the SMS_History Related List to the page layout of your custom object if you let it and which we do recommend.
2. Create a field named exactly **SMS_Opt_Out** on your custom object. It's API name will become **SMS_Opt_Out__c** (this is required for the Convo View and Send SMS buttons and will present you with a friendly error if the field doesn't exist). You may optionally place the field on the Page Layout.
3. The **Scheduled SMS** object should also be modified to add a lookup field for your customer object just like the SMS History.

Conversation View Creation

There is currently no Conversation View creation button, perhaps because the process is so easy.

1. Goto Salesforce Setup and search “Pages”
2. Create a new Visualforce page as shown in *Figure 18* using the code provided below. Switch out the StandardController to your own object.

Grant permissions to your Visualforce page either via standard Salesforce Profiles or clone the **SMS App Permission Set** and then add the page in the Visualforce Pages section of the permission set. Refer to the *Security* section for more about Security and Permission Sets.

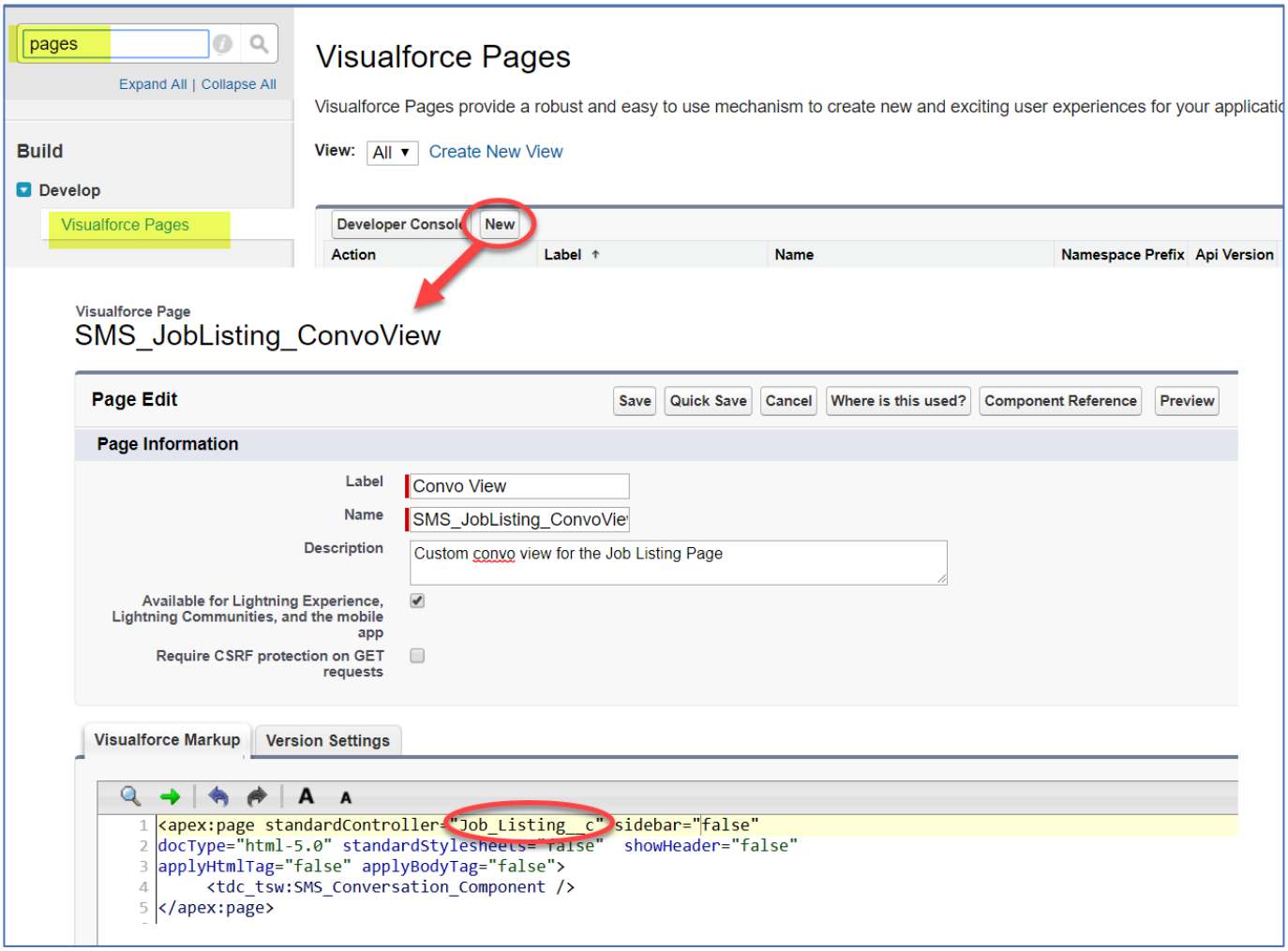


Figure 18 - Conversation View for a custom object

Copy this code and modify the object to create a custom object Conversation View page:

```
<apex:page standardController="Job_Listing__c" sidebar="false"
docType="html-5.0" standardStylesheets="false"  showHeader="false"
applyHtmlTag="false" applyBodyTag="false">
     <tdc_tsw:SMS_Conversation_Component />
</apex:page>
```

Object Configuration

As noted in the basic configuration section, you need to define the object and its phone field(s) to enable Outbound/Inbound SMS to and from that object. With custom objects it is common to use a formula field that points back to the Contact.MobilePhone field. However, one may also use standard editable phone fields. The Phone API pick list displays formula fields of type TEXT and fields of type PHONE.

In *Figure 19* we have an object which is the child object of a Job_Listing object and a Contact object, in other words, many Contacts that might be interested in a Job Listing. Thus, we have created a formula field named Contact_Mobile_Number which pulls from the Contact.MobileNumber.

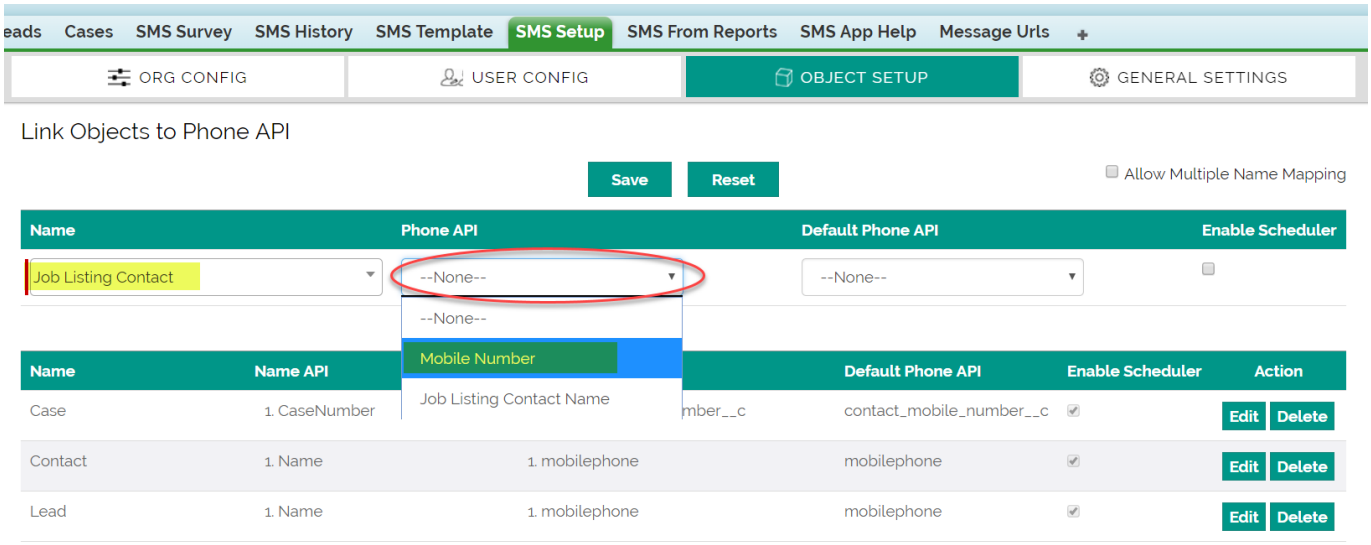


Figure 19 - Define objects and phone fields

Security & Licensing

360 SMS utilizes standard Salesforce security and licensing to grant users access to the various objects, buttons and functionality required for texting.

The easiest security approach is to add Users to the **SMS App Permission Set** which is created at installation time. As this is a managed permission set it cannot be edited other than to Add Users.

Consider cloning this permission set and using your cloned version instead, especially if you are creating additional Conversation View Visualforce Pages. That way you need only add custom Conversation View pages to the cloned permission set.

Additionally, since 360 SMS is a native Salesforce application it honors all Security and Sharing Rules, so it is possible for some users to not see each other's SMS History records depending on how your security is configured.

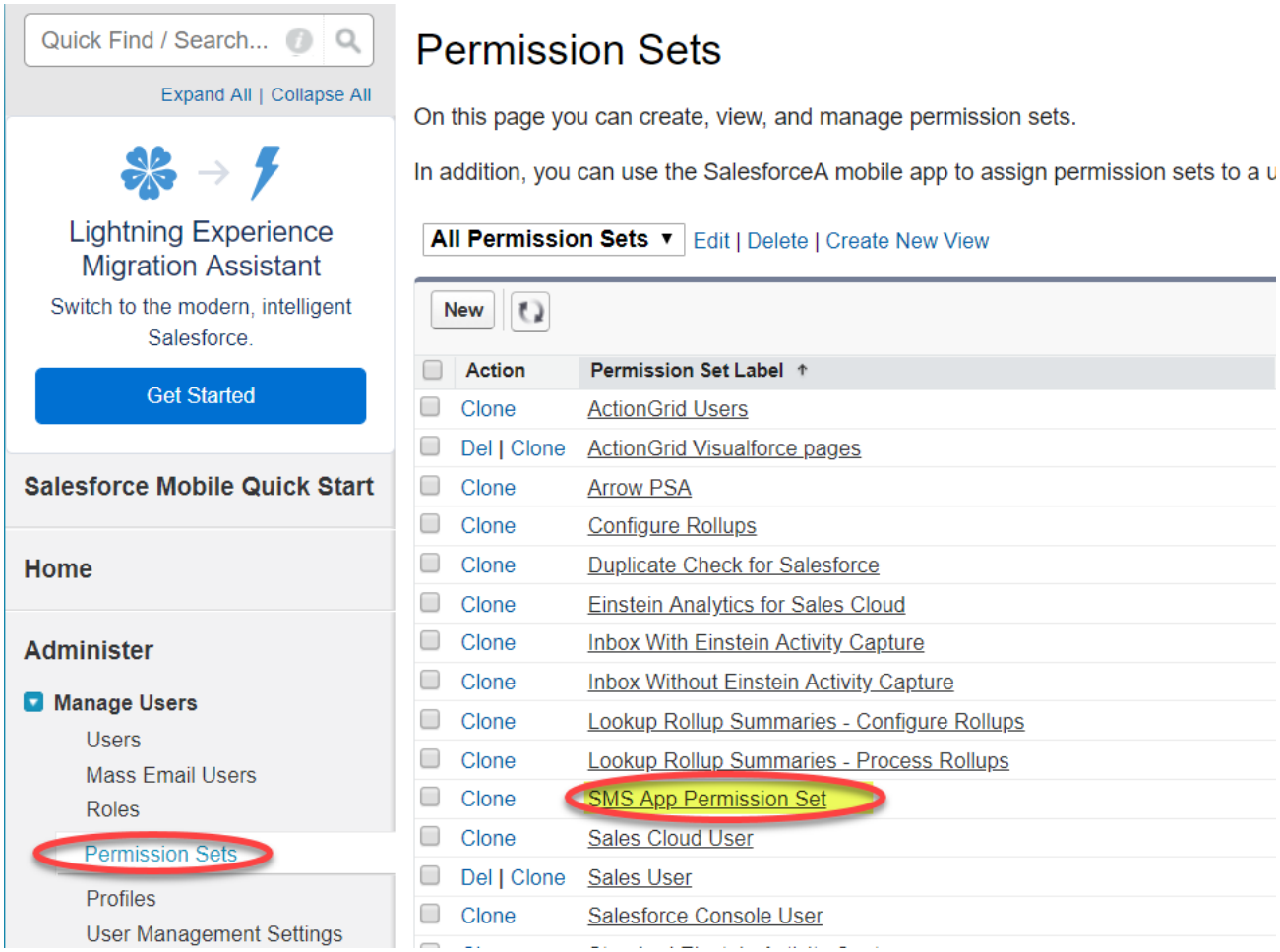


Figure 20 - Add Users to the SMS App Permission Set to grant them security to objects and functionality

Licensing

The application is licensed per user like most Salesforce Apps. Each user that needs to send an outbound SMS must be licensed. Additionally, the user must be licensed to see the Conversation View VisualForce page and the SMS_History related list.

Note for Trial/Evaluations: During the Trial/Evaluation of 360 SMS the application is licensed for unlimited users, so you can ignore this licensing section.

As with all managed and licensed Salesforce Apps, licensing is managed from the Installed Packages page within Salesforce Setup. Simply press the Manage Licenses and add the users.

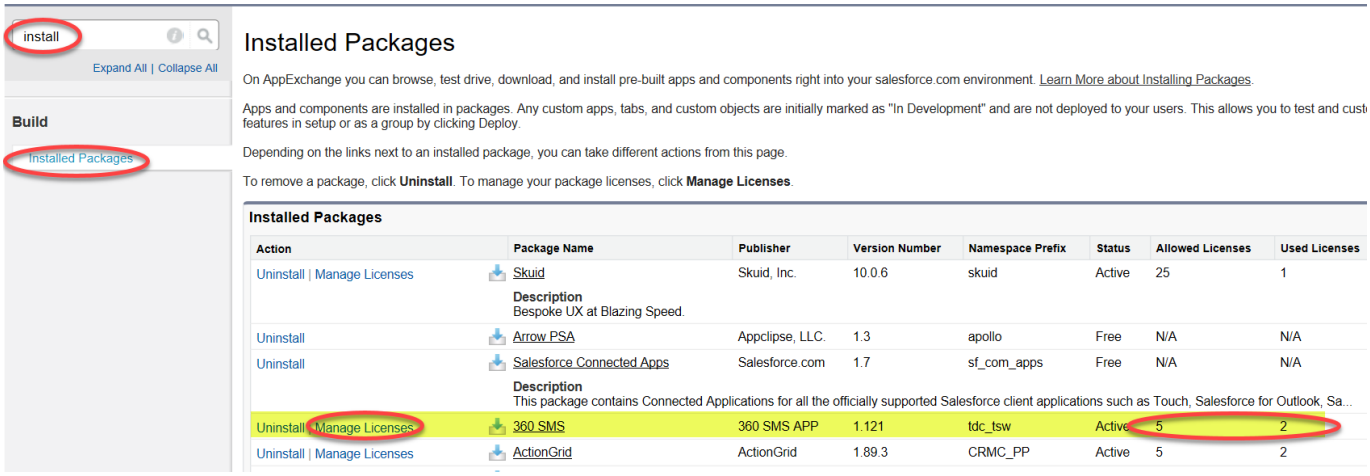


Figure 21 - License Management for 360 SMS

SMS History Visibility Between Multiple Users

360 SMS ships with the visibility to SMS History items set to **PRIVATE**. This means that users can only see their own SMS HISTORY records. If this behavior is not desired, i.e. all users should be able to see each others SMS History but still honor the Salesforce Security Hierarchy, then simply change the sharing rule from **Private** to **Public Read/Write**.

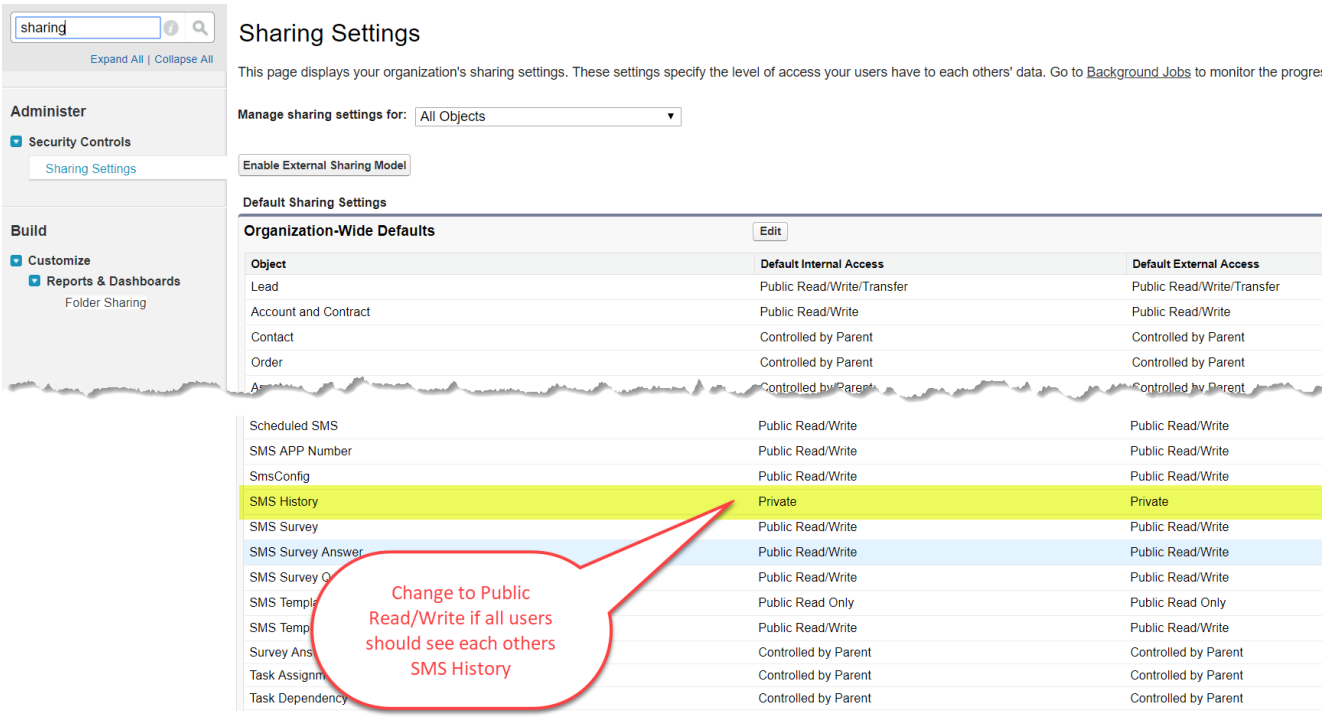


Figure 22 - Sharing Settings for the SMS History Object

User Configuration

In addition to Security, users must be configured in the 360 SMS **User Configuration** table. As shown in *Figure 23*, each user must be matched to one or more phone numbers. Some organizations elect to use a single number where all users utilize the same number. Other organizations assign numbers to departments or even each individual. If a user is assigned to more than one number, a Pick List appears for them to pick which number to use for Outbound messages. The pick list is controlled solely by the User Config table. If the user is only matched to one number, they never see the pick list.

