

# **360 SMS App**

# **USER GUIDE**





# 360 SMS App

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# 360 SMS App

## 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:

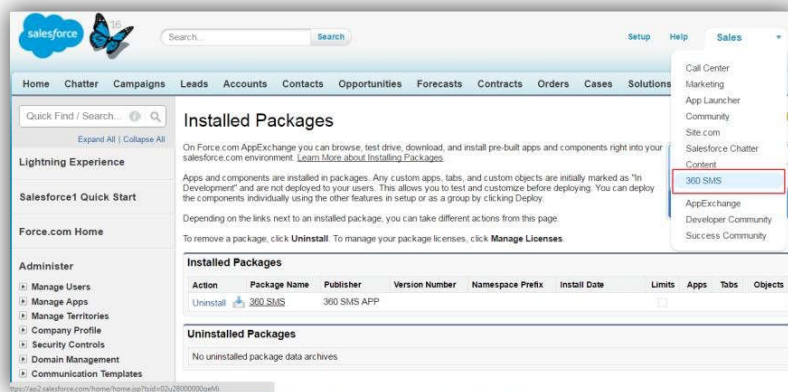
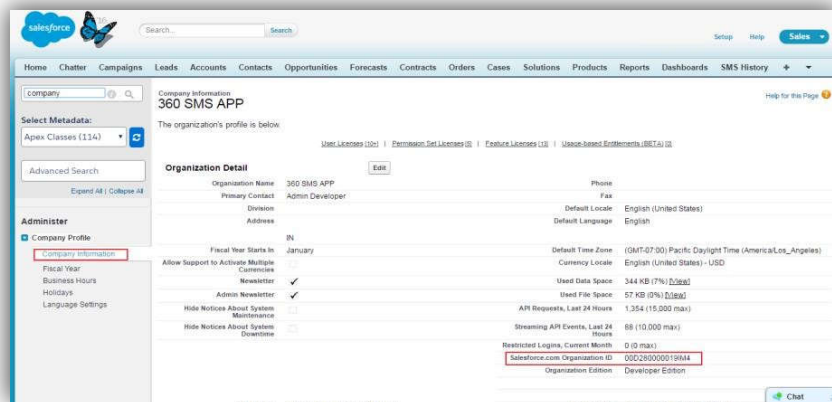
Email Id: - [support@360degreeapps.com](mailto:support@360degreeapps.com) | Contact Number: +1 360-7614-360

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:

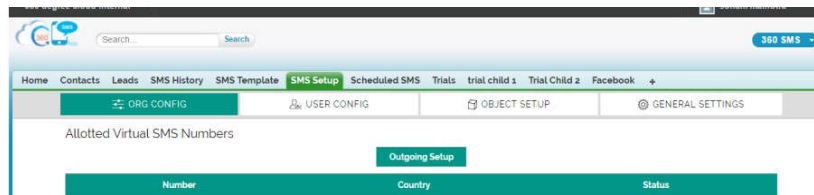
- 4.1.1. Select the 360 SMS app from the Force.com App Menu.
- 4.1.2. Initially, an org is not allotted any Virtual Number. User has to click on Assign Virtual Number to get the Virtual Number and start the app usage.



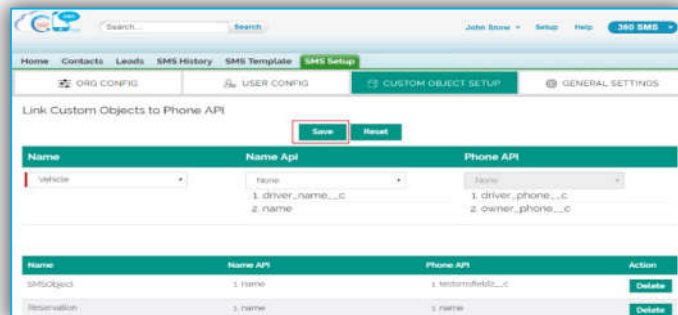
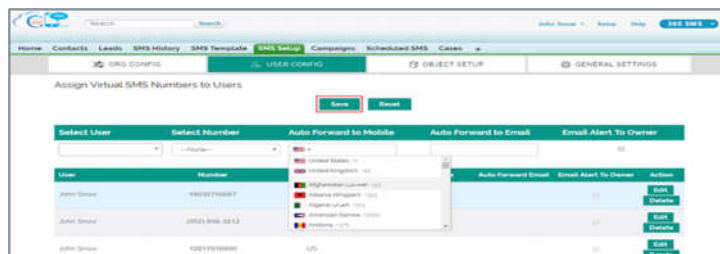


# 360 SMS App

- 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.

| Name                     | Type                     | Object                   |
|--------------------------|--------------------------|--------------------------|
| Trial Layout             | Page Layout              | Trial                    |
| Verify The Email History | Custom Object Definition |                          |
| Trial                    | Custom Field Definition  | Verify The Email History |
| Trial                    | Custom Object Definition |                          |
| Status 1                 | Custom Field Definition  | Trial                    |
| Email Status             | Custom Field Definition  | Trial                    |
| success                  | Custom Field Definition  | Trial                    |
| Did you mean             | Custom Field Definition  | Trial                    |
| Result                   | Custom Field Definition  | Trial                    |

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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This page allows you to create different page layouts to display Lead data.  
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

| Lead Page Layouts                          |                         |                                    |                                   |                          | New Page Layout Assignment |  |
|--|-------------------------|------------------------------------|-----------------------------------|--------------------------|----------------------------|--|
| Action                                     | Page Layout Name        | Created By                         | Modified By                       | Feed-Based Layout        |                            |  |
| <a href="#">Edit</a>   <a href="#">Del</a> | Lead (Marketing) Layout | sonam malhotra, 10/21/2016 1:39 PM | sonam malhotra, 1/5/2017 1:14 AM  | <input type="checkbox"/> |                            |  |
| <a href="#">Edit</a>   <a href="#">Del</a> | Lead (Sales) Layout     | sonam malhotra, 10/21/2016 1:39 PM | sonam malhotra, 1/5/2017 1:14 AM  | <input type="checkbox"/> |                            |  |
| <a href="#">Edit</a>   <a href="#">Del</a> | Lead (Support) Layout   | sonam malhotra, 10/21/2016 1:39 PM | sonam malhotra, 1/5/2017 1:14 AM  | <input type="checkbox"/> |                            |  |
| <a href="#">Edit</a>   <a href="#">Del</a> | Lead Layout             | sonam malhotra, 10/21/2016 1:39 PM | sonam malhotra, 1/23/2017 8:31 PM | <input type="checkbox"/> |                            |  |

4.2.6. Under 'Buttons' section. Choose 'Send SMS' with the API name 'Send\_SMS' and  
Drag it down under 'Custom Buttons'.

The screenshot shows the Salesforce Page Layout Editor. On the left, the 'Buttons' section is expanded, showing a list of buttons including 'Send SMS'. The main area displays the 'Lead' page layout. The 'Lead' section is highlighted, and the 'SMS Opt out' checkbox is checked and highlighted with a red box.

