Version 1.73

Overview of the package release

With this latest version of the package, users can now enjoy more control over their customer conversations. Media message templates, being the main highlight of this release, users will be able to personalize user experience and manage multimedia conversation smarter. Users can now create media message templates, send media message templates via SMS and WhatsApp channels, and manage media message templates from the campaign manager.

Other features such as enhanced search, flagging of invalid sender ids, mapping of license and permission sets, quick links in the dashboard, quick view of OAuth status and credits at global navigation, and the ability to resend failed messages will offer a smoother messaging experience.

1. Enhanced search

The user can also search for the converse apps using the sender id (number, channel, and label), and template name on the converse app page, as shown in the following image:

Search converse app by template name

Search converse app by sender id

Search converse app by channel

2. Flagging of invalid sender IDs

The sender ids that are invalid or not associated with your account will now be flagged in the sender id assignment section, as shown in the image below:

Users will be restricted from sending messages to such invalid sender ids to avoid any failure.
Note: Invalid sender ids are those that are created in your org/account but don't belong to SMS-Magic.

3. Quick links to access SMS history, converse templates, and consents from app navigation

The latest package comes with an enhanced navigation pane as now you can

easily access converse templates, consent database, and message history from the app navigation. Users can click on the quick links and directly access respective pages.

- Upon clicking on the message history option, the user will be redirected to the recently viewed SMS history page directly:

- Click consents option and the following consent details page will appear:

- Click on converse templates and the following message templates page will appear:

4. OAuth status & messaging credits quick view in app navigation

As a user, now with the latest package, you will be able to know the current OAuth status & available credits upfront from the app navigation.

If the OAuth is revoked, it will be shown as below:

Note: To know more about OAuth, refer to [FAQ. No. 25 here](#).

5. Use of unicode characters

Now users can enable or disable the use of unicode characters while composing templates as well as messages for the SMS channel. Disabling this feature will prevent the users from creating templates and sending messages with unicode characters. Messages with unicode characters consume more credits depending upon the size of the message text.

By default, this feature will be disabled from the converse settings>conversations>general settings

6. Resend failed messages

You can now auto-resend failed messages after 10 minutes or opt to resend them manually.

By default, both options will be disabled. Until now, if the message sending failed due to SMS-Magic server issues, the user had to resend them manually. But now, users can resend the failed messages automatically. By enabling the 'Auto send failed messages after 10 mins' option, SMS-Magic would resend the

failed messages after 10 minutes, whenever they failed due to SMS-Magic server downtime.

Note: You should not enable this option if in case you want to send time-sensitive messages.

By enabling the 'Manually resend failed messages' option, users will get an option to resend the failed messages from the converse desk manually. Users will also see a 'Resend' button in the SMS history record.

There are four ways to resend the failed messages, as shown below:

Inside conversation

SMS history list

SMS history record

7. Media message templates

As a user, now you can create multimedia message templates and use them while sending messages over SMS and WhatsApp channels.

Create media message templates

- Click converse templates option to open the templates home page, as shown below:

The template home page displays a list of all templates with details such as template name, template text, template type, channel, objects, content type, and last modified date.

As and when the user scrolls down the page, new templates will appear in the list.

As you can see in the template text column, all media message templates will be identified with a small icon representing the media type (for example, audio, file, video, or image).

- Click create new template button and the following template creation page will appear:

- You need to select the template category as 'Media message template' from the template category drop-down. For now, media message templates can be sent only via SMS and WhatsApp.
- You need to add the URL specific to the environment in CORS in setup > CORS > and create a record specific to the SMS-Magic environment i.e. https://app.sms-magic.com, https://aus-app.sms-magic.com, https://eu.app.sms-magic.com

8. License permission set mapping

Auto assignment of permissions

Now, with the new release, when any license is assigned while adding a new user, the permission set associated with the license will also be assigned automatically.

As you can see in the screenshot above, you will get the message saying, 'License assigned successfully. Additionally, we have assigned an SMS-Magic permission set to this user. For permissions, refer to the permissions management section.'

SMS-Magic will automatically assign permission sets to users based on the license that is being assigned. The 'Auto assignment SMS-Magic permissions' option in the converse settings will be enabled by default. If it is disabled, you will need to manually assign the permissions:

Refer to the table below to understand the license-permission sets mapping:

Note: The auto-assignment SMS-Magic permissions option in the converse settings will be enabled by default. If it is disabled, you need to manually assign the permissions by referring to the steps mentioned in the permission management section.

9. Display credits balance

Now with this version, while composing a message in the message template of the campaign manager, users will be able to see the available credits instead of available SMS:

Known Issues

For sandbox issues: The sandbox issues mentioned in the below table are encountered only when the Salesforce Lightning web security setting is

enabled, after disabling this setting, these issues are not encountered.

Sr. No	Issue description	Impacted Org type	Severity
1	The chart is not defined, and getting an error message in the converse home	Sandbox	Minor
2	Actionfailed:smagicinteract:streamingDataService$controller$onCometLoaded [org is not defined] Failing descriptor: ", getting Component error in Converse desk page (Classic view)	Sandbox	Minor
3	Actionfailed:smagicinteract:streamingDataService$controller$onCometLoaded [org is not defined] Failing descriptor, getting error in Converse Home Side Bar	Sandbox	Minor
4		Emoticon issue |, not able to insert emoticon while creating Converse Template and from all conversation components.	Sandbox	Minor
5	The media preview is not showing when we send the media from the converse app bulk campaign details page.	Sandbox	Minor
6	'This page has an error. You might just need to refresh it. Action failed', getting a component error when the message is sent using Global send sms button	Sandbox	Minor
7	In the conversation component, the mobile phone and sender id not auto-populated.	Sandbox	Minor
8	Global navigation panel three dots continue loading for non-admin users.	Production	Minor
9	In the Salesforce campaign, the emoticon is not showing correctly when emoticon templates are selected.	Production	Minor
10	Media files are not getting attached from the global new send SMS button when SF storage is enabled.	Production	Minor
11	'Attempt to de-reference a null object', this error occurs when a media file is sent using the Facebook sender id and also the outgoing messages fail.	Production	Minor
12	Receiving an undefined message while sending the media template without text using the send SMS button	Production	Minor
13	The auto assignment permission set is not working.	Production	Minor
14	The icon on the converse home page is not placed properly	Production	Minor

Version 1.72

Enjoy more control over your conversations with the latest version of the package

1.Overview of the Package Release

With the latest version of the package, sales, marketing, and admin users will now enjoy more control over their customer conversations. They will now be able to take charge and personalize user experience, manage multimedia conversation smarter, tame their conversation templates, find conversation flows easily with a search option, and level up their campaign game.