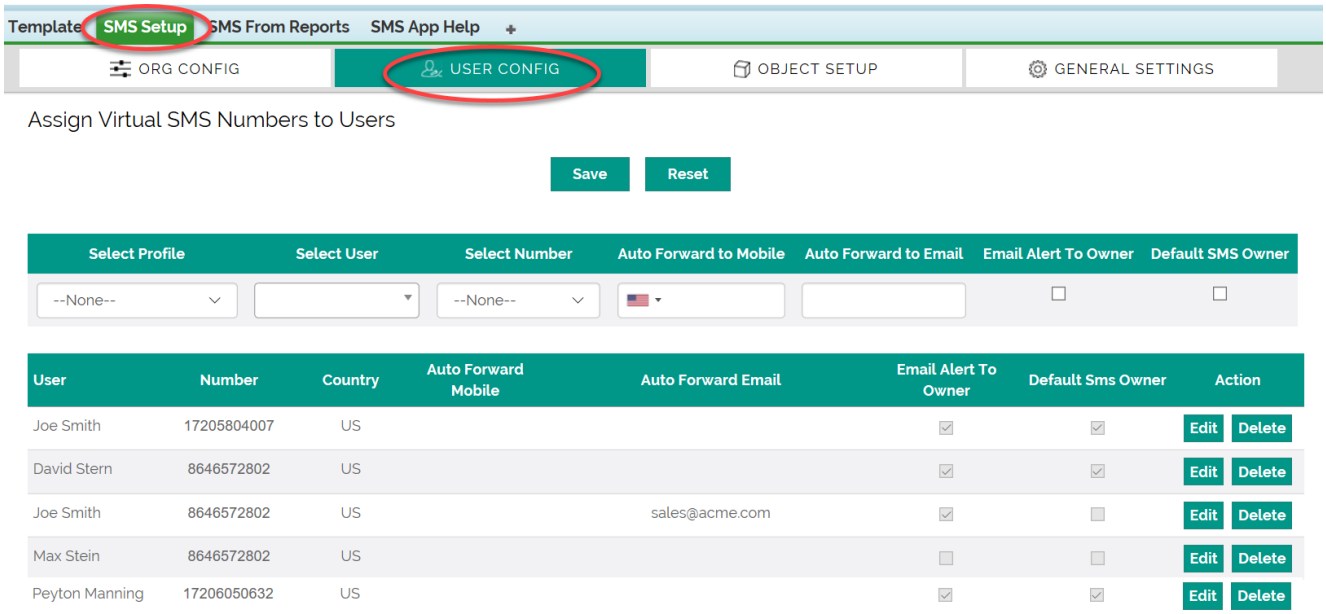


Figure 23 - User Configuration assigns numbers to each user and defines Alerts and SMS_History Ownership

User Configuration Options Explained

Option	Definition
User	The Salesforce User. A single user may be related to multiple numbers in which case he will see a picklist of numbers to SEND SMS from when sending outbound SMS.
Number	An SMS Enabled number purchased or ported from an existing Land Line to have its SMS Path enabled. Multiple users may be related to a single number and vice versa.
Country	Different numbers must be used for different countries (USA/Canada are the same). Phone number costs and the cost of outbound SMS messages vary greatly by country.
Auto Forward Mobile	Allows inbound messages to be forwarded to a personal mobile number. You cannot reply from your personal number though.
Auto Forward to Email	Allows inbound messages to be forwarded to an alternate email address other than the owner. Note that the Email Alert To Owner option already emails the owner.
Email Alert To Owner	When enabled a pre-defined (and customizable) email alert is sent to the SMS_History.Owner displaying the actual text message plus hyperlinks to the related Salesforce records. Utilizes a standard Salesforce Email Template which can be modified if desired. Review the "Reply to Email Alert" section to learn how users can reply to the alert to send an outbound SMS reply. Great for phone users that don't want to use Salesforce1 to reply.
Default SMS Owner	Resolves the SMS_History.Owner to this user when an Incoming message arrives without a previous Outbound message. Ownership rules are also governed by the preceding Outbound message or by the parent Objects owner field. Only one user per number can be designated as the Default SMS Owner.

SMS Templates

360 SMS provides the most robust SMS Templates among all SMS apps in the Salesforce AppExchange especially with regard to its ability to traverse the object structure to obtain the appropriate merge fields. The merge tag syntax matches Salesforce Email Templates so one can literally copy/paste and edit existing email templates if desired, be mindful that no one likes receiving a long text message like you see in an email though.

- Templates are accessed via the Send SMS dialog
- Templates can be categorized by folder for easier management and selection from the Send SMS dialog
- Templates are required for initiating Outbound SMS via Process Builder

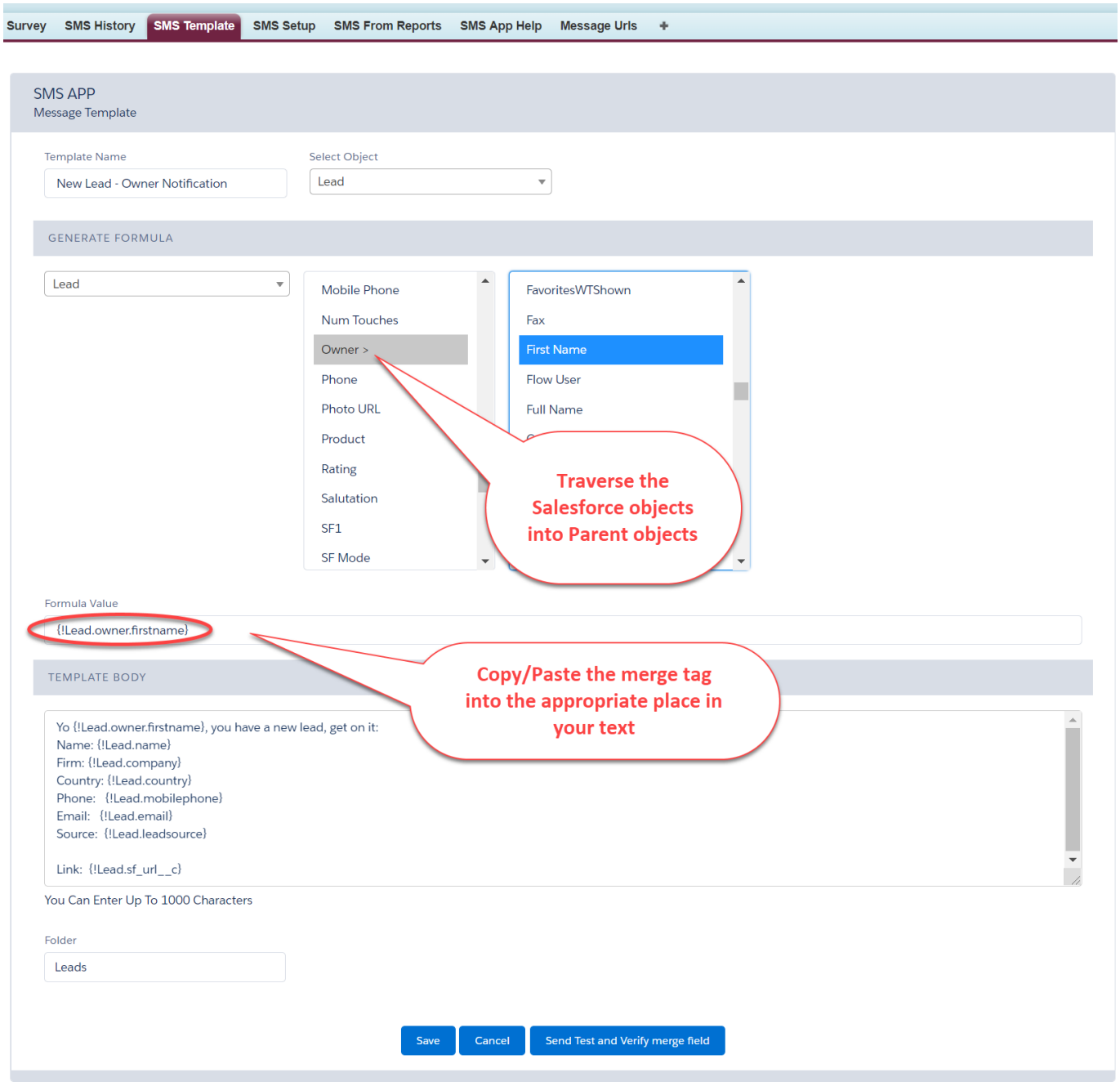
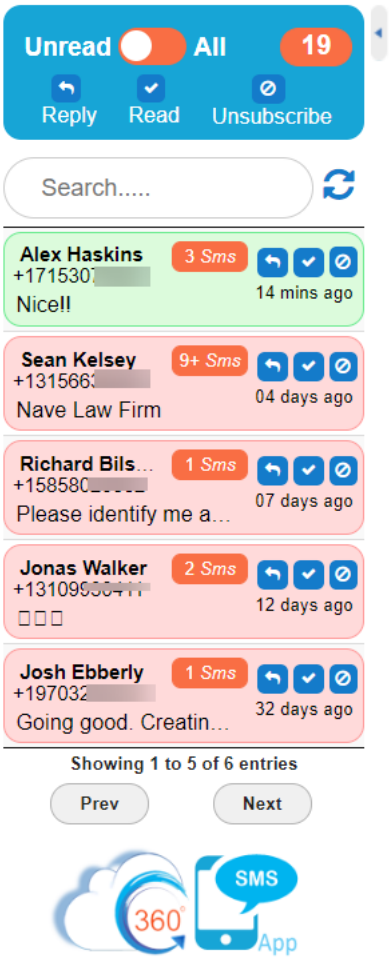


Figure 24 - 360 SMS Templates

Incoming Alerts



There are numerous ways to be alerted about incoming messages. First with a dashboard element that can be placed on:

- Salesforce Classic Dashboard
- Lightning Dashboard
- Lightning Utility Bar
- Salesforce1 Navigation Item

Secondly, via Automatic Incoming Notification email alerts, defined in the *User Configuration* section of this document.

The criteria that is used is as follows:

1. SMS_History.Type = Incoming
2. SMS_History.Owner = Current User (or if sharing rules option is enabled those records as well).
3. SMS_History.Read = False

Classic Home Page component

1. Saleforce Setup -> Search on the term “Home Page” and edit the Home Page Layout as shown in *Figure 25*
2. Enable the Incoming Alert component as shown in *Figure 26*
3. Press Next and arrange your Narrow Components with the Incoming Alert on top if desired.

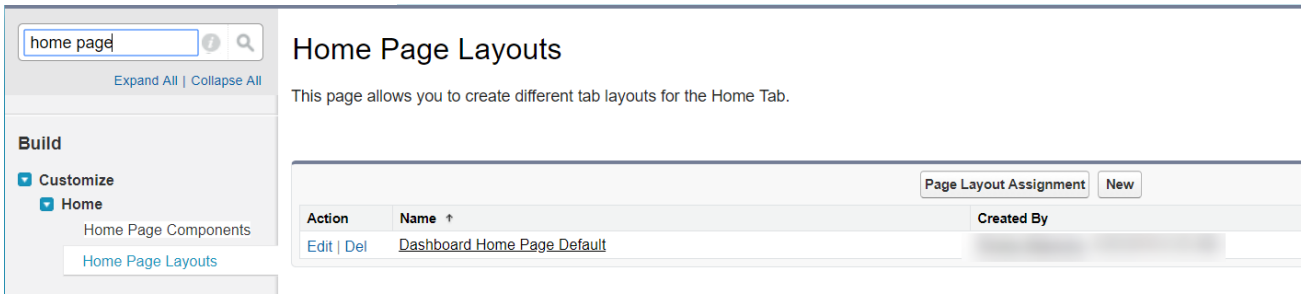


Figure 25 - SF Classic Home Page Layouts

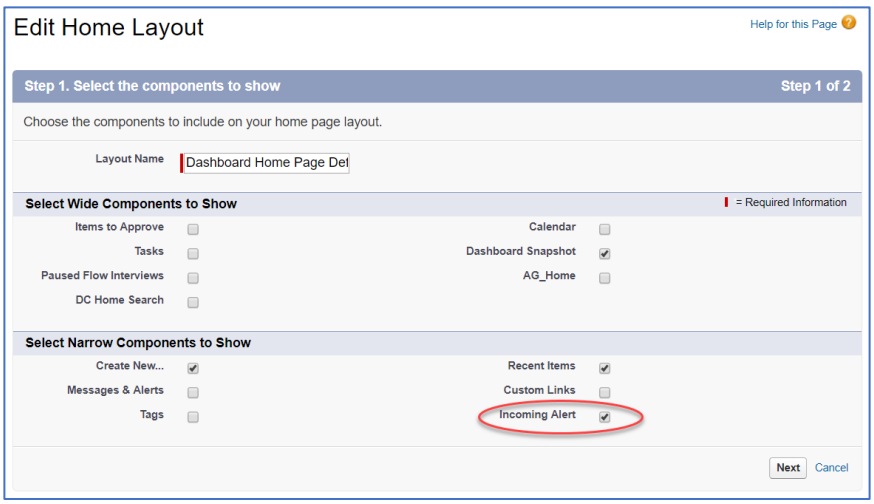


Figure 26 – Enable the Incoming Alert Component

Items in the "Narrow Components" section can display on all Salesforce pages when the User Interface setting for Side Panels is enabled. Go to Settings, then search "User Interface" and turn on Show Custom Sidebar Components on All Pages as shown in *Figure 27.*

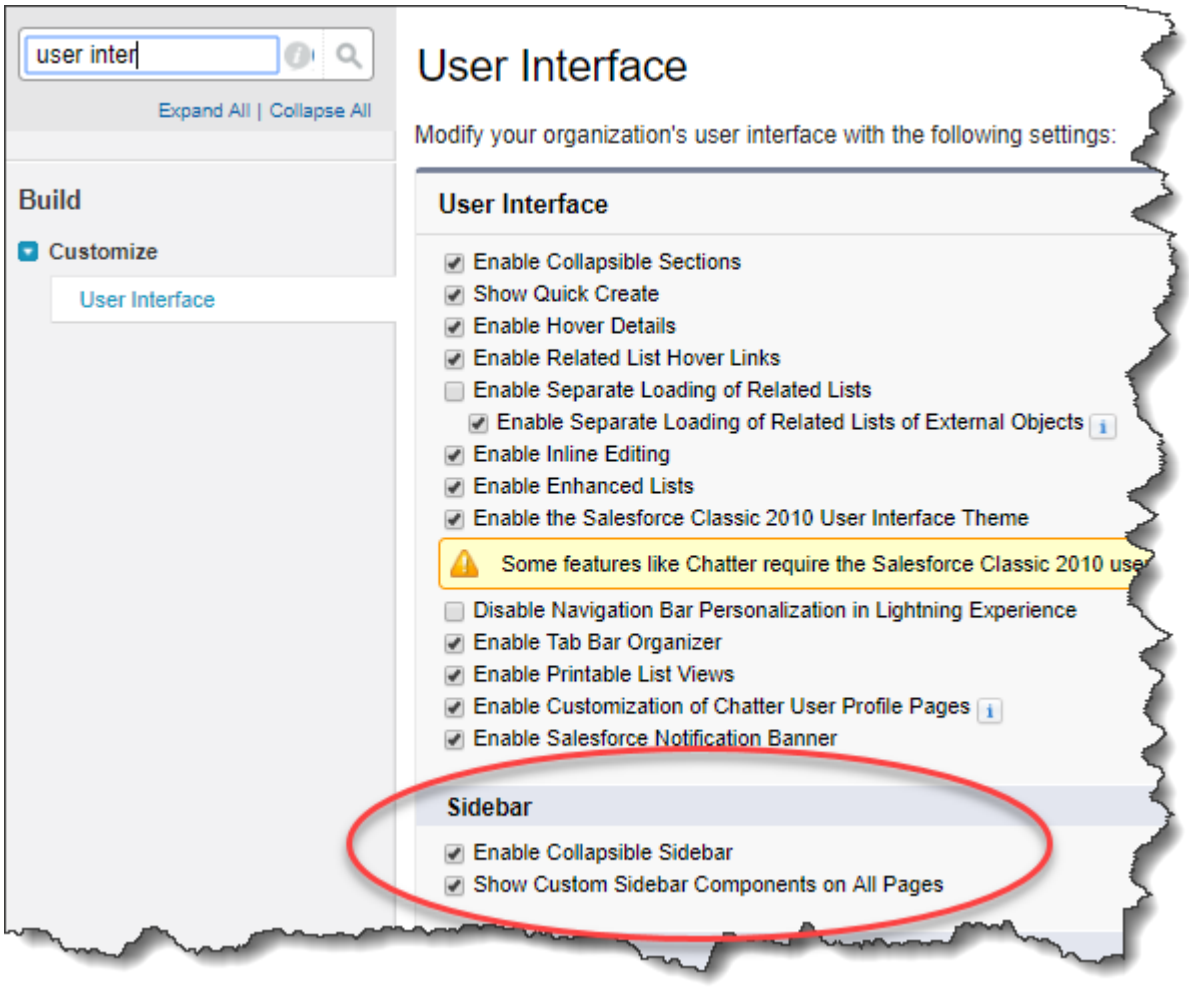
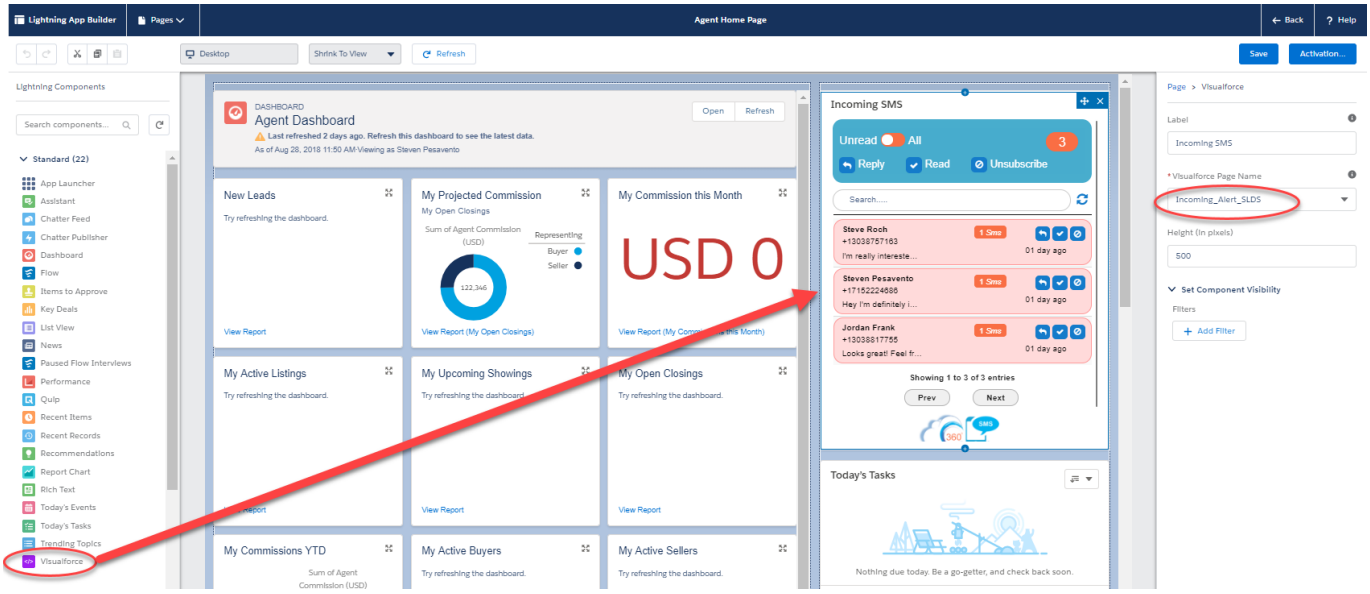


Figure 27 - Turn on Sidebar Components to see the Inbound Alert on all pages

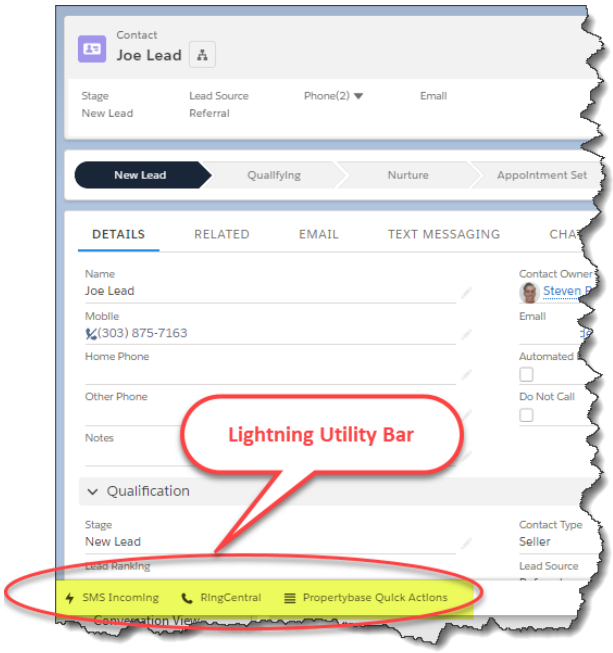
Lightning Home Page Component

With Lightning, the dashboards are modified via the **Lightning AppBuilder**.