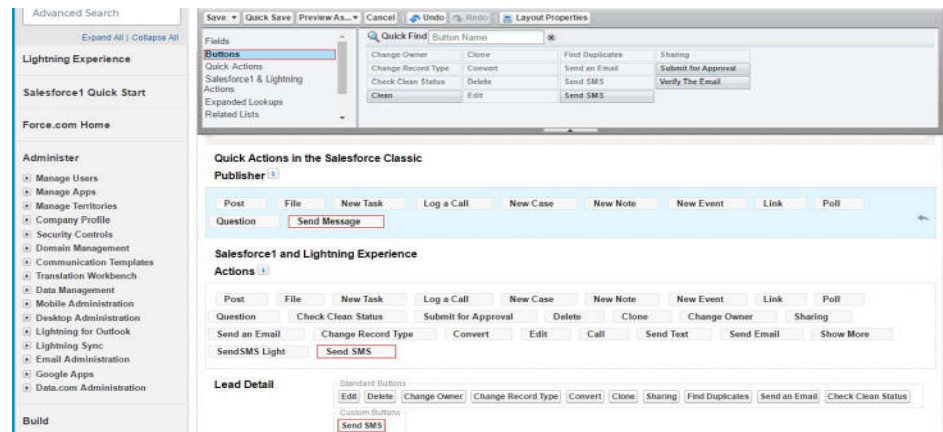
4.2.7. Under 'SF1 and Lightning Actions' section. Choose 'Send SMS' with the API name  
'Send\_SMS\_SF1' and Drag it down under 'SF1 and Lightning Actions'.

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

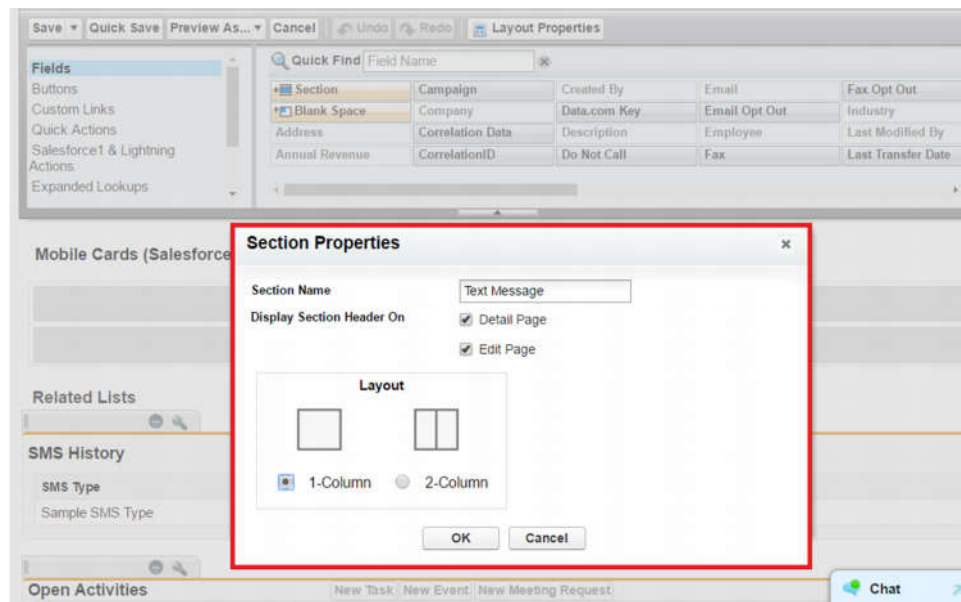


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4.2.9. Under 'Related Lists'. Choose 'SMS History' and Drag it down.



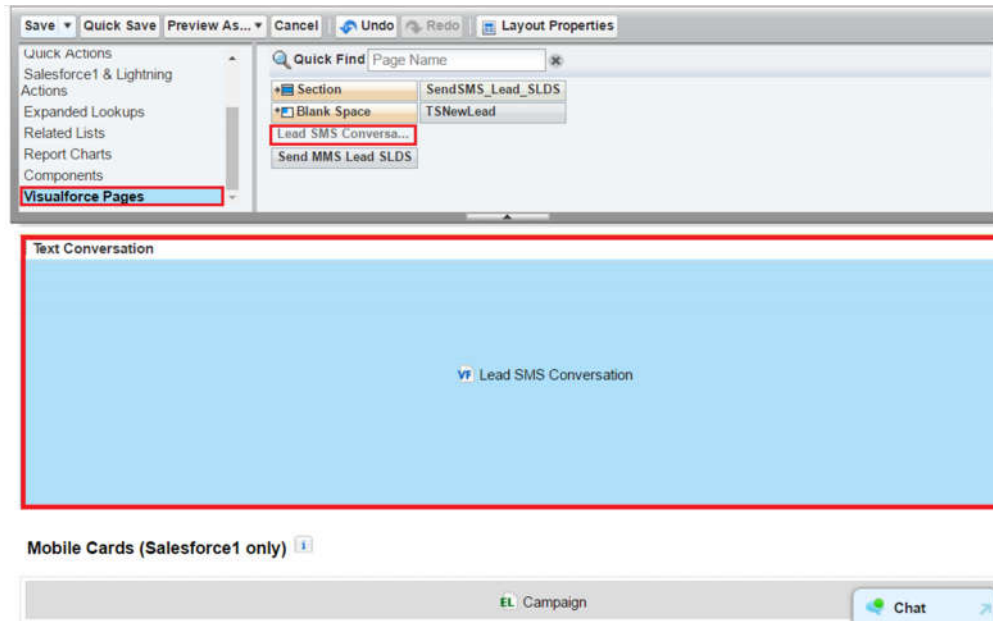
4.2.10 Drag down a new section and label it as 'Text Conversation'. Make it a 1-column section.



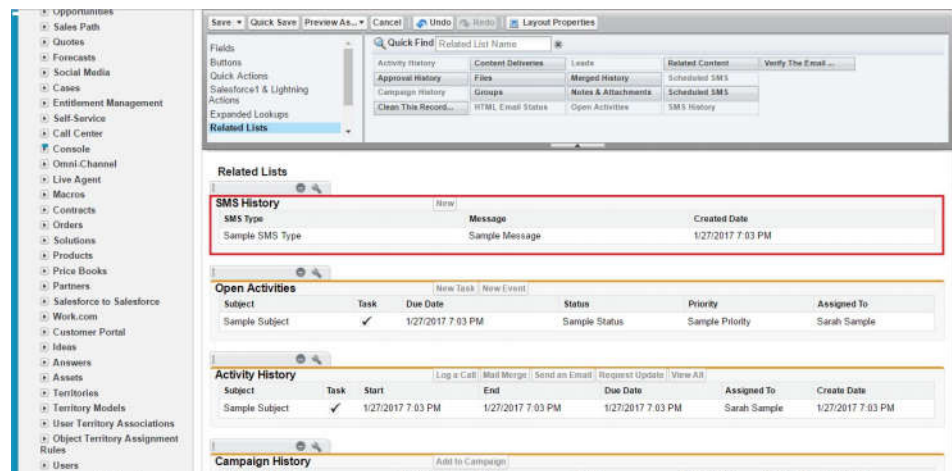


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4.2.11. Under Visualforce pages, click on 'Lead SMS Conversation' and drag it under the 'Text Conversation' section.



