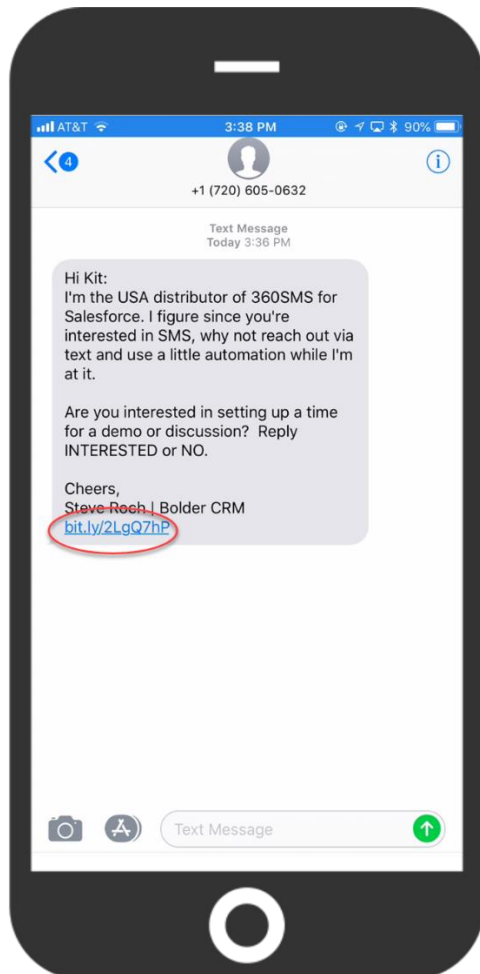




Hyperlink Clickthrough Tracking

360 SMS provides the unique ability to send links 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 abilities.



SMS History Outgoing

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Back to List: Permission Sets

Message Urls [1]

SMS History Detail [Resend]

SMS Type	Outgoing	Owner	Steve Roch [Change]
To Number	3038757163	Status	Delivered
Sender Number	17206050632	Delivery Status	Delivered
Created Date	7/23/2018 3:35 PM	Message Segment	3

▼ **Message & Template**

SMS Template: Lead - Msg1 - Unsolicited SMS - New

Message: Hi Kit: I'm the USA distributor of 360SMS for Salesforce. I figure since you're interested in SMS, why not reach out via text and use a little automation while I'm at it. Are you interested in setting up a time for a demo or discussion? Reply INTERESTED or NO. Cheers, Steve Roch | Bolder CRM bit.ly/2LgQ7hP

When Bit.ly is enabled, outgoing links automatically convert to bit.ly links

▼ **Linkages (Objects/Records the Message is linked to)**

Contact	Related Object	Lead
Lead	Related Object	Lead
Case	Related Object Id	00Q4000008jPTS

[Resend]

Message Urls [Message Urls Help]

Action	Message Url Name	UrlLink	Clicks	First Click	Last Click	Created Date
[Edit] [Del]	L-0011	https://boldercrm.com/360SMS	3	7/23/2018 3:35 PM	7/23/2018 3:37 PM	7/23/2018

When Bit.ly is enabled, link tracking automatically de-crypts the Bit.ly link into a friendly URL.

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 SMS 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 links always creates a Message URL record so that its 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

SMS History SMS Template **SMS Setup** SMS From Reports SMS App Help +

ORG CONFIG USER CONFIG OBJECT SETUP **GENERAL SETTINGS**

SMS Subscription

Edit

Sending time(NEXT Day) 🕒

Link Tracking

Link Tracking Status From Backend 🕒 :	Enabled	
Enable Link Tracking For Bitly 🕒 :	✓	
Bitly Generic Access Token 🕒 :		

Figure 1 - Call your sales person or email to sales@360SMSApp.com to enable Link Tracking



Configure Salesforce “Sites” for Delivery Status and/or Link Tracking

360 SMS offers automatic updating of the Delivery Status of outbound SMS Messages as well as Hyperlink Clickthrough Tracking (when enabled by contacting Sales@360SMSApp.com).

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 in [Figure 2](#) below.

Sites

What is a Site?					
Sites (boldercrm.force.com)					
New					
Action	Site Label ↑	Site URL	Site Description	Active	Site Type
Edit Deactivate	Incoming SMS	http://boldercrm.force.com/IncomingSMS	Site used by 360SMS to update delivered status on SMS History and for the Link Tracking feature.	✓	Force.com

Figure 2 - Incoming SMS Sites needed for Delivered Status and Link Tracking

To create a Salesforce Site follow these instructions:

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 4](#). If no site has been previously created, you must create one, [Figure 3](#).
3. From [Figure 4](#), press **NEW** to create a new Site
4. Make the new Site look exactly as shown in [Figure 5](#).
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 6](#).
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 7](#) for the steps to get there



Sites

To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com such as 'mycompanyportal.'