1. Salesforce Settings –> search Lightning AppBuilder or while on the actual dashboard choose Edit Page which will open the Lightning AppBuilder for that page.
2. Choose whichever dashboard you want
3. Choose the VisualForce component and drag it into the desired location
4. The Incoming SMS dashboard component is named **Incoming_Alert_SLDS**, set it's height to at least 500 pixels.



Lightning Utility Bar Component



Salesforce Lightning has a feature called the **Utility Bar** which allows one to place dashboard components like the SMS Incoming Alert onto the utility bar for quick access.

To configure:

1. Salesforce Setup – then search ***App Manager***
2. Choose the App that you want it to appear on
3. Select the Utility Bar option
4. Add a new Utility Bar item using the ADD button
5. Choose VisualForce for the component type
6. Configure the VF component by choosing the "Incoming_Alert_SLDS" page

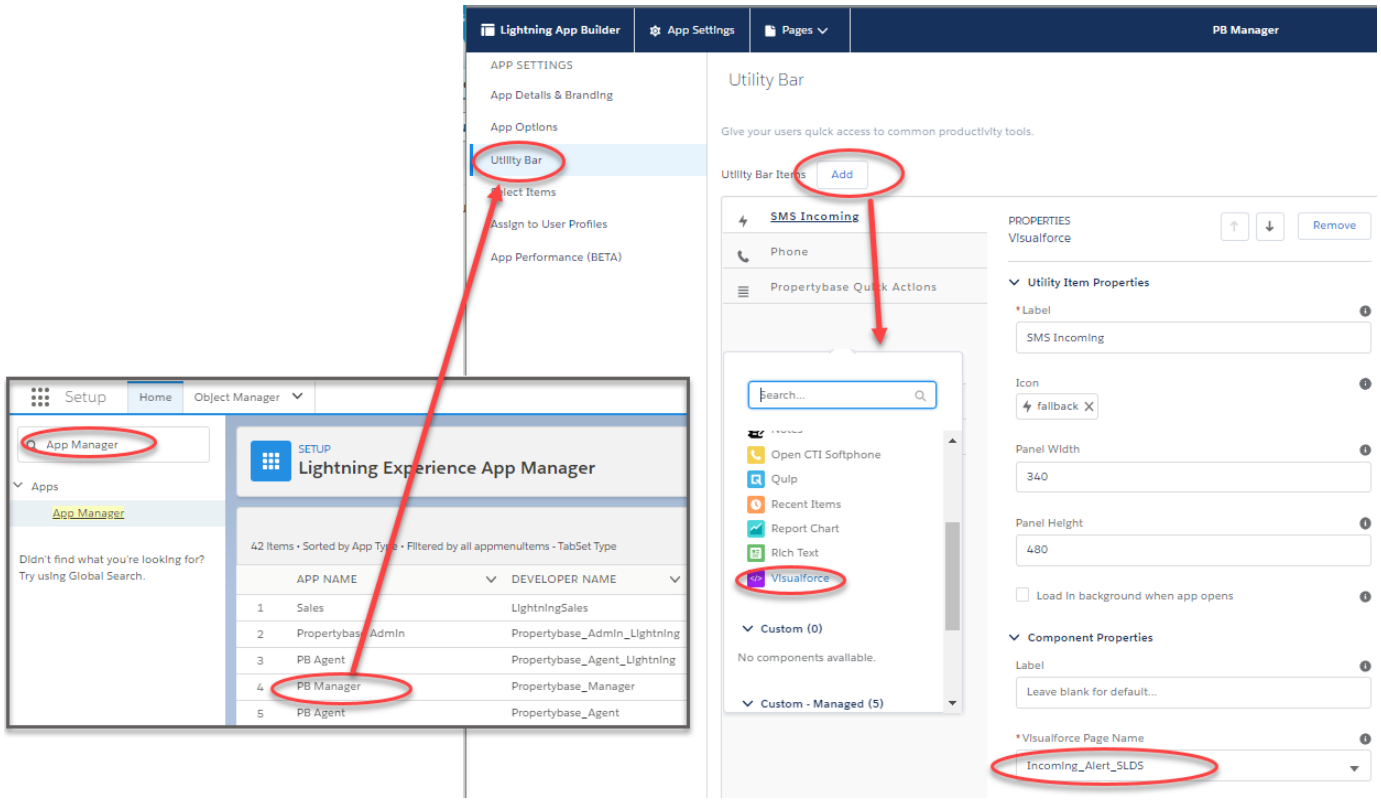


Figure 28 - Configure Lightning Utility Bar for an App

Incoming Alert for Salesforce1

The Incoming Alert component can also be added to the Salesforce1 navigation via these steps:

1. Salesforce Setup → Salesforce Navigation
2. Add the Incoming Alert component to the Mobile Navigation as shown in *Figure 30*

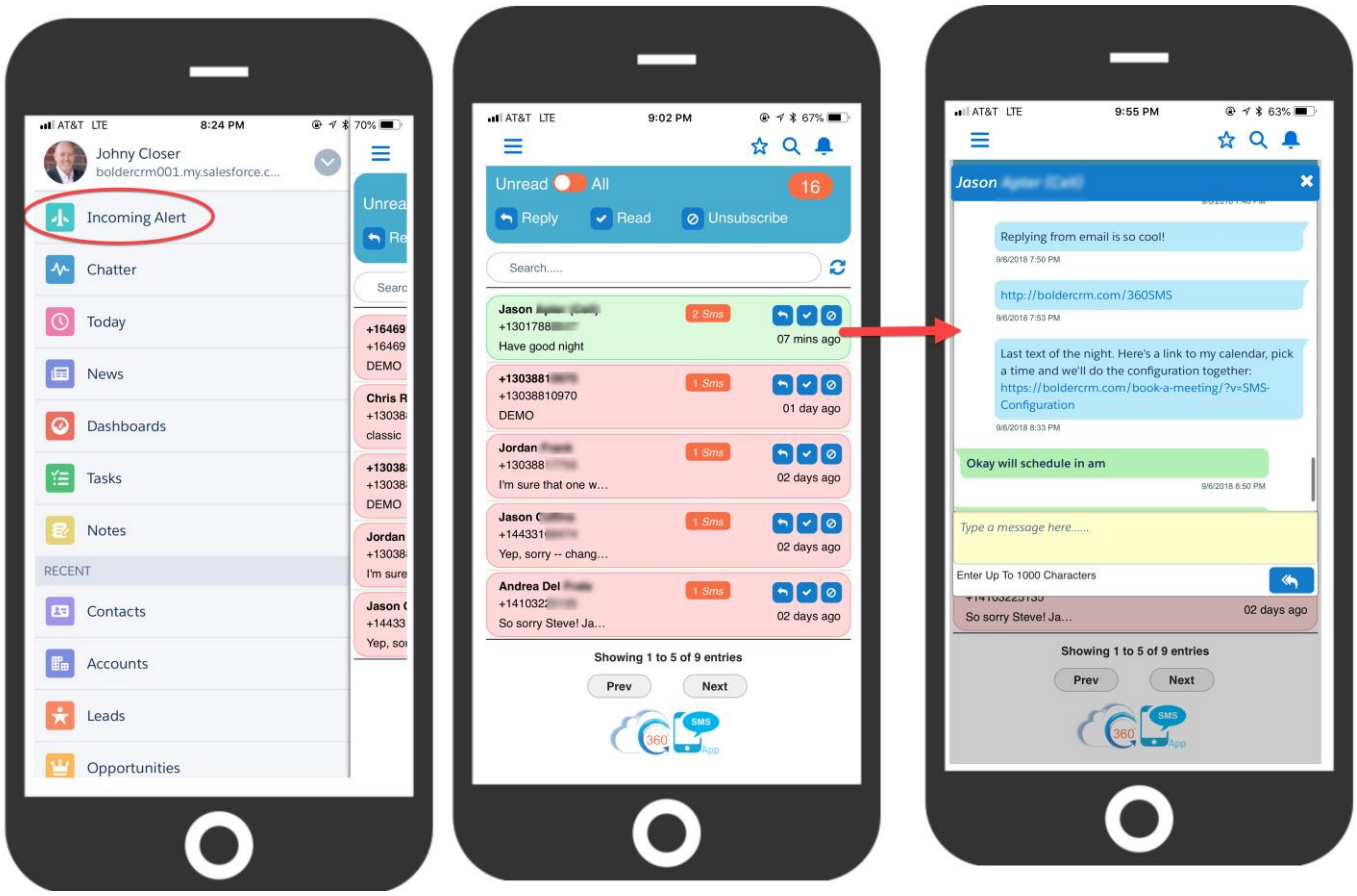


Figure 29 - The incoming alert component works seamlessly on Salesforce1

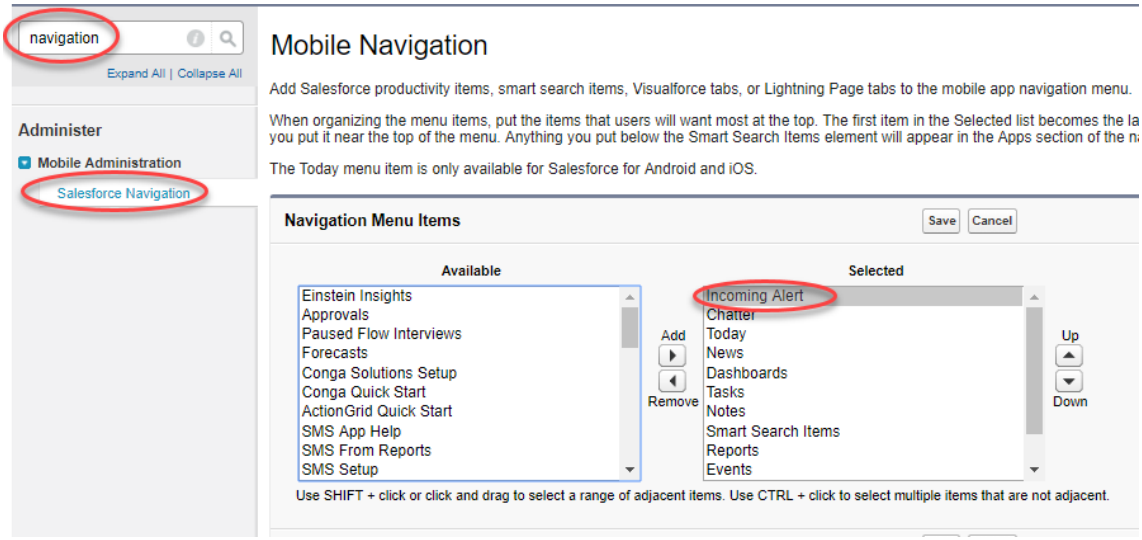


*Figure 30 – Configure **Salesforce Navigation** to the add the Incoming Alert to the Salesforce1 Navigation*

Reply to Email Alert Configuration

360 SMS provides the unique capability to REPLY to the Incoming SMS Notification email and have the text of that reply be sent as an Outbound SMS to the customer. This adds great value to users that may be on their phones and don't want to use the Salesforce1 Mobile app to respond (even though the Incoming Notifications makes that extremely easy as well).

This section explains how to set-up the standard Salesforce Email Service that facilitates this feature.

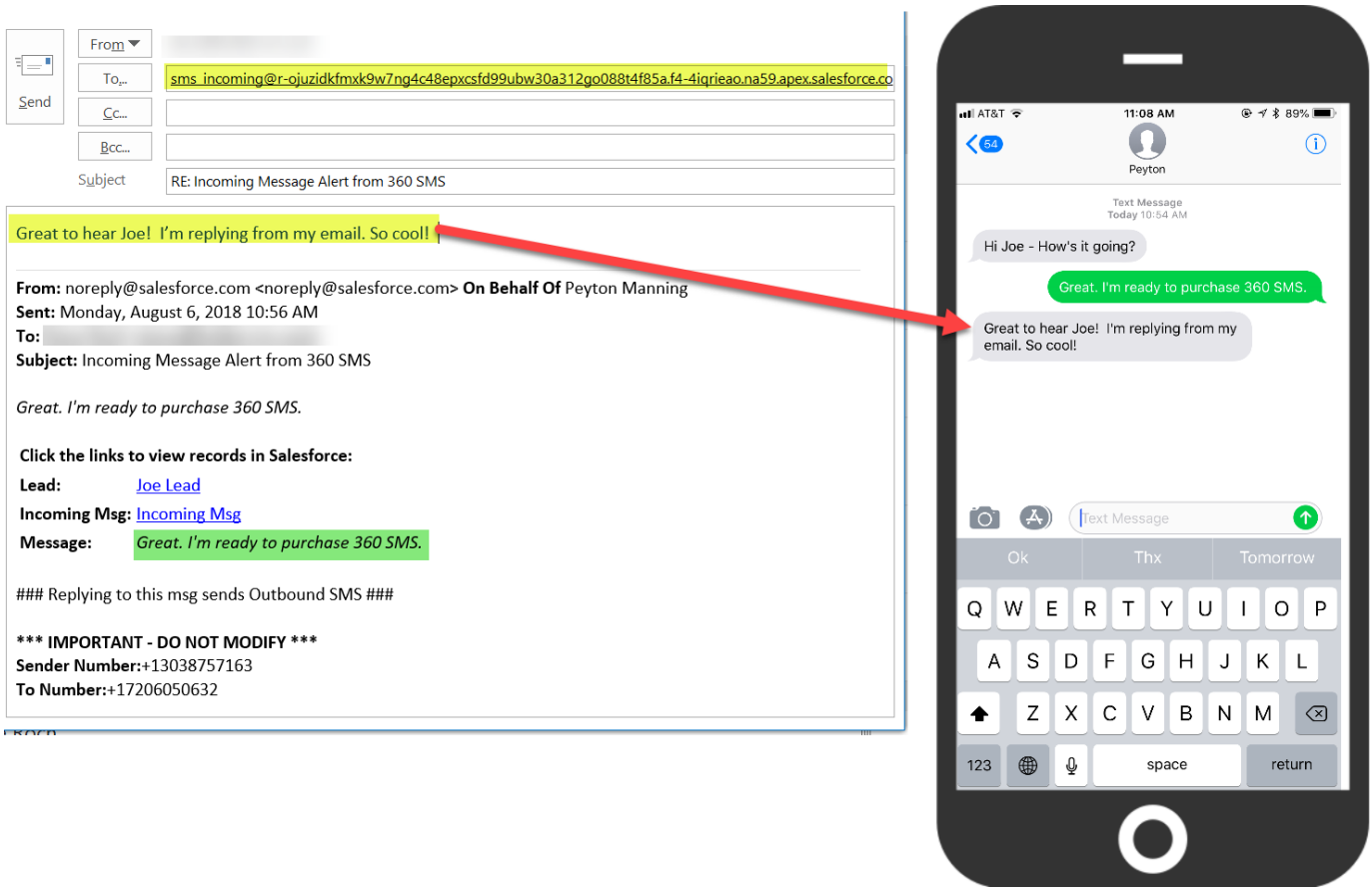
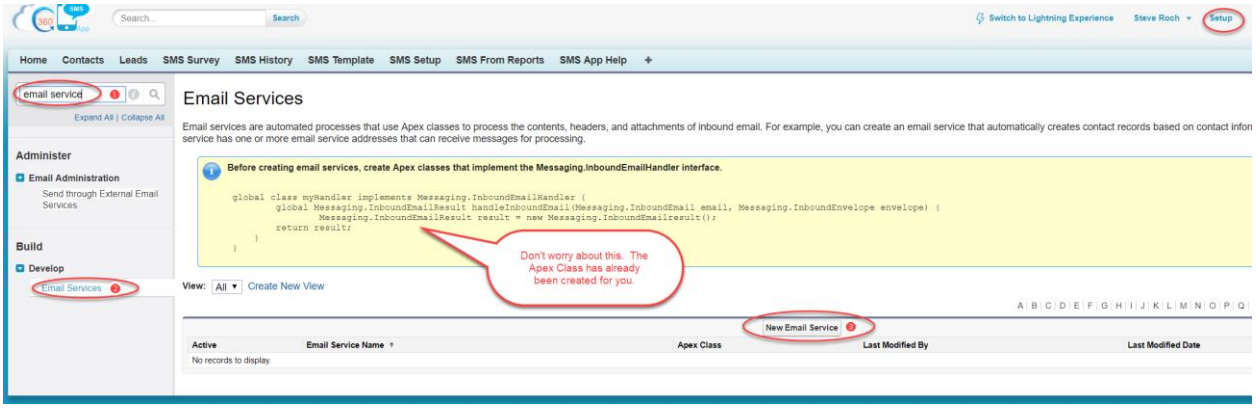


Figure 31 - Reply to email from your desktop or phone sends an outbound SMS to customer

Creating the 360 SMS Email Service

1. Go to Salesforce setup and type '**Email service**s' in the 'Quick Find' box and Setup -> Develop -> Email Services
2. Click on 'New Email Service'



3. Fill out the details as shown in Figure 32:

Email Service Name:	360 SMS Incoming
Apex class:	ReplyFromEmailToSMS
Accept attachments:	All
Active:	True

4. Click on 'Save and New Email Address'

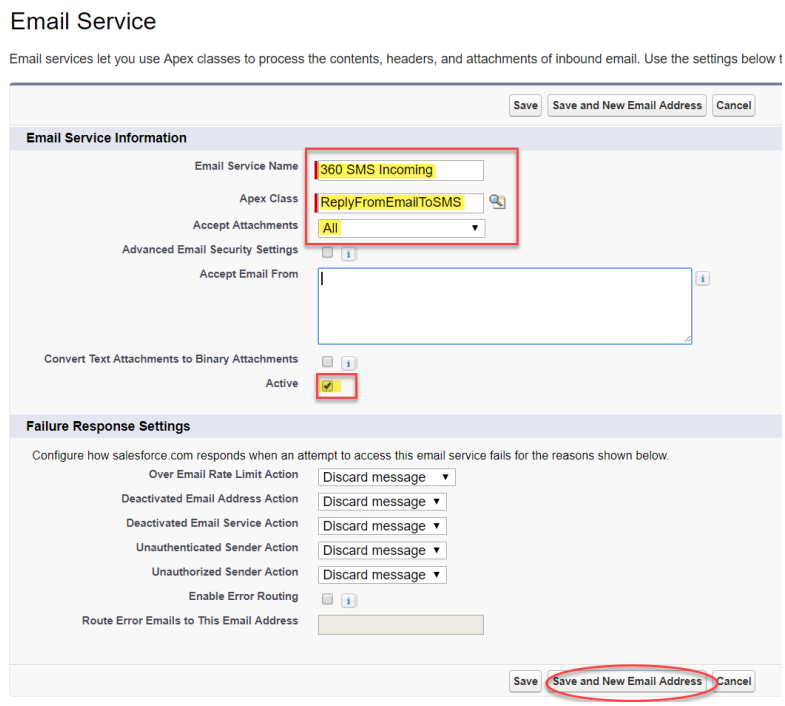
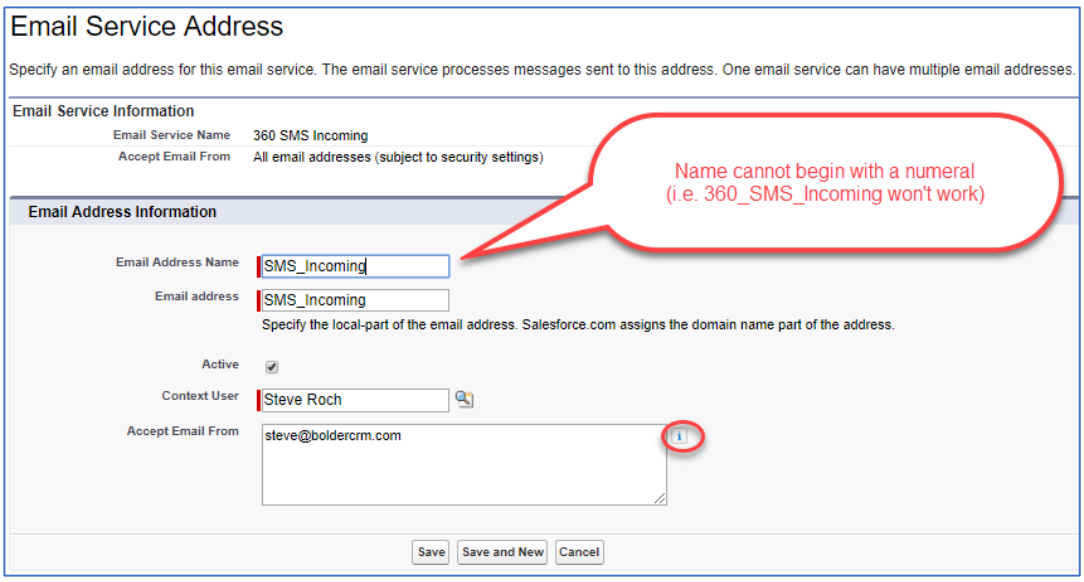


