360 SMS App

USER GUIDE

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Table of Contents

I Introduction 4

II Overview

III Trial Installation 4

IV Configuration 6

4.1. User Setup 6
4.2. Object Setup 7
4.3. Custom Object Setup 12
4.4. General Settings 12
4.5. Setting up the Page Layout 13
4.6. SMS Template Setup 16
4.7. Adding SMS History Related List 17
4.8. Setup for Lightning 22
4.9 Setup for MMS 24

V App Usage

5.1. Sending Single SMS 26
5.2. Sending Bulk SMS 30
5.3. Incoming SMS 33
5.4. SMS History 35
5.5. Schedule SMS 40
5.6. Sidebar Functionality 41

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I Introduction

i Location of Document

The latest edition of this User Guide is available on the AppExchange.

ii Target Audience

This document is meant for Salesforce administrators, end users and potential customers.

II Overview

i Business Need:

SMS is an easy way to exchange short text messages on-the-go with everyone who are involved in your business. As it is essential to communicate effectively with the business contacts, this App has been developed to bridge the communication gap with an easy user interface.

ii Feature Description:

- Send SMS to Lead, Contact or any custom object
- Easy to set up within Salesforce
- Two-way communication i.e. send as well as receive the SMS right from within Salesforce
- Automatic association of SMS body with Name or email addresses using Templates
- Auto-forwarding of SMS to the mobile number of your choice
- Provision for email alert to the owner or an additional user on incoming SMS replies.

iii User Advantage:

- Send both single as well as bulk SMS to specific people
- Incoming and Outgoing SMS messages is maintained within the Salesforce
- SMS credits can be easily tracked
- Easy historical tracking of all SMS sent in past

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III Installation

3.1. Software Requirements:

Both Trial and Paid releases of present version of the App will work in Salesforce Developer, Enterprise, Performance and Unlimited but not in Group and Professional editions.

3.2. Trial Version Installation:

3.2.1. AppExchange will direct you to a URL to install the app.

3.2.2. Click Log In on top right corner of the app's AppExchange page. In case, you don't have Salesforce credentials click I don't have a login and continue as a guest.

3.2.3. Either click 'Install in Production' or 'Install in Sandbox', based on your Salesforce edition.

3.2.4. Agree to the terms and conditions by checking the box (in case you wish to go through the same, you may do so by clicking on it). Click Confirm and Install to proceed further.

3.2.5. You shall receive a notification declaring that our Support have received your request to open the switch for releasing trial SMS credits, who shall get back to you at the earliest via email. One of our Consultants shall, through a quick interaction, will try to understand your requirements and configure the best solution (Trial or Paid) as per your needs. For completing the configuration, your organization will be allotted unique Virtual SMS Number/s for the purposes of using this app. Our Support at 360 Degree Cloud is available via following:

Email Id: - *support@360degreeapps.com* | Contact Number: -+1 360-7614-360

Kindly provide your Organization ID for configuring the app for first time use, which can be obtained by navigating to Setup and typing Company Information in the Quick-Find/Search box as shown:

3.2.6. After installation, you can observe that the App appears in top-right-corner Force.com App Menu.

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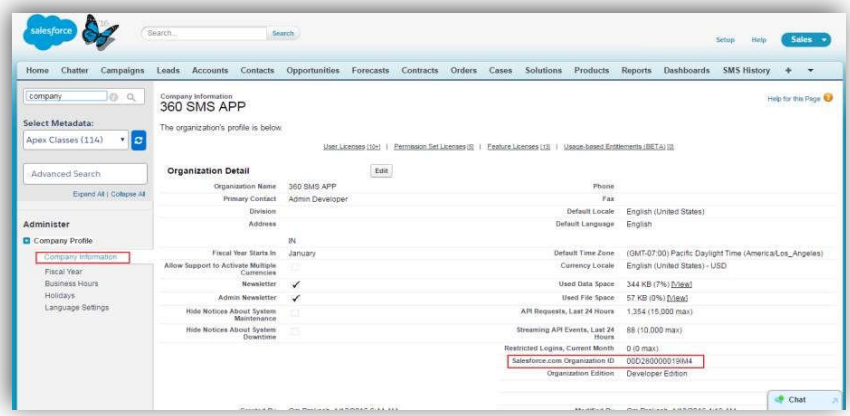

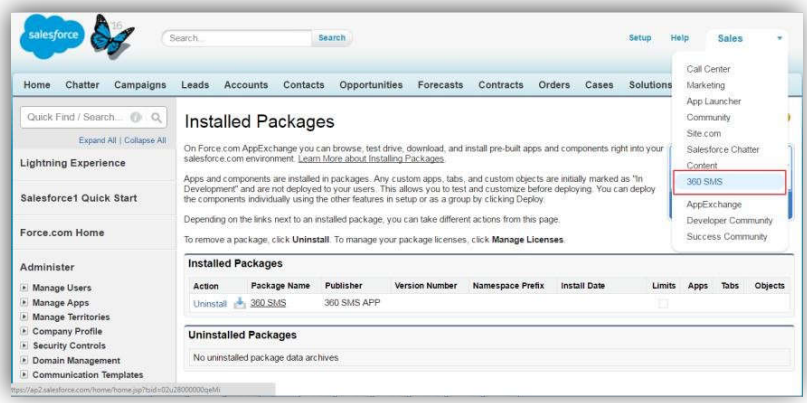

When the app has been successfully installed, continue to the next steps to configure it for usage, else contact our Support if you encounter any issues at this stage.

IV Configuration:

4.1. User Setup:

4.1.1. Select the 360 SMS app from the Force.com App Menu.

4.1.2. Initially, an org is not allotted any Virtual Number. User has to click on Assign Virtual Number to get the Virtual Number and start the app usage.

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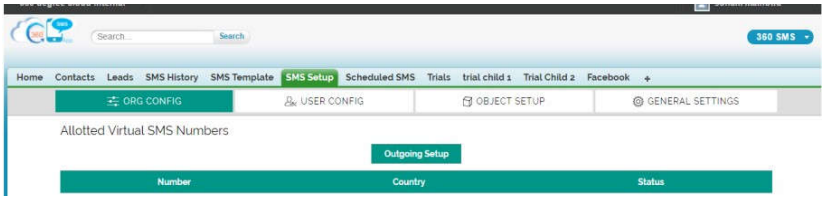
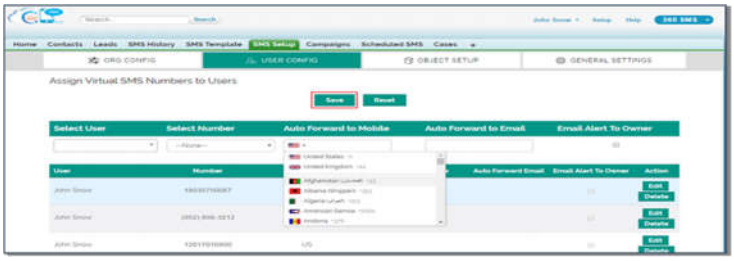
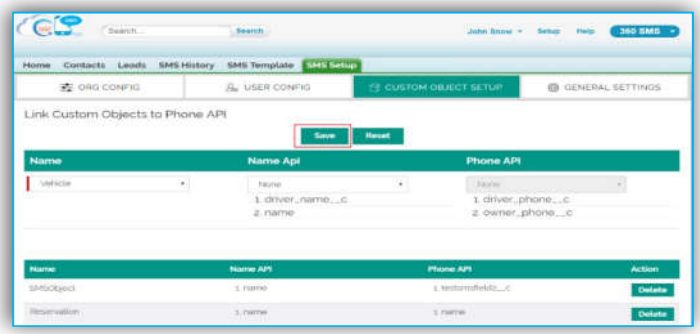
4.1.3. Click on SMS Setup sub-tab and the Virtual SMS Number/s issued to the organization by the provider (360 Degree Cloud Support) shall be displayed in the table. Click the Outgoing Setup button and then the Incoming Setup button at the bottom to sync the Virtual SMS Number/s i.e. enabling the same for sending SMS.



4.1.4. Click on the User Config sub-tab, which will provide the option to assign the allotted Virtual SMS Number/s to multiple users who can send SMS using the same. Click on the New button and choose the appropriate User and Number from the dropdown lists, all at once using Add Row option or otherwise.





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4.1.5. Click on the Save button to save the data.

4.1.6. To start sending SMS, simply drag the button with the API name "tdc_tsw__Send_SMS" into the page layout of Contact/Lead.

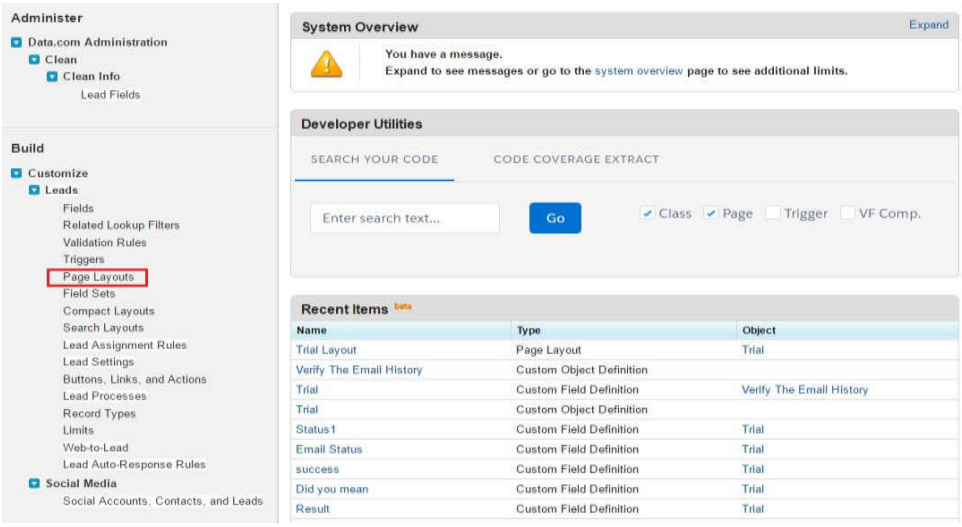
4.2. Object Setup

To be able to send Text messages from Leads/ Contact/ Account Add Elements to Page Layout, follow the following steps:

e.g. For Leads

4.2.1. Go to Salesforce 'Setup'.

4.2.2. Type 'Lead' in the 'Quick Find' box.



4.2.3. Click on 'Page Layouts'.

4.2.4. Click on 'Edit' corresponding to your Lead Page Layout.

4.2.5. Under 'Fields' section. Choose 'SMS Opt out' and Drag it down.

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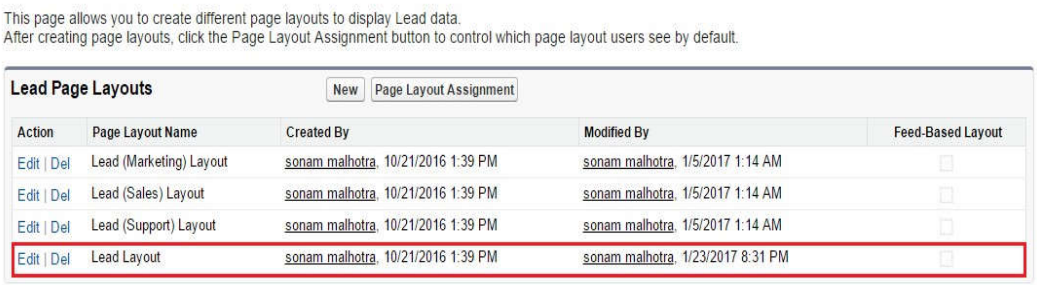
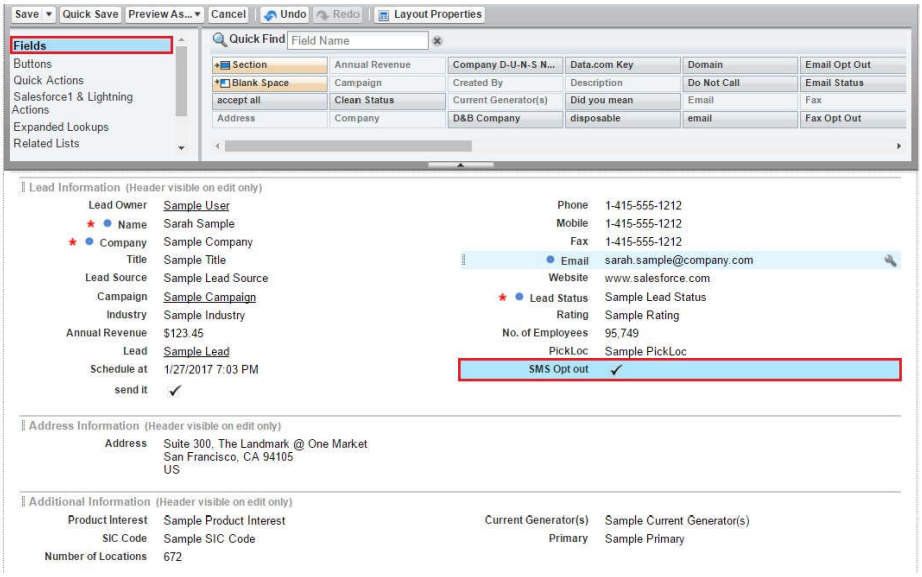


4.2.6. Under ‘Buttons’ section. Choose ‘Send SMS’ with the API name 'Send_SMS' and Drag it down under ‘Custom Buttons'.



4.2.7. Under ‘SF1 and Lightning Actions’ section. Choose ‘Send SMS’ with the API name ‘Send_SMS_SF1' and Drag it down under 'SF1 and Lightning Actions’.