4.2.12. Click on Save.





## 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.

| Name     | Name API | Phone API | Default Phone API | Enable Sched |
|----------|----------|-----------|-------------------|--------------|
| --None-- | None     | None      | --None--          |              |

| Name API | Phone API   | Default Phone API | Enable Scheduler                    | Action |
|----------|---|-------------------|-------------------------------------|--------|
| 1 Name   | 1 assistantphone<br>2 homephone<br>3 mobilephone<br>4 otherphone<br>5 phone | mobilephone       | <input checked="" type="checkbox"/> | Delete |
| 1 Name   | 1 Phone<br>2 MobilePhone  | MobilePhone       | <input type="checkbox"/>            | Delete |

## 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.

The screenshot shows the 'GENERAL SETTINGS' tab for the 360 SMS App. The 'SMS Subscription' section at the top has a 'Save' button highlighted with a red box. Below this are several sections with input fields:

- Owner Details:** SMS App Owner Name: Pooja Singhal
- Subscribed and Unsubscribed Keywords:** Subscribed Keywords: Start Subs; Unsubscribed Keywords: Stop Uns
- SMS Delivery Report Setting:** Site URL: https://smsuat-360dc.c330.force-ci
- Keywords To Create New Lead and Case:** Lead Keywords: createLead.insertLead; Case Keywords: createCase.insertCase
- Settings for SideBar:** Incoming Alert Colour Change to Yellow (min): 15; Incoming Alert Colour Change to Red (min): 20; Incoming Sidebar Automatic Refresh Time: 30 Sec; Show Company Logo in Sidebar: ☒

After that Click on Save button.

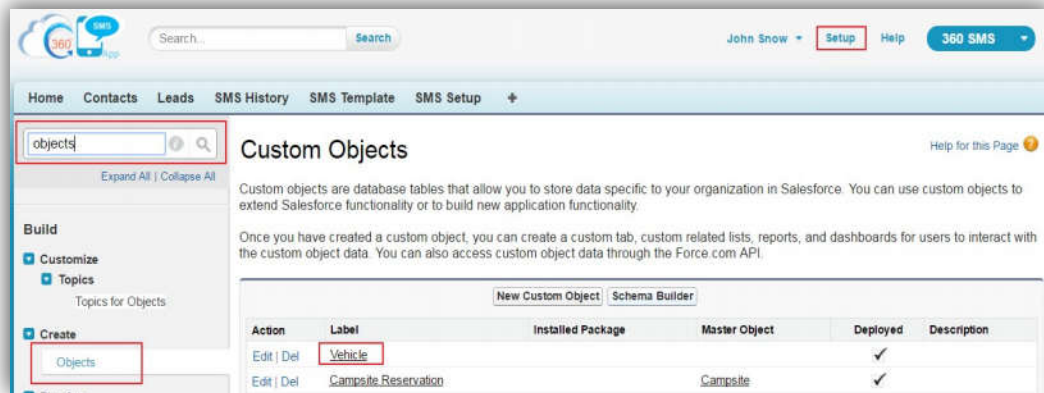
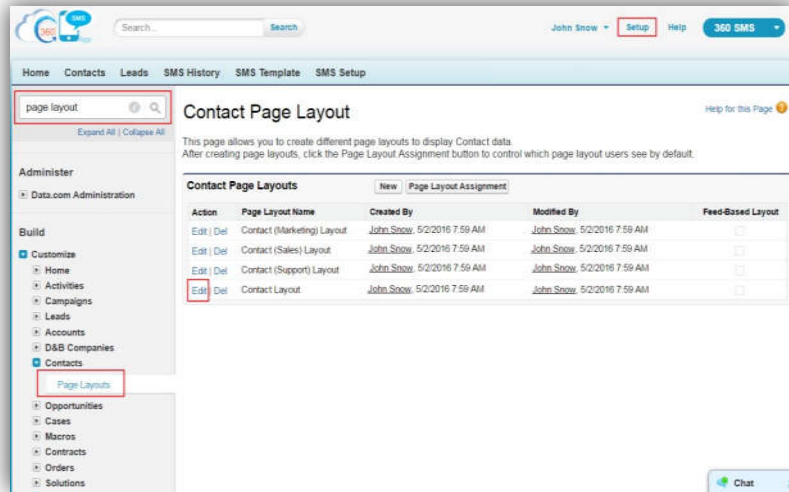
## 4.5 Setting up the Page Layout: Adding SMS Button

- 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.





# 360 SMS App



- 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.

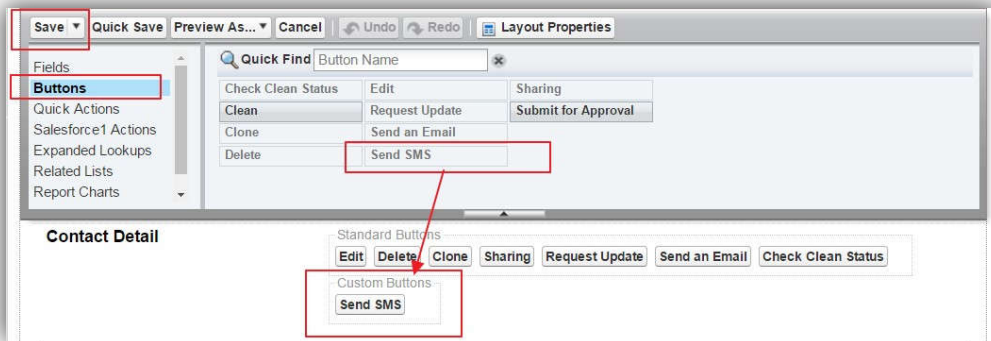
Note: The step above is different in case of a custom object. Please contact Support at 360 Degree Cloud to first create the button specifically for the custom object created as for Vehicle that we created earlier. After the Send SMS button is created by the Support for your custom object, you can add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



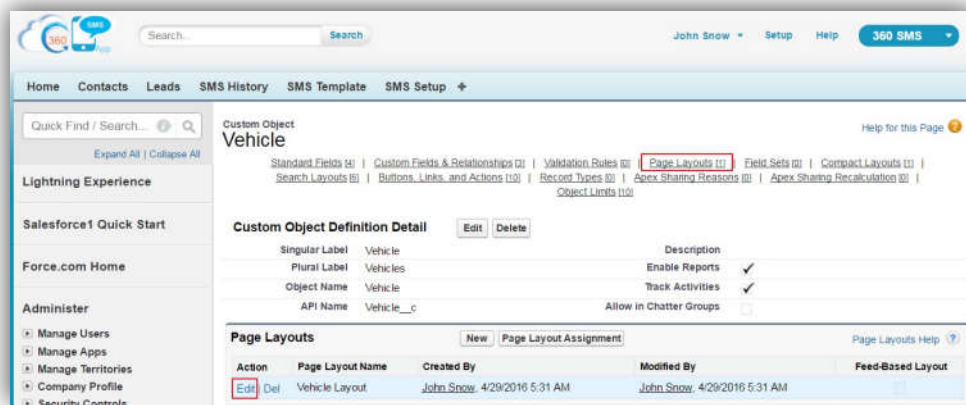


# 360 SMS App

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.