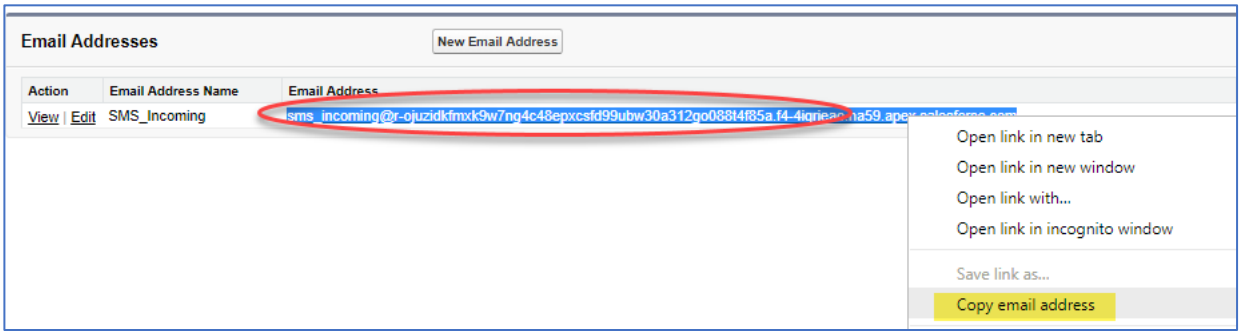
Figure 32 - Define the 360 SMS Email Service

6. Now enter the following details and Save

Email Address Name:	SMS_Incoming
Email Address:	SMS_Incoming
Active:	True
Context User :	Usually an Admin or Service User
Accepted Email From:	Comma separated list of user emails or leave it empty for all users



7. Now, we must copy the email address generated in Step 6 to the 360SMS General Settings.



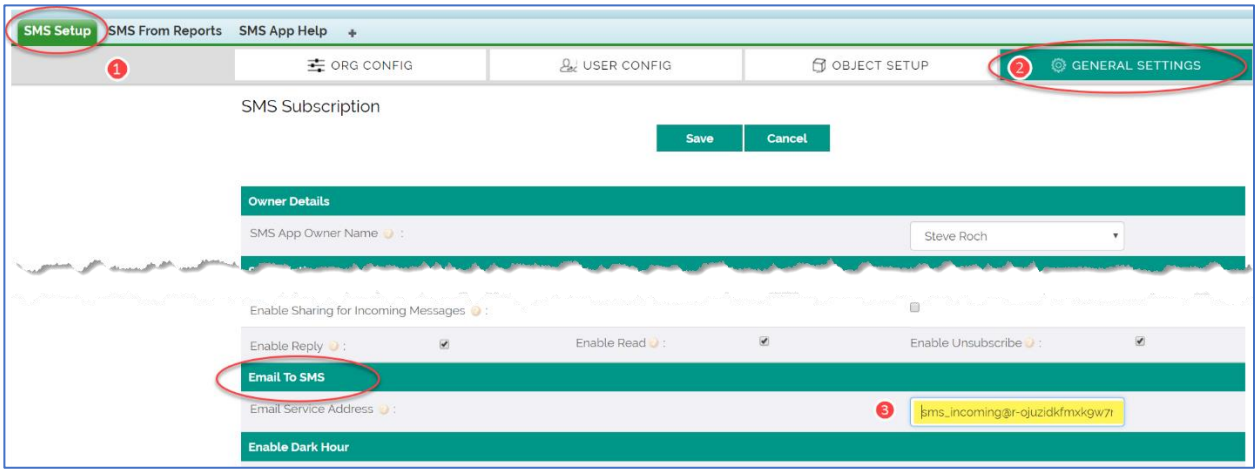
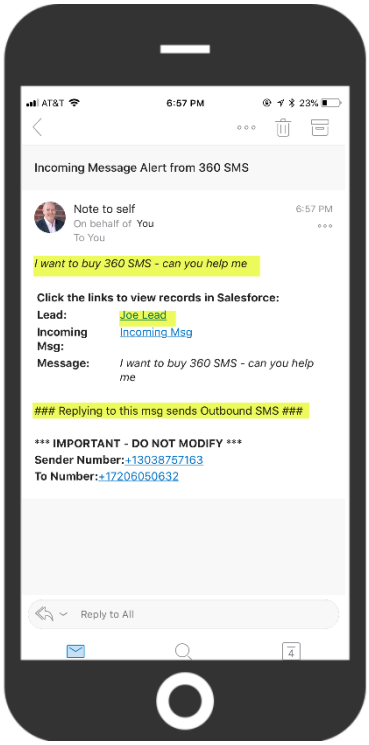


Figure 33 - General Settings - Email To SMS

8. That's it! You may not reply to your Incoming Alert Emails and your reply text will be sent as an Outbound SMS.

Incoming Email Alert Email Templates



The 360 SMS Incoming Notifications uses standard Salesforce Email Templates that are installed with the product. You may optionally edit these templates for your own purposes.

IMPORTANT:
The algorithm to process the Reply Email looks for two specific strings in the email (***Sender Number:*** and ***To Number:***). Even though you may be tempted to change these, the labels and even the lack of space after the colons are important to parse out the messages. You also **cannot** use these labels (Sender Number & To Number) anywhere else in the HTML as these are used to find the key info after the colon.

Sender Number:+13038757163
To Number:+17206050632

Edit the Template

1. Go to Salesforce Setup and type 'Email Templates' in the 'Quick Find' box.
2. 360 SMS uses the template named **Incoming Message Alert** for the incoming email notification.
3. Edit the **Incoming Message Alert** as desired, specifically the HTML version
4. We suggest editing the **Incoming Message Alert** with the suggested code snippet we have provided below. This has been modified to fit on a phone, uses HTML table tags for nicer formatting and has some fixes to the hyperlinks.

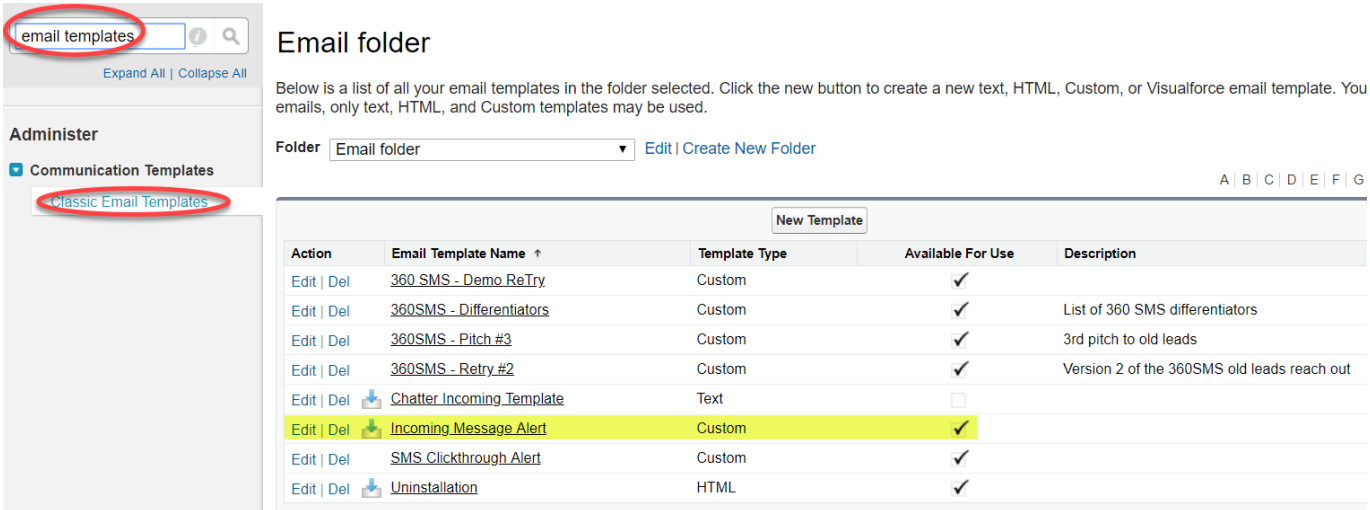


Figure 34 - Edit the default email template for Incoming Message Alerts

---

Recommended HTML Template (copy/paste this code)

```
####### Reply Above To Send Outbound #######<br><br>
<b>Message:</b><br>
<i> {!tdc_tsw__Message__c.tdc_tsw__Message_Text_New__c}</i>
<br><br>
<table border="0">
   <tr><td colspan="2"><b>Click the links to view in Salesforce:<b></td></tr>
   <tr><td valign="top"><b>Links:</b></td><td
valign="top">{!tdc_tsw__Message__c.tdc_tsw__Related_Object_Id_URL__c} or <a
href="https://login.salesforce.com/{!tdc_tsw__Message__c.Id}"  target="_blank">Incoming Msg</a></td></tr>
   <tr><td valign="top"><b>Sender:</b></td><td
valign="top">{!tdc_tsw__Message__c.tdc_tsw__Sender_Name__c}</td></tr>
  <tr><td valign="top"><b>Message:</b></td><td
valign="top"><i>{!tdc_tsw__Message__c.tdc_tsw__Message_Text_New__c}</i></td></tr>
</table>
<br>

<b>*** IMPORTANT - DO NOT MODIFY ***</b><br>
<b>Sender Number:</b>{!tdc_tsw__Message__c.tdc_tsw__Sender_Number__c} <br>
<b>To Number:</b>{!tdc_tsw__Message__c.tdc_tsw__ToNumber__c}<br>
```

Default Out-of-Box Email Template (in case you need to revert back)

```
#################### Reply Above ####################<br><br>
Hello, <br><br>
You have received an incoming message. <br><br>
<i> {!tdc_tsw__Message__c.tdc_tsw__Message_Text_New__c}</i> <br><br>

To view the message, click
<a href="https://login.salesforce.com/{!tdc_tsw__Message__c.Id}" target="_blank">Here</a><br><br>
To view associated record, click
<a href="https://login.salesforce.com/{!tdc_tsw__Message__c.tdc_tsw__Related_Object_Id__c}"
target="_blank">Here</a><br><br>
<b>More Details:</b> <br>
<b>Sender Name:</b>{!tdc_tsw__Message__c.tdc_tsw__Sender_Name__c}   <br>
<b>Sender Number:</b>{!tdc_tsw__Message__c.tdc_tsw__Sender_Number__c} <br>
<b>To Number:</b>{!tdc_tsw__Message__c.tdc_tsw__ToNumber__c}<br><br><br>

Thanks , <br><br>

360 SMS App for Salesforce <br><br>
```

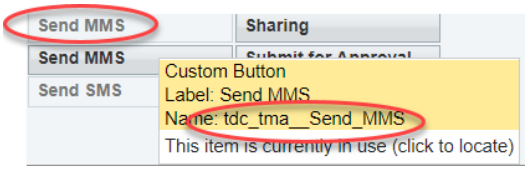
MMS

MMS is the industry standard term for sending/receiving Pictures and other file types such as PDF, via text messaging. MMS requires a separate installer link that you can obtain by writing to Sales@360DegreeApps.com.

360 SMS allows for both Outgoing and Incoming MMS. Attached files are stored natively in Salesforce in the SMS_History.Attached_Files field which uses the native Salesforce **Document** object. The attached pictures and files display directly on the Conversation View as well. See *Figure 35.*

Once installed follow these steps to configure your org:

1. Add the **Send MMS** button to your page layout (similar to the basic configuration instructions)
    a. Like the Send SMS button there is one button for Classic and a 2nd one for Lightning and Salesforce1. Use the one named **tdc_tma__Send_MMS** for Classic.



2. Add the Send MMS button to your Search Layouts (List Views) to enable Batch MMS
    a. Batch MMS stores only a single copy of the File(s) for efficient storage, then all the SMS_History records point to this single file.
3. Expose the SMS_History.Attached_Files field on your SMS History Related List (optional if using Convo View)
4. **Note**: MMS requires Content-Delivery to be enabled. Create a Case with Saleforce if Content Delivery is not enabled.
5. File Types Supported:
    a. .jpeg
    b. .gif
    c. .png
    d. .bmp
    e. .mpeg
    f. .pdf - although the interface lets you choose PDF's most mobile phone providers now block PDF
6. MMS is not available with Professional Edition or Group Edition.
7. If you only want a single button to handle both regular SMS and MMS, simply create a custom "Send SMS" button using the MMS button code and remove both of the managed package buttons from their locations. It is completely fine to send an SMS using the Send MMS button without attaching any files.
8. Refer to the Send SMS with Process Builder section for documentation on triggered/automated MMS

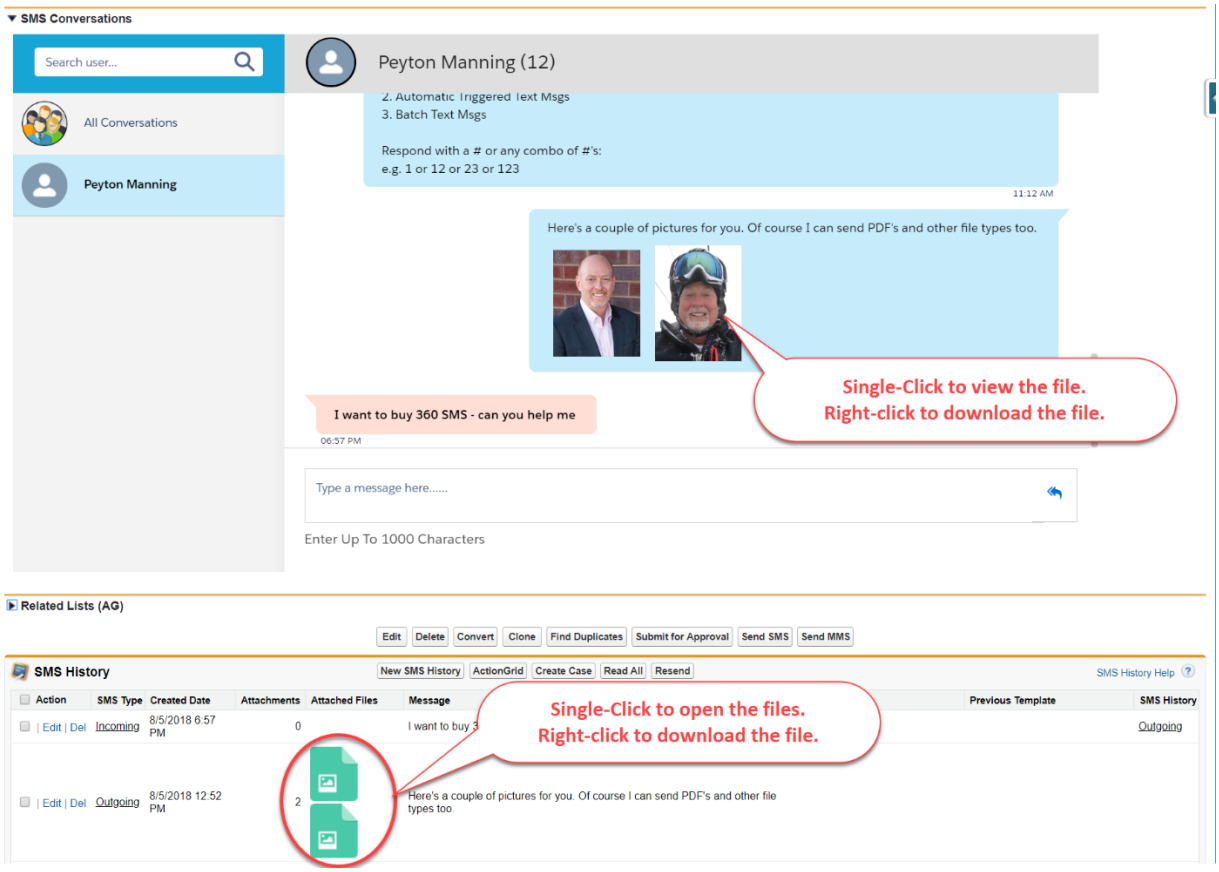


Figure 35 - MMS stores attachments in native Salesforce Documents object, easily accessible from Convo View or Related List

Hyperlink Clickthrough Tracking

360 SMS provides the unique capability to send hyperlinks via SMS and have the clickthrough's tracked against the SMS History record. The clickthrough statistics are stored in the **Message URLs** related list of the outbound SMS History. One can write powerful reports and Process Builder automations based on this data, making 360 SMS truly unique in its SMS Marketing capabilities.

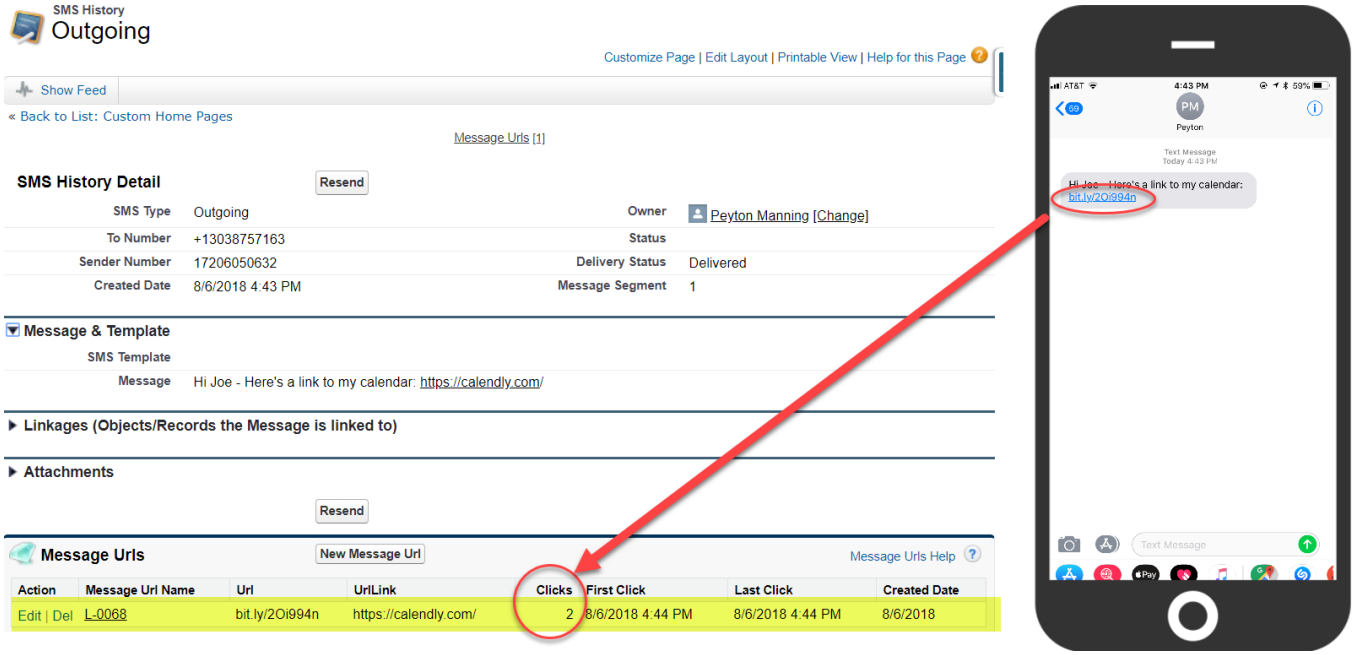


Figure 36 - Outbound SMS link click tracking

Key Points:

1. You must write to Sales@360SMSApp.com to request that Link Tracking be enabled.
2. Uses standard Salesforce Sites technology that must be configured to communicate the clickthrough data back into Salesforce. Thus, Sites must be setup as documented in the following section.
3. Link Tracking is not supported on Salesforce Professional Edition because it doesn't support Sites.
4. When combined with the optional Bit.Ly integration, regular links entered into outbound messages convert to bit.ly links automatically and when the link is tracked it un-encrypts the bit.ly link back into a friendly readable link.
5. The bit.ly integration is not required, without it the links simply go out as they were typed.
6. An outbound SMS with a link always creates a Message URL record so that it's easy to report those records with and without a clickthrough. The Clicks Count will simply remain at 0 if never clicked.
7. Only one link can be sent and tracked per outbound SMS