Moreover, they will be able to strike the right conversation at the right time, every time, and keep their conversations always on, with released enhancements preventing conversation interruptions and helping in faster issue resolution.

1.1.Take charge of how you converse

1.1.1.Personalize User Experience

- Personalize Permission Sets

Now take charge of how you converse and personalize the user experience with 11 new permission sets. Whenever admins are adding new users and assigning licenses to them, the application will now prompt them to assign the required 'Permission Sets' along with licenses so that users would be able to use SMS-Magic converse smoothly.

Conversational messaging admins can now define detailed user permissions on their own (e.g. enable an external user to converse via CRM while restricting specific access) by choosing from 11 types of permission sets based on the user role. They also get prompted to define the permission sets when assigning licenses, so they don't miss it. Click here to know more.

- Personalize Your Workspace With Conversation Component Resizing

Conversational messaging users can now better organize their record detail pages and be more efficient at work by adjusting the width and height of the SMS-Magic record detail page as per their screen resolution in the Lightning UI. Click here to know more about how it works.

1.1.2.Manage Multi-Media Conversations Smarter

Users exchange a lot of documents and files with a record (e.g. insurance application docs on contact object) while messaging. SMS-Magic Converse application has been using SMS-Magic storage to store media files. Many times, the documents were lost in the conversations, as they did not get attached to the record.

Also, irrespective of what is configured at the account level, we have been supporting only 2.5 MB as the max size, which was a known limitation of the SMS-Magic Salesforce application.

Hence in order to enable sharing of higher size media files and to strengthen data privacy, we brought in the media file exchange via Salesforce storage.

- Store Multimedia Files In Salesforce Storage

Users exchanging rich media over conversations can now store files on Salesforce (say for audit purposes), by enabling Salesforce storage. This will automate Salesforce storage for future conversations and activate an option to selectively save incoming/outgoing media files from past conversations to Salesforce.

- Associative Media Files With Salesforce Records

If this option is enabled, the system will associate all incoming and outgoing media files with the primary object record. For this, either of the two options namely, 'Incoming Media Files' and 'Outgoing Media Files' should be enabled.
To know more about how it works, how to associate media files with records, disable media files, and more, click [here](#).

1.1.3.Tame Your Conversations

Template authors can now enjoy quick access to their org-wide templates every now and then, with Converse Templates being added to the SMS-Magic global navigation. They can also now work more flexibly with their templates, with the ability to search, create, view, edit or filter templates from a unified view.

1.1.4.Find Your Conversation Flows

Conversation admins and automation users can now quickly find any message flow (e.g. an appointment flow), by searching the converse app by name or PA-Key XXXXXX. They will also be able to manage their conversational automation better, by viewing linked workflows, and flows upfront (e.g. an appointment messaging flow linked to an event creation workflow).

- Search

Users will now have the option to search converse apps by using the app name or the PA key of messaging flow, as shown in the images below. Click [here](#) to know more about how the Search operation works.

- Linked flows

In the messaging flow list, users will be able to see which messaging flow is linked to which flow/workflow. Here, users can see information about each of the messaging flows. Users can also manually pull the information of each of the linked flows, and workflows.

- Delete blanks

Users will be able to delete the blank automation flows so that the UI remains clean and reduces confusion during configuration.

1.1.5.Level Up Your Campaign Game

Marketing users who drive conversational campaigns can easily manage multiple high-volume campaigns by installing and accessing the SMS-Magic campaign manager from the global navigation.

1.2.Strike the right conversation at the right time, every time

1.2.1.Track Your Conversations From Start To End

Record owners can now get a holistic view of customer engagement by defining inter-object relationships for all conversation records and SMS History records.

1.2.2Keep Your Conversations Always On

Conversation users and admins can now foresee and prevent conversation interruptions caused by human errors, OAuth failures, sync issues, and system downtime.

- Edit or Delete Messaging Objects or Templates

Conversation users and admins can now ensure the smooth running of their engagement workflows even as they try to modify or delete any configured objects and fields or conversation templates. If that object, field, or message template is currently in use, warning messages, such as below, will pop up. Know more about [message object configuration here](#), [editing templates here](#), and [deleting templates here](#).

- On-demand syncing

Conversation admins can now keep their conversations synced with the CRM at all times, thanks to the anytime sync option with status updates and nudges for necessary action when things aren't perfect.

Upon clicking the 'Sync Now' button, all account information, licenses, Sender IDs, and plans will get synced with the SMS-Magic Platform. The user will be able to view the sync status, last sync date, and time. Click [here](#) to know more about how it works.

As an extension of this, we have also introduced the 'DataSync' page (Setup → Visualforce Pages) where you can see and understand the data discrepancies if any between your org vs. SMS Magic platform and ensure quicker troubleshooting.

- Managing OAuth when it is revoked

Conversation admins can now keep their conversations uninterrupted at all times, thanks to prompt reset notification with instructions for the relevant admin user whenever the SMS-Magic authentication key gets revoked. The notification will include the details of the admin user who is supposed to reset the same to have an uninterrupted experience with using the SMS-Magic application. Besides, we have introduced a new setting that when enabled will automatically pull the unsynced messages via the default scheduled cron job (every 4 hours) to ensure no messages are lost in the event of an OAuth revocation. Click here to know more about how it works.

- Service downtime notifications

Users will now be able to see notifications inside Converse App whenever there's any service downtime/delay in message sending/delay in syncing of incoming messages observed. The notifications will also link to understand more details about such incidents if any happened without having to reach out to the SMS Magic support team. Click here to know more about how it works.

1.3.Enjoy stronger compliance and support

1.3.1.Track all SMS-Magic user activity in one place

Conversation admins & auditors can now track all SMS-Magic user activity in one place, thanks to the new activity logs introduced in the SMS-Magic portal for maintaining a record of all user actions that have been performed using the system.

1.3.2.Coordinate better with the SMS-Magic support team to resolve issues

Conversation admins & power users can now collaborate better with the SMS-Magic team to resolve support issues, thanks to the 7-day access (with or without PII or Personally Identifiable Information) that customers can give to the SMS-Magic support team to log into their org, to diagnose and repair problems.