4.2.8. Under ‘Quick Actions’ section. Choose ‘Send SMS’ and Drag it down under 'Quick Actions'.

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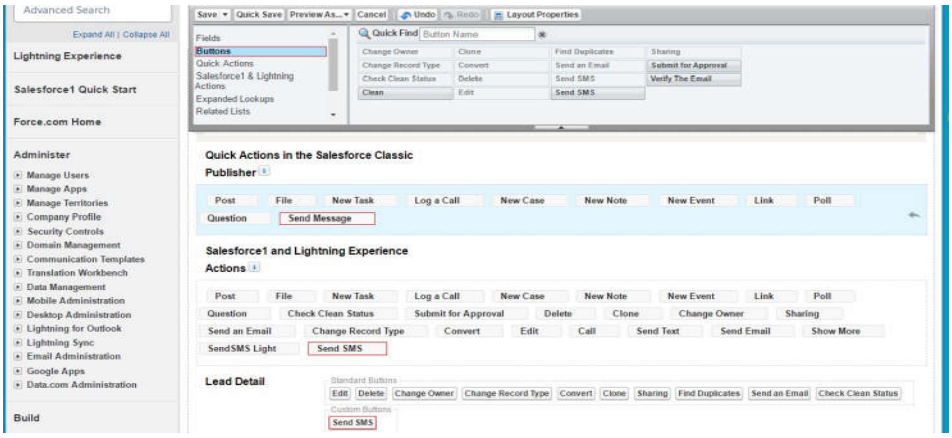
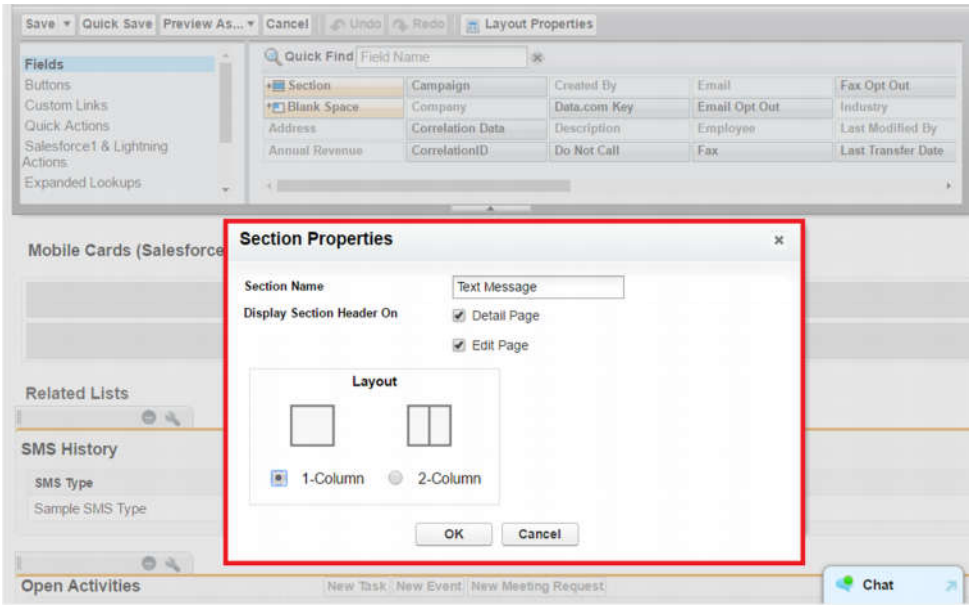
4.2.9. Under ‘Related Lists’. Choose ‘SMS History’ and Drag it down.



4.2.10 Drag down a new section and label it as ‘Text Conversation’. Make it a 1-column section.



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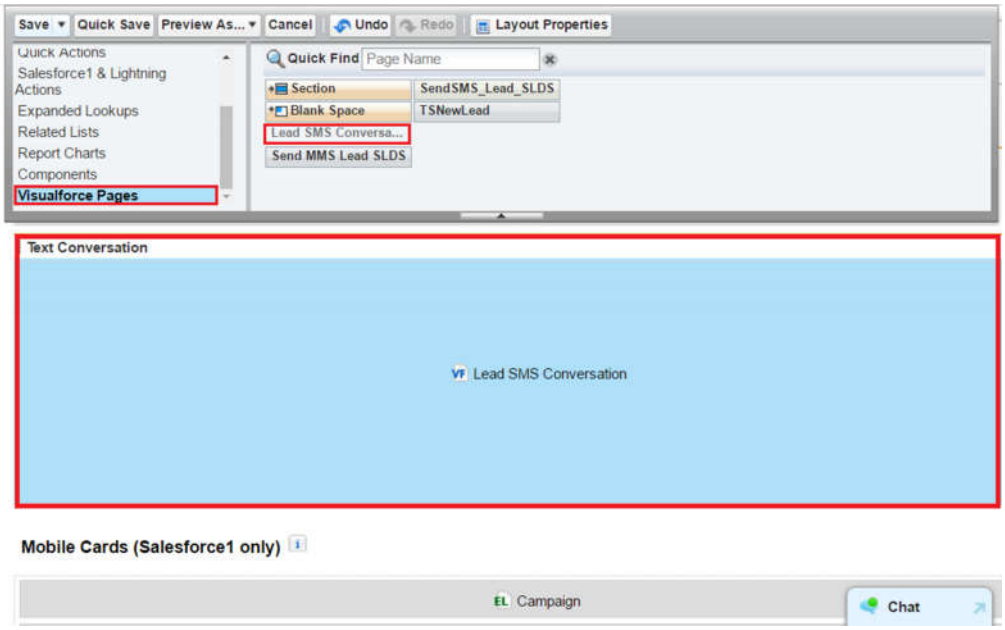
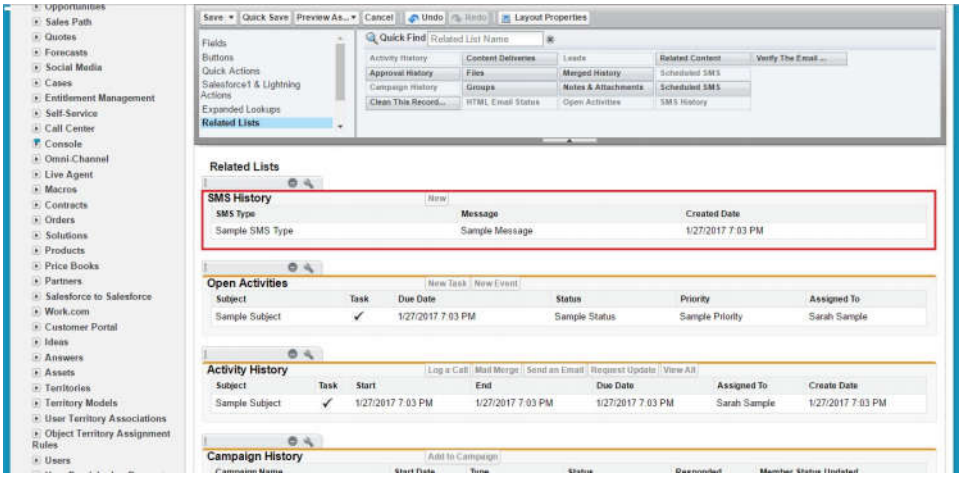
4.2.11. Under Visualforce pages, click on 'Lead SMS Conversation' and drag it under the 'Text Conversation' section.



4.2.12. Click on Save.



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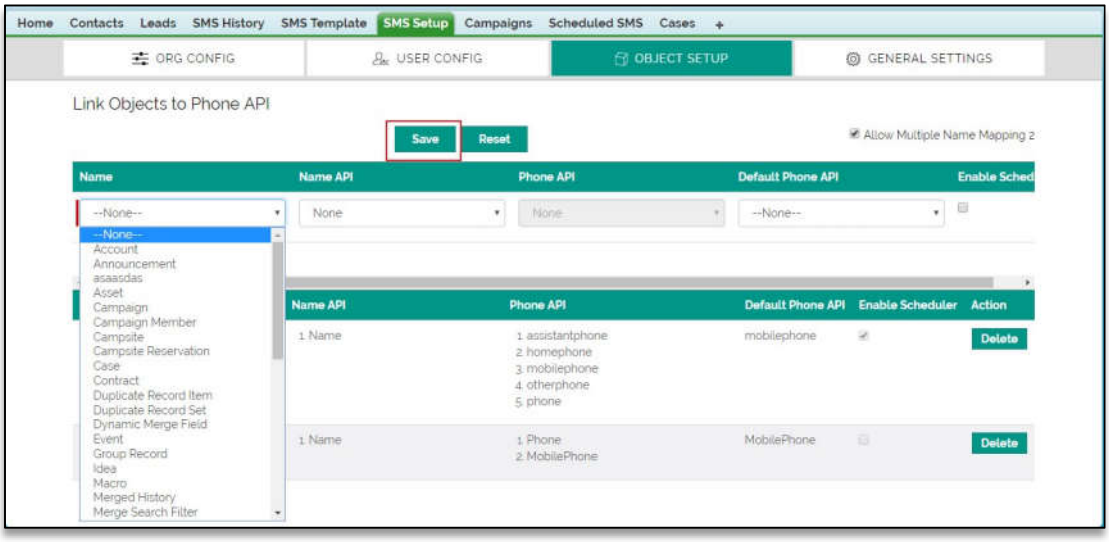
4.3. Custom Object Setup:

Firstly, create an appropriate custom object (Vehicle in our case for this guide purposes) and if needed, its respective tab. Then link the respective Name API and Phone API by choosing the same from the dropdown picklists on Custom Object Setup sub-tab (User can link multiple APIs to same selected object and can also add multiple objects using the same steps). After choosing all the values, even you can choose Enable scheduler to send the messages once, daily or monthly basis from that particular object ,click the Save button.

Note: Make sure that the Name API number is connected to correct Phone API number and you can also set default Phone API.



4.4. General Settings:

Using general setting tab you can do following things:-

- Change the owner details.
- Change the subscribed and unsubscribed keywords.
- Change the auto creation of Lead and case keywords which are made on the basis of incoming messages.
- You can also set URL for delivery status for our outgoing messages.
- Set the desired time for the Incoming SMS to turn Yellow (mins).