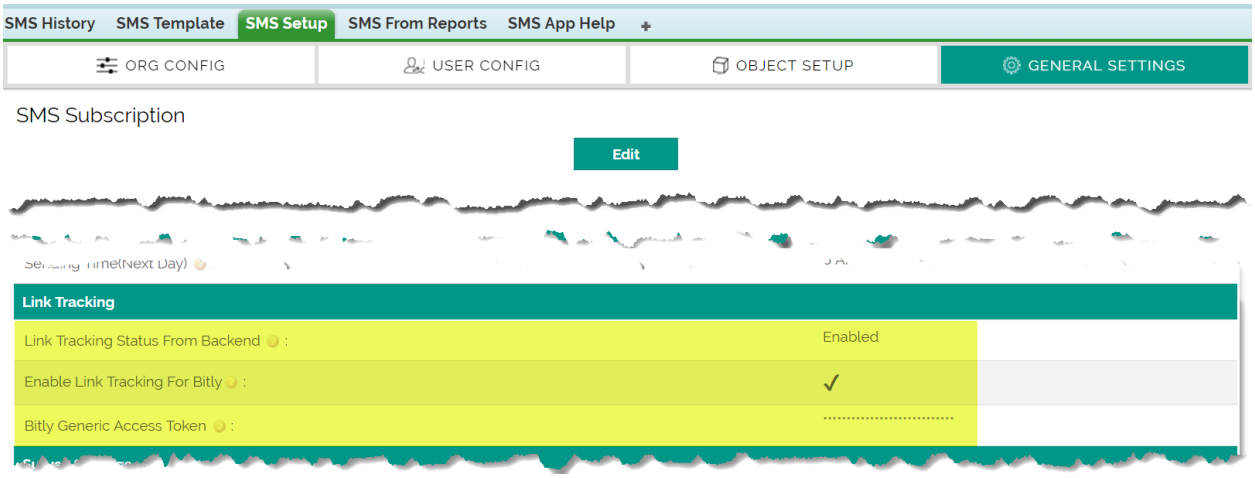
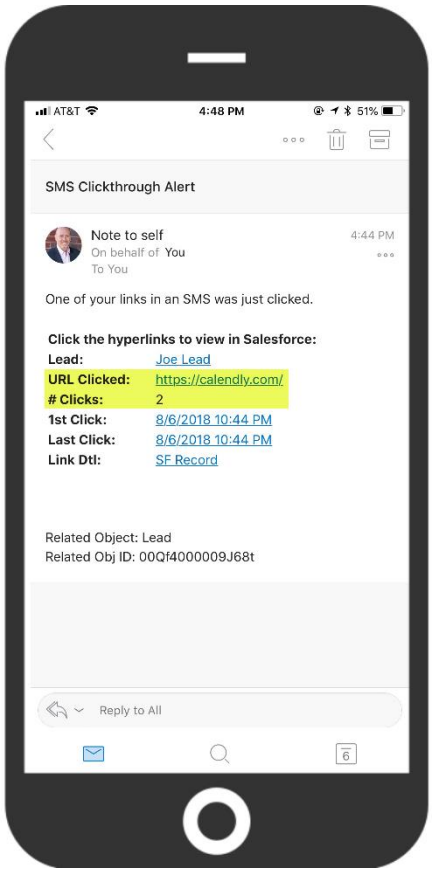


Figure 37 - Call your sales person or email to sales@360SMSApp.com to enable Link Tracking

Define a Clickthrough Email Alert

One can easily define a Process Builder which sends the SMS_History.Owner an email alert when a link is clicked and of course if you can do that, you can trigger any sort of additional automation or field updates when a link is clicked. Here's a quick example:



1. Create an Email Template using fields from the Message_URL object
2. Create a Salesforce Email Alert from the Template
3. Create a Process Builder on the Message_URL when Click > 0, then trigger the Email Alert
4. The HTML code snippet used to create this alert is on the following page.

Figure 38 - SMS Link Clicked Alert

HTML for the SMS Clickthrough Alert

Use this html code snippet to create your own SMS Clickthrough Alert

```
One of your links in an SMS was just clicked. <br><br>
<table border="0">
   <tr><td colspan="2"><b>Click the hyperlinks to view in Salesforce:</b></td></tr>
   <tr>
    <td valign="top"><b>{!tdc_tsw__Message_Url__c.Related_Object__c}:</b></td>
    <td valign="top"><a
href="{!tdc_tsw__Message_Url__c.Related_Object_URL__c}">{!tdc_tsw__Message_Url__c.Related_Obje
ct_Name__c}</a></td>
    </tr>

   <tr><td valign="top"><b>URL Clicked:</b></td><td
valign="top">{!tdc_tsw__Message_Url__c.tdc_tsw__UrlLink__c}</td></tr>

   <tr><td valign="top"><b># Clicks:</b></td><td
valign="top">{!tdc_tsw__Message_Url__c.tdc_tsw__Clicks__c}</td></tr>

   <tr><td valign="top"><b>1st Click:</b></td><td
valign="top">{!tdc_tsw__Message_Url__c.tdc_tsw__First_Click__c}</td></tr>

   <tr><td valign="top"><b>Last Click:</b></td><td
valign="top">{!tdc_tsw__Message_Url__c.tdc_tsw__Last_Click__c}</td></tr>

   <tr><td valign="top"><b>Link Dtl:</b></td><td valign="top"><a
href="{!tdc_tsw__Message_Url__c.Link}">SF Record</a></td></tr>
</table>
<br><br>
<br>
Related Object:  {!tdc_tsw__Message_Url__c.Related_Object__c}<br>
Related Obj ID:  {!tdc_tsw__Message_Url__c.Related_Object_Id__c}<br>
```

Note that the HTML above does use three custom formula fields pulling from the parent SMS_History record since Salesforce Email Template Merge tags cannot traverse to a parent object.

Related_Object__c	tdc_tsw__SMS_History__r.tdc_tsw__Related_Object__c

Related_Object_Name__c	IF (Related_Object__c = 'Contact',
	tdc_tsw__SMS_History__r.tdc_tsw__Contact__r.FirstName & " " &
	tdc_tsw__SMS_History__r.tdc_tsw__Contact__r.LastName,
	IF (Related_Object__c = 'Lead',
	tdc_tsw__SMS_History__r.tdc_tsw__Lead__r.FirstName & " " &
	tdc_tsw__SMS_History__r.tdc_tsw__Lead__r.LastName,
	""
	)
	)

Related_Object_URL__c	"https://YourDomainHere.my.salesforce.com/" & Related_Object_Id__c

Salesforce Sites

360 SMS offers automatic updating of the Delivery Status of outbound SMS Messages as well as Hyperlink Click Tracking using standard Salesforce Sites technology.

Because, these services are writing into your Salesforce system to update various fields, we must use the standard Salesforce **Sites** technology to create this communication channel. The site runs as its own user profile so we must also give it security access via the standard **SMS App Permission Set.**

Note: Sites are not supported in **Salesforce Professional Edition** and thus Delivery Status and Link Tracking are not available for Professional Edition.

When we're all done, we'll have something like shown

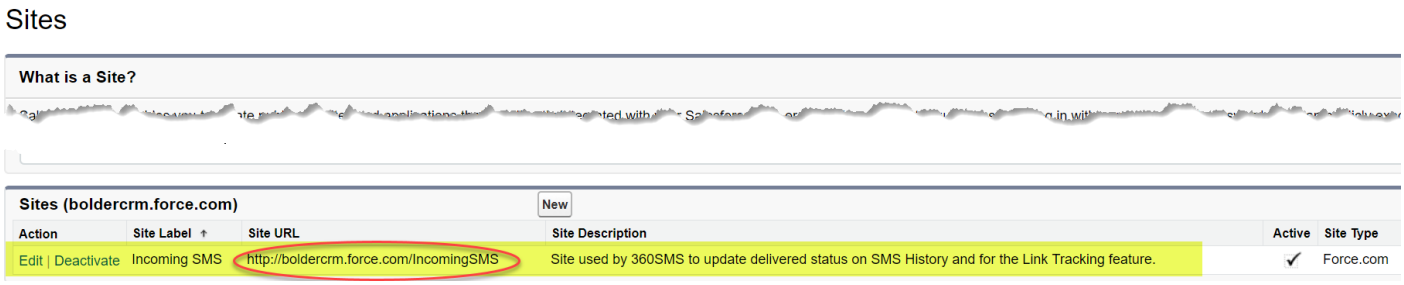


Figure 39 - Incoming SMS Sites needed for Delivered Status and Link Tracking

Create a Salesforce Site:

1. Go to Setup → Quick Find → **Sites**
2. You may or may not have a primary site already created for your org such as shown in Figure 41. If no site has been previously created, you must create one, Figure 40.
3. From Figure 41, press **NEW** to create a new Site
4. Make the new Site look exactly as shown in Figure 42.
5. When the Incoming SMS site has been created, copy its Site URL and paste it into the **SMS Set-up → General Settings → Site URL**, as shown in Figure 43.
6. The new **Incoming SMS** site runs under its own **security profile** and thus we must give it access to all the various 360SMS items by putting it into the same Permissions Set as regular users, see Figure 44 for the steps to get there

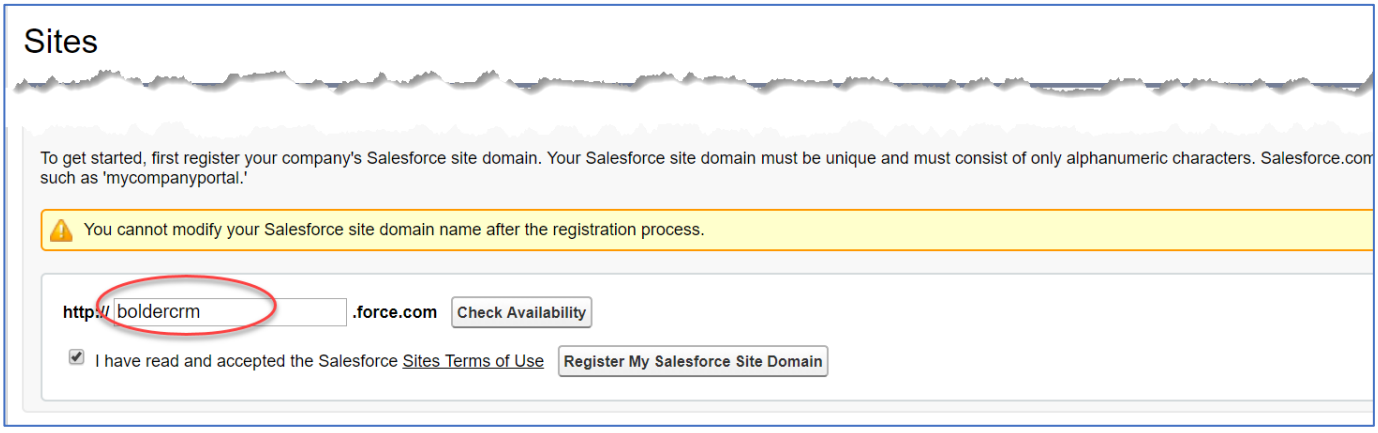


Figure 40 - Salesforce Sites - no previous site has been created so we must make one for the first time.

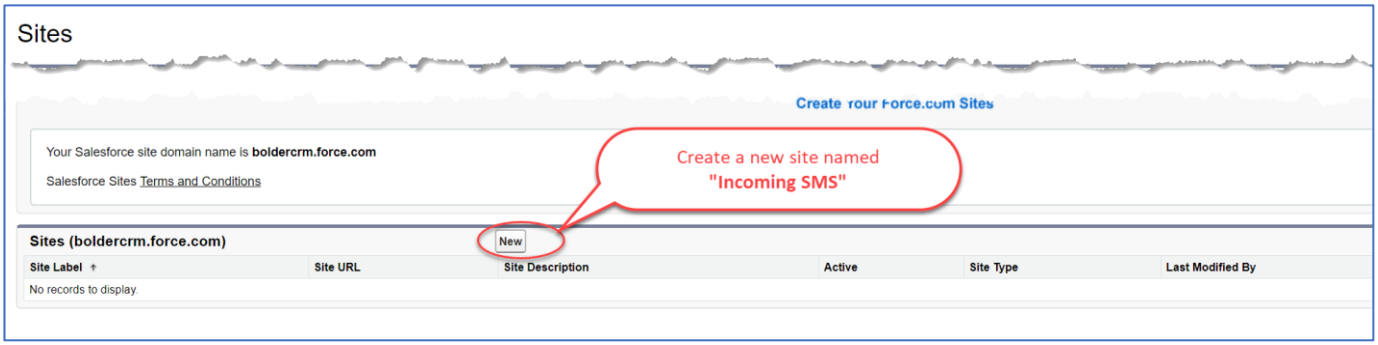


Figure 41 - Create a new Site

Site Edit

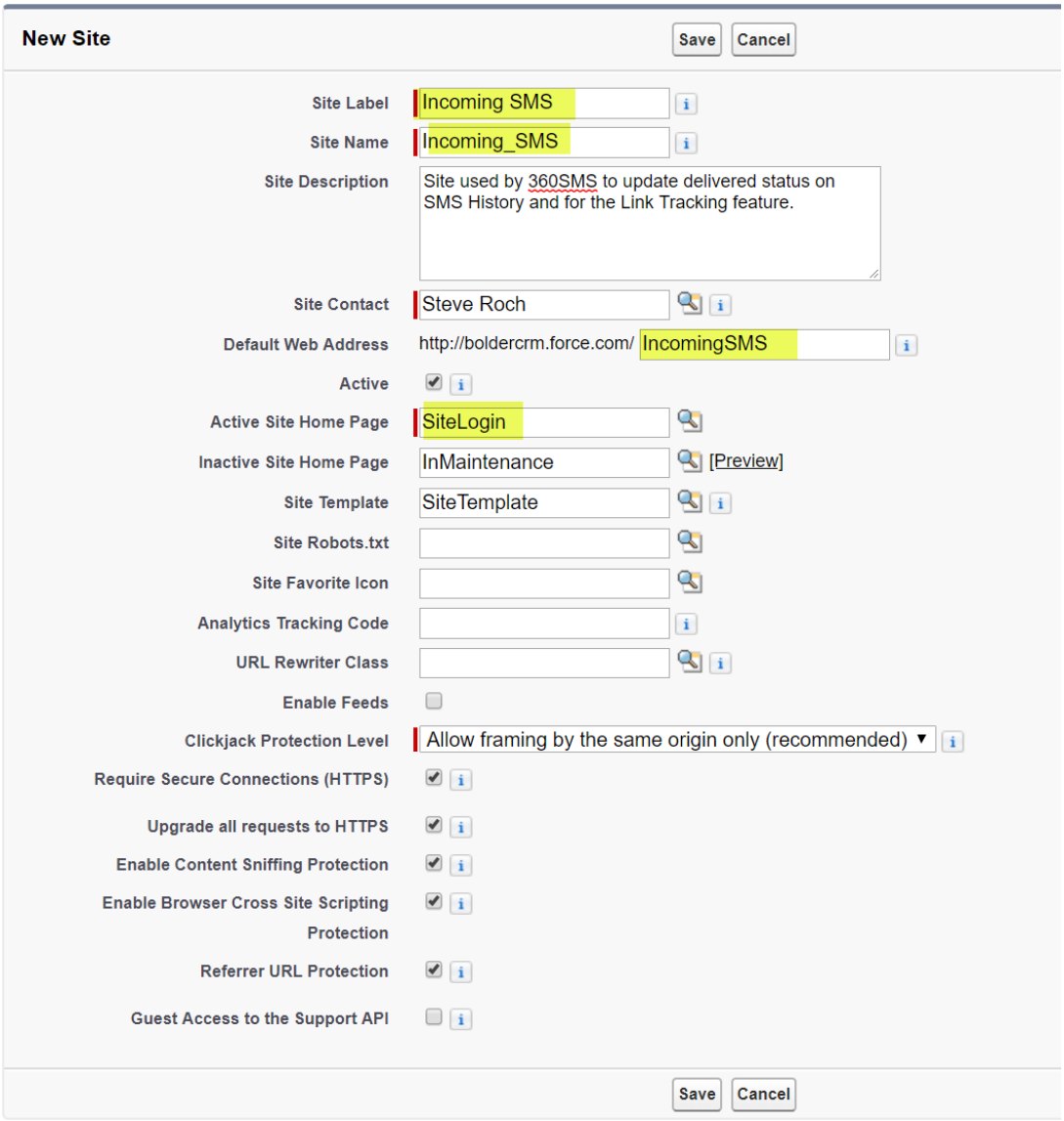


Figure 42 - Incoming SMS site for Delivery Status and Link Tracking

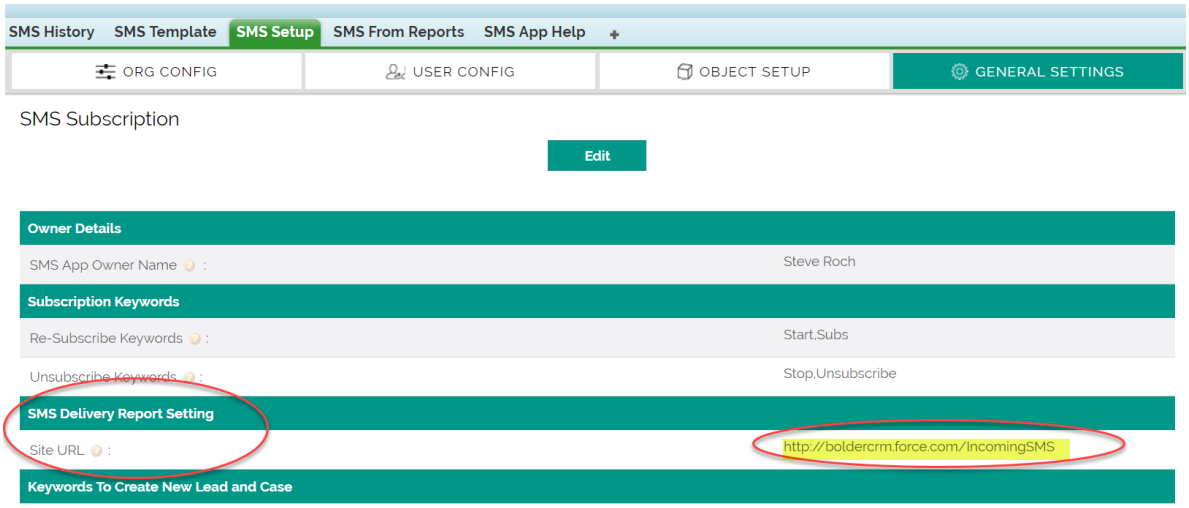


Figure 43 - Set the Site URL to the Incoming SMS Site which was just created

Security for Salesforce Sites

Because the Incoming_SMS site accesses Salesforce like other users, we must give the **Incoming_SMS** site user the same permissions that a regular user would have. We do this by simply adding the Site/User to the out-of-box 360SMS Permission Set (**SMS App Permission Set**). *Figure 44* illustrates the steps as it's a long haul to get to Permission Sets from the Sites record.

Additionally, the Site User must be assigned a 360 SMS license. As the Site User is a special kind of user you do this from the same Site User record where the Permissions Sets was just added. *Figure 45* illustrates that you use the Managed Packages related list to then Assign Licenses to the Site User.