1.4.Converse on the go with more confidence

1.4.1.Share location pins when conversing from a mobile app

Conversation users can now share exact locations when conversing and save time ahead of in-person meetings, thanks to the location pin sharing support where users can add map location links complete with latitude and longitude.

1.4.2.Spot new messages from the app icon notification badge

Conversation users can now track unread messages better — anytime, anywhere, thanks to the new notification badge on the SMS-Magic app icon, where the count of new messages received will be visible.

2.Known Issues

Sr. No.	Known Issues Description
1.	Facebook incoming messages are not getting synced with Salesforce while doing manual incoming pull
2.	While upgrading from package 1.48 to the upcoming version of the package, users are getting an error 'converse installation failed'

Fall Release 2021

1. Overview

With the Fall Release 2021, SMS-Magic empowers its customers to drive happier and uninterrupted conversations through a wider range of channels, thereby saving time and effort while conversing. The introduction of the Line channel will widen the scope for the customers to converse seamlessly and delight more service seekers globally.

The Salesforce experience cloud and console improvements will enable you to make the most of every conversation opportunity. Converse one-to-one from your CRM, reach a wider audience with a personal touch, standardize and speed up conversations to empower partners and representatives beyond the walls of your organization.

2. LINE Messaging

With nearly 200 million global users, LINE is poised to be the world's 20th most popular social messaging channel. With SMS-Magic business solutions allowing you to start business messaging over LINE, you would be able to connect to your customers with this popular chat app globally.

Once you have connected your LINE channel with SMS-Magic and recipients have subscribed to your LINE channel, you will be able to send one-to-one messages or bulk messages to a single LINE recipient or multiple LINE recipients who have subscribed to your channel. You can send text, text templates, or multimedia messages of image, audio, and video with a maximum size of 1MB. Similarly, you will be able to receive those as incoming messages.

3. Salesforce Experience Cloud Improvements

Empower partners and representatives beyond the walls of your organization, standardize and speed up the conversations

Bulk Messaging and Messaging templates on Salesforce Experience Cloud

Partner relationship managers need to enable partner representatives to standardize and speed up regular conversations with their common audience.

This feature is enabled for template creation as an innovative feature for community users to manage their templates.

New Community User Power License for Salesforce Experience Cloud Users

Support for community-specific low-cost user licenses has been newly added so that customers don't have to buy standard SMS-Magic licenses for enabling messaging capabilities for their community users.

4. Make the most of every conversation opportunity

Ability to control and manage Sender IDs visibility

We have added a configuration mechanism for admin users using which they would be able to better control and manage the Sender ID's visibility across users. Admin users can now assign specific Sender IDs to a user and also define a Sender ID to act as a default Sender ID for that user.

Sender ID and Template Search in Message Composer

Sales and marketing representatives who have hundreds of message templates and dozens of business Sender IDs assigned to them and find scrolling is a difficult way to search a particular message template or Sender ID.

Earlier, it was time-consuming for messaging users to find the exact Sender ID or a template from the list of 100s of Sender IDs/Templates in the messaging composer. To simplify this, we now have a feature allowing messaging users to search for a Sender ID or a template while composing a message.

Visual indicator for queued messages

We have added a visual indicator in the conversation user interface that can help the messaging users identify that a particular message is in a queued state due to throttling or business hours settings enabled at the account.

Persisting the Converse Inbox Filters and pinned Conversation tabs

The Converse Desk inbox filter, as well as conversation pinned tabs, were getting vanished as soon as the messaging user refreshes the Converse Desk or refreshes the browser tab, or performs logout and login operation. This was leading to an additional effort for users to select the respective filter as well as conversation tabs once again. We have now added functionality that will help the application persist the last opened Converse Inbox filter view as well as pinned tabs at a user level even when the user refreshes the Converse Desk or refreshes browser tab or performs logout and login operation

Bulk-send your messages more confidently using WSYIWSG (What You See Is What You Get) Preview

Marketing and sales representatives use merge fields to personalize their bulk messages.

On the bulk message sending interface, the application displays the message with merge fields (if used) but does not have an option to see the preview of the message against a specific user to see the actual message text after resolving the merge fields. We have now given an option for messaging users to see a preview of the message at a recipient level. This can help users to check resolved message text for some of the recipients and know in advance if any changes are needed in the recipient level data or used merge fields or in the messaging template before sending messages.

Drive Uninterrupted Conversation

View Thread of messages in the email notification

Sales representatives who receive new message notifications on their email. Need the context of the conversation to respond better using email-to-text.

Whenever the system sends out an email notification to the respective user based upon the configuration done by the admin user when an incoming message is received.

The notification template was used to display the message text from the latest incoming message

but was not showing any of the past conversation messages. Because of this, the user receiving the email notification was not able to understand the context of the conversation in order to respond to the message directly from the email.
So, we have added an option for admin users to configure the HTML template for email notification which will by default have a view of the last 5 messages exchanged with the recipient and thereby giving the context of the

latest message.

Notifying Record Owners over email

Sales representatives who receive new message notifications on their email. They need the context of the conversation to respond better using email-to-text.

Sales and marketing teams where multiple employees simultaneously converse with a given customer. In such cases, it is important to send new response email notifications to the right representative to avoid confusion about who should be responding.

Save time and efforts while conversing with customers

On the primary tab, a record will be highlighted with a color when a new incoming message is received for that record so that the console user gets notified about new messages and can reply to the message quickly. With this you can save time and efforts while conversing with customers

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Spring Release 2021

Overview

This release focuses on the following features:

1. Ease of Navigation

A New Navigation allows you to interact with all of your application modules from a single interface. All the horizontal navigation tabs are now available in simplified vertically arranged navigation. This menu will be available under the single navigation tab 'SMS-Magic Converse' inside the SMS-Magic Converse application in Salesforce. This new navigation helps increase user adoption and quickly provides users the ability to easily access the most relevant features and data from a single source. This feature will be available in the Salesforce Classic and Salesforce Lightning version. Feature accessibility will remain as per plan and profile/user-level permissions assigned. For further information please click here.

2. Do-It-Yourself (DIY)

Now you can install the SMS-Magic Converse App into your Salesforce org all by yourself with this feature. This feature gives you the ability to choose

and assign sender IDs on your own, auto-configure messaging objects, and auto-assign a default sender ID based upon the destination county selection you make, so that you can get message sending experience right away with 'Send a Test Message' option in the first registration step. For more information please [click here](#).