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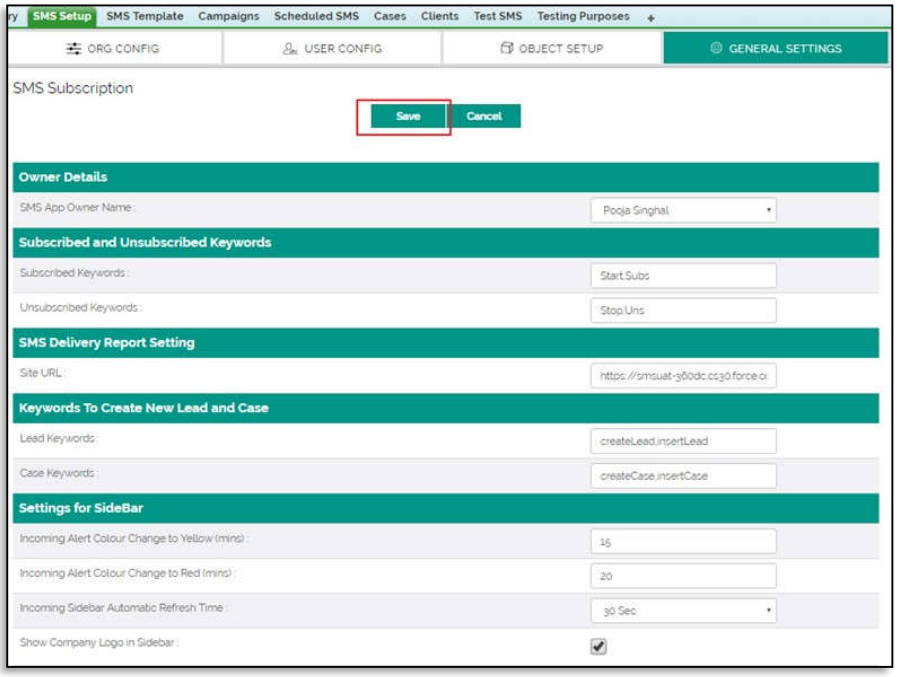
- Set the desired time for the Incoming SMS to turn Red (mins).
- You can also set the time to refresh the Incoming sidebar for displaying new messages.



After that Click on Save button.

4.5 Setting up the Page Layout: Adding SMS Button

4.5.1. Whether the user wants to send single SMS or bulk SMS, Send SMS button needs to be placed on record detail page by changing the Page Layout of appropriate object type (custom or standard). For User Guide purpose, we are going to use standard Contacts object to show you the steps. For that, click Setup and type Page Layout in Quick Find search field. Next, click on Page Layouts under relevant object in the list that appears under the search bar and click the Edit button besides Contact Layout (or as per appropriate object of your choice) as shown.

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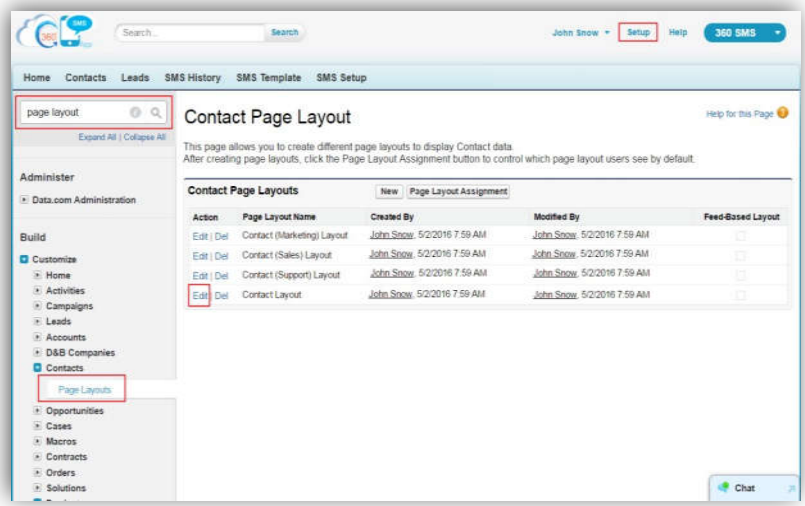

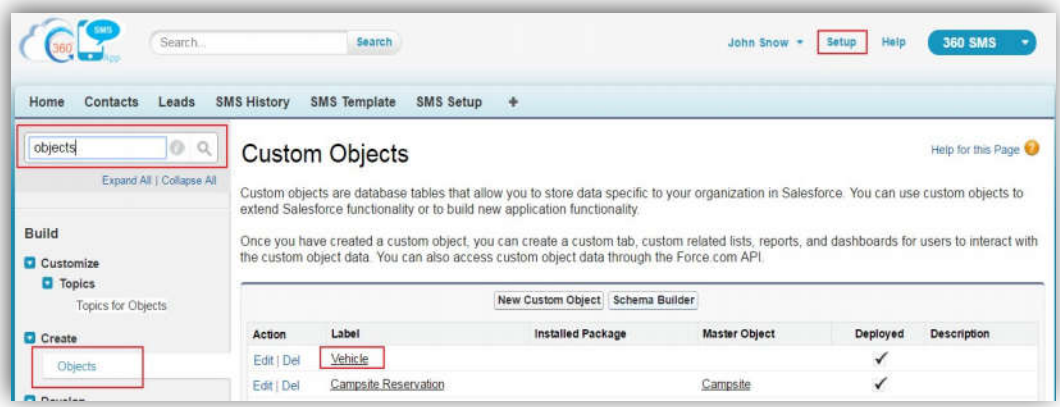

4.5.2. Click on the sub-section of Buttons and drag-drop the Send SMS button onto the Custom Buttons part of page layout.

Note: The step above is different in case of a custom object. Please contact Support at 360 Degree Cloud to first create the button specifically for the custom object created as for Vehicle that we created earlier. After the Send SMS button is created by the Support for your custom object, you can add the same by first clicking on

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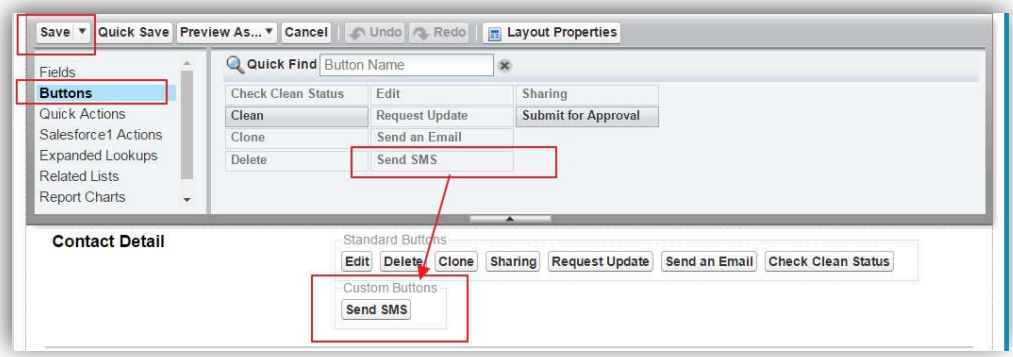
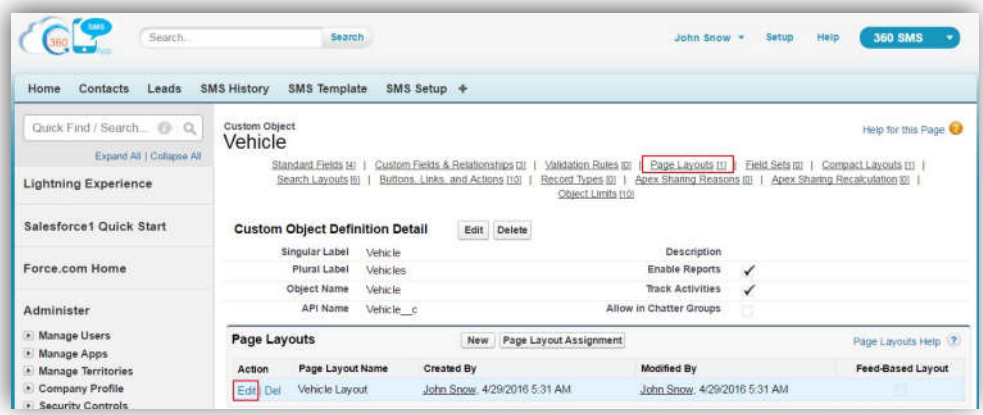
Setup followed by typing Objects in Quick Find search field. Then click on Objects to receive a list of custom objects, thus click on relevant custom object (Vehicle in our case, as shown).



Now, click on Page Layouts on top of page to navigate to the field and click Edit besides the appropriate custom object. Repeat the step described earlier to drag and drop the Send SMS button.



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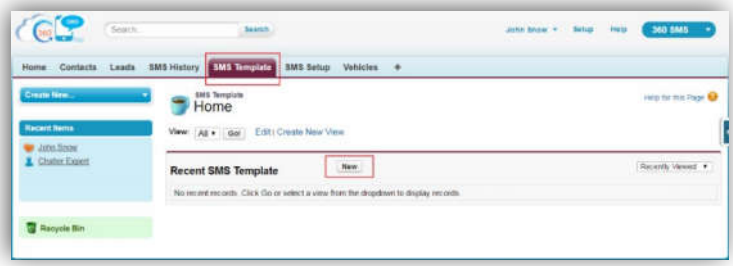
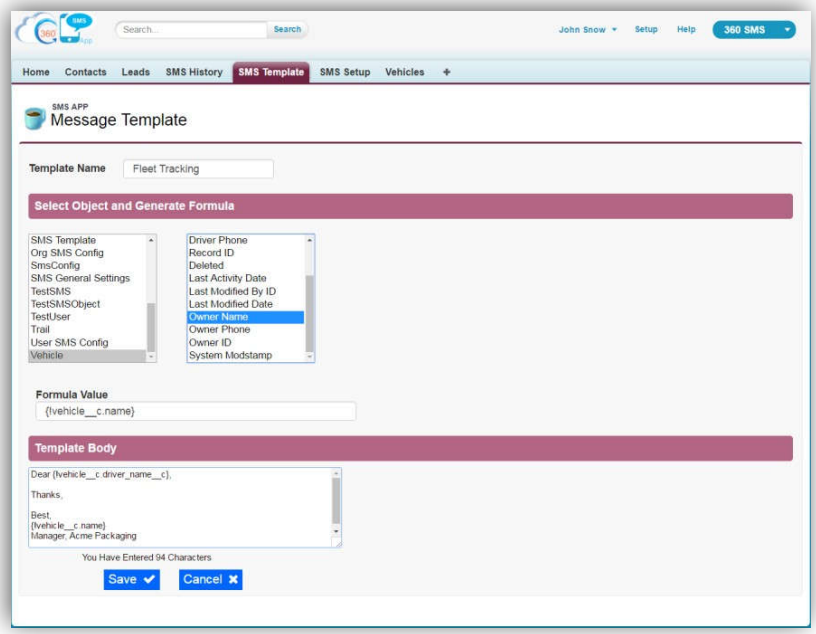
4.6. SMS Template Setup:

4.6.1. To create a SMS template (i.e. saved body content of SMS message), first click on SMS Template tab and then on New button to create a new template.





4.6.2. Choose a Template Name, select relevant object/field to receive a code for the combination in the Formula Value textfield below and copy the same into the Template Body box at the bottom of the page. Add any combination of relevant formula values, text, numerals etc. for the SMS body and press Save in the end.

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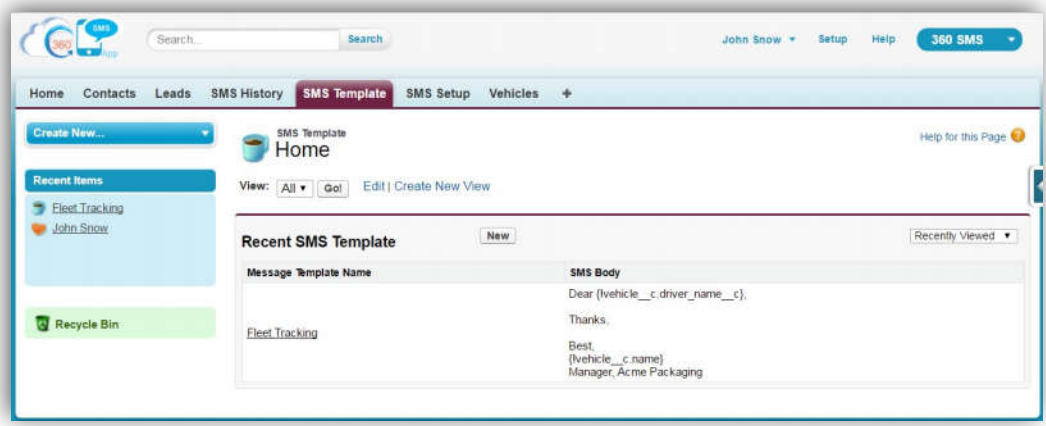
Notes:

(i) Select an object name for the template to associate with an object. In its absence, the template will not be associated with that object and will not show up in the templates of that particular object.

