

Version 1.97

Now you will be able to send Media Message Template from the Campaign Manager.

Key features:

- Campaign Manager allows you to send Media Messages Template
- Display of attachment icon on the template list
- After the selection of the template, the attachment file is shown
- Messages sent with Media Message Templates through the Campaign Manager are sent as MMS
- While composing a message in the message template of the Campaign Manager, users will now be able to see the available credits instead of available SMS

Here is how, you will be able to send Media Message Templates from Campaign Manager:

- Login to your Salesforce org and go to the SMS Magic Converse home page:



- Go to the Campaign Manager home page



- Click on the New Campaign button and the following page will appear:



- Enter the name of the campaign in the 'Campaign Name' field.
- Enter the objective and description in respective fields and click on the 'Create' button



- Select the type as List View from the drop-down:



- Accordingly, other fields such as Object, List View, and Phone Field will appear. Enter relevant details in all fields to proceed.



- Select the Sender ID and Template that you want to use to send the message. In the Template Selection, select a Media Message Template from the Converse Templates.

Note: Refer to [this guide](#) to know about how to create a media message template(package version 1.73 onwards).



- You will be able to see all the templates with their media files. As per

the type of media file(image, audio, video, document), you will be able to see the preview of the media file. Select the template to proceed.



- Once the template is added, you can decide to execute the campaign immediately or schedule it for later, as shown in the image below:



- Click on the Start Campaign button to run your campaign with a media messages template

Version 1.95



The Campaign Manager add-on package (for both, the Classic and the Lightning view) can now be accessed via a single navigation panel on the Converse Home page. If the user already has the add-on package installed, on click of the icon, the Campaign Manager UI will open inside the global navigation view. If the add-on package is not installed, the user will be shown a page with installation instructions.

Key Features:-

- Run campaigns using standard Salesforce List View and Reports
- Track campaign success in terms of sent, delivered, response, and success rate
- Running a campaign using a report [tabular format] having multiple standard objects or custom objects for predefined report types
- Running a campaign using a report [tabular format] having multiple standard objects or custom objects for custom report types
- Running a campaign using a report having 2000+ records
- Compliance support with Campaign Manager
- Running campaign using list view supported for community users [Using report not supported for community users]
- Scheduling recurring campaigns of type daily, weekly, monthly & yearly
- Supports URL Shortening and Tracking

You can access the Campaign Manager from the Salesforce Classic header tab row or directly from the global navigation view (for both, the Classic and the Lightning), as shown in the images below:



- Log in to Salesforce. Click on 'Campaign Manager' inside the converse apps or on the header tab row. The following page will appear if the add-on package is not installed already:



- Once the admin user installs the Campaign Manager add-on package and launches it, the following page will appear:



- Click on the 'New Campaign' button to add new campaigns:
- Refer to the [User Guide](#) to know the process of creating a new campaign.



- Once the campaigns are added, they will appear in a list view as shown in the image above. Here, you can see campaign details such as Status, Total, Processed, Sent, Delivered, Response, and Response Rate.



- Here, users can search, filter, reorder, and refresh the campaigns. Click on the 'View Details' option on the right to view the campaign details. Click on the 'Clone' option to create a clone copy of the campaign.

Version 1.93

Version 1.93.1

Bug fixed

Date: 19th Oct 2021

- **Issue:** The customer was facing an issue with the Campaign Manager as it was fetching only 100 records (which needed to be increased). The customer also addressed a few user concerns regarding Campaign Manager 1.90.

Fix:

The user had the below concerns for the campaign manager 1.90.

- When the user was creating a campaign by configuring the report, object name, Sender ID & template & was clicking on 'Save Campaign' and reopening the campaign by clicking 'Edit' from the dropdown, they found out that the report name was not selected. They had to perform the same steps again.
- When the user was opening the SMS campaign & selecting the 'Test' Report, they found that the report name was not showing in the preview. The preview showed an incomplete sentence – "This message will be sent to opted-in records of"
- While the user was selecting the list view as recipient type in the

campaign & selecting any desired list view, the preview box showed the message 'The Message will be sent to 14 Recipients of Active Service Contracts when the conditions are met.' However, when the user was selecting 'Report' as the recipient type in the campaign, it was not showing the record count in the preview.

- The user wants to rename the "Send to duplicate records" checkbox, as it was creating confusion about whether it determined the duplicate records with their name field or the mobile number.

When the user clicks on an edit campaign, it was calling the campaign builder controller to retrieve the report options method. It runs a SOQL query on Report, with a limit of 100 records in SOQL. If the user selects a report at 100+ positions while creating a new campaign and when editing that campaign, SOQL will fetch only the first 100 reports, and the selected reports are not visible.

Also, we have addressed the following user concerns for the campaign manager 1.90.

- The selected report name was missing in the test report preview, and the user was prompted to create the configuration again after saving it.
- The record count was missing in the preview when the customer selects Report as the recipient type in the campaign while creating a campaign using the report.
- Renamed the message "Send to duplicate records" to "Send to duplicate mobile numbers" from the checkbox.

The issue related to the Campaign manager is now resolved, changing the limit of SOQL from 100 to 1000.