3. Analytics Dashboards

The global navigation bar gives you a single tab to display different dashboards and charts.

The five dashboards included in this section are as below. For more information please [click here](#).

1. Consent Status dashboard

The Consent Status dashboard displays the overall consent status at the org level. It shows the number of known contacts against configured messaging objects who have provided the consent to receive messages. The displayed data is fetched in real-time.

2. Opt-out Analysis

The Opt-out Analysis dashboard shows the analysis for opted out numbers based on different dimensions, such as numbers opting out from different types of content, messaging sources, etc. The displayed data is not real-time. It is last updated based upon the batch processing schedule time that you have configured.

3. Compliance Enforcement

The Compliance Enforcement dashboard displays information about the compliance enforcement metric with respect to the number of times the opt-out compliance was enforced and sending of messages was blocked. The displayed data is not real-time. It is last updated based upon the batch processing schedule time that you have configured.

4. Agent Productivity

The Agent Productivity dashboard is visible to administrators only. The admin can view an agent's progress based on conversation status, response time, pending replies from the agent, and customers. The measurements are filtered based on the owner of the conversation and represented in a tabular format. The displayed data is not real-time. It is last updated based upon the batch processing schedule time that you have configured.

5. Message Analytics

The Message Analytics dashboard displays information related to messages such as messages sent, delivery success, messages received, and messages response rate.

4. Text Replies to Incoming Email Notifications

This service is an extension to inbound message notification via email feature. It is provided for customers to easily reply to inbound messages without having to log in to Salesforce.

A sales or service rep would get alerted via an email whenever a new incoming message is received from a customer. Until now, they had to go to Salesforce to reply to these inbound messages. With this feature, your sales/service rep can reply to inbound messages via email. These SMSs will get logged under appropriate objects such as a lead, contact as per your org setup. These SMS replies will also get attached to an ongoing conversation.

It would save significant time for your reps from switching between email & salesforce app and also increase their productivity. It would also increase customer satisfaction as they will get quick responses from your reps.

We have given the option to configure this feature globally, or specific to Sender ID. Users can reply to the notification received over an email using their email software such as Gmail & Outlook clients. SMS-Magic will further send the same message as a text via the same channel, using the Sender ID on which the notification was received. This functionality will work with SMS, WhatsApp as well as the Facebook channel. For further information please [click here](#).

5. Compliance Enabled WhatsApp Messaging

With 1.5 billion global users and end-to-end encryption, WhatsApp is poised to be the world's most powerful business messaging channel. With SMS-Magic business solutions allowing you to start messaging over WhatsApp, it is simple to connect with users with the most popular chat app. WhatsApp commercial messaging is for communications such as through order, transaction, and appointment information, delivery and shipping notifications, product, and service updates. For further information please [click here](#).

6. Compliance Enabled Facebook Messaging

With 2.5 billion monthly active users, Facebook is poised to be the world's most popular business messaging channel. With SMS-Magic business solutions allowing businesses to start messaging over Facebook, they would be able to easily connect with users with the most popular chat app globally. Customers can get started with Facebook Messaging just by connecting Facebook Business Page with SMS-Magic. For further information please [click here](#).

7. Multichannel Compliance

SMS or messaging compliance is a highly regulated industry. The applicable laws depend on the place of business, destination country of your recipients, and the specific industry you are in. Telecom laws apply uniformly to any SMS sent in that particular country.

Businesses are required to obtain specific consent before messaging their prospects and customers. Each regulation such as Telephone Consumer Protection Act (TCPA), General Data Protection Rights (GDPR), Canada's Anti-Spam Legislation (CASL), or California Consumer Privacy Act (CCPA), California, or the new California law, makes it mandatory for each business to obtain specific consent.

Just like SMS, all other messaging channels such as WhatsApp and Facebook have also defined specific guidelines to capture and manage user consents for driving high-quality conversations between people and businesses. Businesses will have to adhere to region-specific regulations along with channel-specific guidelines. As we may expand our channel support with additional channels such as Line, etc., we will be improving our compliance configurations to be in sync with different channel-specific Business Policies and Terms on managing consents.

Considering all these region-specific messaging regulations as well as channel-specific guidelines, SMS-Magic has created an extensive framework that serves as a guideline for you to define:

- Who are you messaging and on which channel?
- What are you messaging and are you obtaining specific consent for that content?
- How are you obtaining channel-specific consent?

We advise you to consult your attorneys before deciding on choosing your consent options. For further information please [click here](#).

8. URL Shortening and Tracking

URL Shortening and Tracking feature allow users to shorten a URL thereby reducing the characters in the link and hiding the parameters which deter recipients from clicking on the links. Clicks on all Short Links created using SMS-Magic are tracked and the information such as time of the click, country, browser, and device type are synced to Salesforce.

Improvements

Below are the Improvements that we have added related to existing functionalities:

Sr No	Improvement Description
1	On a fresh install of the SMS-Magic converse package, users would have the ability to create converse apps by default. No extra steps would be needed.
2	Removed the char length restriction for compliance-related confirmation messages and auto appended messages.
3	Added an option to delete consent records captured in the consent object
4	Enabling users to create multiple Double Opt-in configurations based on content type.

5	Expire consent records after a certain time period to comply with local regulatory compliance.
6	Added an option to set Message sending limits in content type compliance configuration.
7	Added toggle button to TurnOff Compliance Module.
8	Added Converse Desk Performance enhancements such as Page Load time, Conversation Load time, # of Conversations
9	Added error logs to notify any unexpected application issues.
10	A better alerting mechanism with sound on the Converse desk for every incoming SMS.

Known Issues

Sr No	Known Issues Description
1	Two SMS-Magic Converse tabs are shown for selection in the drop-down where we can add new tabs.
2	Value in Decimal up to 2 digits not shown on the tooltip for Consent status Dashboard
3	Users are not allowed to de-associate/remove mapping against content type once a content type value is selected for a template. Though users can update the content type.
4	The App Name 'SMS-Magic Interact' in the Menu of classic and In lighting is not getting updated to 'SMS-magic converse' when we upgrade from lower version to 1.61 and above package version
5	Unable to run SMS campaign and bulk SMS in lightning view from Safari browser
6	Mismatch in the total available and total allocated license on Salesforce and Portal respectively.
7	User is unable to access features with help of License Manager on upgrading to Winter2021 for versions < 1.60
8	[Consumed License count not updated after plan change]().