(ii) SMS with Unicode Characters are counted as 1 segment of 70 characters.

4.6.3. After clicking Save, the template gets added to list on SMS Template page.



4.7. Adding SMS History Related List:

A) For standard objects:

4.7.1 Edit the Page Layout as explained earlier but this time click on Related List from the palette and drag/drop the SMS History list to the page. Change the content displayed in the History list by clicking on spanner icon , as highlighted.

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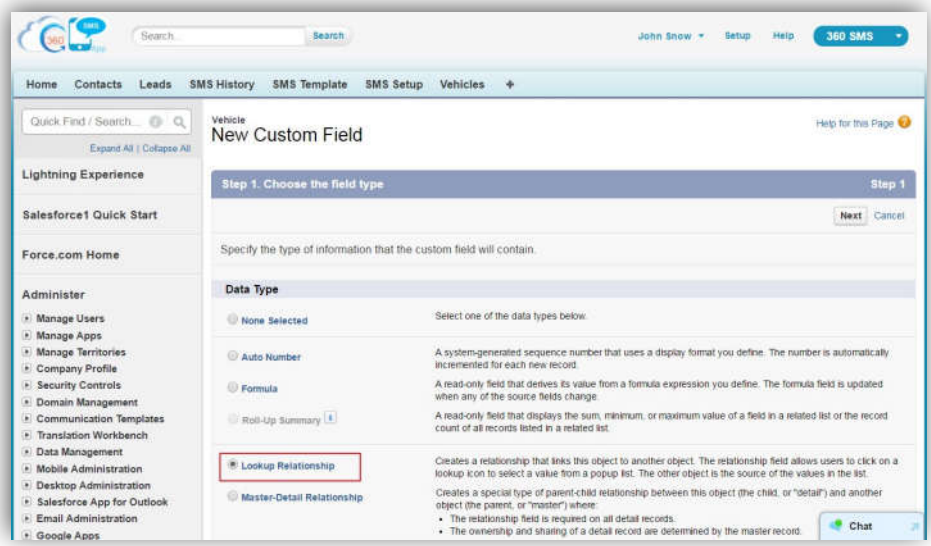

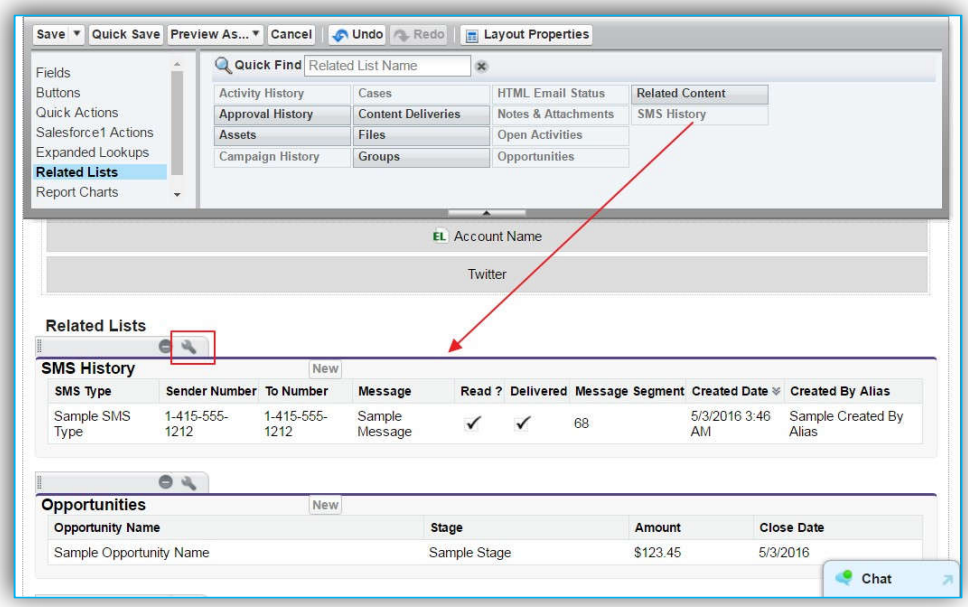

4.7.1. Choose appropriate information that you like displayed related to SMS History that may be of concern for your use.

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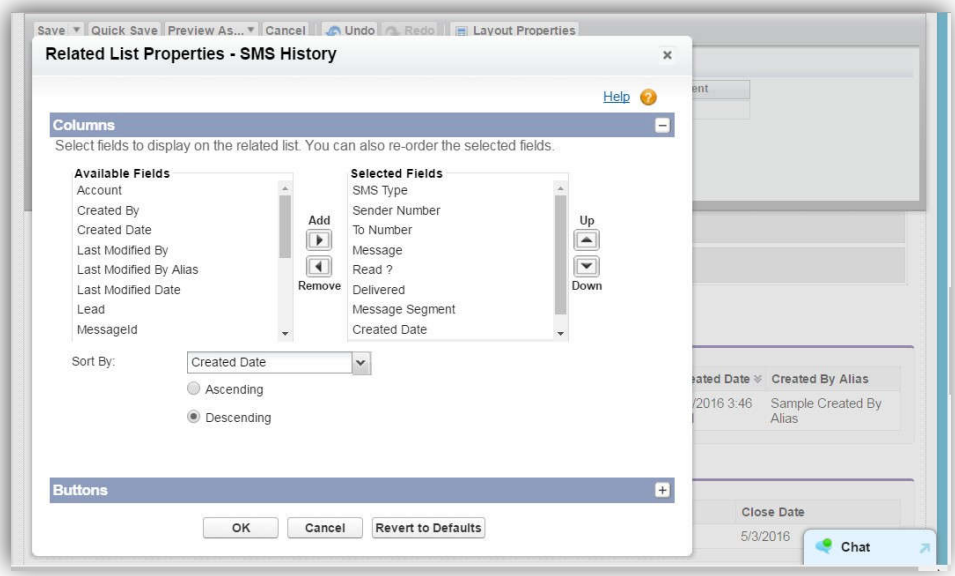
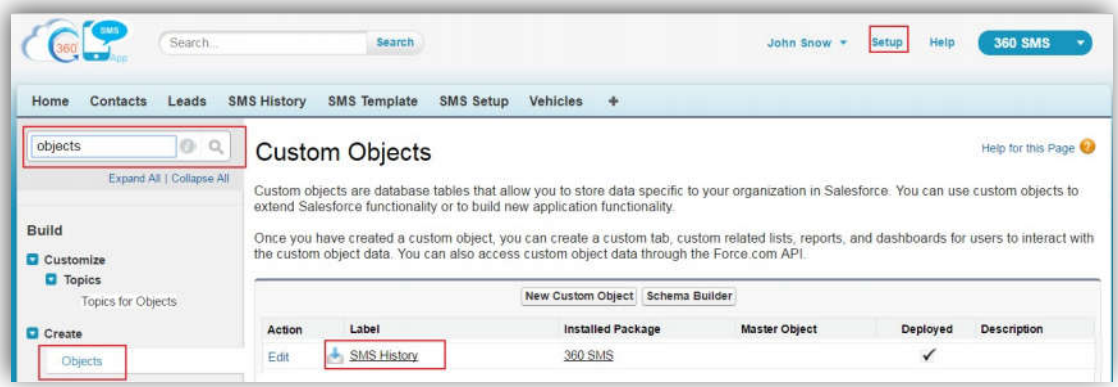


4.7.2. Click Save on top of edit layout page.

B) For custom objects:

4.7.4. Navigate to Setup and write ‘Objects’ in Quick Find search bar. Click on SMS History from under the Custom Objects page.



4.7.5. Click on New to create new custom field.

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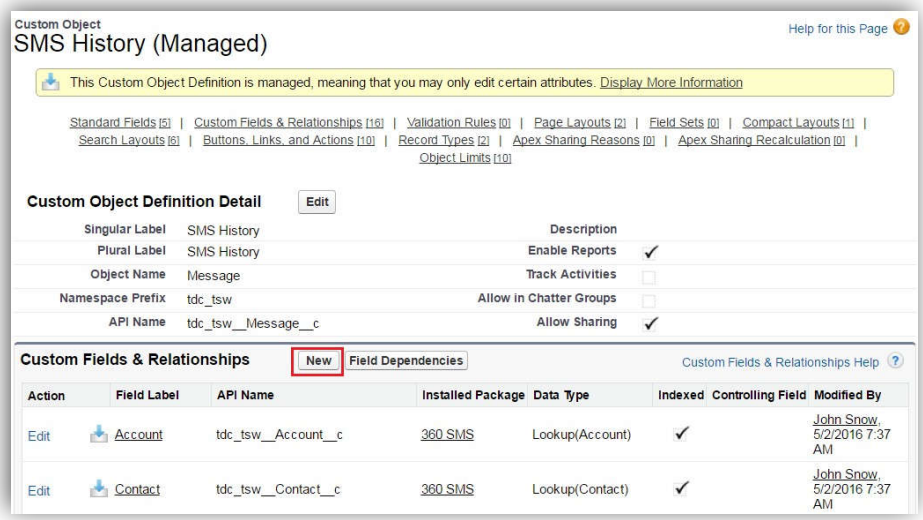
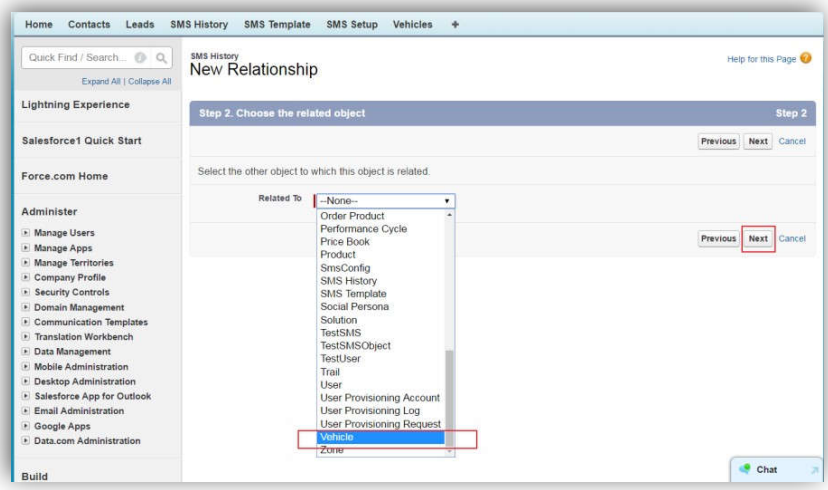


4.7.6. Choose the radio button for Lookup Relationship and click Next.

4.7.7. On the following page, choose the appropriate custom object you created i.e. Vehicles in our case, from the dropdown picklist and click Next.