Version 1.90

Bug fixed

Date: 2nd Sep 2021

- **Issue:** Customer was not able to run recurring campaigns on the campaign manager when the repeat frequency was greater than or equal to 2 days

Fix:

The customer was facing an issue while running recurring campaign on the campaign manager on version 1.89. The user created a campaign that fetched data from reports and tried to see which report was used by clicking on the edit; which did not display the report name. The Campaign Manager failed while scheduling recurring campaigns with a frequency greater than or equal to 2 days.

Analyzed the technical limitation of cron expressions which led to the limitation of Campaign Manager with the daily frequency with an interval of more than 1 day.

Provided the workaround that instead of scheduling the campaigns on 'Daily' basis, the user could schedule them on 'Weekly' basis as per their requirements. The user can now choose days of the week, like Mon-Wed-Fri, to schedule a campaign and can schedule campaigns for a long time without any issue.

Added a permanent fix for the issue by handling the day count in apex code to skip days using the days' difference count between the start date and today's date. The user can now create a daily frequency by creating a cron expression for 1 day, and the repeat frequency is selected to be greater than 1.

The issue related to the Campaign Manager failing while scheduling recurring campaigns with repeat frequency greater than or equal to 2 days is now resolved.

Version 1.89

Bug fixed

Date: 8th July 2021

- **Issue:** Issues with the Campaign manager as the campaign showed more processed records than the total records

Fix:

The user faced an issue with the Campaign manager, as the campaign showed more processed records than the total records (Status- Completed; Total-145; Processed-155; Sent-156).

When the processed, sent, and delivered record count was analyzed on the campaign dashboard by fetching the query on the SMS history based on campaign lookup and direction, it was observed that the campaign lookup was added to all messages of those conversations. So if a user was sending any message with this conversation, it was adding a campaign lookup to that message. In this case, the user had configured automation based on keywords. So when they ran a campaign, they received incoming messages with the STOP keyword, and the outgoing messages triggered which had a lookup of the campaign. So these messages were also added to the processed, sent, and delivered count, which is why the processed, and sent count showed more than the total records.

The issue was resolved by adding a condition while querying the SMS history records in the query that fetches only those records triggered by the campaign manager.

The issue with the Campaign manager showing mismatched Total, Processed, and Sent values is now resolved.

Version 1.54

Version 1.54

1. Issue: Status appears as 'completed' for the recurring campaign from the list view.

For the recurring campaign, from the List view of Campaign Manager, it is showing its status as Completed when it is run for the first time.

Fix:

The Campaign status will remain as 'Ongoing' until the campaign is triggered on the selected last day.

2. Issue: Record details were not shown correctly.

Record details were not shown correctly on the Campaign Manager when the list view on the 'Contact' object is selected.

When the customer tried to create a campaign the list view on the Contact object some list view contacts did not populate.

Fix:

All the contact records are now getting populated in the campaign manager list view.

3. Issue: Campaigns fail if the template used with merged field.

Campaigns fail if the template used with merged field from the information object.

Fix:

Added a new UI to get the data about the information object records present in the template text. Updated the campaign detail page to show the proper information as per the selected information object.



4. Issue: Campaign Manager UI freezes for a large number of the templates.

The Campaign Manager UI freezes if a large number of the template is created in the Salesforce org.

Fix:

Provided search functionality to fetch the required templates, The number of

templates shown by default will be 50.

Improvements

- Changes to support Campaign Launcher on Community.
Changes are made to support the community in the campaign manager.
Added new permission, set-Campaign Manager admin.
- Proper Error handling for campaign Manager. In order to provide the proper error message in the error log so as to debug the issue easily.

Limitations

- Recurring Campaign supported only with Daily type (Start and End date are mandatory). Also, Weekly, Monthly and yearly recurring schedules are not supported for now.
 - Running a campaign with a report is not supported to community users as of now.
 - A new Permission set is introduced as "Campaign Manager Admin" which includes all mandatory object-level permission to use Campaign Manager, this needs to be assigned to Non-Admin User. Along with assigning this Permission Set, Admin must explicitly give permission for 'Report Access Job' Object either from Permission set (by cloning) or at Profile Level.
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Version 1.53

Version 1.53

Improvements

N/A

Bug fixes

- Fixed issue for allowing non-admin users to use campaign manager by assigning a new permission set "Campaign Manager Permission Set".
- Fixed issue for allowing message sending using Custom Reports having filter logic i.e. Creating a report with filter logic using multiple objects (Standard and/or custom) for custom report types.
- Fixed issue for allowing message sending using List Views having filter logic applied.
- Fixed issue for allowing users to use org level created converse apps with campaign Manager.

Note: Non-admin user must be assigned with newly introduced “Campaign Manager Permission Set” in order to use Campaign Manager.

Version 1.52

Version 1.52

Improvements

- Sending messages using report with 2000+ Records.
- Sending messages using complex report i.e Creating a report using multiple standard objects for predefined report types.
- Sending messages Custom Reports i.e Creating a report using multiple objects (Standard and/or custom) for custom report types.

Bug fixes

- Fixed issue in Report selection when more than 2000 reports are present.
- Fixed issue with working of “Send to duplicate records” checkbox in Campaign Manager.

Note: This update of the Campaign Manager works with the SMS Magic Converse base package 1.58.25 and above.