Version 1.64

Overview

This release focuses on the following features:

1. Global Navigation

A New Navigation allows you to interact with all of your application modules from a single interface. All the horizontal navigation tabs are now available in simplified vertically arranged navigation. This menu will be available under the single navigation tab 'SMS-Magic Converse' inside the

SMS-Magic Converse application in Salesforce.This new navigation helps increase user adoption and quickly provides users the ability to easily access the most relevant features and data from a single source. This feature will be available in the Salesforce Classic and Salesforce Lightning version. Feature accessibility will remain as per plan and profile/user-level permissions assigned. For further information please [click here](#).

2. Do-It-Yourself (DIY)

Now you can install the SMS-Magic Converse App into your Salesforce org all by yourself with this DIY feature. This feature gives you an ability to choose and assign sender IDs on your own, Auto-configuration of messaging objects and an auto-assignment of a default sender ID based upon the destination county selection you make, so that you can get message sending experience right away with 'Send a Test Message' option in the first registration step. For more information please [click here](#).

3. Analytics Dashboards

The global navigation bar gives you a single tab to display different dashboards and charts.

The 4 dashboards included in this section are as below.For more information please [click here](#).

1. Consent Status dashboard

The Consent Status dashboard displays the overall consent status at the org level. It shows the number of known contacts against configured messaging objects who have provided the consent to receive messages. The displayed data is fetched in real-time.

2. Opt-out Analysis

The Opt-out Analysis dashboard shows the analysis for opted out numbers based on different dimensions, such as numbers opting out from different types of content, messaging sources, etc. The displayed data is not real-time. It is last updated based upon the batch processing schedule time that you have configured.

3. Compliance Enforcement

The Compliance Enforcement dashboard displays information about the compliance enforcement metric with respect to the number of times the opt-out compliance was enforced and sending of messages was blocked. The displayed data is not real-time. It is last updated based upon the batch processing schedule time that you have configured.

4. Agent Productivity

The Agent Productivity dashboard is visible to administrators only. The admin can view an agent's progress based on conversation status, response time, pending replies from the agent, and customers. The measurements are filtered

based on the owner of the conversation and represented in a tabular format. The displayed data is not real-time. It is last updated based upon the batch processing schedule time that you have configured.

4. Email to text

Email to text service is an extension to inbound message notification via email feature. It is provided for customers to easily reply to inbound messages without having to log in to Salesforce.

A sales or service rep would get alerted via an email whenever a new incoming message is received from a customer. Until now, they had to go to Salesforce to reply to these inbound messages. With an Email to Text feature, your sales/service rep can reply to inbound messages via an email. These SMSs will get logged under appropriate objects such as a lead, contact as per your org setup. These SMS replies will also get attached to an ongoing conversation.

It would save significant time for your reps from switching between email & salesforce app and also increase their productivity. It would also increase customer satisfaction as they will get quick responses from your reps.

We have given the option to configure this feature globally, or specific to senderId. Users can reply to the notification received over an email using their email software such as Gmail & Outlook clients. SMS-Magic will further send the same message as a text via the same channel, using the Sender ID on which the notification was received. This functionality will work with SMS, WhatsApp as well as the Facebook channel. For further information please [click here](#).

5. WhatsApp Messaging

With 1.5 billion global users and end-to-end encryption, WhatsApp is poised to be the world's most powerful business messaging channel. With SMS-Magic business solutions allowing you to start messaging over WhatsApp, it is simple to connect with users with the most popular chat app.WhatsApp commercial messaging is for communications such as through order, transaction, and appointment information, delivery and shipping notifications, product, and service updates.For further information please [click here](#).

6. Facebook Messaging

With 2.5 billion monthly active users, Facebook is poised to be the world's most popular business messaging channel. With SMS-Magic business solutions allowing businesses to start messaging over Facebook, they would be able to easily connect with users with the most popular chat app globally. Customers can get started with Facebook Messaging just by connecting Facebook Business Page with SMS-Magic. For further information please [click here](#).

7. Multichannel Compliance

SMS or messaging compliance is a highly regulated industry. The applicable

laws depend on the place of business, destination country of your recipients, and the specific industry you are in. Telecom laws apply uniformly to any SMS sent in that particular country.

Businesses are required to obtain specific consent before messaging their prospects and customers. Each regulation such as Telephone Consumer Protection Act (TCPA), General Data Protection Rights (GDPR), Canada's Anti-Spam Legislation (CASL), or California Consumer Privacy Act (CCPA), California or the new California law, makes it mandatory for each business to obtain specific consent.

Just like SMS, all other messaging channels such as WhatsApp and Facebook have also defined specific guidelines to capture and manage user consents for driving high-quality conversations between people and businesses. Businesses will have to adhere to region-specific regulations along with channel-specific guidelines. As we may expand our channel support with additional channels such as Line, etc., we will be improving our compliance configurations to be in sync with different channel-specific Business Policies and Terms on managing consents.

Considering all these region-specific messaging regulations as well as channel-specific guidelines, SMS-Magic has created an extensive framework which serves as a guideline for you to define:

- Who are you messaging and on which channel?
- What are you messaging and are you obtaining specific consent for that content?
- How are you obtaining channel-specific consent?

We advise you to consult your attorneys before deciding on choosing your consent options.For further information please [click here](#).

Improvements

Below are the Improvements that we have added related to existing functionalities

Sr No	Improvement Description
1	On a fresh install of SMS-Magic converse package, users would have an ability to create converse apps by default. No extra steps would be needed.
2	Removed the char length restriction for compliance related confirmation messages and auto appended messages.
3	Added an option to delete consent records captured in consent object
4	Enabling users to create multiple Double Opt-in configurations based on content type.
5	Expire consent record after certain time period to comply with local regulatory compliance.
6	Added an option to set Message sending limits in content type compliance configuration.

7	Added toggle button to TurnOff Compliance Module.
8	Added Converse Desk Performance enhancements such as Page Load time, Conversation Load time, # of Conversations
9	Added Error Logs on Home Page for initial troubleshooting.
10	A better alerting mechanism with sound on Converse desk for every incoming sms.