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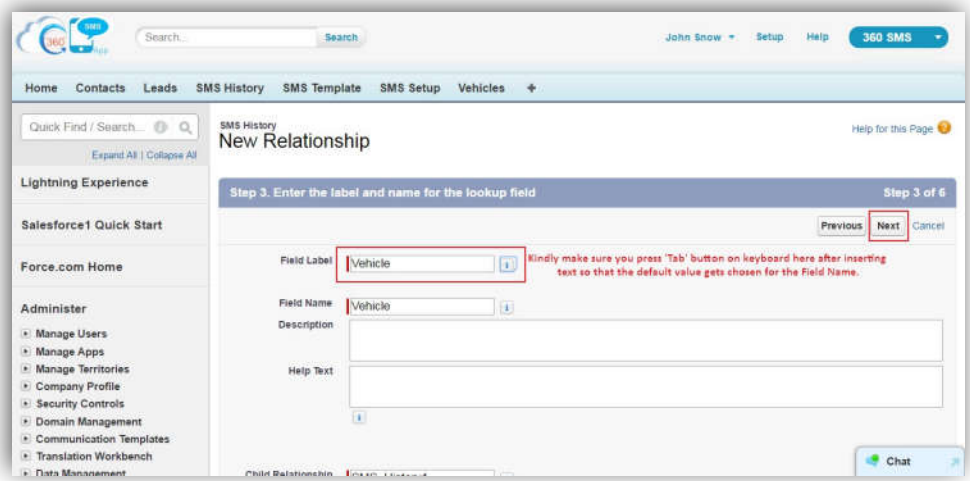
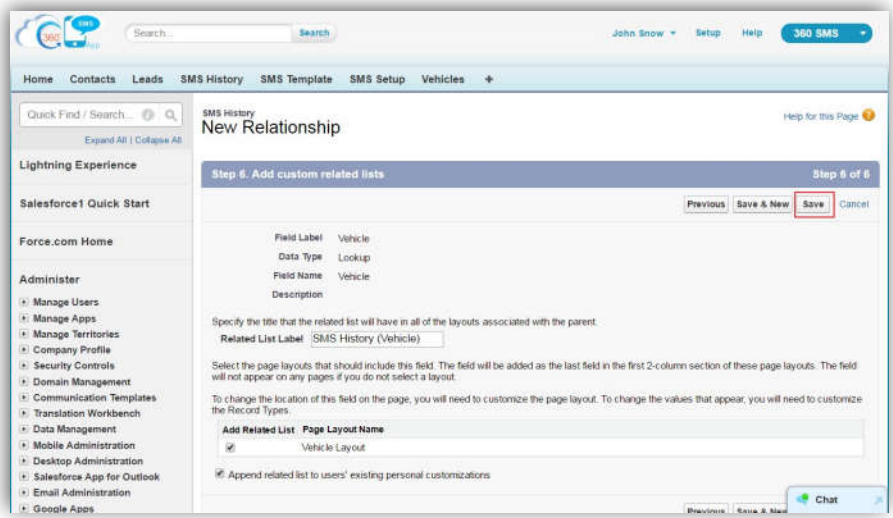
4.7.8. Choose the appropriate Field Label and its default Field Name.

Note: Make sure that the custom object you created for the purposes of using this app should have default Field Name.



4.7.9. Select appropriate field-level security for reference field and add the reference field to Page Layouts of appropriate custom object. After saving this process, repeat the steps 4.6.1 to 4.6.3.



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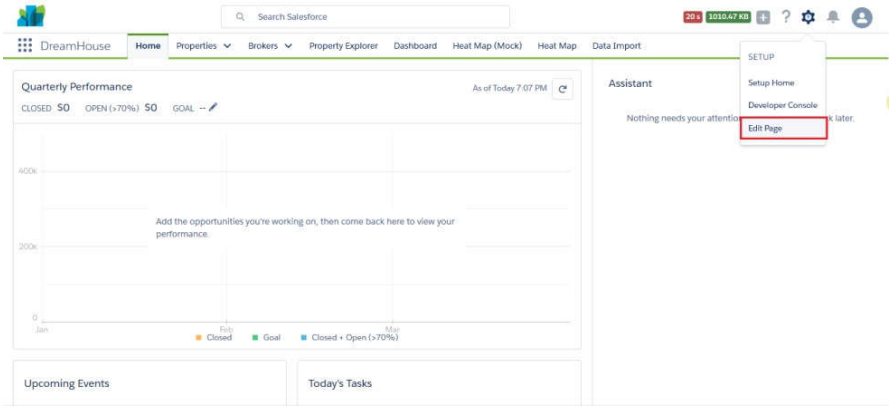
This completes the setup and configuration part of the App and now the usage of the App will be discussed in following steps.

4.8. Setup for Lightning

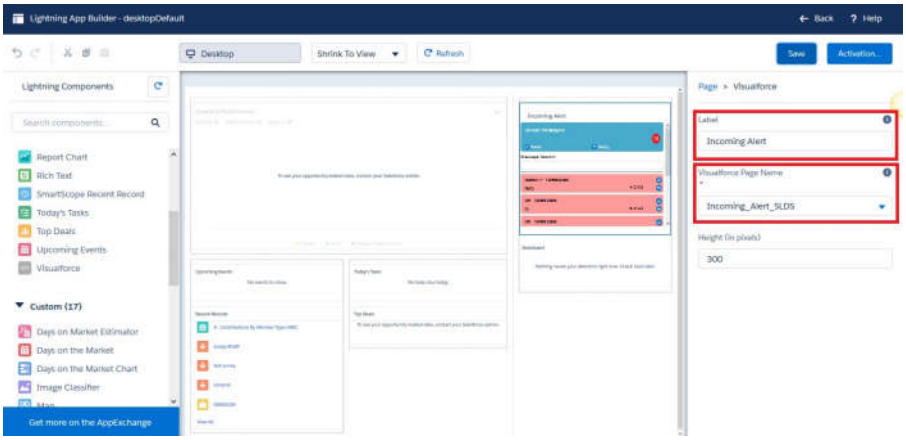
4.8.1. Setup Sidebar

4.8.1.1. Go to Setup and click Edit Page.



4.8.1.2. Under the Lightning components, click Visualforce.

4.8.1.3. Drag Sidebar on the side and enter 'Incoming Alert' in the Label field, followed by 'Incoming _Alert_SLDS' in the Visualforce Name Page field.



4.8.1.4. Save and Activate.

4.8.1.5. Furthermore, assign it your homepage.

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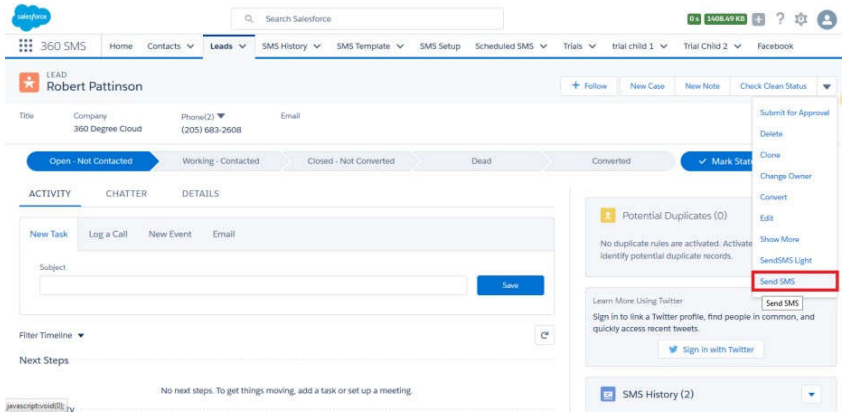
4.8.2. Send SMS in Lightning Experience

4.8.2.1. Go to the Record Detail Page.

4.8.2.2. Choose the Quick Action ‘Send SMS’. A pop up would appear. Enter the requisite information as is done in Salesforce Classic.



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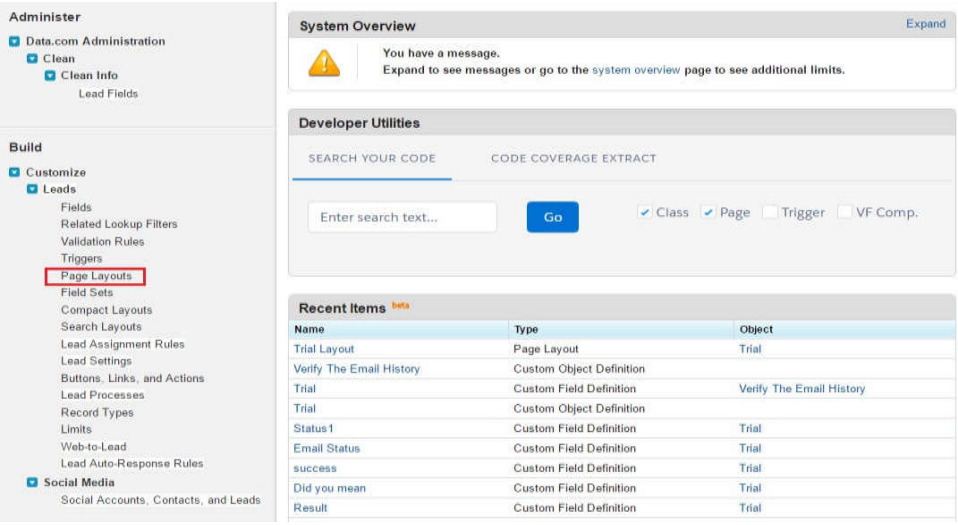
4.9 MMS Setup

e.g. For Leads

4.9.1. Adding MMS Button

(i) Go to Salesforce ‘Setup’.

(ii) Type 'Lead' in the 'Quick Find' box.



(iii) Click on 'Page Layouts'.

(iv) Click on ‘Edit’ corresponding to your Lead Page Layout.

(v) Under ‘Buttons’ section. Choose ‘Send MMS’ and Drag it down under ‘Custom Buttons'.

(vi) Click Save.

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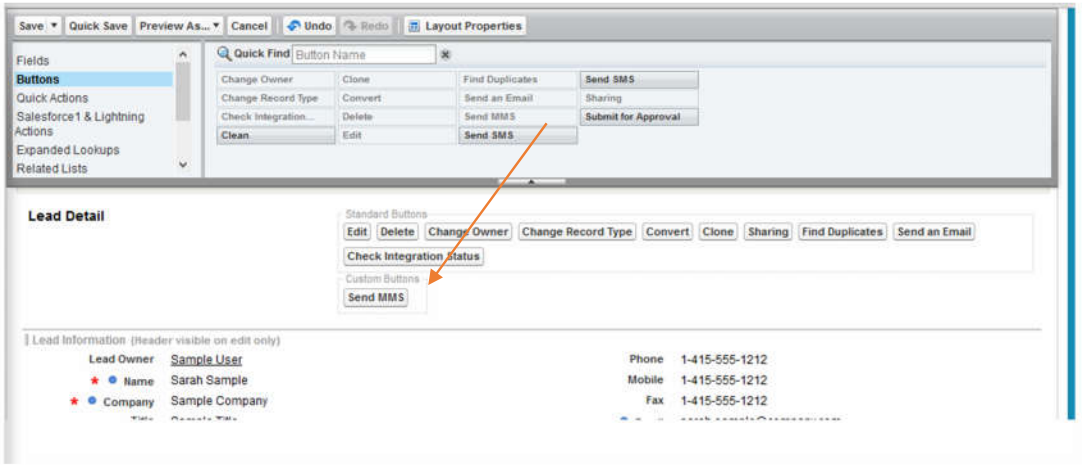


4.9.2. Relating attachments to MMS

(i) Go to Salesforce Setup.

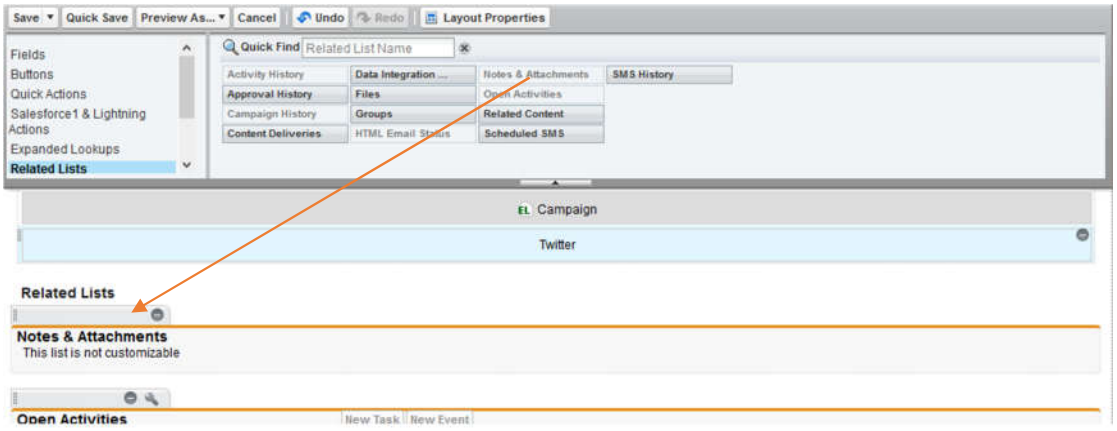
(ii) In the quick find box, type 'Objects'

(iii) Select 'SMS History'.

(iv) Click on Edit corresponding to the 'Incoming' in the 'Page Layouts'.

