SMS Magic Converse Package Upgrade Guide

Note:

To upgrade your existing Converse App package to the latest version 1.72, you need to connect with the customer support team who will then execute the required steps manually.

1. Upgrade from version 1.58 to 1.72

Here are the steps that you need to follow to upgrade your Converse App Package from version 1.58 to the latest version 1.72:

You can choose to install/upgrade your Converse package for Admin users, for specific users, or for all users.

- The status of the account on the portal should be 'Payee' and not 'Trial'
- Add static resource (name = SMSMagicUpgradeCheck, Cache Control = Public , File = any)

- All users should have the SMS Magic permission set assigned. Check if the respective user is assigned an SMS Magic permission set.

Once the required licenses are assigned, make sure that the permission sets are assigned too. If the permission sets are not assigned, users will not be able to access SMS Magic objects.

- Then upgrade the package to 1.72

- After upgrading the package to the 1.72 version, run data migration scripts for Converse Desk

- Then go to the Converse Setting tab and reset the OAuth/Sync OAuth/Retry in the registration step

- In the plan selection section, make sure that the ‘Start your conversation’ plan is selected

- This completes the package upgrade from version 1.58 to the latest version 1.72

NOTE: Please reach out to care@screen-magic.com for any assistance

2. Upgrade from version 1.48 to 1.72

Here are the steps that you need to follow to upgrade your Converse App Package from version 1.48 to the latest version 1.72:

- The status of the account on the portal should be ‘Payee’ and not ‘Trial’

- Add static resource (name = SMSMagicUpgradeCheck, Cache Control = Public , File = any)

- All users should have the SMS Magic permission set assigned

- The upgrade from older version 1.48 to 1.68

- After upgrading, run data migration scripts (one by one)

- Then go to the Converse Setting page and reset the OAuth/Sync OAuth/Retry in the registration step
- In the plan selection section, make sure that the ‘Start your conversation’ plan is selected
- This completes the package upgrade from 1.48 to 1.68
- Now follow the steps to upgrade the package from version 1.68 to the latest version 1.72
- After upgrading, run data migration scripts (one by one)
- After upgrading the 1.72 manage package, you should go to Converse settings
- Go to the Converse Setting page and reset the OAuth/Sync OAuth/Retry in the registration step
- In the plan selection section, make sure that the ‘Start your

conversation’ plan is selected
- This completes the steps to upgrade Converse App package 1.48 to 1.72

NOTE: Please reach out to care@screen-magic.com for any assistance

3. Upgrade from version 1.55 to 1.72

Here are the steps that you need to follow to upgrade your Converse App Package from version 1.55 to the latest version 1.72:

- The status of the account on the portal should be ‘Payee’ and not ‘Trial’

- Add static resource (name = SMSMagicUpgradeCheck, Cache Control = Public , File = any)

- All users should have the SMS Magic permission set assigned
- Then upgrade the package version 1.55 to the latest version 1.72

- After upgrading, run data migration scripts (one by one)

- Click on the Preview button as shown in the above screenshot
- Refer to the Data Migration For Converse Desk steps above

- Then go to the Converse Setting tab and reset the OAuth/Sync OAuth/Retry in the registration step
- In the plan selection section, make sure that the ‘Start your conversation’ plan is selected
- This completes the package upgrade from version 1.55 to the latest version 1.72

NOTE: Please reach out to care@screen-magic.com for any assistance

4. Upgrade from version 1.68 to 1.72

Here are the steps that you need to follow to upgrade your Converse App Package from version 1.68 to the latest version 1.72:

- Run the data migration steps (same as mentioned in the above versions)
- After upgrading the 1.72 manage package, navigate to the Converse settings tab
- Go to the Converse Setting page and reset the OAuth/Sync OAuth/Retry in the registration step
- In the plan selection section, make sure that the ‘Start your conversation’ plan is selected
- This completes the package upgrade from version 1.68 to the latest version 1.72

NOTE: Please reach out to care@screen-magic.com for any assistance

Upgrade your old version to the latest SMS Magic Converse package and enjoy more control over your conversations

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.