Known Issues

Sr No	Known Issues Description
1	New message button having dependency on the contextual setting in the utility bar.
2	When the user selects a filter of "30 days" in Analytics dashboards, System shows data corresponding to '7 days' filter on hover action at UI data points
3	Two SMS-Magic Converse tabs are shown for selection in the drop-down where we can add new tabs.
4	Value in Decimal up to 2 digits not shown on the tooltip for Consent status Dashboard
5	Users are not allowed to de-associate/remove mapping against content type once a content type value is selected for a template.Though users can update the content type.
6	The App Name 'SMS-Magic Interact' in the Menu of classic and In lighting is not getting updated to 'SMS-magic converse' when we upgrade from lower version to 1.61 and above package version
7	Unable to run sms campaign and bulk SMS in lightning view from Safari browser

Version 1.60

Overview

Release 1.60 was mainly focused on following things:

1. Changes related to prebuilt dynamic dashboard

SMS magic 1.59 version has prebuilt dynamic dashboards giving insights on compliance, team and agent productivity etc. In salesforce, every enterprise edition organization can have up to 5 dynamic dashboards and unlimited edition organisation can have up to 10 dynamic dashboards.

Based on the organisation edition, customers were facing issues with installation of 1.59 version where the dynamic dashboard limit was exceeding. So through release 1.60 we are taking out the packaged dynamic dashboards outside of the main package and giving it as an add-on for those who need it / who's org can support it. [To get the add-on package version link, please

reach out to us at care@screen-magic.com]

2. Patch for Salesforce Critical Update rolled out on February 17, 2020

Critical update has been rolled out with the Spring '20 release on January 3, 2020 and made globally available from February 17, 2020. After the critical update, users without the Customize Application permission can no longer access custom settings which will impact the SMS-Magic capabilities like sending messages, receiving incoming messages, etc. Through 1.60, we are giving a SMS-magic packaged permission set "SMS Converse conversation user" to give access to only SMS-magic custom settings which you can assign to your users. You can read the [detailed instructions here](#) or please reach out to us at care@screen-magic.com with any questions you might have.

3. Custom Apex Code Injection Capability

Sender ID selection, template selection and incoming lookup selection can now be customised as per business process with custom development.

4. Bug fixes & Improvements

Through 1.60, we are coming up with a few more bug fixes & enhancements as listed below.

Improvements

1. Bulk SMS component load time improvements.
2. Optimization for composer rendering on Send SMS button click.
3. Auto reload of Conversations and ConversationView Components on community edition with push topics dependency removed.
4. MMS file size limit increased to 2.5MB from 500Kb.
5. The converse app is made available for all from 1.60 version onwards.
6. Application available for use on Salesforce Professional Edition.
7. New compliance support for the campaign manager. For more information [click here](#).
8. Salesforce API version updated to 1.46, allowing user to add all objects in message configuration under converse settings.

Bugs

1. Fixed issue with expanded view of conversation component on alert notification of Incoming Message.
2. Fixed issue with facebook's alphanumeric sender ID formatting on conversation view.
3. Fixed issue with Conversation Id creation and Unformatted number population for Line & Facebook channel.
4. Fixed new message UI to populate correct data in record detail page.
5. Fixed issue with record owner sender id not displayed in Bulk Campaign in Converse App.
6. Fixed issue with Utility bar where the message is displayed to two records.
7. Fixed issue with UI while sending single SMS when country set to all for

MMS.

8. Fixed issue regarding only the text from the Template getting sent when Template is used in Campaign and extra text is added.
9. Fixed issue regarding missing fields in conversation user permission set.

Version 1.59

Overview

The SMC 1.59 Release is focused on helping users adopt a more detailed yet simplified approach in configuring compliance settings. It includes all essential TCPA guidelines in the new compliance features.
The release also includes a Pricing plan with updated features to accommodate different customer requirements. The new pricing plan offers multiple options for the user to make an informed purchase decision depending on their exact business requirement.
The Release 1.59 provides the following updates:

Converse Settings

A few productivity features added to the desk for agents to quickly find, respond and update CRM with conversations details. Refer to below enhancements added with SMC 1.58 release.

1. Enhanced Compliance Configuration

As an Admin user, you can ensure that your business users are able to send messages that will reach only those customers who have opted for them, thus preventing message loss due to unwanted spamming. The current compliance features are completely aligned with TCPA requirements. They help your business record consent, give your customers the ability to change or modify their consent and enhance your CRM with the right tools to apply a different kind of consent for a different segment of customers.
 [Read More](#)

2. New Lookup fields

As an admin user, you can ensure that conversation views, in Converse Desk, provide additional information for conversation name and record number on an ongoing conversation.
 [Read More](#)

3. Configure new CRM Action

As an admin user you can configure CRM actions to ensure that a new contact and new case is created from an unknown number.

[Read More](#)

4. License Management Display

As users you will now have more clarity on the total number of licenses available, those consumed and those remaining to be assigned. This helps you to plan license management more effectively in order to meet your usage requirements.
 [Read More](#)

Bulk Message Interface

The Bulk message interface used from multiple modules within SMS-Magic Converse is equipped to provide compliance status updates. Read below to know more.

1. Compliance Mode Display

While sending messages, you can view the consent mode applicable for the Bulk Message interface. It derives details from the customer's consent status and provides information on whether you will be able to send out messages to the selected recipients.
 [Read More](#)

Converse Templates

Templates are now tagged with compliance status to provide the best experience for users who will be using them to send out messages.

1. Assign Templates with Content Type

While adding or editing templates, you can now tag it with a content type for which it will be used. Once tagged the compliance status assigned to the content type is also linked to the template. This will be available only to customers who have enabled the new Converse Compliance feature.
 [Read More](#)

Converse Desk

Sending messages from Converse Desk now includes the viewing of consent status and the flexibility to include PDF attachments.

1. Compliance Status Display

Users need to understand the exact consent status of every contact/lead/opportunity prior to sending out messages. This helps to ensure that their messages will reach the inbox of the intended recipient and not violate compliance regulations. In the 1.59 release, the Converse Desk displays a descriptive summary of the consent status stating the possible reasons why the user will or will not be able to send messages to the recipient.
 [Read More](#)

2. PDF and MMS File attachments

Sales representatives can now attach MMS as well as PDF files with their messages for quicker closure from customers. In case the file size is not permitted by providers, SMS-Magic Converse provides them with the flexibility to convert the message into an SMS. The PDF or MMS file will be added as a link within the SMS text.

Permission Management

SMC 1.59 release has included new permissions to ensure stronger process adherence.