(v) Under 'Related Lists'. Select 'Notes and Attachments' and drag it down.

(vi) Click Save.



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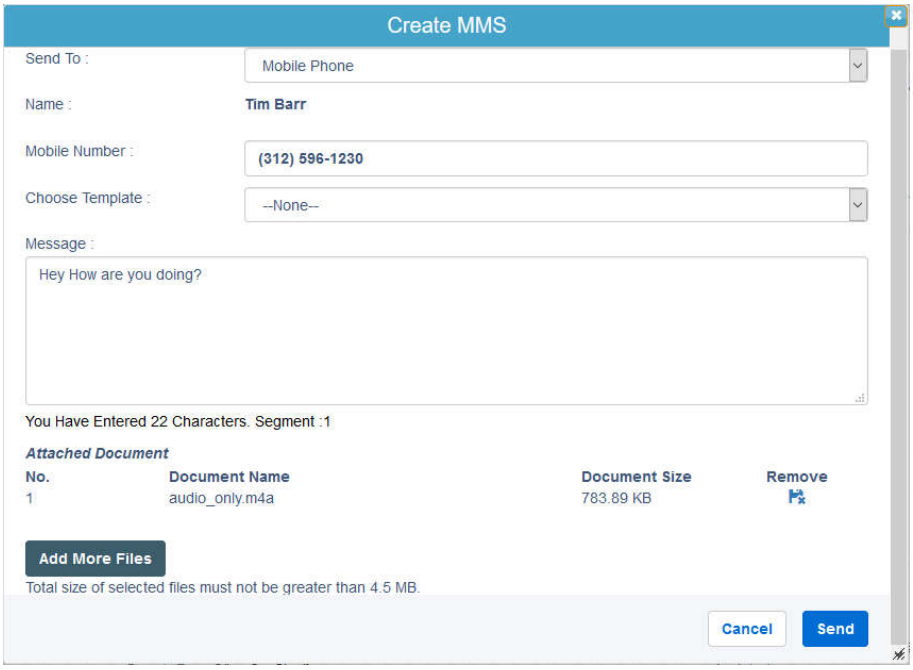
Now a user can send multimedia messages from Leads.



V App Usage:

5.1. Sending Single SMS:

5.1.1. Click on Send SMS button from record detail page of relevant standard/custom object.

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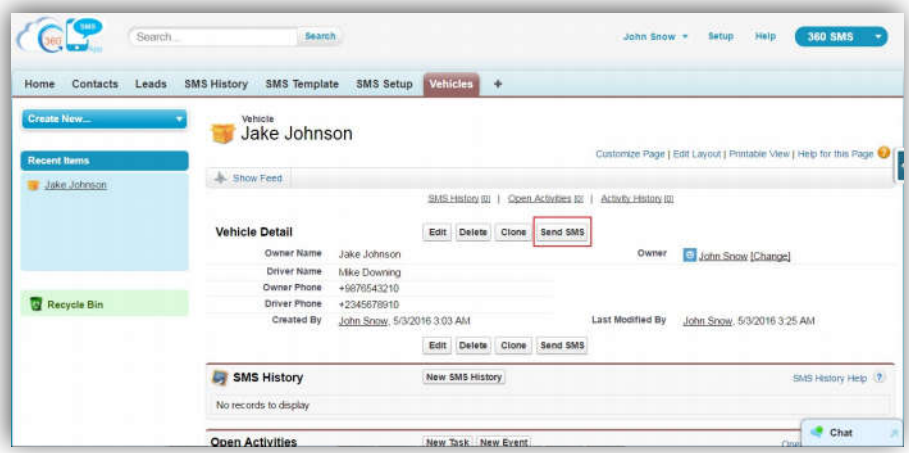

Note: SMS History appears at bottom of detail page for that particular record.

5.1.2. After clicking on Send SMS button, a Create Message template pop-up appears to choose various options i.e. Receiver's name under Send To (phone number appears automatically if the name is connected to the same on SMS Setup > Custom Object Setup page) and SMS body content by choosing appropriate Template title from the drop-down list. Clicking on Send button will send the SMS to the selected user's phone instantly.

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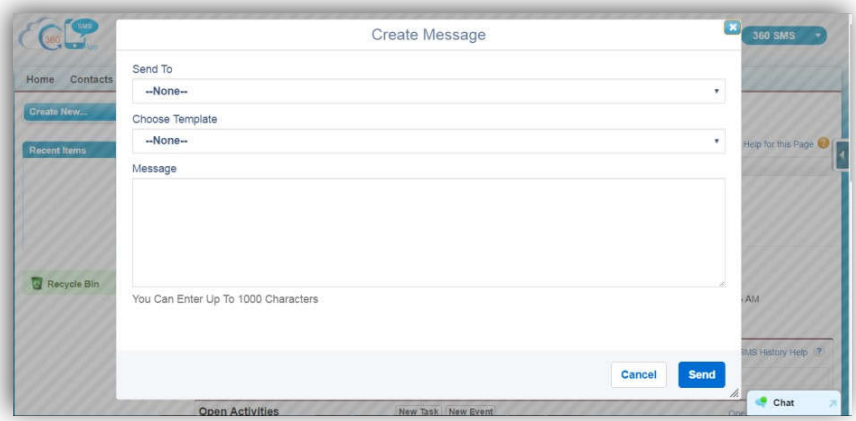

Notes:

(i) A single SMS could consist up to 1000 characters.

(ii) 1 message segment would be of 160 characters.

(iii) In case of Unicode character, 1 SMS segment would be of 70 characters.

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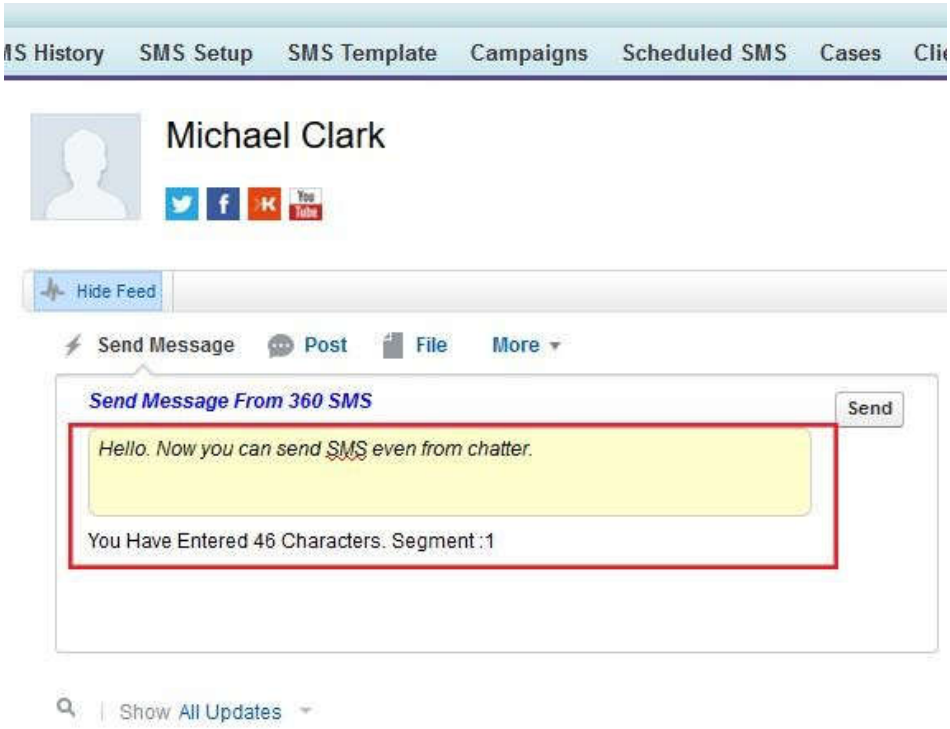
Chatter:



A user can send SMS from any Record detail page directly from the Chatter.

(i) If the user of an org has multiple numbers assigned, then the Chatter would simply pick up a random no. to send text message.

(ii) If the Contact/Record has multiple phone API fields associated with it, then Chatter would use the default phone API field that has been setup in the 'Object Config' under 'SMS Setup' for that particular object.

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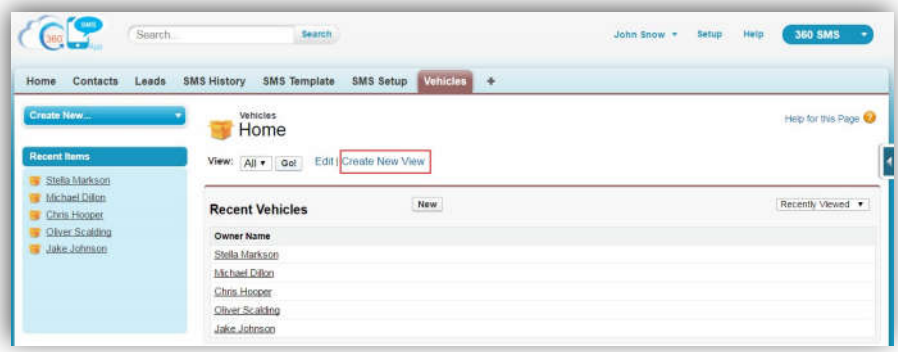
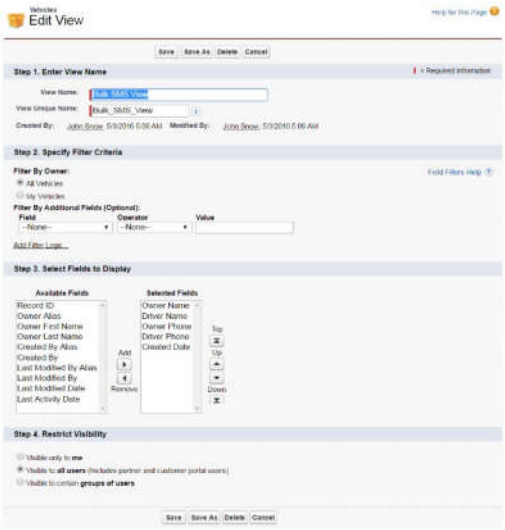
5.2. Sending Bulk SMS

5.2.1. Bulk SMS can be sent to a list of specific records selected from list view. First click on appropriate tab/object and then click on the Edit/Create New View.



5.2.2. Provide View Name in Step 1, followed by Step 2 which is optional (for further filtering of the records or choose All instead). In Step 3, choose the relevant fields (which needs to be displayed) from Available Field box using Add/Remove buttons and add them to the Selected Fields box. Choose relevant Visibility option and click on Save.



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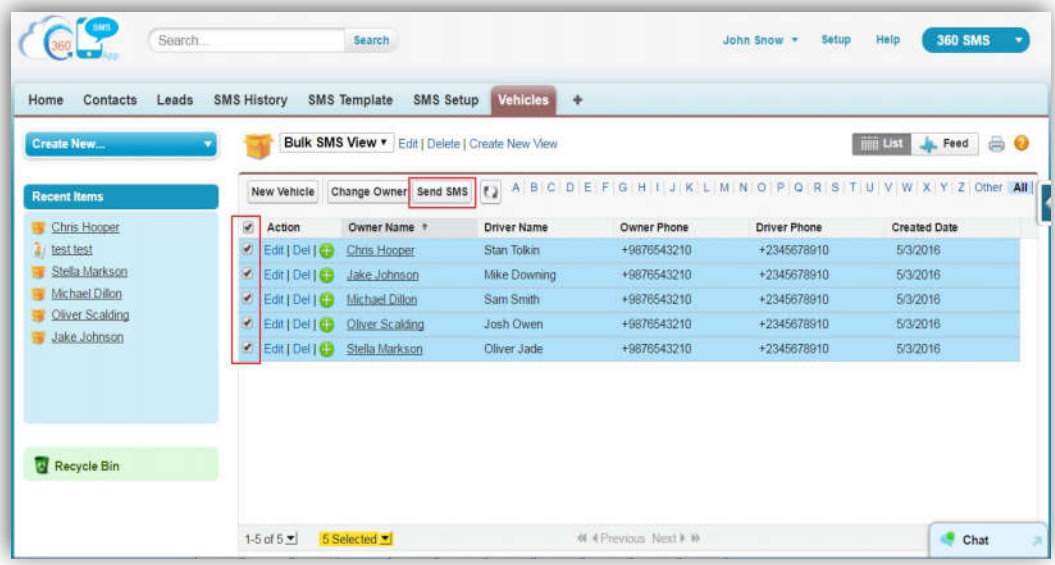
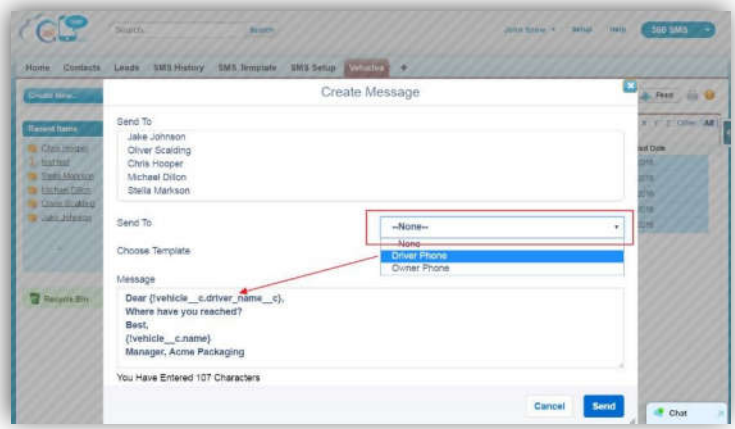
5.2.3. Check all the records in Action column to whom the SMS needs to be sent followed by clicking on the Send SMS button. Click Send to send the SMS.