 You cannot modify your Salesforce site domain name after the registration process.

http:// **boldercrm** .force.com

☒ I have read and accepted the Salesforce [Sites Terms of Use](#)

Figure 3 - Salesforce Sites - no previous site has been created so we must make one for the first time.

Sites

[Create your Force.com Sites](#)

Your Salesforce site domain name is **boldercrm.force.com**

[Salesforce Sites Terms and Conditions](#)

Create a new site named
"Incoming SMS"

Sites (boldercrm.force.com)

Site Label +	Site URL	Site Description	Active	Site Type	Last Modified By
No records to display.					

Figure 4 - Create a new Site



Site Edit

New Site

SaveCancel

Site LabelIncoming SMS ⓘ

Site NameIncoming_SMS ⓘ

Site Description

Site used by 360SMS to update delivered status on SMS History and for the Link Tracking feature.

Site ContactSteve Roch ⓘ ⓘ

Default Web Addresshttp://boldercrm.force.com/IncomingSMS ⓘ

Active☒ ⓘ

Active Site Home PageSiteLogin ⓘ

Inactive Site Home PageInMaintenance ⓘ [Preview]

Site TemplateSiteTemplate ⓘ ⓘ

Site Robots.txt ⓘ

Site Favorite Icon ⓘ

Analytics Tracking Code ⓘ

URL Rewriter Class ⓘ ⓘ

Enable Feeds☐

Clickjack Protection LevelAllow framing by the same origin only (recommended) ⓘ

Require Secure Connections (HTTPS)☒ ⓘ

Upgrade all requests to HTTPS☒ ⓘ

Enable Content Sniffing Protection☒ ⓘ

Enable Browser Cross Site Scripting Protection☒ ⓘ

Referrer URL Protection☒ ⓘ

Guest Access to the Support API☐ ⓘ

SaveCancel

Figure 5 - Incoming SMS site for Delivery Status and Link Tracking



SMS History SMS Template **SMS Setup** SMS From Reports SMS App Help +

ORG CONFIG USER CONFIG OBJECT SETUP GENERAL SETTINGS

SMS Subscription

Edit

Owner Details

SMS App Owner Name : Steve Roch

Subscription Keywords

Re-Subscribe Keywords : Start.Subs

Unsubscribe Keywords : Stop.Unsubscribe

SMS Delivery Report Setting

Site URL : <http://boldercrm.force.com/IncomingSMS>

Keywords To Create New Lead and Case

Figure 6 - Set the Site URL to the Incoming SMS site created in Figure 4

Security

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 7](#) illustrates the steps as it's a long haul to get to Permission Sets.



Site Details
Incoming SMS

« Back to List: Sites

Site Detail

Site Label	Incoming SMS
Site Description	Site used by 360SMS to update delivered status on SMS History and for the Link Tracking feature.
Active	☒

1 **Public Access Settings**

Profile
Incoming SMS Profile

« Back to List: Visualforce Pages

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more changes.

Login IP Ranges [0] | Enabled Apex Class Access [128] | Enabled Visualforce Page Access [50] | Edit

Profile Detail

Name	Incoming SMS Profile
User License	Guest User License
Description	
Created By	Steve Roch, 7/23/2018 12:15 PM

2 **View Users**

Incoming SMS Profile

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile device.

Action	Full Name ↑	Alias	Username
Edit	Site Guest User, Incoming SMS	guest	incoming_sms@boldercrm.force.com

3

User
Incoming SMS Site Guest User

4 **Permission Set Assignments [0]**

User Detail

Name	Incoming SMS Site Guest User
Alias	guest
Email	steve@boldercrm.com
Username	incoming_sms@boldercrm.force.com
Nickname	Incoming_SMS

5 **SMS App Permission Set**

Permission Set Assignments
Incoming SMS Site Guest User

Save Cancel

Available Permission Sets

- Duplicate Check for Salesforce
- Einstein Analytics for Sales Cloud
- Inbox With Einstein Activity Capture
- Inbox Without Einstein Activity Capture
- Lookup Rollup Summaries - Configure Rollups
- Lookup Rollup Summaries - Process Rollups
- Sales Cloud User
- Sales User
- Salesforce Console User
- Standard Einstein Activity Capture

Add Remove

Enabled Permission Sets

- SMS App Permission Set**

Figure 7 - Put Incoming_SMS into the SMS App Permission Set



About the Author

Steve Roch, CEO of Bolder CRM is an SMS Industry expert having worked or consulted with the top three SMS Apps on the Salesforce AppExchange and also having built the popular Salesforce app [ActionGrid™](#), acquired by Conga in April-2016. Bolder CRM is the exclusive distributor of 360 SMS in the United States and Canada.

Learn more about Steve and Bolder CRM at <https://www.BolderCRM.com>.