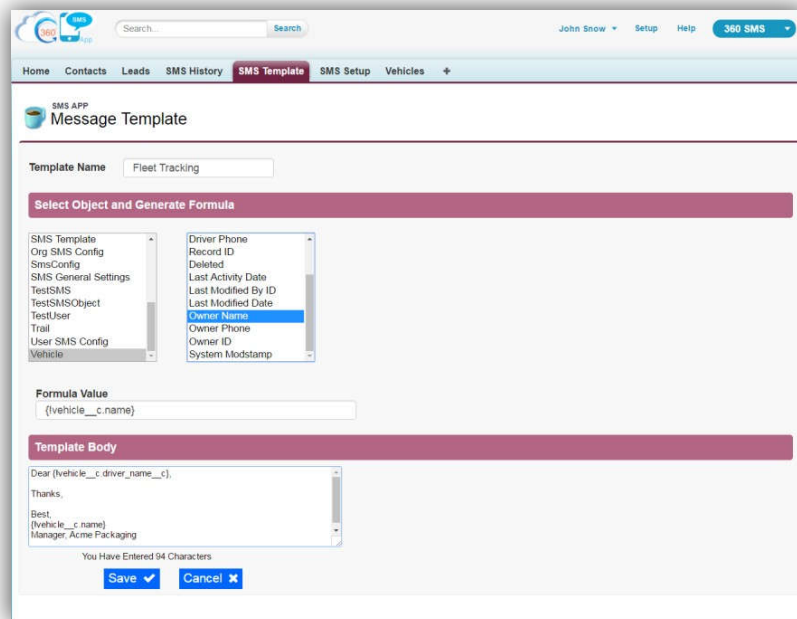
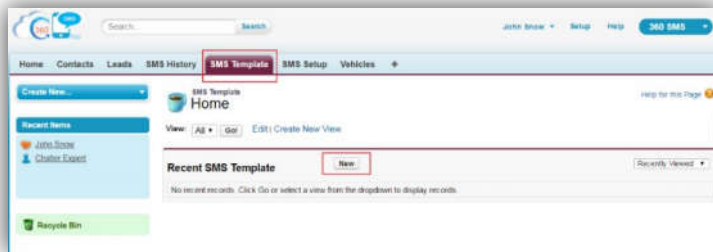




# 360 SMS App

## 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.

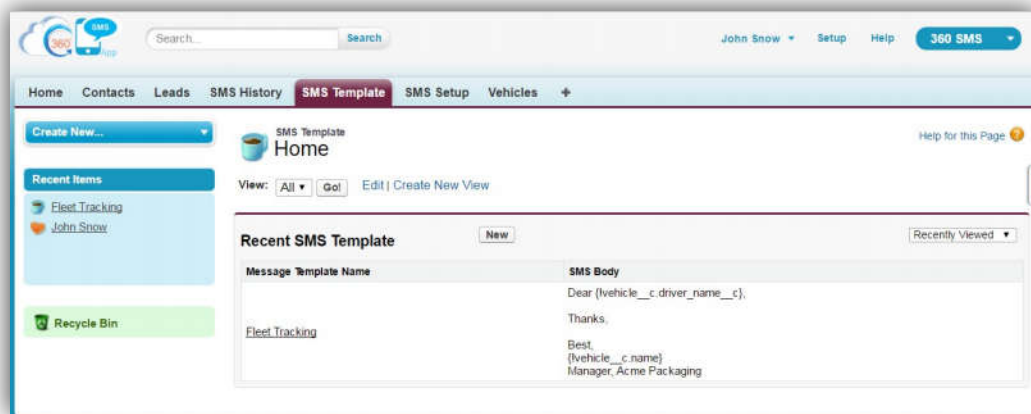


# 360 SMS App

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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Vehicle  
New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☐ Roll-Up Summary
- ☒ **Lookup Relationship**
- ☐ Master-Detail Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

|                  |                    |                     |                 |
|------------------|--------------------|---------------------|-----------------|
| Activity History | Cases              | HTML Email Status   | Related Content |
| Approval History | Content Deliveries | Notes & Attachments | SMS History     |
| Assets           | Files              | Open Activities     |                 |
| Campaign History | Groups             | Opportunities       |                 |

EL Account Name

Twitter

Related Lists

**SMS History** New

| SMS Type        | Sender Number  | To Number      | Message        | Read ? | Delivered | Message Segment | Created Date     | Created By Alias        |
|-----------------|----------------|----------------|----------------|--------|-----------|-----------------|------------------|-------------------------|
| Sample SMS Type | 1-415-555-1212 | 1-415-555-1212 | Sample Message | ✓      | ✓         | 68              | 5/3/2016 3:46 AM | Sample Created By Alias |

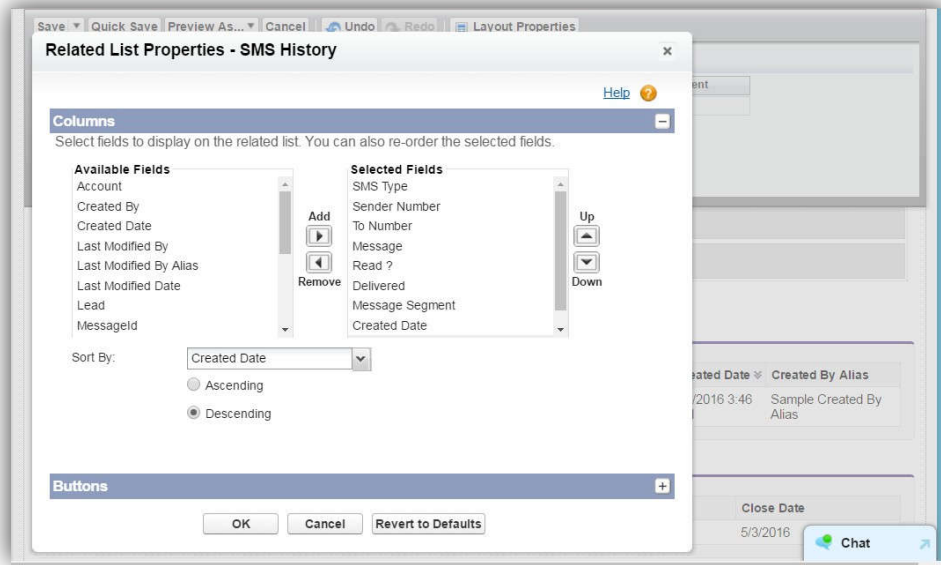
**Opportunities** New

| Opportunity Name        | Stage        | Amount   | Close Date |
|-------------------------|--------------|----------|------------|
| Sample Opportunity Name | Sample Stage | \$123.45 | 5/3/2016   |

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



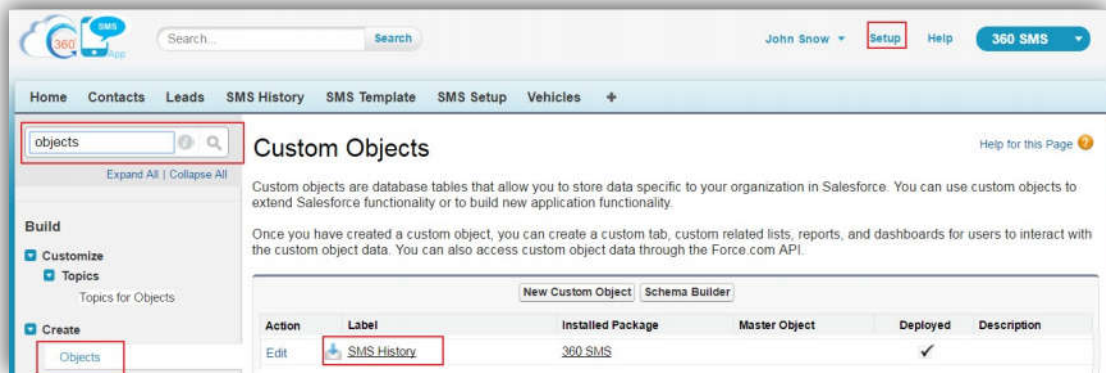
# 360 SMS App



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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Custom Object  
**SMS History (Managed)** [Help for this Page](#)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Standard Fields \(5\)](#) | [Custom Fields & Relationships \(16\)](#) | [Validation Rules \(0\)](#) | [Page Layouts \(2\)](#) | [Field Sets \(0\)](#) | [Compact Layouts \(1\)](#) | [Search Layouts \(6\)](#) | [Buttons, Links, and Actions \(10\)](#) | [Record Types \(2\)](#) | [Apex Sharing Reasons \(0\)](#) | [Apex Sharing Recalculation \(0\)](#) | [Object Limits \(10\)](#)