By upgrading to the latest version, here is what you will get:

- Personalized permission sets
- Personalize Your Workspace With Conversation Component Resizing
- Manage Multi-Media Conversations Smarter
- Store Multimedia Files In Salesforce Storage
- Associative Media Files With Salesforce Records
- Find your conversation flows easily by searching your Converse app with name or PA-Key
- Track Your Conversations From Start To End
- On-demand syncing
- Managing OAuth when it is revoked
- Track all SMS-Magic user activity in one place
- Coordinate better with the SMS-Magic support team to resolve issues
- Spot new messages from the app icon notification badge

Create Conversive Buttons

Overview of Conversive Buttons

With embedded messaging, you can get high-intent inbound conversations from everywhere and create a conversation-first experience. Embedded messaging guides prospects throughout the conversation path from everywhere by adding messaging entry point to your emails, web pages, hoardings, pamphlets, and much more. direct and personal conversations when your prospects and customers need you the most – that is when they are seeking more information, making up their minds, and evaluating service providers like you.

SMS-Magic makes it easy for you to connect with your audience through personalized messaging via their preferred channels, including text messaging, WhatsApp, and Facebook Messenger. Conversive buttons is the very first step towards embedded messaging. Conversive buttons help businesses to deliver value faster by engaging with customers across the phases of attracting, engaging, onboarding, and support.

Companies would be enabled to invite customers to converse with them across websites, SMS & WhatsApp channels. This will help them get started with messaging quickly and get maximum value from it by being reachable to their customers on their favorite messaging channels.

How to Configure Conversive Buttons

To configure conversive buttons follow the steps below:

- Login to the Customer Portal using valid credentials, and the following home page of the Portal will appear:

The conversive buttons option will be available in the 'Settings' drop-down list only to the users to whom the relevant license is assigned.

- Click on the 'Settings' drop-down as shown in the image below to access the conversive buttons settings section:

- The conversive buttons settings page will appear:

Here you can edit or deactivate the conversion buttons that you might have already created, by clicking on the three dots on the right of each button.

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

The new conversive button creation section is divided into two parts namely, Channel & Related Information and Advanced Settings. The Channel & Related Information section is mandatory, whereas the Advanced Settings section is optional. The Button Preview section on the right gives a preview of the button as per your configuration.

Channels & Related Information section

1. Enter the button name (combination of alphanumeric and special characters) in the 'Button Name' field
2. Select one or more channels that you want to display with the conversive button. You can opt to disable the channels. Once you select the channels, they will appear in the preview section.
3. As per the channels selected, enter the relevant information in channel-specific fields
4. In the case of SMS as the channel, the default Sender ID will be shown.

Select the associated visitor countries. We have 1 Sender ID which will be selected as the default Sender ID for all locations and we can add more Sender IDs country-wise. The SMS pre-filled message is nothing but the keyword or phrase that you want your visitors to start a conversation with, for instance, ‘Hi’, ‘Hello’, etc.

5. For WhatsApp, there is no associated visitor countries selection option. The WhatsApp pre-filled message is nothing but the first keyword that you use to start your conversation, for instance, ‘Hi’, ‘Hello’, etc.
6. Enter a greeting message that you want to be displayed to the user with the conversive button
7. Under the ‘Publish Your Button’ section, enter the domain for the embedded script. The domain is nothing but the website where conversive buttons will be hosted. If the main domain URL is added, sub-domains will be covered under it, and the button script can be embedded into sub-domain page URLs.
8. The ‘Display’ drop-down indicates on what all devices the conversive button will be displayed, for instance, Desktop, Mobile, or Desktop and Mobile.
9. After entering details in all fields, click on the ‘Generate Script’ button. Once the script gets generated, the user needs to copy and paste it into the codebase
(HTML file like index.html). With this, the conversive buttons will be enabled at the location where the script was added to the codebase.

Advanced Settings section

Advanced Settings is an optional section, where the user can configure the button appearance, view, image, font color, brand color, size, and position.

- Click on the ‘Save’ button to save and create the conversive button.