1. New Compliance Configuration Permission

Adhering to message Compliance guidelines is significantly important. It is critical, therefore, that users should not be given free access to modify the new compliance settings. SMC 1.59 release will enable Admins to provide access to selected users, through the Compliance Configuration setup permission, to view and edit the Compliance settings to avoid any possibility of violation.

Pricing Plans

Do you want to ensure a holistic understanding of the full feature benefits prior to availing the full version? Learn about our enhanced pricing plans launched in Release 1.59 that helps you explore the product in details prior to purchasing a plan.

1. Enhanced Pricing Plan

As a business user, you can avail an enhanced pricing plan that will help you manage your trial extensions, update billing plans, view current plan and balance, and purchase plan add-ons. Additional security is ensured by gating specific plans. All available plans are displayed dynamically based on your account type to help you experience a smooth buying journey.

Converse Analytics

Analytics is now part of the SMC 1.59 release.

1. Dashboards for Message Analytics

Dashboards designed for Agents and Managers will now be available for viewing message analytics.
 [Read More](#)

Help Access

Help topics are now within easy reach. Read about how the 1.59 Release enables you to access the application Help to ease your app adoption.

1. Access to Help Documentation

Users can now access Help documentation from within the SMS-Magic Converse Interface. Help icons have been placed in visible locations to ensure users can access the relevant support when needed.

KNOWN ISSUES

SERIAL	SUMMARY
1.	Irrelevant Information is showing on Bulk SMS page(PFA)
2.	Template – Cannot cancel template if navigating from Content Type screen
3.	For Alpha Sender Id compliance is not getting followed properly
4.	Browser notification not consistent
5.	Once I create new contact from a conversation, It doesnt automatically relate conversation with Contact.
6.	For new conversation view user is unable to send the sms for opt in record from opt out record.
7.	msg sent popup is displayed for 0 numbers.
8.	Notification – Correct message is not displayed in Notification
9.	Notification – When replied to a notification it creates a new conversation
10.	Not able to access Converse App on Campaign Manager 1.46(Winter20)
11.	Not able to add Template in Campaign Manager 1.46(Mac issue)
12.	Not able to add object in MOC on package upgradation from 1.48 to 1.59 (Managed Package) AND converse setting steps are still incomplete
13.	Converse Home page is breaking and JS error is displaying at bottom
14.	Not able to Create Converse Action and Run Bulk Action with Record Owner SenderId
15.	SenderID as "Auto" not getting populated for Auto Reply and Notification to User in Converse App
16.	Upgrade – Unable to upgrade from 1.51 to 1.59.2 package
17.	Upgrade – For Unknown incoming number, mobile no is not populated while replying from Converse Desk
18.	After up-gradation, senderId is changing
19.	Not able to add note from page which opens from browser notification. It works from converse desk though.
20.	Character limit feature is not working as expected
21.	Message Credits are not properly reflected in Customer Portal
22.	While doing setup in SF- Company name is not getting added in DB after signup.

23.	For sandbox account , production account message credits are displaying
24.	Existing SMS-Magic Customer is able to complete buy.sms-magic.com Journey
25.	Available phone number count is not getting updated on Admin portal after selecting Basic Trial plan / Standard Trial Plan.

Version 1.58

Overview

The SMC 1.58 release is focused mainly on the converse desk improvements and to help our customers use the Converse Desk for their existing business process seamlessly.

The use of converse desk can be totally different for sales & support agents. Also, conversations to be displayed in the desk based on logged-in users can be a little taxing for Salesforce admins to configure.

The new converse desk gives you the flexibility to configure the desk depending on who the end-user is and render the front-end with the relevant details and capabilities.

Converse Desk

A few productivity features added to the desk for agents to quickly find, respond and update CRM with conversations details. Refer to below enhancements added with SMC 1.58 release.

1. Assign Conversations in Bulk on Converse Desk

As a manager, you can assign conversations of an agent, who is on leave, to another. You can select multiple conversations at one go and save significant time as you no longer need to assign conversations individually.

You can also apply a filter to select and assign similar conversations to other users.

Read More

2. Marking Multiple Conversations as Read or Unread

This will help you keep your inbox sorted. Even though conversations in your Inbox have been read, you may want to highlight some of them as you may want to visit them later. This feature helps you mark all those conversations as unread. Similarly, you can also mark unread conversations as read if you do not feel they are significant for your business.

[Read More](#)

3. Create Lead from Unknown Number

If you are using Texting to generate leads, this will help you to quickly
create lead from conversations. It eases the process to create a new lead
from an unknown number.

[Read More](#)

4. Custom Inbox

As part of the Sales/Marketing/Support team you may need to customize your
inbox to receive specific messages relevant for your business. You can also
build filters to categorize messages and get a customized view to respond to
conversations that are left open by other members of your team. Team leads
can also use the custom Inbox to respond to cases that team members have not
responded to.

[Read More](#)

5. Enhanced Message Box Display Screen

As a business user, you now have better visibility of the Sender ID, phone
numbers and templates to be chosen while composing messages in the Converse
Desk. The width of the drop-down list for SenderId, phone numbers and
templates have been increased to view the complete details before sending the
message.

[Read More](#)

6. Toggle Message View in Converse Desk and Utility Bar

You can now view individual record's detail from within the Converse Desk.
The Message Reply panel on the Converse Desk and the utility bar displays the
toggle button that helps you switch between individual record's detail view
and the All message view. You can also click **Reset** to revert to the default
view.

[Read More](#)

7. UI Enhancements in Converse Desk

You can now use improved UI features in the Converse Desk that has enhanced
its usability.

[Read More](#)

8. Internal Note

As a manager, you can now write and share notes internally with your team
from within the Converse Desk. These notes are visible only to members of
your team or to other users within your organization. These will, however,
not be visible to your customers.

[Read More](#)

9. Refresh option on Converse Desk

You can now easily be aware of new incoming/outgoing messages by simply refreshing your Converse Desk view.

[Read More](#)

Utility Bar

Quickly refer to the recent conversations for your leads or contacts from any page in Salesforce before who take the next action. Please note this capability is supported in Salesforce lightning only. Refer to below enhancements added with SMC 1.58 release.

1. Contextual Conversations

You can now focus on conversations that are contextual to the record you are viewing. Following are a few examples:

- When on a lead record, the desk displays all conversations related to a lead.
- When on a contact record, the desk displays all conversations related to a contact.
- When on an opportunity record, the desk displays all conversations related to opportunity.