**Custom Object Definition Detail** [Edit](#)

|                  |                     |                         |                                     |
|------------------|---------------------|-------------------------|-------------------------------------|
| Singular Label   | SMS History         | Description             |                                     |
| Plural Label     | SMS History         | Enable Reports          | <input checked="" type="checkbox"/> |
| Object Name      | Message             | Track Activities        | <input type="checkbox"/>            |
| Namespace Prefix | tdc_tsw             | Allow in Chatter Groups | <input type="checkbox"/>            |
| API Name         | tdc_tsw__Message__c | Allow Sharing           | <input checked="" type="checkbox"/> |

**Custom Fields & Relationships** [New](#) [Field Dependencies](#) [Custom Fields & Relationships Help](#)

| Action               | Field Label             | API Name            | Installed Package | Data Type       | Indexed                             | Controlling Field | Modified By                 |
|----------------------|-------------------------|---------------------|-------------------|-----------------|-------------------------------------|-------------------|-----------------------------|
| <a href="#">Edit</a> | <a href="#">Account</a> | tdc_tsw__Account__c | 360 SMS           | Lookup(Account) | <input checked="" type="checkbox"/> |                   | John Snow, 5/2/2016 7:37 AM |
| <a href="#">Edit</a> | <a href="#">Contact</a> | tdc_tsw__Contact__c | 360 SMS           | Lookup(Contact) | <input checked="" type="checkbox"/> |                   | John Snow, 5/2/2016 7:37 AM |

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.

Home Contacts Leads SMS History SMS Template SMS Setup Vehicles +

Quick Find / Search... [Expand All](#) [Collapse All](#)

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Salesforce App for Outlook
- Email Administration
- Google Apps
- Data.com Administration

Build

SMS History  
**New Relationship** [Help for this Page](#)

Step 2. Choose the related object [Previous](#) [Next](#) [Cancel](#)

Select the other object to which this object is related.

Related To: [--None--](#)

- Order Product
- Performance Cycle
- Price Book
- Product
- SmsConfig
- SMS History
- SMS Template
- Social Persona
- Solution
- TestSMS
- TestSMSObject
- TestUser
- Trail
- User
- User Provisioning Account
- User Provisioning Log
- User Provisioning Request
- Vehicle**
- Zone

[Previous](#) [Next](#) [Cancel](#)

[Chat](#)





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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.



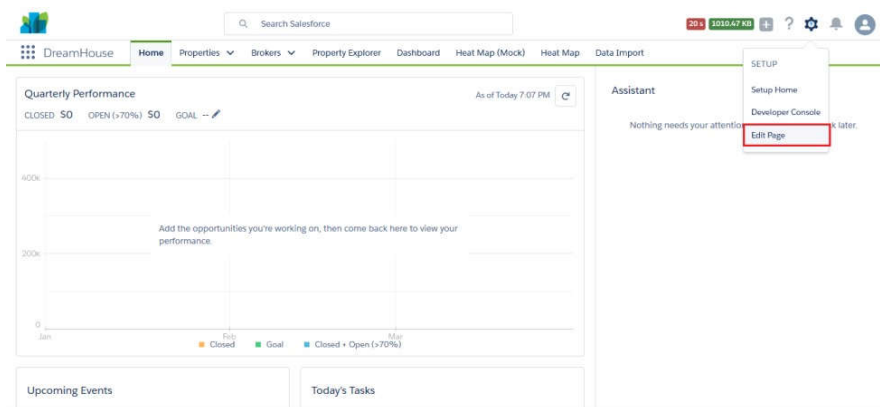
# 360 SMS App

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

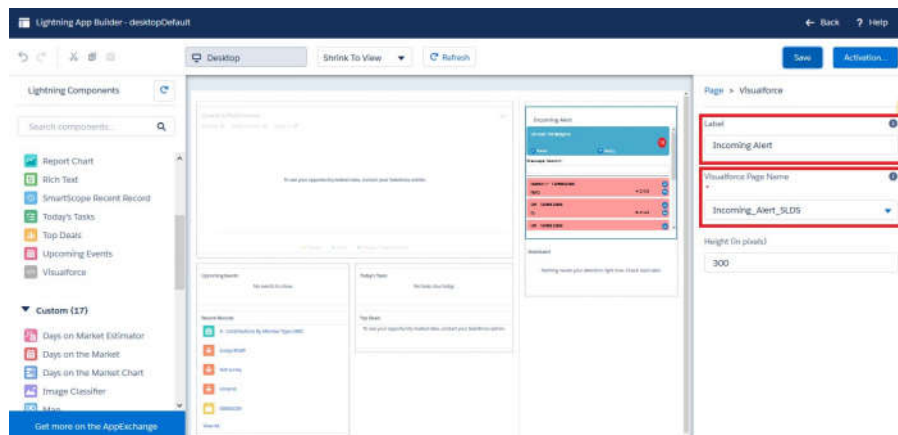
### 4.8.1. Setup Sidebar

#### 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.

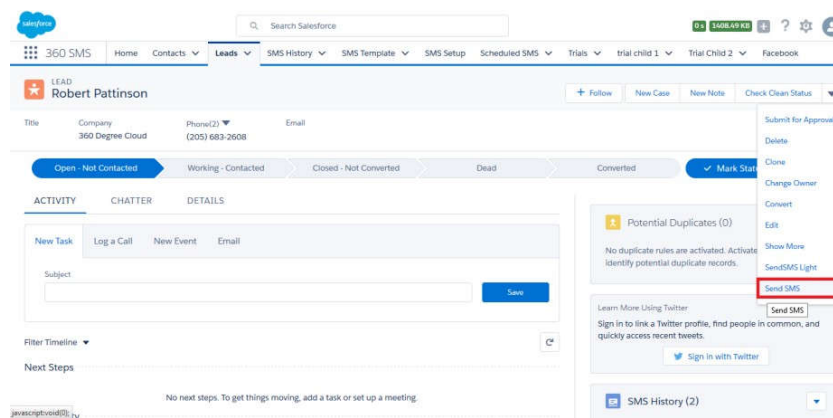


# 360 SMS App

## 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.





# 360 SMS App

## 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.

| Name                     | Type                     | Object                   |
|--------------------------|--------------------------|--------------------------|
| Trial Layout             | Page Layout              | Trial                    |
| Verify The Email History | Custom Object Definition |                          |
| Trial                    | Custom Field Definition  | Verify The Email History |
| Trial                    | Custom Object Definition |                          |
| Status1                  | Custom Field Definition  | Trial                    |
| Email Status             | Custom Field Definition  | Trial                    |
| success                  | Custom Field Definition  | Trial                    |
| Did you mean             | Custom Field Definition  | Trial                    |
| Result                   | Custom Field Definition  | Trial                    |

(iii) Click on 'Page Layouts'.