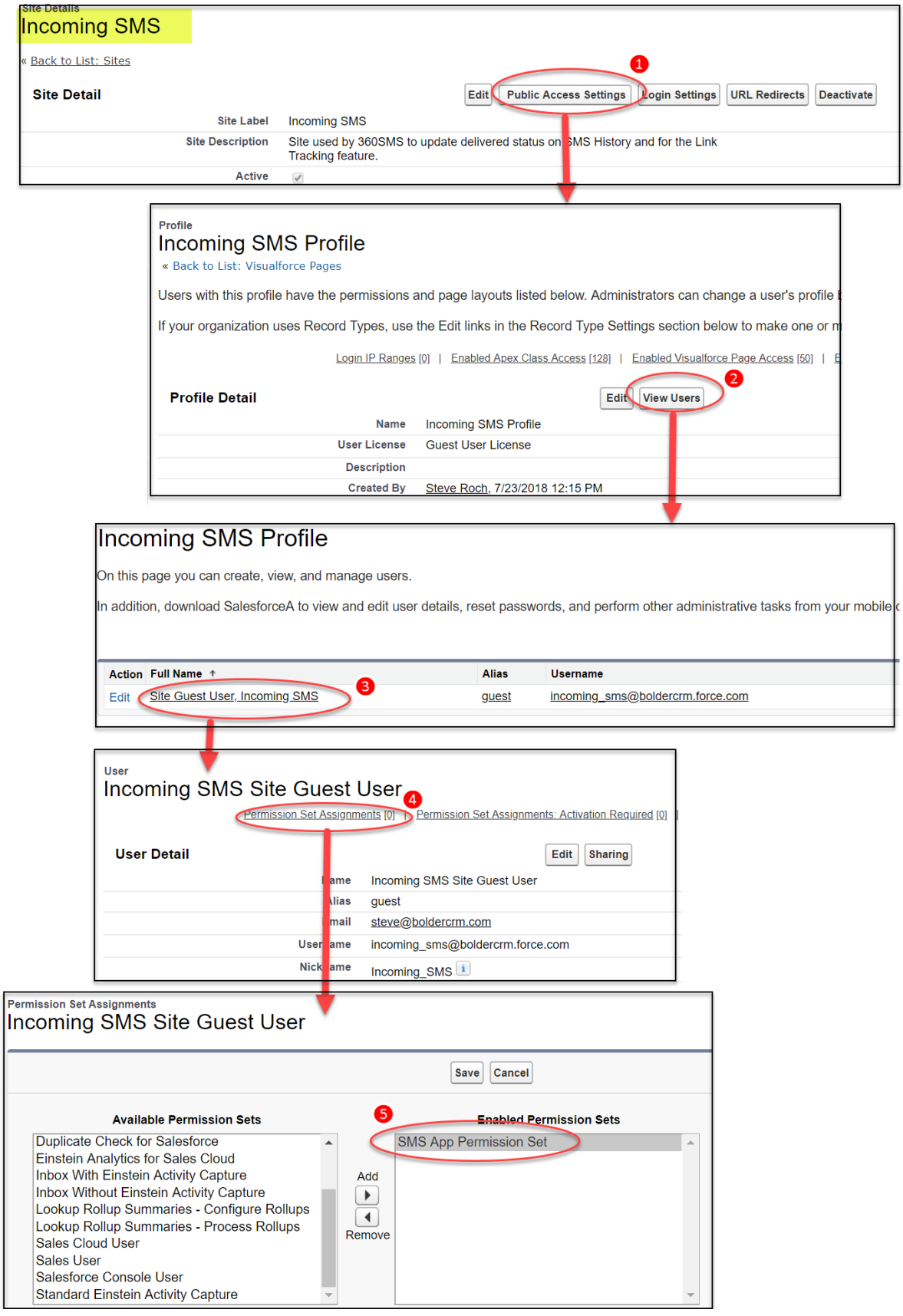


Figure 44 – Put the Incoming_SMS special service user into the SMS App Permission Set

Figure 45 - The Site user must also be assigned a 360SMS license - do this from the Managed Packages related list on the Site User record

Delivery Status

360 SMS updates the SMS History.**Delivery Status** field between values of SENT and DELIVERED when the Sites Configuration above has been configured. This allows delivery reporting.

When the outbound message is initially sent, the Delivery Status = Sent and then after the providers report back to 360 SMS, the service updates the Salesforce status to **Delivered**. Alternatively, you may elect to display the **Delivered SMS** checkbox which is governed by the same logic.

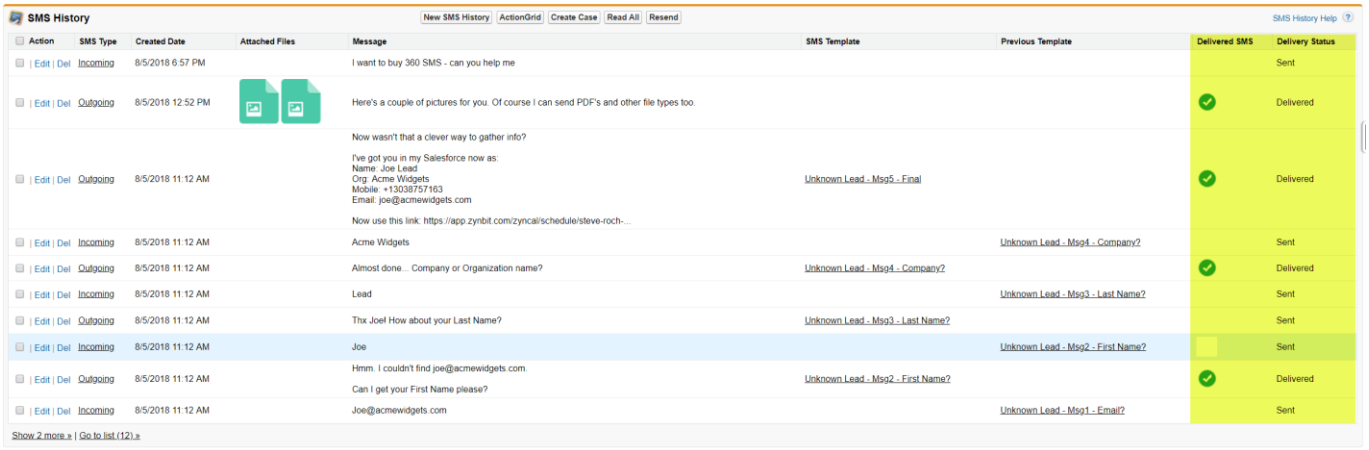


Figure 46 - Delivery Status is updated when the Salesforce Site has been configured

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”

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. See the “Sending > 2,000 Records” section below for a required special field on the report
        iv. Sending large batches can take between 3 – 5 minutes
    b. **Summary Reports**
        i. Summary reports can only send up to 2,000 records due to Salesforce limitations

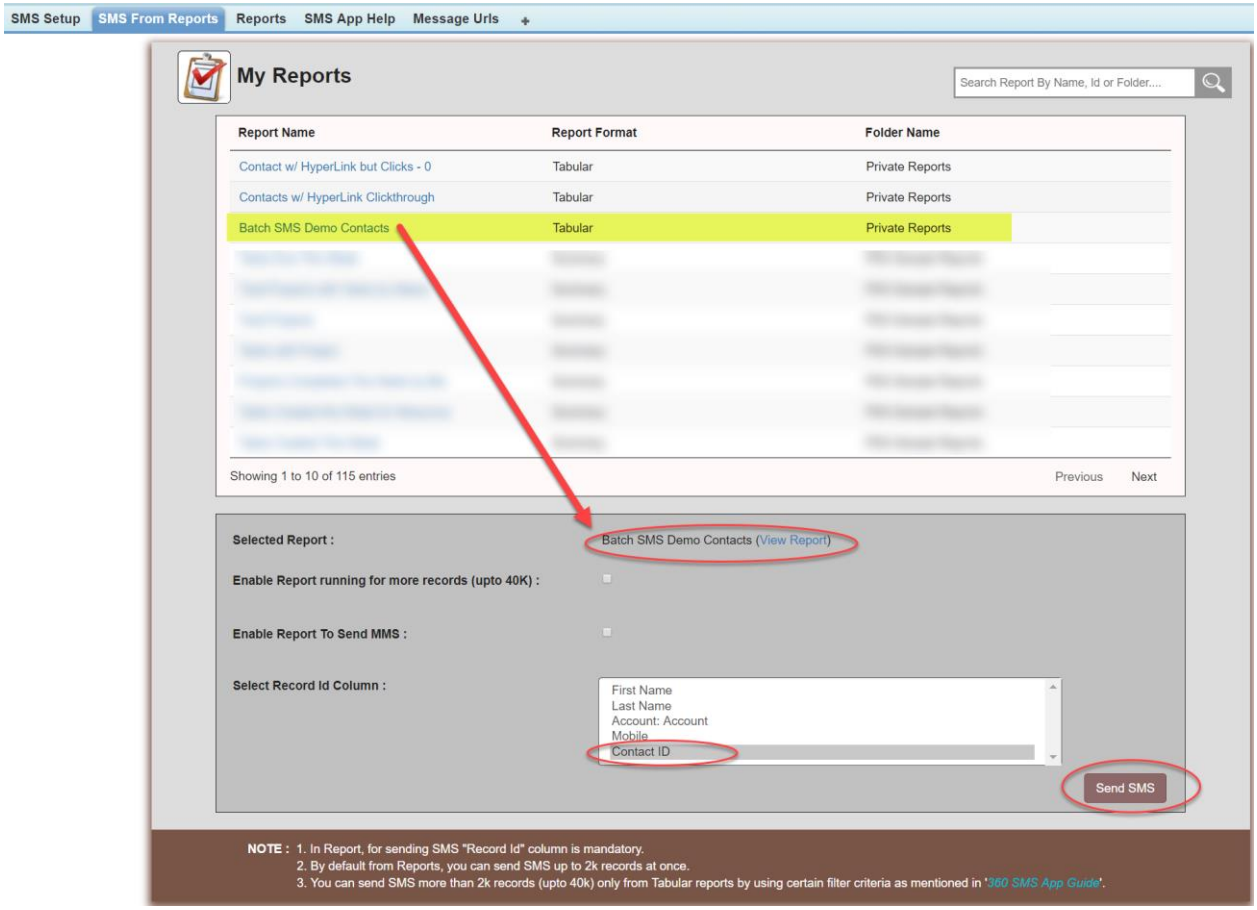


Figure 47 - SMS from Reports screen - pick your report first, then define your Record ID column and Send SMS!

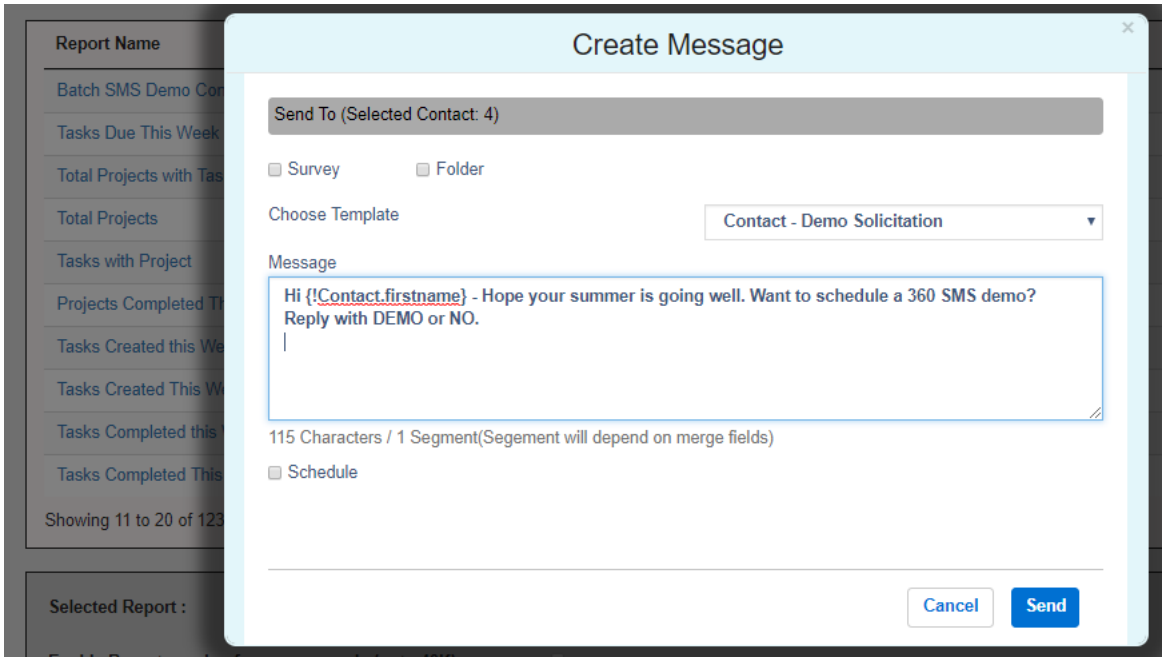


Figure 48 - After the Send SMS button is pressed, choose a template

Sending > 2,000 Records

When using the **Enable Reports Running for more Records (up to 40K)** option your report must have a special custom field of type AutoNumber and the report must be sorted by this AutoNumber field in Ascending order as the reports primary sort field, in order for the technology to loop through the records correctly.

The field label and name can be whatever you like but the format and starting number needs to be EXACTLY as shown in *Figure 49* and the "Generate Auto Number for existing records" must be checked.

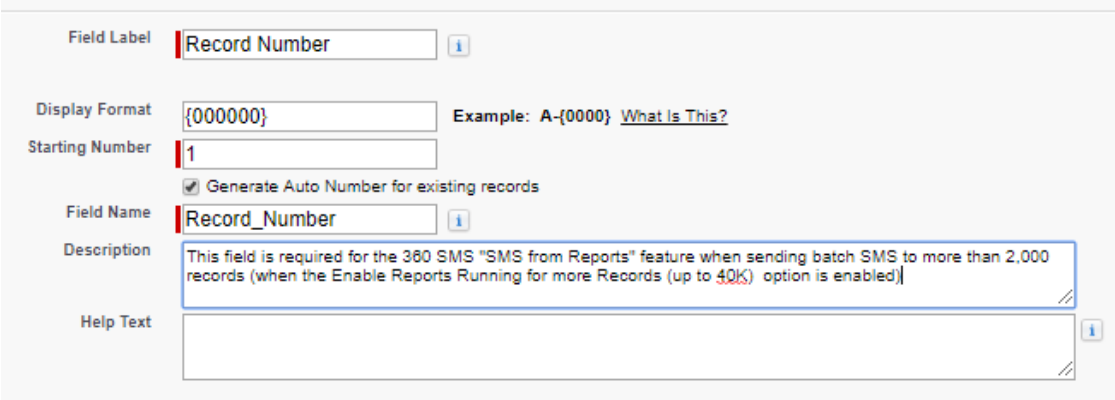


Figure 49 - A special AutoNumber field for the object must exist on the report and the report must be sorted in Ascending order by this field as the primary sort

Send SMS with Process Builder

Salesforce Process Builder is a no-coding method to easily handle triggering Outbound Text Messages as well as to process Incoming Messages based on Keywords or other factors. One can literally trigger on any object. Common objects to trigger off of are:

Lead/Contact – Common use cases are when various fields change and you want to trigger an Outbound SMS.

Custom Objects – Similar to Lead/Contact use cases. 360 SMS supports triggered messages from any custom object and its SMS Templates support all custom objects.

SMS_History – Especially useful for incoming SMS – read the message and do something else based on the Incoming Message, either updating the Salesforce record or sending out some other question based on the reply. Useful for Surveys, i.e. Reply with INTERESTED or NO and then SMS_History.Message = INTERESTED updates a field or status in the corresponding Salesforce record.

There are two primary methods of triggering an outbound SMS:

Method #1 – Simple: This is good for customers new to process builder

Method #2 – Apex Class: This is the preferred method as the formula fields it uses allow for comments and you can easily copy/paste it to other process builders.

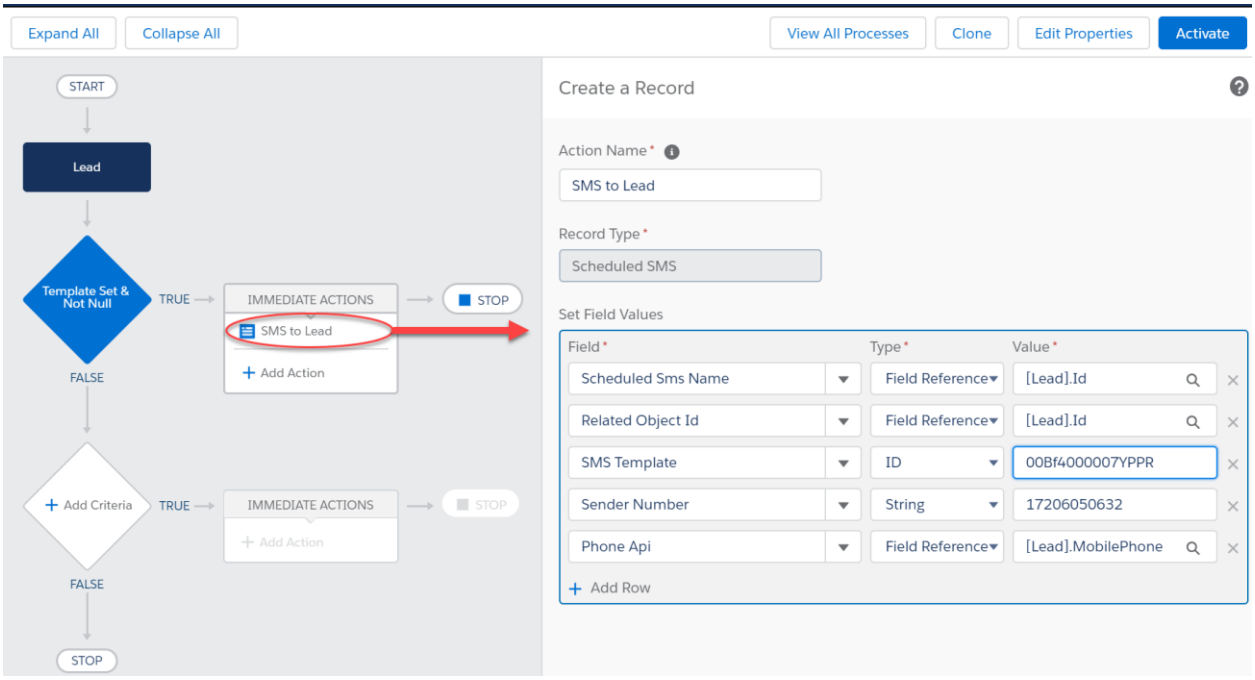


Figure 50 - Salesforce Process Builder is a no-coding method to easily handle triggered Outbound SMS as well as to process Incoming SMS based on Keywords or other factors.

Method #1 – Simple

A few simple settings is all it takes to trigger a message:

1. Set CREATE OBJECT to **Scheduled SMS**

2. **Scheduled SMS Name**: Must be the ID field of the triggered object/record. This is used primarily in conjunction with the SMS Template and must match by object in order for the merging to occur, i.e.

Supply a Contact.Id and a matching SMS Template based on the Contact object.

3. **Related Object Id**: Set the Related Object Id to Lead.Id or Contact.Id. Hint you can also set it to other objects to gain visibility to the text conversations, i.e. set it to a Account ID and the SMS History attaches there. However, it will then not set the SMS_History.Contact_Id, so we recommend instead using a Process Builder to attach SMS_History to parent objects.

4. **SMS Template**: Set the ID of the Template to be used. This can be obtained from the URL of the template. You may also use a reference field such as Contact.SMS_Template (if you've created a SMS Template Id on your Contact, see the section below titled *Create a Master Send SMS Handler*).

5. **Sender Number**: Set the Sender Number (this is your number that you are sending from) this can also be a referenced field such as Lead.Owner.Mobile (so as to send from different sales people). This field is **OPTIONAL**. If you only have one outbound number in your org, it need not be supplied.