[Read More](#)

2. Enhanced Converse Desk on Utility Bar

You can avail the following benefits with the enhanced Converse Desk on the Utility bar:

- View the search results by applying a contextual filter. The record, selected as the contextual filter, is highlighted to indicate that it is in active use. You will continue to receive notification for all incoming messages irrespective of the filter being used.
- You can also reset the contextual filter.
- Revert to viewing All records.

[Read More](#)

Converse Settings

Looking to customize the converse desk as per your existing business process? Refer to below enhancements added with SMC 1.58 release.

1. Configurable Converse Desk Settings

As an Admin you can now configure certain Converse Desk settings to help in making the Converse Desk more intuitive. These include the following:

- CRM Actions — Can select which actions the user can have with certain message objects.
- Internal Note — Enable users to send private notes to each other in the same organization during a conversation.
- Desk Themes — Select color theme for the Converse Desk and preview the theme before applying the theme.
- Messages — Automated messages can be given a different color background. Incoming and outgoing messages can contain additional information by selecting the options in a separate pop up window.
- Conversation Topic — Customize the view of the topic of the conversation. The Admin configures the topic of the conversation to display additional information.

[Read More](#)

2. Converse Desk Layout

As an admin, you can now configure the layout of the Converse Desk layout for specific user roles and profiles in the organization. The following can be configured:

- The color or pattern for the Desk theme.
- The**Conversation**topic view
- Color theme displayed for Automated messages in the conversation flow.
- Information to be displayed under each message bubble.
- Information to be displayed in the information lookup field.

The settings under the **General Settings** tab.

[Read More](#)

3. Enable Canned Responses

As an admin user, you can enable users and profiles to send canned responses or a template-based response. This disables users from creating custom messages. You can also add specific users and profiles to send canned responses.

[Read More](#)

4. Character Limit Restrictions for Converse Desk Messages

As an Admin user, you can restrict the number of characters to any number between 1-700, in all outgoing messages sent from the Converse Desk. Messages longer than that, if required, need to be sent using templates only.

[Read More](#)

5. New Custom Permissions in Admin Settings

As an Admin user, can view new custom permissions in the Custom Permissions tab under Permission Management.

[Read More](#)

Converse Apps

You do realize how critical it is to avoid sending out duplicate messages in your campaigns. The improved SMC 1.58 release ensures that you are given the flexibility to avoid duplication.

[Read More](#)

1. Eliminate Duplicate Messages

You can now ensure that customers are not spammed with duplicate messages while executing campaigns and bulk actions from Converse Apps.

[Read More](#)KNOWN ISSUES

Serial	Issues
1.	Records are created simultaneously in both SMS History and Error Logs even when permissions for "MMS type" and "MMS URL" from the MMS Detail Field-level Security are removed after the user starts running the campaign.
	Not Responded Filter appears within the Not Responded by Customer list view.
2.	Toaster Messages in Converse Settings display even for settings that are not modified.
	In Lightning components the alternative text is blank for spinner.js.
3.	The count of characters configured for messages being sent is not displaying correctly.
4.	Following inconsistencies exist in Utility Bar Behavior enhancements. Notification for incoming messages (the dot near the recipient name) is not consistently visible.Notification for incoming messages (the dot near the recipient name) should disappear only user moves to the All filter.Pagination should appear at the bottom of the page.
5.	The filter icon in the utility bar on the record detail page, fails to navigate user to to the relevant contextual conversation.
6.	Utility bar UI is not displaying conversations as desired.
7.	The Home Page Layout configuration page displays two classic side bar components.
8.	The Converse Desk Theme preview is not updated as per the currently implemented Desk UI.
9.	Unicode characters is not considered as plain text in Salesforce.
10.	"SMS Magic" should be replaced with "SMS-Magic" throughout the interface.
11.	Outgoing message, from an unknown number for which there is an incoming message already present, is creating a new message instead of being linked to its predecessor.
12.	The mobile number last used to send messages is not being displayed as the default number.
13.	Template is trimmed to character limit defined for the campaign and prevents use of the complete version.

14.	The Back button displayed on the message flow window of Contact Records is not functional.
15.	Standard Profiles for which Internal Note/Character counts have been configured are displayed as PT1, PT2 and so on instead of the profile name.

DEPRECATED COMPONENTS

Serial	**Component**
1.	force:recordView

Version 1.55

Overview

 The information in this release notes is focusing on security of the application.

Converse Template

The New Template page user interface has been changed to match the look and feel of Salesforce Lightning Experience. This UI is the same for the Salesforce Classic.DEPRECATED COMPONENTS

Features	Components	Impact	Workaround
Incoming	src/pages/ActionOnIncoming.page	Cannot set or edit existing action.	Previous Settings page has been removed. Users must set up Flows to achieve the same.
Incoming	src/pages/IncomingAlertConfigurationPage.page	Cannot set or edit existing action.	Users must set up Flows to achieve the same. Alternatively, the user can use Apps or sender ID notification.
Incoming	src/pages/IncomingLookupPage.page	Cannot set or edit existing action.	Users must move to new logic.
Incoming	src/pages/OptoutSettingsPage.page	Cannot set or edit existing action.	Users must set up Flows to achieve the same. Alternatively, the user can use Apps.
Incoming	src/classes/BulkIncomingRecordsHandlerBatch.cls	Bulk Incoming if received can hit governor limits.	Portal is set to send one incoming at a time.
Settings	src/pages/SMSMagicConfig.page	Cannot view/edit settings.	User must use Converse Settings tab.

Help	src/pages/SMSMagicHelp.page	Cannot view help page.	User must use Converse Settings tab.
Default Sender	src/pages/DefaultSenderIdPage.page	Cannot set/edit default senders.	Users must move to Settings page.
Default Sender	src/classes/DefaultSenderIdController.cls		
Feedback	src/pages/FeedbackPage.page	Users cannot submit feedback now.	No workaround.
Endpoint	src/classes/EndpointConfigController.cls	Cannot set/edit endpoint.	Use new protected settings to set endpoints.
Outgoing	List View Configuration	Cannot use the old List View configuration.	Users must migrate their existing schedules to Bulk Action in Converse App.
Conversations	Favorite functionality	Removed Favorite functionality for Conversations.	The user can no longer mark a conversation as a favorite in the Converse Desk.