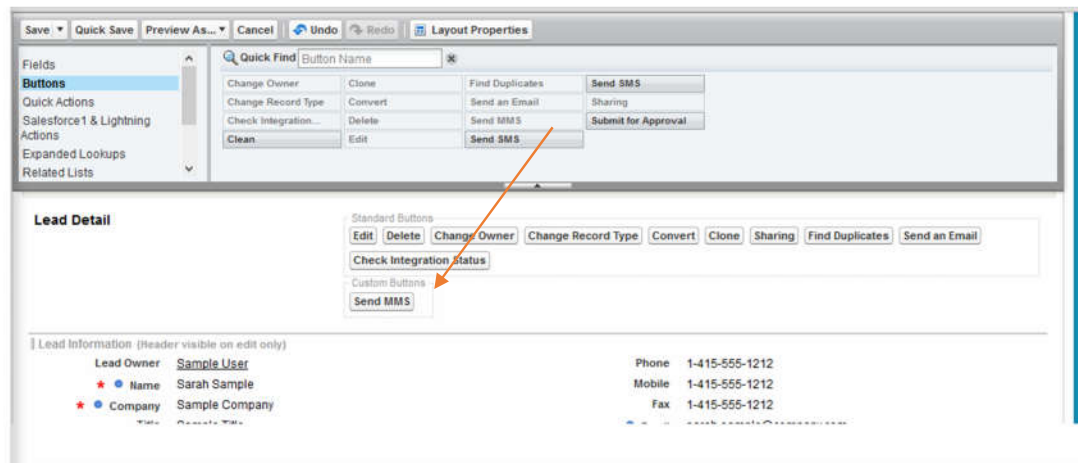
(iv) Click on 'Edit' corresponding to your Lead Page Layout.

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

(vi) Click Save.

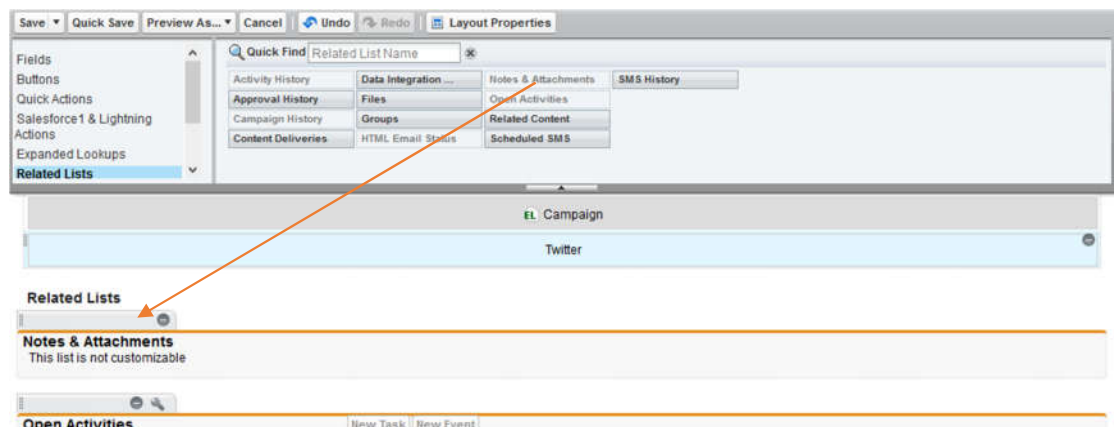


# 360 SMS App



## 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.





# 360 SMS App

Now a user can send multimedia messages from Leads.

**Create MMS**

Send To : Mobile Phone

Name : Tim Barr

Mobile Number : (312) 596-1230

Choose Template : --None--

Message :  
Hey How are you doing?

You Have Entered 22 Characters. Segment : 1

**Attached Document**

| No. | Document Name  | Document Size | Remove |
|-----|----------------|---------------|--------|
| 1   | audio_only.m4a | 783.89 KB     |        |

**Add More Files**

Total size of selected files must not be greater than 4.5 MB.

**Cancel Send**

## V App Usage:

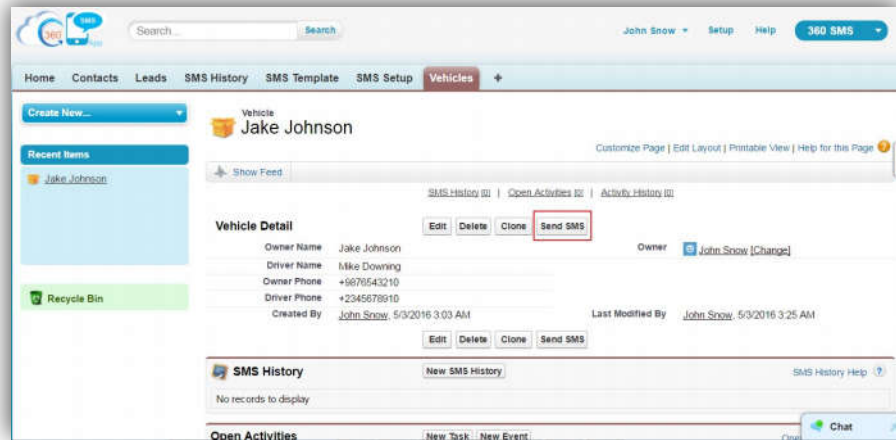
### 5.1. Sending Single SMS:

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





# 360 SMS App

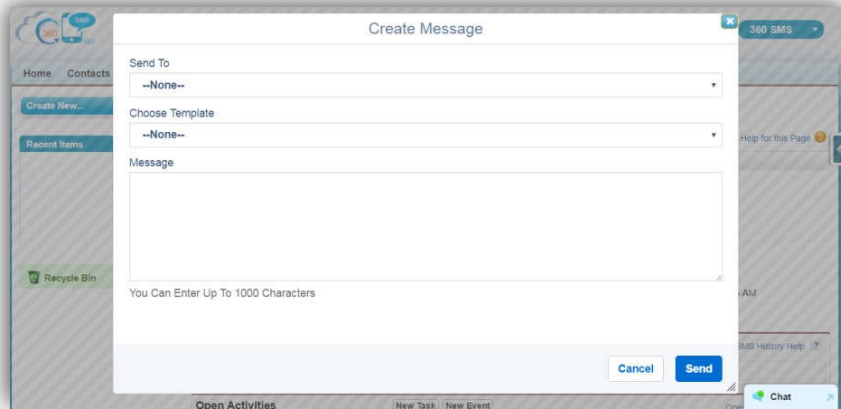


Note: SMS History appears at bottom of detail page for that particular record.

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.



# 360 SMS App



## 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.








# 360 SMS App





## Chatter:


IS History SMS Setup SMS Template Campaigns Scheduled SMS Cases Cli

 **Michael Clark**




 Send Message  Post  File  More

**Send Message From 360 SMS** 

Hello. Now you can send SMS even from chatter.

You Have Entered 46 Characters. Segment :1

 Show All Updates

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

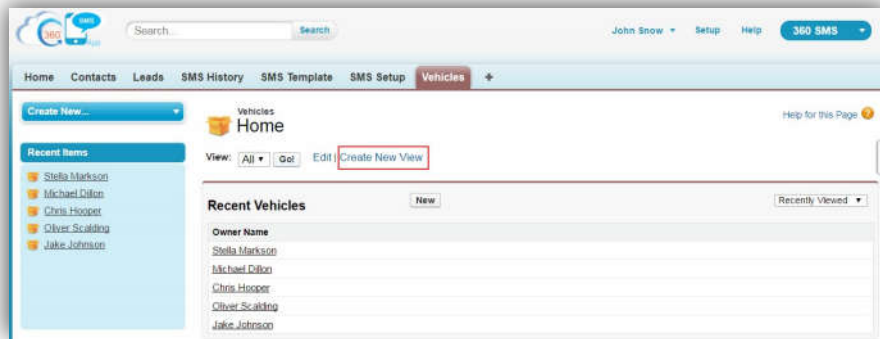
- (i) If the user of an org has multiple numbers assigned, then the Chatter would simply pick up a random no. to send text message.
- (ii) If the Contact/Record has multiple phone API fields associated with it, then Chatter would use the default phone API field that has been setup in the 'Object Config' under 'SMS Setup' for that particular object.