6. **Phone Api**: Supply the phone field to send the message to. Normally you pull this from the record, i.e. Lead.MobileNumber

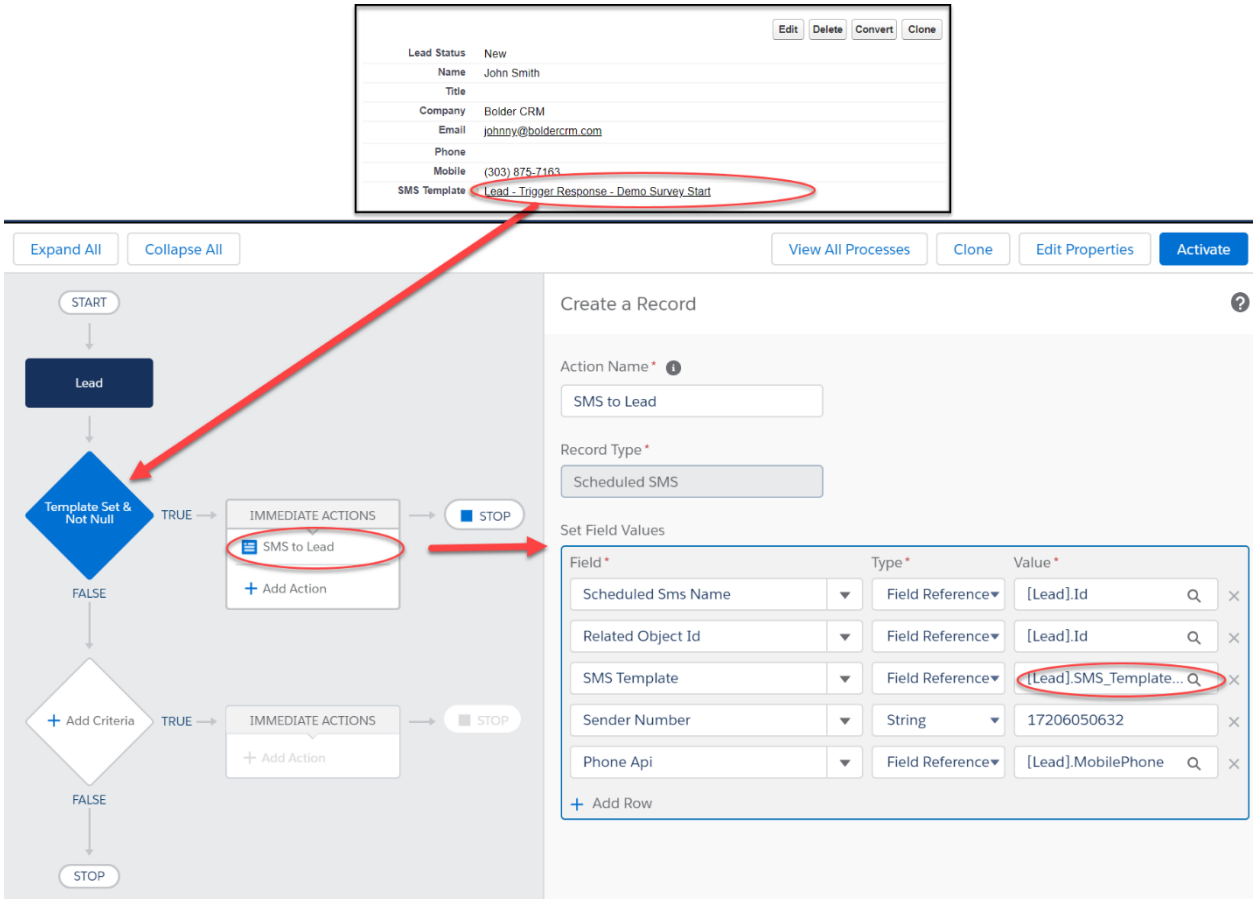


Figure 51 - In this scenario we are pulling the Template from a custom field we placed on the Lead for even easier automation. Now you can have other process builders that only need to set the Lead.SMS_Template and that alone will trigger an outbound SMS.

Relating Outbound SMS to Parent Object

Although one can use the Related Object Id to set the Outbound SMS to another object it may have the undesirable effect of then not being able to link the SMS History to the record that initiated the SMS.

For example, if wanting to trigger a message from a contact but have the message appear under the Account, one can set the Schedule SMS Name to the Contact.Id and the Related Object Id to Contact.AccountId. However, then the message does not show up under the Contact. Usually this is undesirable. Instead, consider setting the Related Object Id to the Contact.Id and instead write a process builder on SMS History to set the SMS_History.Account.Id = Contact.Account.Id whenever SMS_History.Contact_Id is not null.

Method #2 – Apex Class

360 SMS also has an Apex class that can either be called in code or via Process Builder. There is an Apex class for sending regular **SMS** and another one for sending **MMS** which includes a parameter for the picture or file.

The Apex classes accept parameters in a comma separated string that you pass to the param field of the Apex class. This method is the preferred method as it's easy to copy/paste the code between PB's and Salesforce allows comments in formula fields, so we strongly recommend commenting your formulas using the **/* some comment */** syntax.

Send SMS From Process Builder

For the regular **Send SMS From Process Builder** Apex Class the string of parameters is defined as:

Param1: Id of the primary object you are triggering from – this must match your Template object and it will be the primary object that the outbound SMS will relate to.

Param2: The API name of the phone field for that object.

Param3: A template Id pulled from the URL of an SMS Template – it's object must match the object defined in param1

Param4: Optional originating phone number, if blank it sends the default phone number for the org or the first phone number found in the 360 SMS User Configuration tables for the current user.

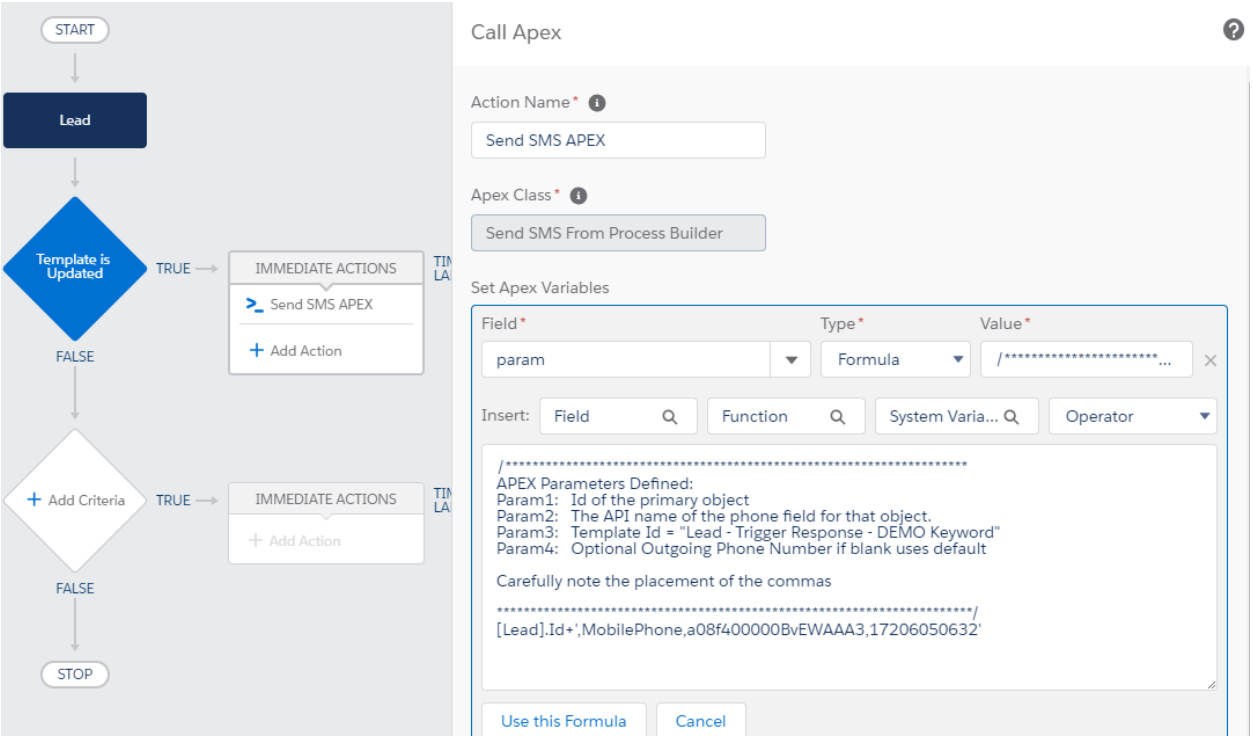


Figure 52 - Code example of sending regular SMS via the "Send SMS From Process Builder" Apex class

Send MMS from Process Builder

For the **Send MMS from Process Builder** Apex Class the string of parameters is defined as follows and shown in *Figure 54*.

Param1: Id of the primary object you are triggering from – this must match your Template object and it will be the primary object that the outbound SMS will relate to.

Param2: The API name of the phone field for that object.

Param3: A template Id pulled from the URL of an SMS Template – it's object must match the object defined in param1

Param4: Optional Document ID of the picture or file to send

Param5: Optional originating phone number, if blank it sends the default phone number for the org or the first phone number found in the 360 SMS User Configuration tables for the current user.

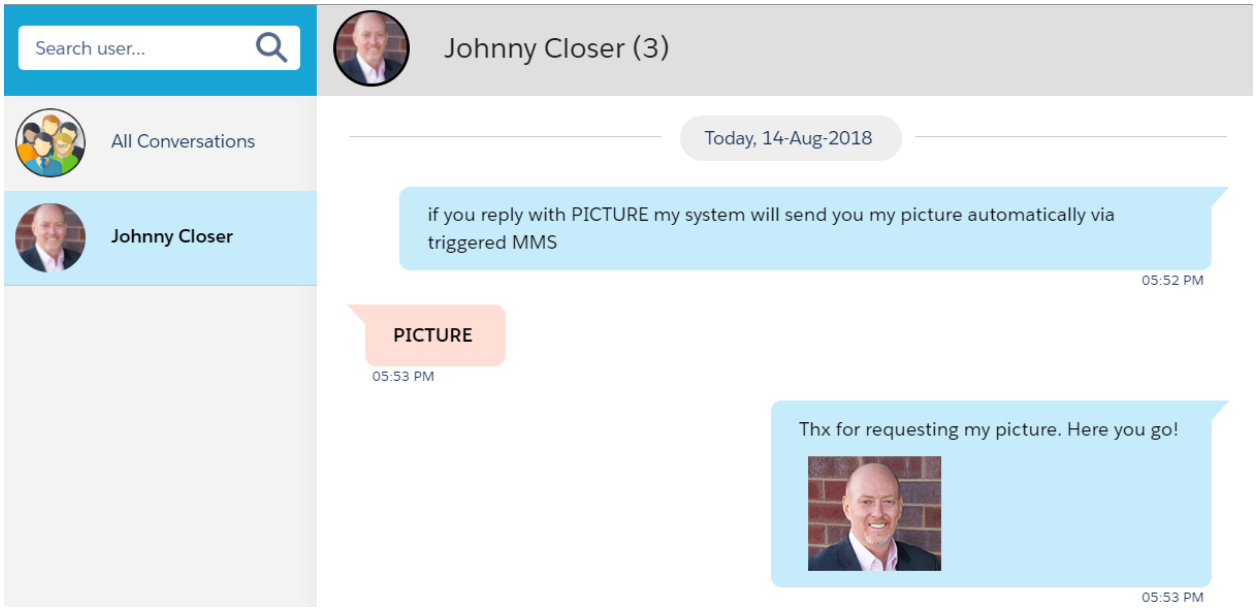


Figure 53 - MMS automation with keyword "Picture" sending pic of the Lead.Owner

Figure 54 shows a completely dynamic solution where the picture is derived by navigating to a custom field on the User record via SMS_History.Owner and the outbound phone number is also gathered from the User record. Most of the time you will be dynamically setting the Pictures and Outbound Number.

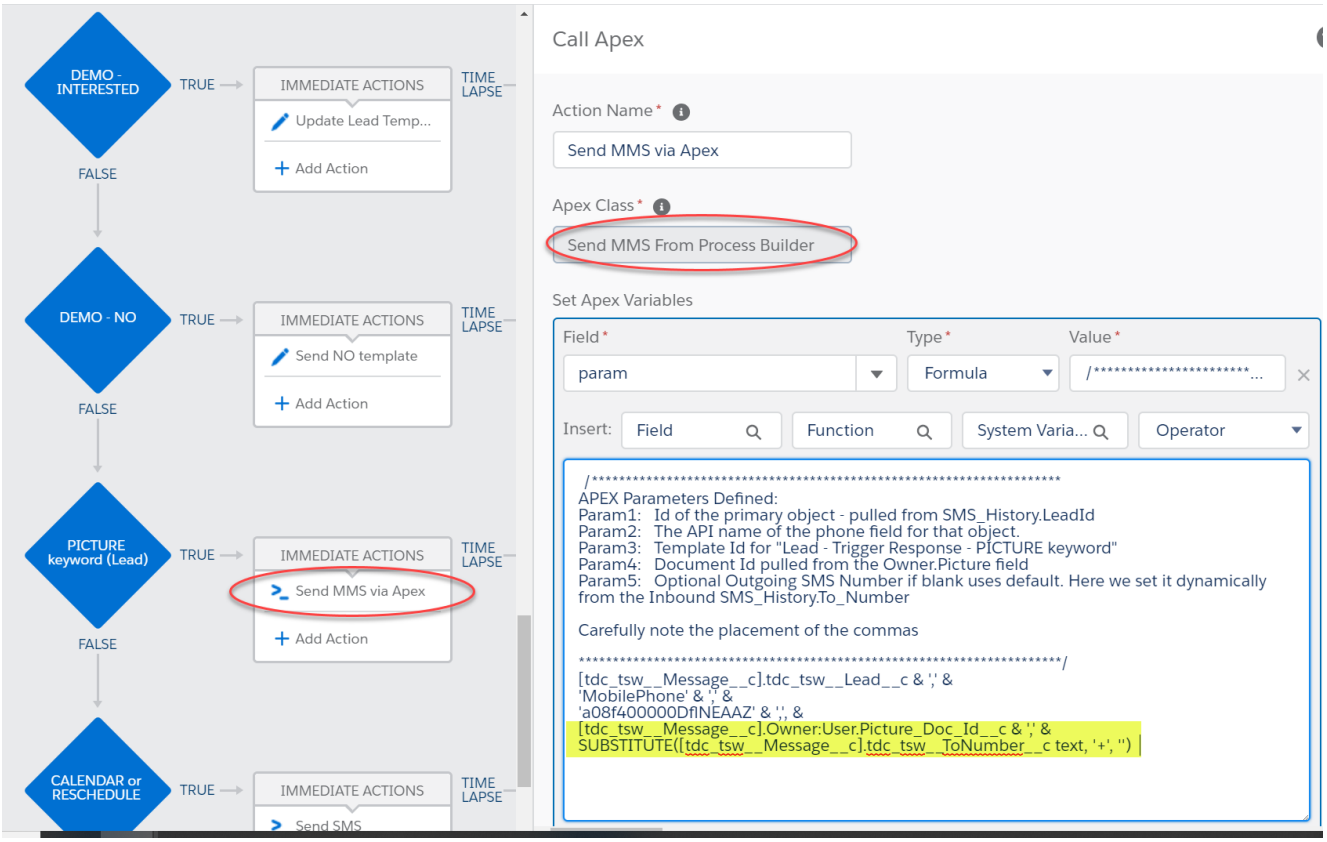


Figure 54 - PB code for executing triggered MMS via the "Send MMS from Process Builder" Apex class – this example is triggering off an inbound message with keyword "PICTURE". We obtain the picture by traversing up to the USER object and accessing a custom Picture_Doc_Id field. We use the SMS_History.To_Number to send back the reply.

Dynamically setting the Outbound Number

No matter which method one uses, it is common that the automation should send the Outbound SMS from the record owners unique SMS Number. Many orgs use separate numbers for each user. These are defined in the SMS Setup → User Configuration which is not accessible via process builder. However, with a simple customization to your USER object you can make your Process Builders dynamically obtain the Outbound SMS Number parameter that either method makes available as an optional parameter.

Simply, create a custom text field named something like User.**SMS_Number**. Then copy the number associated to each user into the field. DO NOT attempt to use the standard User.MobilePhone field as Salesforce formats this number on you, such as (720)605-0632. The number needs to be completely unformatted and have the country code prefix, i.e. 17206050632.

As shown in *Figure 54* you can now traverse to the User table via the SMS History.Owner or Lead.Owner/Contact.Owner and get the number from your custom field.

A second common scenario is to dynamically set the SMS Number parameter based on the Incoming Message. This is common when responding to Keywords. In this case, you don't need to lookup the number from a user table, you simply need to get it from the SMS_History.**To_Number** field (the number that the customer wrote to). However, be careful as the value will have a "+" character in front of it which is invalid for an outbound number, so you must use the **SUBSTITUTE** function as shown below to remove the +. The formula is provided below for easy copy/pasting.

```
/*********************************************************************
APEX Parameters Defined:
Param1:   Id of the primary object - pulled from SMS_History.ContactId
Param2:   The API name of the phone field for the contact object.
Param3:   Template Id:
Param4:   Optional Outgoing Phone # - pulled from Inbound SMS_History.To_Number but
we have to remove the + that is inherent with inbound numbers

Carefully note the placement of the commas
*********************************************************************/

[tdc_tsw__Message__c].tdc_tsw__Contact__c  & ',' &

'MobilePhone' & ',' &

'a08f400000Dfo3fAAB' & ',' &

SUBSTITUTE([tdc_tsw__Message__c].tdc_tsw__ToNumber__c , '+', '')
```

Dynamic MMS – such as sending a picture of a particular user

Similar to a dynamic outbound number, one can create a custom field on the User record that holds the Document Id of a previously stored picture. In *Figure 54* above we simply uploaded a Picture to the Salesforce Document object and manually copy/pasted the actual ID of the picture into a custom field named User.**Picture_Doc_Id**. We obtained the Document Id from the URL when we opened the picture.

For ease of copy/pasting the code for the Dynamic MMS has been provided below.

```
/*********************************************************************
APEX Parameters Defined:
Param1:   Id of the primary object - pulled from SMS_History.ContactId
Param2:   The API name of the phone field for that object.
Param3:   Template Id:  Contact - Trigger Response - PICTURE keyword
Param4:   Document Id pulled from the Owner.Picture_Doc_Id field
Param5:   Optional Outgoing Phone # - pulled from Contact.Owner --> User.SMS_Number
(custom)

Carefully note the placement of the commas
*********************************************************************/

[tdc_tsw__Message__c].tdc_tsw__Contact__c   & ',' &
'MobilePhone' & ',' &
'a08f400000DflORAAZ'  & ',' &
[tdc_tsw__Message__c].tdc_tsw__Contact__c.Owner.Picture_Doc_Id__c  & ',' &
[tdc_tsw__Message__c].tdc_tsw__Contact__c.Owner.SMS_Number__c
```

Create a Master Send SMS Handler

Figure 51 above introduced the concept of creating a single Process Builder that triggers via the OnChange of a custom field which you add to your object. We recommend adding the **SMS_Template_Id** lookup field to a Lead, Contact or any custom object. Then as shown in *Figure 56* you can have numerous process builders that trigger outbound messages but all you will need to do is update the Contact.SMS_Template with whatever template you want to send. This centralized approach means that you won't have to create the same Send SMS action repeatedly, whether that be Method #1 or Method #2.

Of course, there will be many times when you will not want to use your Master Send SMS Handler such as when the outbound number needs to come from a different number or perhaps when you need to trigger an MMS.

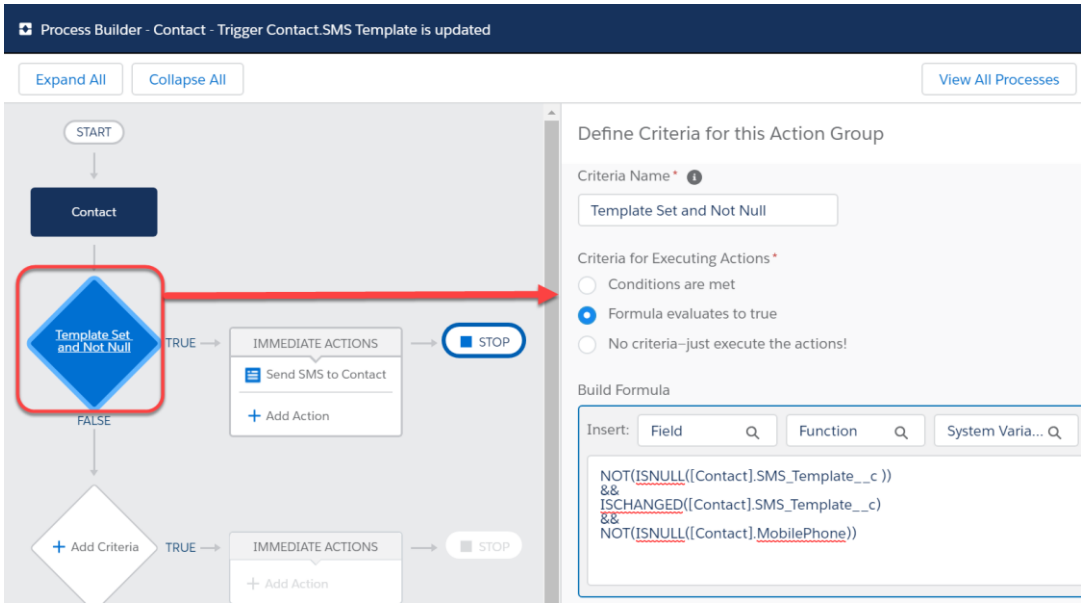


Figure 55 - When the SMS Template is changed - trigger the outbound SMS, Figure 2 shows the Immediate Action

Figure 56 shows a perfect example where we have a survey with multiple answers and it needs to trigger a different template per response. It would be a hardship to write the APEX code for each possible answer over and over again. So instead, we just set the SMS_Template for the contact and let our other Process Builder do the work!