Note: When sending bulk SMS, although the template body still displays the code labels instead of replacing same with the appropriate values, the receiver (chosen from the Send To picklist) still receives the SMS with replaced values relevant to the same.



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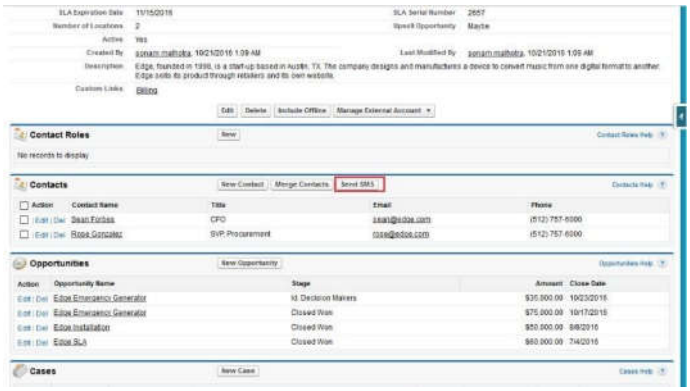
5.2.4. From related list of an object:

You can also send mass SMS from related list of an object e.g. here

(a) An account consists of multiple contacts,

(b) Just add the 'Send SMS' button on the related list, namely 'Contact' of account.

(c) Now, just select the contacts associated with that particular account and click on 'Send SMS' button to send an SMS to these contacts.



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5.3. Incoming SMS

5.3.1. The user can see the Incoming messages in the sidebar and from there he can reply as well look into the object from which he has received the messages. Moreover, while hovering on it he will be able to read the messages as :-

5.3.2. *SMS Unsubscribe/Opt out*

If an incoming SMS is received with the keyword associated with 'Unsubscribed' then:

(i) The contact from which such incoming was received will not receive further messages in future from the org.

(ii) The "Opt out' checkbox would be checked corresponding to this contact.

(iii) Hence, you can identify which contact has unsubscribed from you.

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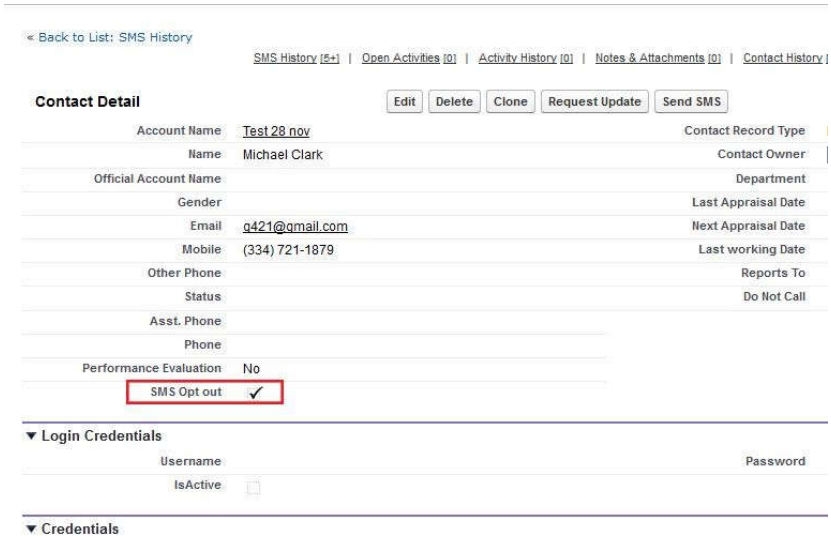

Notes:

(i) The contact can resubscribe by sending an SMS containing the keyword corresponding to the 'Subscribe' keyword in the general setting.

(ii) The "Opt in' checkbox will now be checked.

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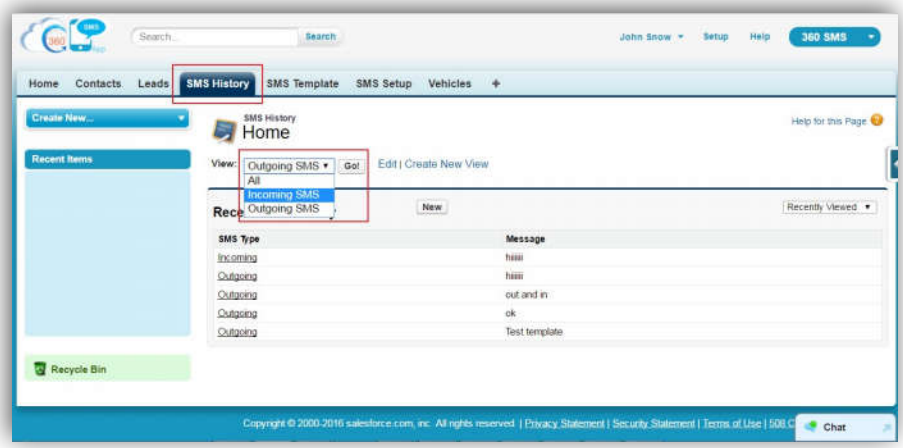
5.4. SMS History:

5.4.1. Historical record of SMS sent in past can be viewed by navigating to SMS History tab and selecting the appropriate default View, as shown.



5.4.2. The View can be altered by clicking on Edit/Create New View. Give relevant View Name in Step 1 for later use, Specify Filter Criteria in Step 2 (i.e. SMS Type field should be equal to 'Outgoing' for SMS sent from App or 'Incoming' for Incoming Messages), add appropriate relevant fields (namely SMS Type, Sender Number, To Number, Message, Read?, Delivered?, Message Segment, Created date and Created By etc.) to Selected Fields box from Available Fields box using Add/Remove button and click Save button after choosing the relevant Visibility option. Some relevant fields of importance:

SMS Type: is the term given to the type of SMS messages depending on whether they were sent from the App or received as a reply to the same from the receiver (Incoming Message).

Message: displays the body of the SMS sent/received

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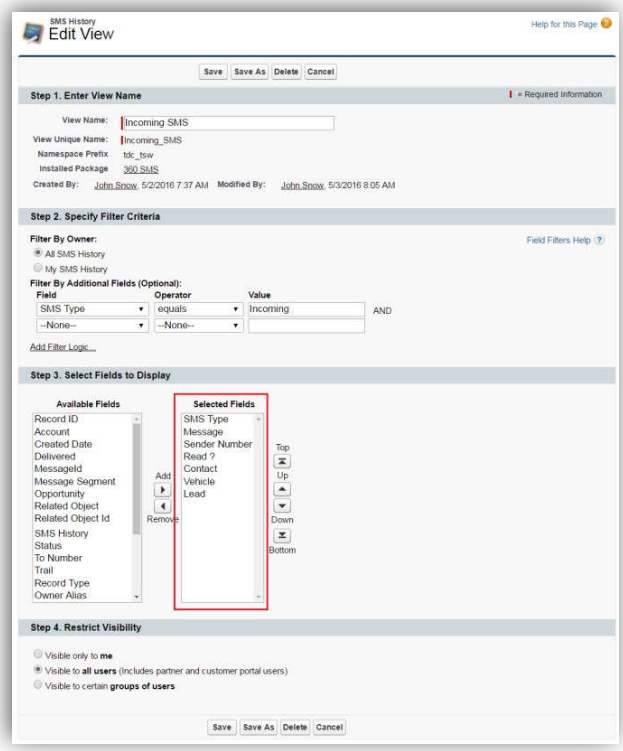
Sender Number: is the phone number of the person/entity that sent the SMS
Read? : The org owner can mark, for later reference, an incoming SMS as Read by visiting the message record and clicking on Mark As Read button:

Message Segment: is the term given to SMS with 160 characters (counted as 1 SMS).

Delivered: is the status (displayed as a tick ✓) given to Outgoing SMS that is confirmed by the operator as being delivered to the destination number. Sometimes, if the message delivery gets delayed (owing to issues on telecom operator end) or doesn't get delivered at all (owing to incorrect phone number entered), the app doesn't display the tick ✓.

To Number: phone number to which the SMS is sent using the app.

Related Object (like Contacts, Leads, Vehicles as shown in pic): are the objects which were used to send the SMS or receive the Incoming Messages. For Incoming Messages:



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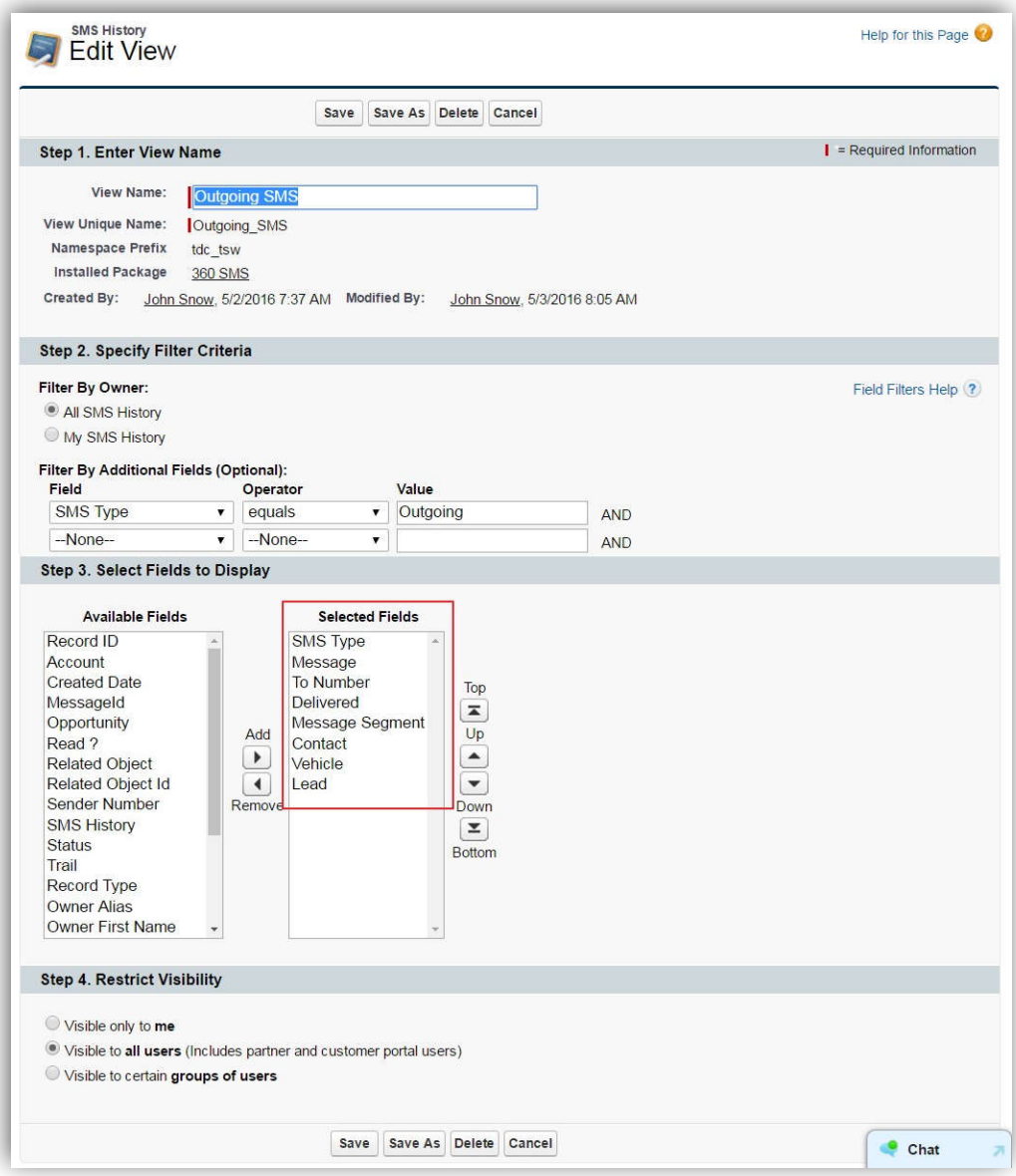
For Outgoing SMS:



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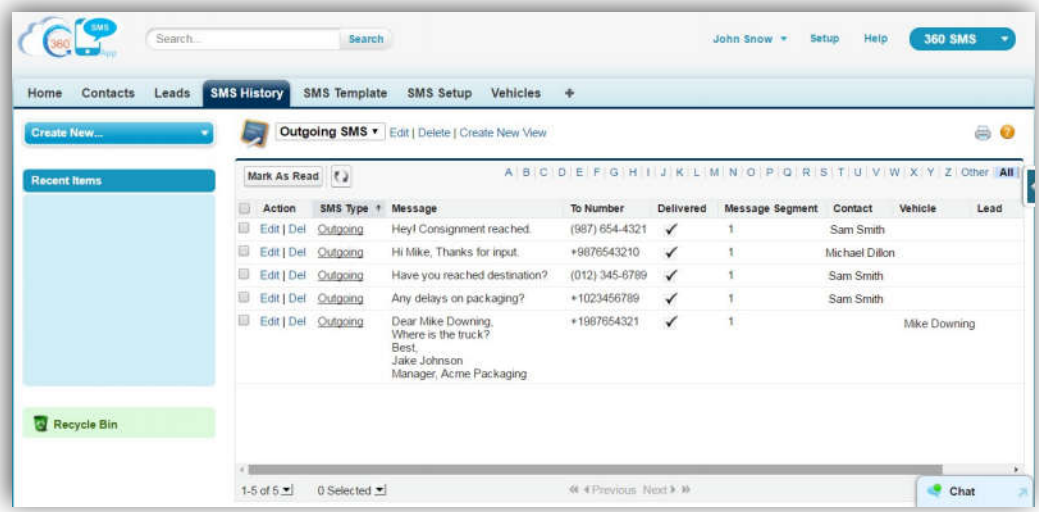
5.4.3. Following historical view is obtained by choosing the view created above from the drop down menu for Outgoing SMS that were all delivered successfully using Contact (standard) and Vehicle (custom) objects.



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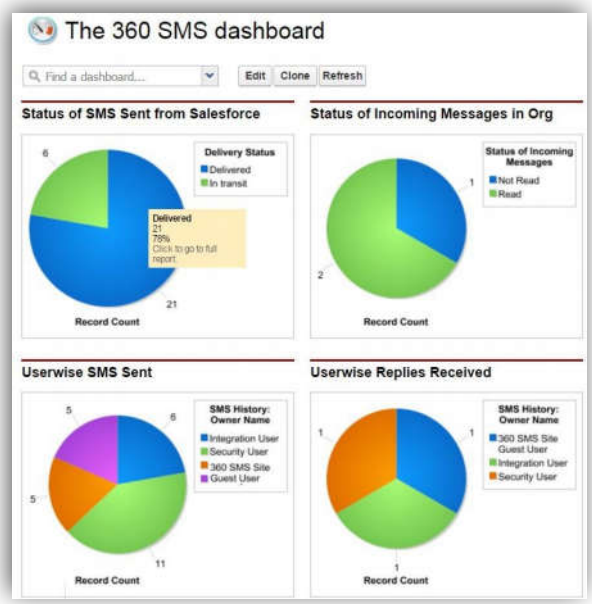
5.4.4. Navigate to the Reports and org-wide information on user-wise SMS history and status of Outgoing/Incoming messages can be seen using the provided dashboard.



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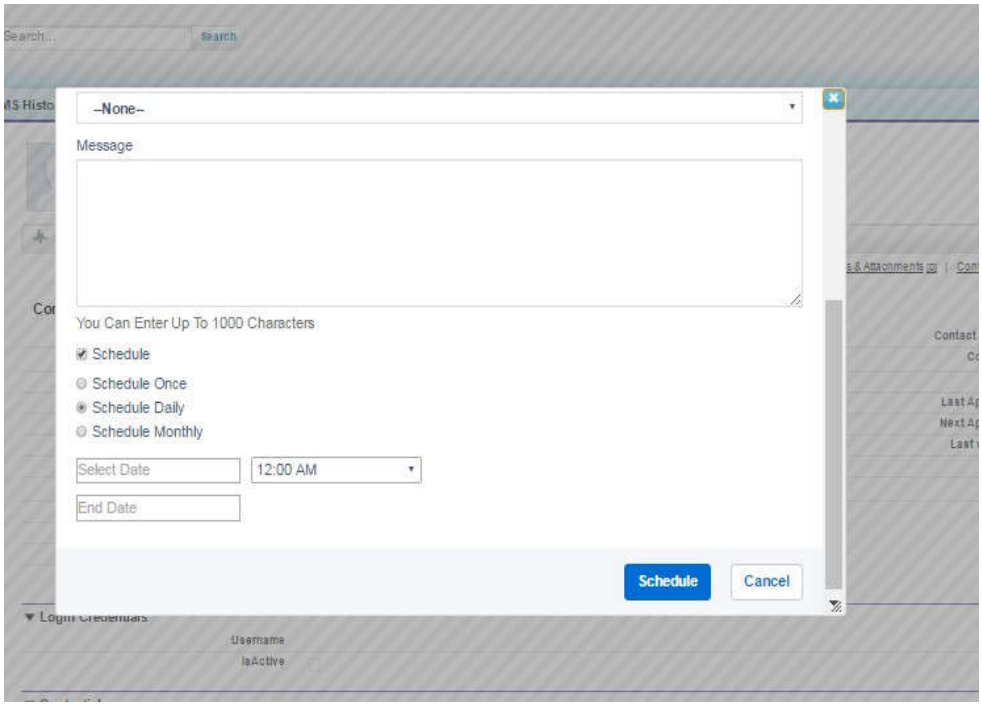
5.5. Schedule SMS

5.5.1 If Enable scheduler is true, then user will be able to see the schedule checkbox on the send SMS screen and can choose the following options.

- Once.
- Daily.
- Monthly.



5.5.2. The Scheduled SMS tab is used to display scheduled SMS history. Here, user has to click on Schedule button after selecting date and time. As soon as the button is clicked, it will be listed under Schedule SMS tab. Once SMS has been sent, it will be listed under Sent SMS List view under Schedule SMS tab. One can delete the scheduled SMS manually from this tab.

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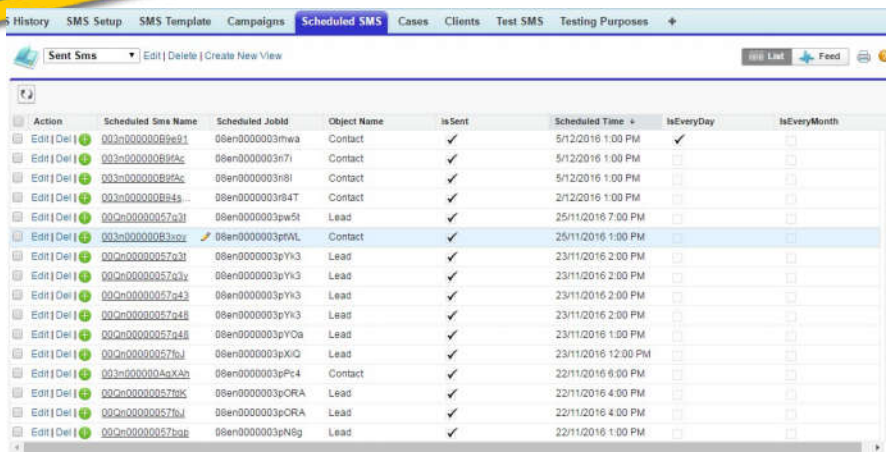
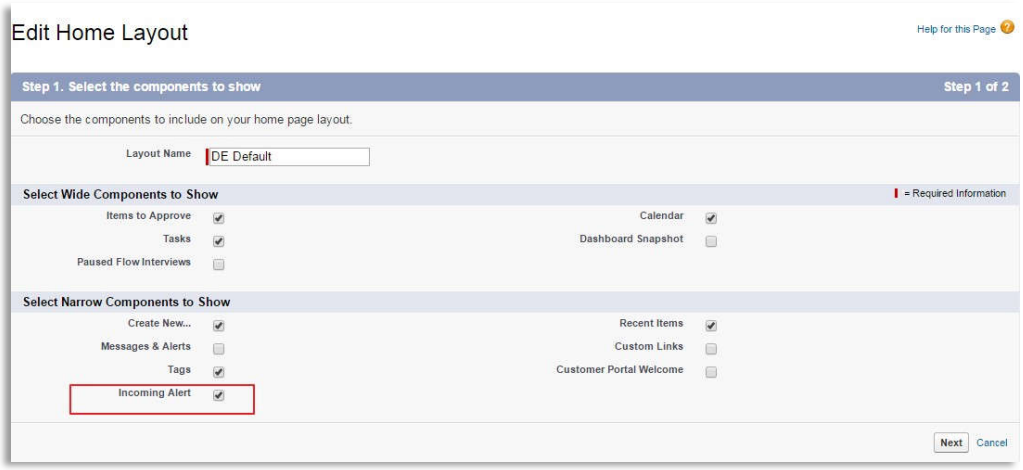


5.6 Sidebar Panel

A user can mark the message as Read. One can directly reply to any message from the Sidebar. When a user clicks the Reply button, then in the sidebar displays the last 4 messages exchanged with that particular contact.



Note: The character limit is 1000 characters.

5.6.1 To enable this, the user has to go to Home pagelayout. Here, user has to edit the Current layout and check incoming Alert checkbox. Click on Next and then Click on Save button .

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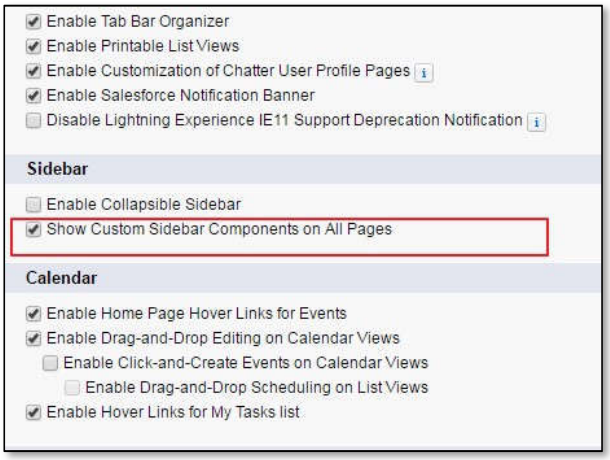
5.6.2 For adding Sidebar to all page layout, user has to go to Setup Tab and then Type User Interface to check as follows:-



This completes the explanation of installation and usage of the App for Trial/Paid versions.

Problems or questions dealing with use and installation should be directed to our Support. We are here to save you time and money with an increased adoption rate.

360 Degree Cloud is constantly rolling out new features to our apps. And the one feature you want that we do not have right now, may be right around the corner. We encourage you to submit additional enhancements requests, any queries regarding the app or even suggestions about improvements, please get in touch with our Support at *support@360degreeapps.com*. We look forward to talking to you.

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