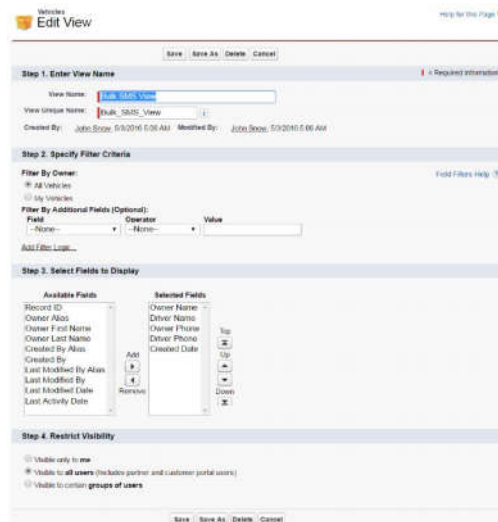
# 360 SMS App

## 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.



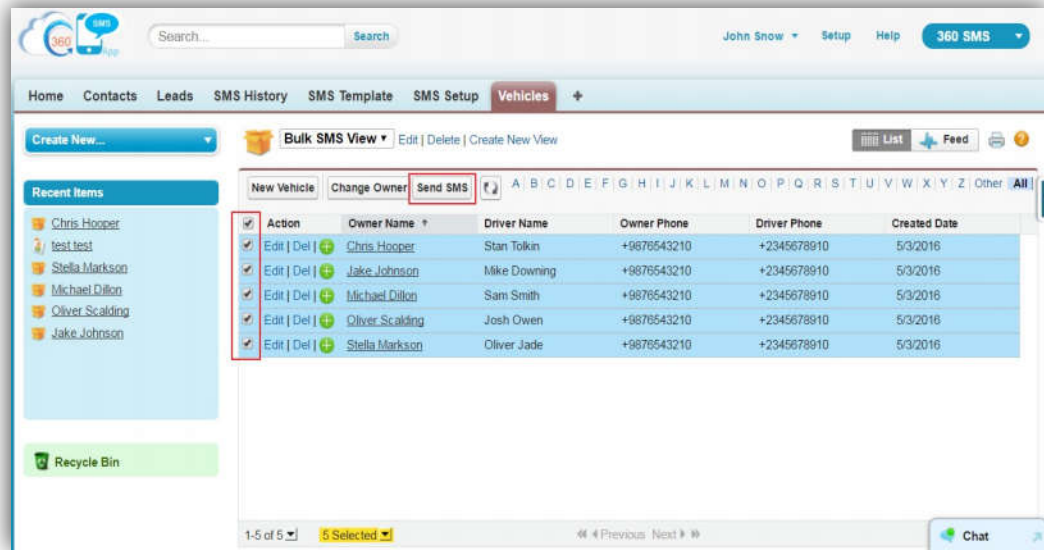
- 5.2.2. Provide View Name in Step 1, followed by Step 2 which is optional (for further filtering of the records or choose All instead). In Step 3, choose the relevant fields (which needs to be displayed) from Available Field box using Add/Remove buttons and add them to the Selected Fields box. Choose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



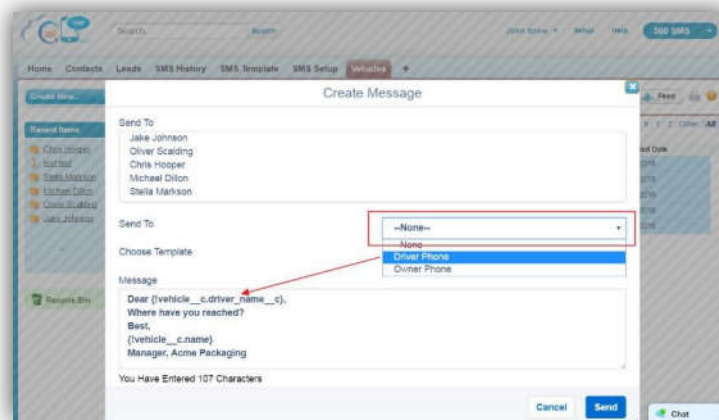


# 360 SMS App

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.





# 360 SMS App

## 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.

The screenshot displays the 360 SMS App interface. At the top, there's a header with fields like 'SLA Expiration Date', 'SLA Serial Number', 'Number of Locations', 'Speed Opportunity', 'Active', 'Created By', 'Last Modified By', 'Description', and 'Custom Link'. Below this is a 'Contact Roles' section with a 'Send' button. The main section is 'Contacts', which has a 'Send SMS' button highlighted in red. Below 'Contacts' is an 'Opportunities' section with a 'Send Opportunity' button. At the bottom is a 'Cases' section with a 'Send Case' button. The 'Contacts' table lists two contacts: 'Steve Forbes' (CEO) and 'Steve Forbes' (SVP Procurement). The 'Opportunities' table lists three opportunities: 'Edson Enterprises, Generator', 'Edson Enterprises, Generator', and 'Edson Enterprises, Generator'.

| Action                   | Contact Name | Title           | Email           | Phone          |
|--------------------------|--------------|-----------------|-----------------|----------------|
| <input type="checkbox"/> | Steve Forbes | CEO             | steve@edson.com | (512) 757-8500 |
| <input type="checkbox"/> | Steve Forbes | SVP Procurement | steve@edson.com | (512) 757-6600 |

| Action                   | Opportunity Name             | Stage              | Amount      | Close Date |
|--------------------------|------------------------------|--------------------|-------------|------------|
| <input type="checkbox"/> | Edson Enterprises, Generator | 10 Decision Makers | \$35,000.00 | 1/23/2016  |
| <input type="checkbox"/> | Edson Enterprises, Generator | Closed Won         | \$75,000.00 | 1/17/2016  |
| <input type="checkbox"/> | Edson Enterprises, Generator | Closed Won         | \$80,000.00 | 8/20/16    |





# 360 SMS App

## 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.



# 360 SMS App

◀ Back to List: SMS History

[SMS History \(5+\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Notes & Attachments \(0\)](#) | [Contact History](#)

## Contact Detail

[Edit](#) [Delete](#) [Clone](#) [Request Update](#) [Send SMS](#)

|                        |                                     |                     |
|------------------------|-------------------------------------|---------------------|
| Account Name           | Test 28 nov                         | Contact Record Type |
| Name                   | Michael Clark                       | Contact Owner       |
| Official Account Name  |                                     | Department          |
| Gender                 |                                     | Last Appraisal Date |
| Email                  | g421@gmail.com                      | Next Appraisal Date |
| Mobile                 | (334) 721-1879                      | Last working Date   |
| Other Phone            |                                     | Reports To          |
| Status                 |                                     | Do Not Call         |
| Asst. Phone            |                                     |                     |
| Phone                  |                                     |                     |
| Performance Evaluation | No                                  |                     |
| SMS Opt out            | <input checked="" type="checkbox"/> |                     |

## ▼ Login Credentials

|          |                          |
|----------|--------------------------|
| Username | Password                 |
| IsActive | <input type="checkbox"/> |

## ▼ Credentials

### Notes:

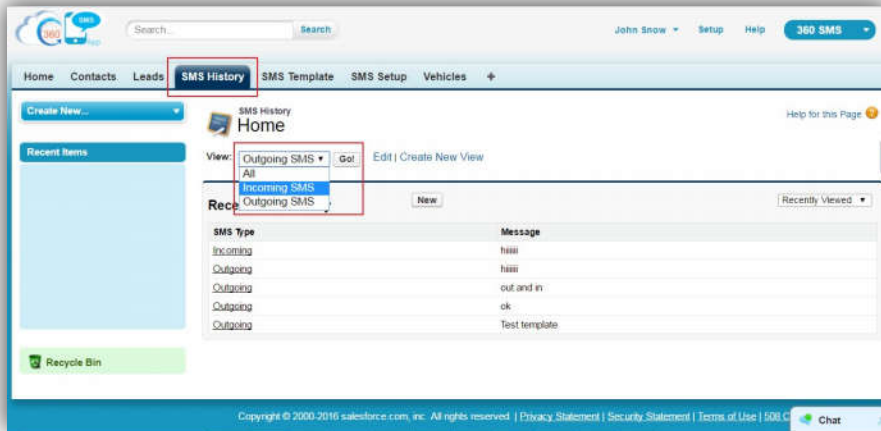
- (i) The contact can resubscribe by sending an SMS containing the keyword corresponding to the 'Subscribe' keyword in the general setting.
- (ii) The "Opt in" checkbox will now be checked.