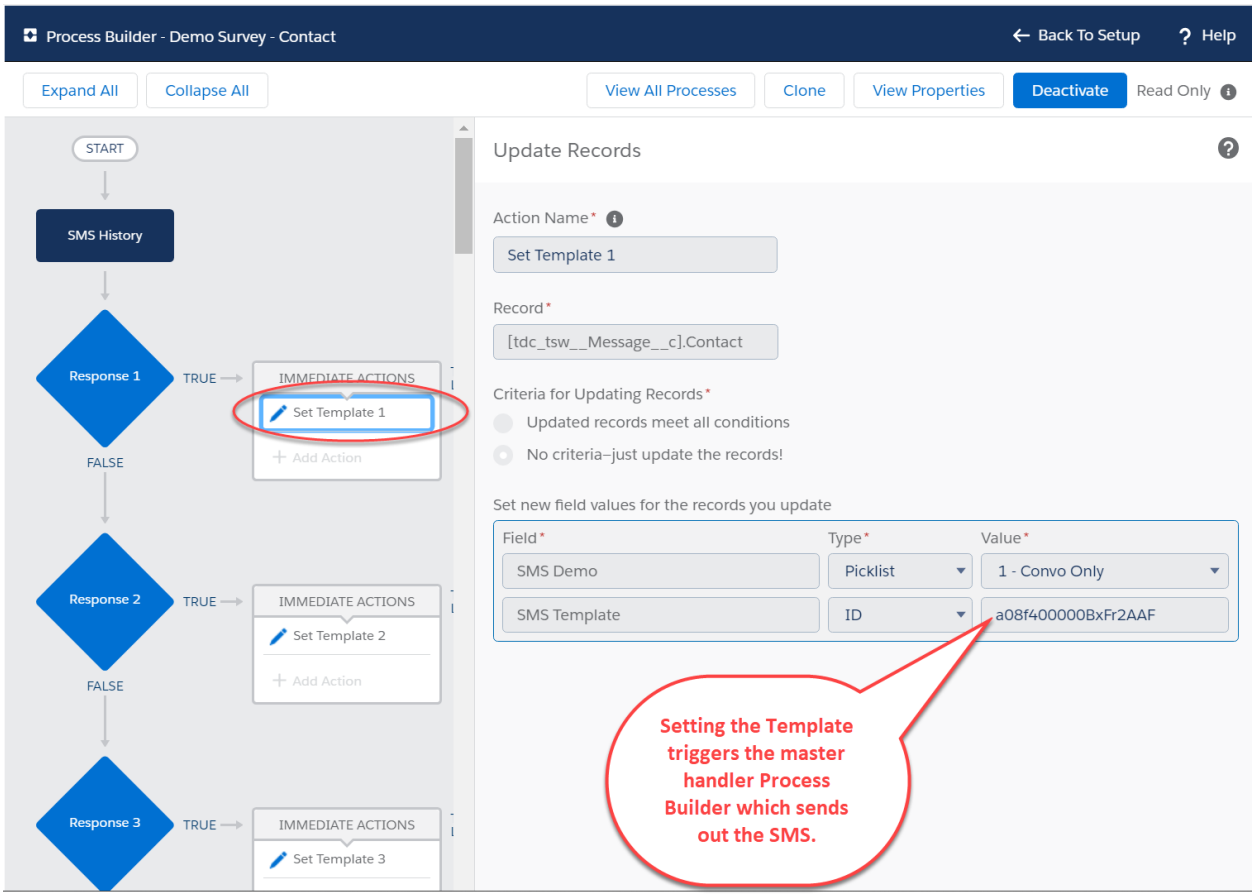


Figure 56 - Demonstration of the easier way of triggering an SMS via a change to the Contact.SMS_Template_Id (custom formula and matching PB)

Drip Campaigns

A common automation task is what is commonly referred to as a Drip Campaign, whereby you place a Contact/Lead into a Campaign or even trigger any Process Builder and then you want to keep Texting the Contact/Lead periodically until they respond to your Call-To-Action such as replying with a keyword or clicking a trackable link.

There are of course other methods to construct a Drip Campaign, but this method described below is the easiest to maintain.

In this example below, we have created two custom fields on the Campaign_Member object and one custom field on the Contact:

Campaign_Member.SMS_Template_Id:Lookup field to the SMS_Template – we move the person through the drip by setting the SMS_Template to a new template at each stage. You could also avoid this step by using the APEX method of sending an SMS at each stage. This method triggers a call to another PB which looks for changes to Campaign_Member.SMS_Template and triggers the SMS, just for easier centralized coding.

Contact.SMS_Stop_Drip: Checkbox field on the Contact record, since incoming SMS will link to Contact we only have scope to the Contact record and we can mark this field TRUE when the reply to our message.

Campaign_Member.Stop_Drip_Contact: A formula field back to the Contact.SMS_Stop_Drip so that the main PB that handles the Campaign.SMS_Template OnChange checks the field before deciding to send the next drip.

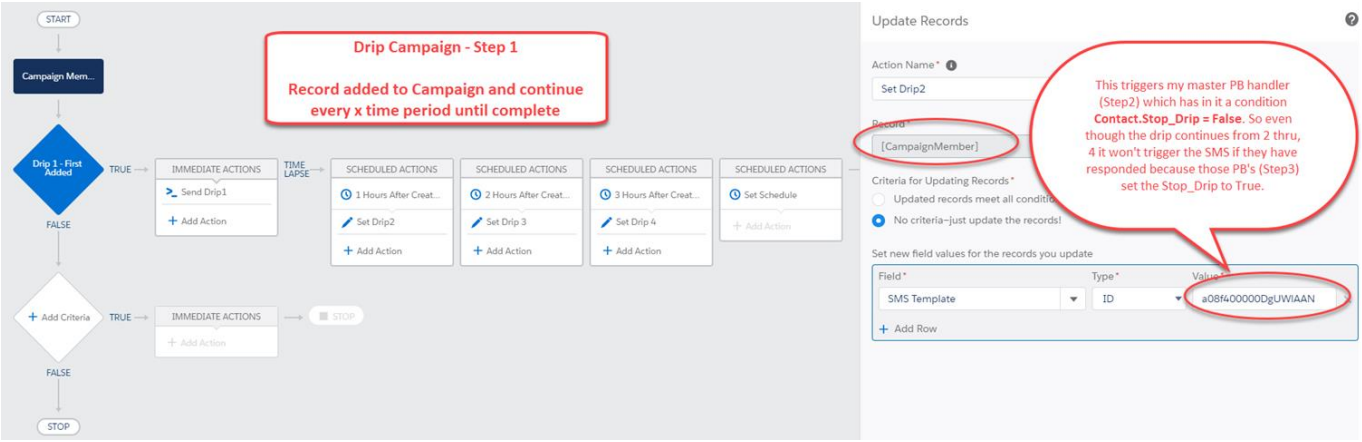


Figure 57 - Step 1: Define the drip campaign - usually starts when a Contact/Lead is added to a Campaign (via CampaignMember)

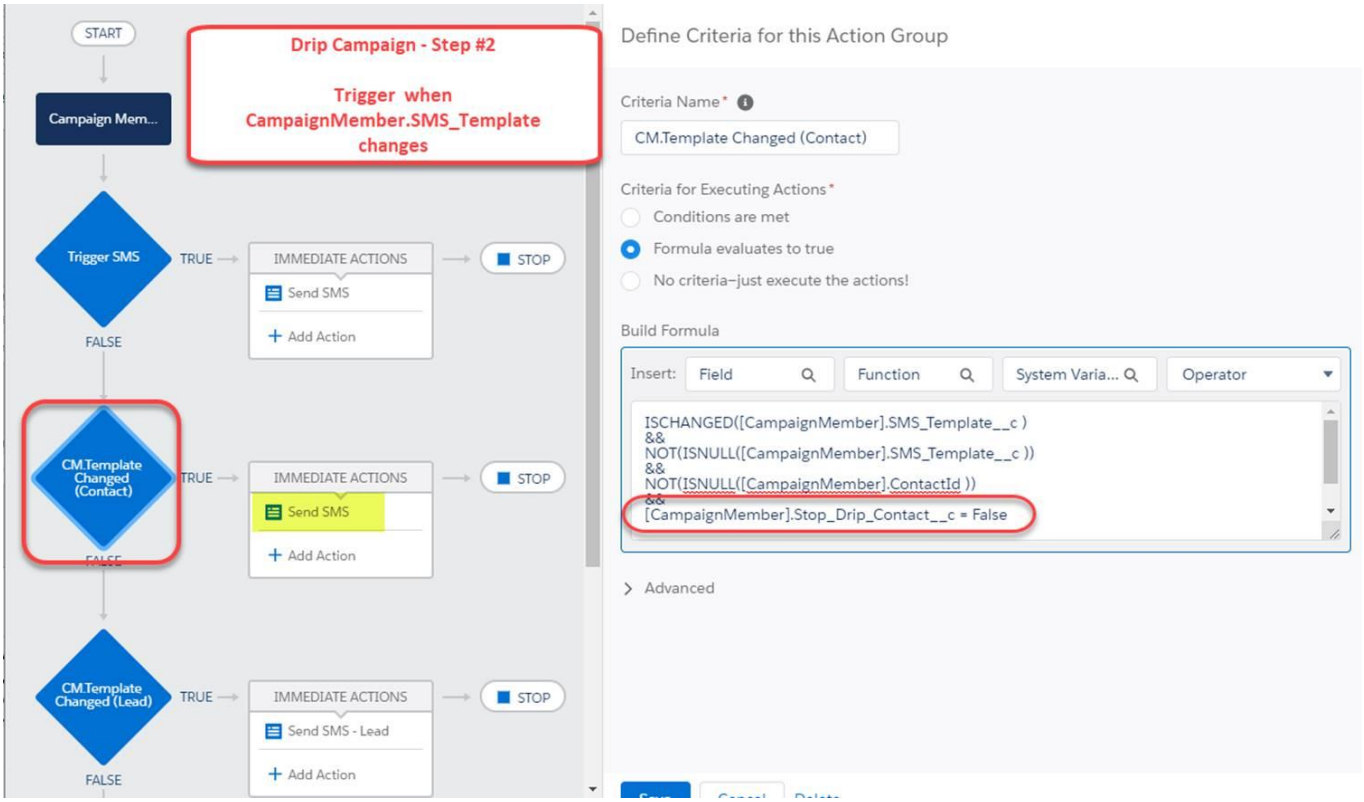


Figure 58 - This is the master Process Builder that handles all changes to the CampaignMember.SMS_Template and triggers an outbound SMS

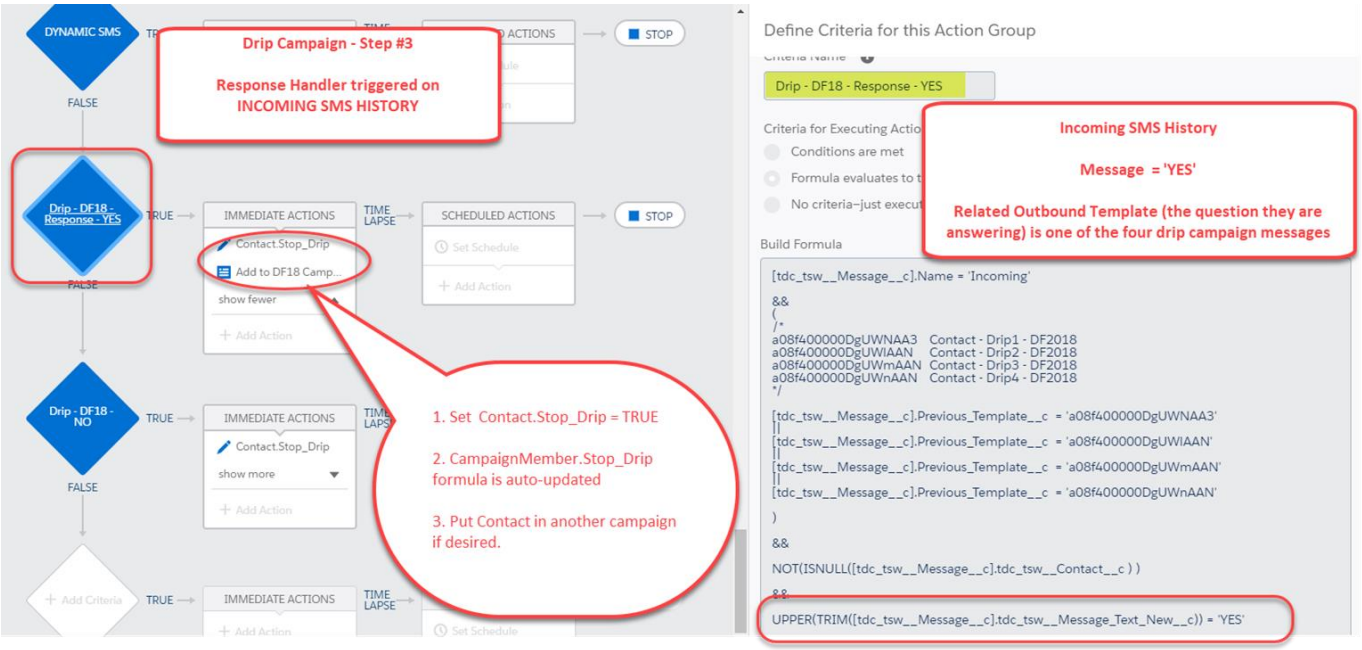


Figure 59 - This is my Response Handler handling the keyword responses that stop the drip

Using Salesforce Flows

The Salesforce Flow technology is worth a short discussion as it provides considerably more power than Process Builder such as the ability to Lookup Records and Mass Update them.

In the examples below, we demonstrate receiving an email address via an Incoming SMS in response to a template which says, "***I don't recognize your number, can I get your email address so I can look you up by email?***"

In this particular workflow, we have a new unknown number writing into our Salesforce system. In a previous Process Builder we have created a new Lead record for this incoming SMS and we start asking them questions to fill out the record such as Name, Email and Company. However, here we use a Flow called from a process builder to take the email address and perform a Record Lookup against the contact object. If we find a record, we will instead send back a template that says, "***Found you Contact.Name!***" and then proceed with the original keyword that started the whole process.

Figure 60 shows how a normal process builder can call a Flow passing in parameters that we gather from the SMS_History record. *Figure 61* then shows the details of the flow where it:

1. Lookups up the email from the Contacts object
2. If a contact is found it re-links all the SMS_History that got linked to the dummy lead record which was created when the SMS from the unknown record first came in.
3. Finally, we can send the outbound SMS reply either via the same APEX methods as a Process Builder uses or in this case we use the technique shown in ***Figure 51*** where we only update the Contact.SMS_Template field which in turns triggers our Master SEND SMS Handler.

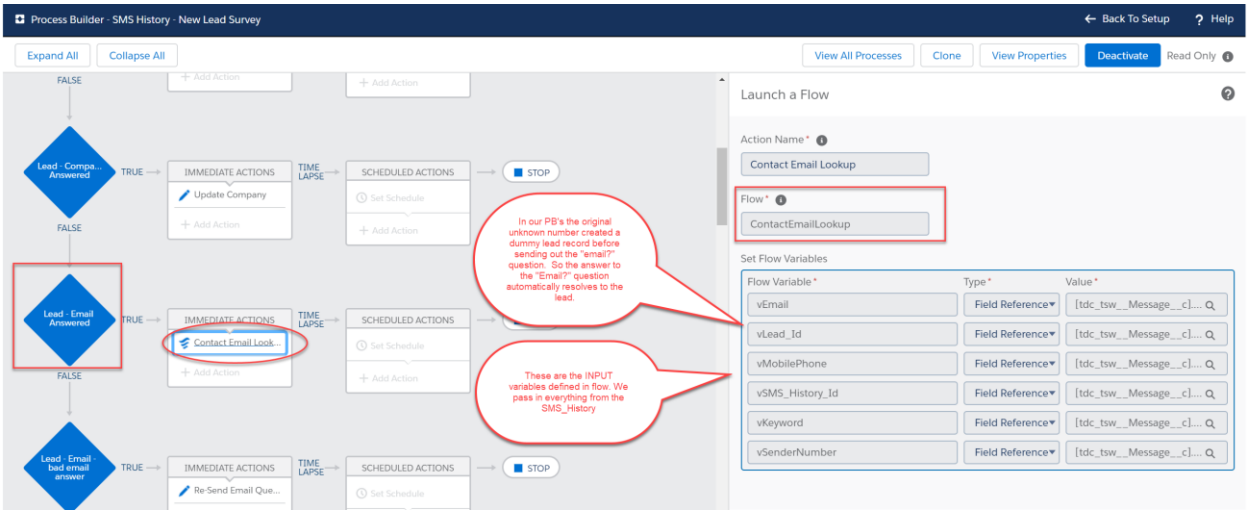


Figure 60 - Example of an SMS_History Incoming process builder triggering a call to a flow.

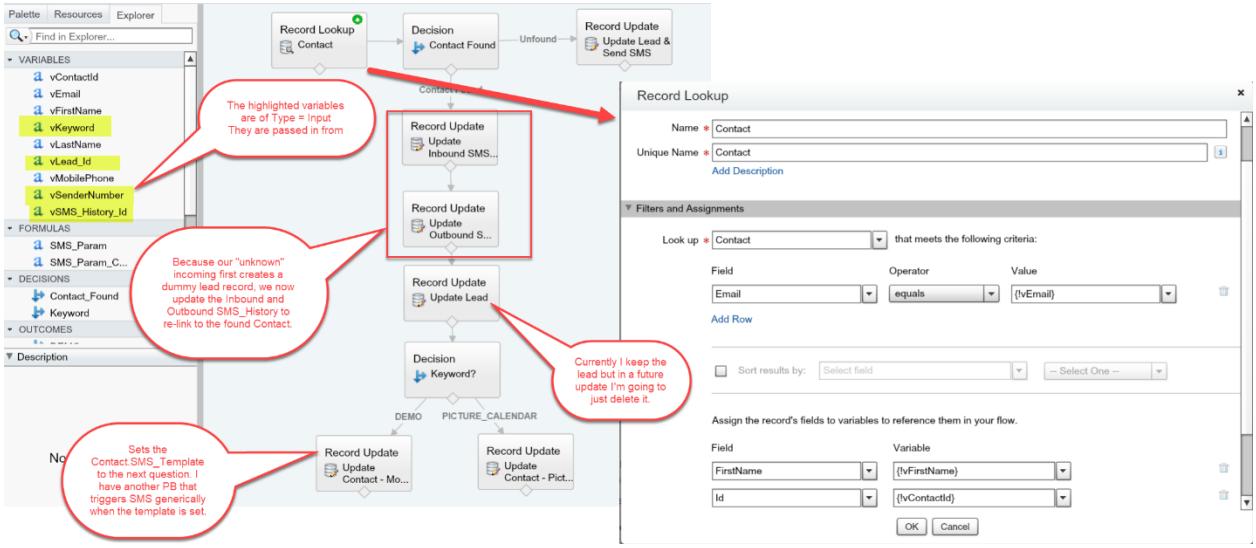


Figure 61 - A flow which does a Record Lookup based on a response from an inbound SMS with an email address