



360 SMS - Email to SMS 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.

The screenshot shows the Salesforce Lead Detail interface. At the top, there are action buttons: Edit, Delete, Convert, Clone, Find Duplicates, Submit for Approval, and Send SMS. The lead information includes Name (John Smith), Title, Company (BolderCRM), Email, Phone, and Mobile ((303) 875-7163). Below this, the 'SMS Conversations' section is expanded, showing a search bar and a list of conversations. The main conversation area shows a message from Steve Roch: 'How's it going John?' (01:29 PM) and a reply: 'Great! I'm loving 360 SMS!' (01:32 PM). To the right, a smartphone screenshot shows the received text message and the reply.

The screenshot shows the email configuration interface. The 'To' field is populated with 'sms_incoming@r-ojuzidkfmk9w7ng4c48epxcsf499ubw30a312go088t4f85a.f4-4iqrtao.na59.apex.salesforce.com'. The subject is 'RE: Incoming Message Alert from 360 SMS'. The email body contains the reply text: 'Great to hear. I'm replying from my email. So cool!'. Below this, there is a 'Message:' section with the text 'Great! I'm loving 360 SMS!'. There are also links to view the lead or incoming message, and a warning to not modify the sender number or to number. To the right, a smartphone screenshot shows the received text message and the reply, with a red arrow pointing from the email body to the message on the phone.



Step 1: Create Email Service

1. Go to Salesforce setup
2. Type 'Email services' in the 'Quick Find' box and Setup -> Develop -> Email Services.
3. Click on 'New Email Service'

The screenshot shows the Salesforce 'Email Services' setup page. The 'Quick Find' search bar at the top left contains the text 'email service'. The left sidebar shows the navigation menu with 'Email Services' selected under the 'Develop' section. The main content area displays a yellow informational box with the following text: 'Before creating email services, create Apex classes that implement the Messaging.InboundEmailHandler interface.' Below this is a code block for an Apex class:

```
global class myHandler implements Messaging.InboundEmailHandler {
    global Messaging.InboundEmailResult handleInboundEmail(Messaging.InboundEmail email, Messaging.InboundEnvelope envelope) {
        Messaging.InboundEmailResult result = new Messaging.InboundEmailResult();
        return result;
    }
}
```

A red speech bubble annotation points to the code block with the text: 'Don't worry about this. The Apex Class has already been created for you.' Below the code block is a table with columns: 'Active', 'Email Service Name', 'Apex Class', 'Last Modified By', and 'Last Modified Date'. The table is currently empty, with a 'New Email Service' button circled in red. The top right of the page shows the user's name 'Steve Roch' and a 'Setup' link circled in red.

4. Fill out the details as shown in the screen capture:

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



5. Click on 'Save and New Email Address'

Email Service

Email services let you use Apex classes to process the contents, headers, and attachments of inbound email. Use the settings below t

Save Save and New Email Address Cancel

Email Service Information

Email Service Name

Apex Class

Accept Attachments

Advanced Email Security Settings

Accept Email From

Convert Text Attachments to Binary Attachments

Active

Failure Response Settings

Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below.

Over Email Rate Limit Action

Deactivated Email Address Action

Deactivated Email Service Action

Unauthenticated Sender Action

Unauthorized Sender Action

Enable Error Routing

Route Error Emails to This Email Address

Save Save and New Email Address Cancel

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

Email Service Address

Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.

Email Service Information

Email Service Name 360 SMS Incoming

Accept Email From All email addresses (subject to security settings)

Email Address Information

Email Address Name

Email address

Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.

Active

Context User

Accept Email From

Save Save and New Cancel

Name cannot begin with a numeral (i.e. 360_SMS_Incoming won't work)



7. Now, we must copy the email address generated in Step 6 to the 360SMS Set-Up

The screenshot shows the Salesforce interface for setting up 360SMS. It is divided into two main parts:

- Top Section: Email Addresses**
 - A table with columns: Action, Email Address Name, Email Address.
 - Row 1: View | Edit | SMS_Incoming | sms_incoming@r-ojuzidkfmk9w7ng4c48epxcfd99ubw30a312go088t485a.f4-4griear...ha59.apex.salesforce.com
 - The email address is circled in red.
 - A context menu is open over the email address, with "Copy email address" highlighted in yellow.
- Bottom Section: SMS Setup**
 - Navigation tabs: SMS Setup (circled in red), SMS From Reports, SMS App Help.
 - Sub-tabs: ORG CONFIG, USER CONFIG, OBJECT SETUP, GENERAL SETTINGS (circled in red).
 - Section: SMS Subscription
 - Buttons: Save, Cancel
 - Owner Details: SMS App Owner Name (Steve Roch)
 - Enable Sharing for Incoming Messages (checked)
 - Enable Reply (checked), Enable Read (checked), Enable Unsubscribe (checked)
 - Section: Email To SMS (circled in red)
 - Email Service Address: sms_incoming@r-ojuzidkfmk9w7ng4c48epxcfd99ubw30a312go088t485a.f4-4griear...ha59.apex.salesforce.com (circled in red)
 - Enable Dark Hour (checkbox)

Step 2 (Optional): Edit Email Template

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 message 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



To edit the template:

1. Go to Salesforce Setup and type 'Email Templates' in the 'Quick Find' box.
2. Navigate to the:
Administrator -> Communication Templates -> Email Templates
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. This has been modified to fit on a phone and has some fixes to the hyperlinks.

Email folder

Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template. You emails, only text, HTML, and Custom templates may be used.

Folder: [Edit](#) | [Create New Folder](#)

Action	Email Template Name ↑	Template Type	Available For Use	Description
Edit Del	360 SMS - Demo ReTry	Custom	✓	
Edit Del	360SMS - Differentiators	Custom	✓	List of 360 SMS differentiators
Edit Del	360SMS - Pitch #3	Custom	✓	3rd pitch to old leads
Edit Del	360SMS - Retry #2	Custom	✓	Version 2 of the 360SMS old leads reach out
Edit Del	Chatter Incoming Template	Text	<input type="checkbox"/>	
Edit Del	Incoming Message Alert	Custom	✓	
Edit Del	SMS Clickthrough Alert	Custom	✓	
Edit Del	Uninstallation	HTML	✓	

Recommended HTML Template

```
##### 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 hyperlinks 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>
```



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

Reply Above

Hello,

You have received an incoming message.

<i> {!tdc_tsw__Message__c.tdc_tsw__Message_Text_New__c}</i>

To view the message, click

Here

To view associated record, click

Here

More Details:

Sender Name:{!tdc_tsw__Message__c.tdc_tsw__Sender_Name__c}

Sender Number:{!tdc_tsw__Message__c.tdc_tsw__Sender_Number__c}

To Number:{!tdc_tsw__Message__c.tdc_tsw__ToNumber__c}

Thanks ,

360 SMS App for Salesforce