# 360 SMS App

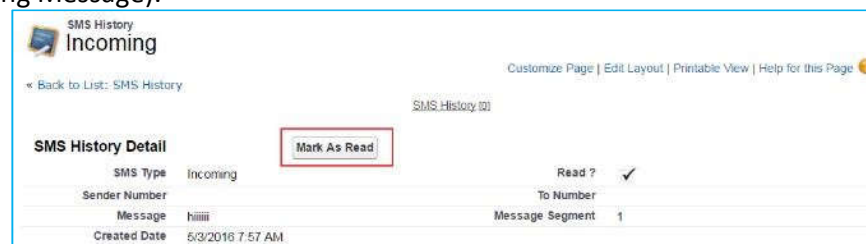
## 5.4. SMS History:

- 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



# 360 SMS App

**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:

**Step 1. Enter View Name**

View Name: Incoming SMS  
View Unique Name: Incoming\_SMS  
Namespace Prefix: tdc\_issw  
Installed Package: 360 SMS  
Created By: John Snow, 5/2/2016 7:37 AM Modified By: John Snow, 5/3/2016 8:05 AM

**Step 2. Specify Filter Criteria**

Filter By Owner:  
☒ All SMS History  
☐ My SMS History

Field Filters Help

Filter By Additional Fields (Optional):

| Field    | Operator | Value    |
|----------|----------|----------|
| SMS Type | equals   | Incoming |
| None     | None     |          |

AND

Add Filter Logic...

**Step 3. Select Fields to Display**

Available Fields:

- Record ID
- Account
- Created Date
- Delivered
- MessageId
- Message Segment
- Opportunity
- Related Object
- Related Object Id
- SMS History
- Status
- To Number
- Trail
- Record Type
- Owner Alias

Selected Fields:

- SMS Type
- Message
- Sender Number
- Read ?
- Contact
- Vehicle
- Lead

Top Up Down Bottom

**Step 4. Restrict Visibility**

☐ Visible only to me  
☒ Visible to all users (Includes partner and customer portal users)  
☐ Visible to certain groups of users

Save Save As Delete Cancel



# 360 SMS App

For Outgoing SMS:

SMS History

Edit View

Help for this Page ?

SaveSave AsDeleteCancel

Step 1. Enter View Name

View Name: Outgoing SMS

View Unique Name: Outgoing\_SMS

Namespace Prefix: tdc\_tsw

Installed Package: 360 SMS

Created By: John Snow, 5/2/2016 7:37 AM Modified By: John Snow, 5/3/2016 8:05 AM

Step 2. Specify Filter Criteria

Filter By Owner:

All SMS History

My SMS History

Field Filters Help ?

Filter By Additional Fields (Optional):

FieldSMS TypeOperatorequalsValueOutgoingAND--None--AND

Step 3. Select Fields to Display

Available Fields

Record ID

Account

Created Date

MessageId

Opportunity

Read ?

Related Object

Related Object Id

Sender Number

SMS History

Status

Trail

Record Type

Owner Alias

Owner First Name

Add

Remove

Selected Fields

SMS Type

Message

To Number

Delivered

Message Segment

Contact

Vehicle

Lead

Top

Up

Down

Bottom

Step 4. Restrict Visibility

Visible only to me

Visible to all users (Includes partner and customer portal users)

Visible to certain groups of users

SaveSave AsDeleteCancel

Chat

Support@360degreeapps.com  
+1 360 7614 360

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# 360 SMS App

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.

| Action                                     | SMS Type | Message   | To Number      | Delivered | Message Segment | Contact        | Vehicle      | Lead |
|--|----------|---|----------------|-----------|-----------------|----------------|--------------|------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Outgoing | Hey! Consignment reached.   | (987) 654-4321 | ✓         | 1               | Sam Smith      |              |      |
| <a href="#">Edit</a>   <a href="#">Del</a> | Outgoing | Hi Mike, Thanks for input.  | +9876543210    | ✓         | 1               | Michael Dillon |              |      |
| <a href="#">Edit</a>   <a href="#">Del</a> | Outgoing | Have you reached destination?   | (012) 345-6789 | ✓         | 1               | Sam Smith      |              |      |
| <a href="#">Edit</a>   <a href="#">Del</a> | Outgoing | Any delays on packaging?  | +1023456789    | ✓         | 1               | Sam Smith      |              |      |
| <a href="#">Edit</a>   <a href="#">Del</a> | Outgoing | Dear Mike Downing,<br>Where is the truck?<br>Best,<br>Jake Johnson<br>Manager, Acme Packaging | +1987654321    | ✓         | 1               |                | Mike Downing |      |



# 360 SMS App

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.





# 360 SMS App

## 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.

The screenshot shows a web-based interface for sending SMS. A modal window titled 'Schedule SMS' is open. It contains a large text area for the message, a 'Schedule' checkbox which is checked, and three radio button options: 'Schedule Once', 'Schedule Daily', and 'Schedule Monthly'. Below these options are two input fields: 'Select Date' and 'End Date'. To the right of the 'Select Date' field is a time dropdown menu currently showing '12:00 AM'. At the bottom right of the modal are two buttons: 'Schedule' (in blue) and 'Cancel' (in white). The background shows a blurred view of the main application interface with various tabs and search bars.

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.



## 5.6 Sidebar Panel

## Edit Home Layout

Help for this Page

Step 1. Select the components to show

Step 1 of 2

Choose the components to include on your home page layout.

Layout Name

Select Wide Components to Show

Items to Approve

☒

Tasks

☒

Paused Flow Interviews

☐

Calendar

☒

Dashboard Snapshot

☐

Required Information

Select Narrow Components to Show

Create New...

☒

Messages & Alerts

☐

Tags

☒

Incoming Alert

☒

Recent Items

☒

Custom Links

☐

Customer Portal Welcome

☐

Next

Cancel

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 .



# 360 SMS App

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:-

The screenshot shows the Salesforce Setup page for the '360 SMS App'. The 'Sidebar' section is expanded, and the checkbox 'Show Custom Sidebar Components on All Pages' is checked and highlighted with a red rectangle. Other options in the 'Sidebar' section include 'Enable Collapsible Sidebar' (unchecked). The 'Calendar' section below it has several options, most of which are checked, including 'Enable Home Page Hover Links for Events', 'Enable Drag-and-Drop Editing on Calendar Views', 'Enable Click-and-Create Events on Calendar Views', 'Enable Drag-and-Drop Scheduling on List Views', and 'Enable Hover Links for My Tasks list'.

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](mailto:support@360degreeapps.com). We look forward to talking to you.





# 360 SMS App

# Thank You