Docs Design Guidelines (SMS-Magic) – **Do Not Delete This Post**

Table

Use Case	Which type of Template?	How to set up?
Thomas as service agents uses only predefined templates on case object with contact name from the contact object	Single Object Template	Setup case as Primary object and Name and Phone field on Contact ID -> Full Name in MOC

Henry is a recruiter and he wants to send job offers information to his students object records	Cross Object Template	Setup Students as Primary Object and Job Offers as information Object in MOC

```
<!-- wp:table {"hasFixedLayout":true,"className":"is-style-stripes"} -->
<table class="wp-block-table has-fixed-layout is-style-
stripes"><tbody><tr><td><strong>Use Case</strong></td><td><strong>Which type
of Template?</strong></td><td><strong>How to set
up?</strong></td></tr><tr><td>Lorem Ipsum Sit Amat </td><td>Single Object
Template</td><td>Lorem Ipsum Sit Amat</td></tr><tr><td>Lorem Ipsum Sit
Amat</td><td>Cross Object Template</td><td>Lorem Ipsum Sit
Amat</td></tr></tbody></table>
<!-- /wp:table -->
```

Alerts

Info: On the Message Notification panel, click the message to which you want to send a reply. The message reply panel appears. On the Message Notification panel, click the message to which you want to send a reply. The message reply panel appears.

Success: On the Message Notification panel, click the message to which you want to send a reply. The message reply panel appears. On the Message Notification panel, click the message to which you want to send a reply. The message reply panel appears.

Error: On the Message Notification panel, click the message to which you want to send a reply. The message reply panel appears. On the Message Notification panel, click the message to which you want to send a reply. The message reply panel appears.

```
/* For Alerts */

<div class="c-alert-message">
<p><strong>Change the bold text:</strong>Change the text</p>
</div>
```

Tags

New features / Bug fixes
Known Issues / Improvements
Deprecated Components

```
/* For Tags */

<div class="custom-label">
<span>New features / Bug fixes</span>
</div>
```

<div class="custom-label improvements">
Known Issues / Improvements
</div>

<div class="custom-label deprecated">
Deprecated Components
</div>

Videos

Add the youtube video caption here.
Add the vimeo video caption here.

Images

Image caption here.

Image cover example

Image Gallery

Code

```
# Python3 program to add two numbers

number1 = input("First number: ")
number2 = input("\nSecond number: ")

# Adding two numbers
# User might also enter float numbers
sum = float(number1) + float(number2)

# Display the sum
# will print value in float
print("The sum of {0} and {1} is {2}" .format(number1, number2, sum))
```

Audio

Sample audio files

File

Best Practices for Conversational Text Messaging in Financial Services (Whitepaper)Download

Note: Lorem ipsum sit amat.

Slideshare

What It Is Like to Be a Product Marketer from **Product School**

Caption here

Empower your teams with Experience Cloud

Bulk Messaging

Every text messaging initiative geared to drive sales typically would begin with a bulk messaging activity. You may need to address a group of people within a geographic region or community and send out a bulk message to all or a few of them from the list. Salesforce Experience Cloud users can trigger automated and bulk messages using list view and reports.

To send automated bulk messages using list view and reports to a few or all contacts, follow the below steps:

- Login to Salesforce using valid credentials
- From the 'Search' field, search for Contacts, as shown in the image below:

- On the Contacts page, select the 'All Contacts' option as shown below:

- Select the contacts to whom you want to send a bulk message and click on the 'Send Bulk Message' button on the right, as shown below:

- The following window will appear with all selected contacts. Here you can compose your bulk message and send it to all selected contacts.

- Before sending the message, you can preview it and also check if a particular contact has opted out. If yes, the message will not be sent to them. This enables you to edit the contacts before sending them a message.

Converse Desk

The Converse Desk provides you with an intuitive, easy-to-use interface. It features a familiar Inbox style, making it simple for users to begin messaging with little or no training. The Converse Desk also features intelligence that guides users to effectively manage and respond to any volume of messaging conversations.
For more details on how to use the Converse Desk, refer to the detailed guide.

Campaign Manager

The Campaign Manager is an add-on package to the SMS-Magic Converse app on Salesforce that allows you to run campaigns with standard Salesforce List View and Reports using converse templates. The Campaign Manager supports Salesforce Experience Users who can run campaigns with content provided by the business.
To know more about how to use the Campaign Manager, refer to the detailed guide.

Converse Templates

The Converse Template is a library of all the templates created for different purposes across multiple channels such as SMS, WhatsApp, Facebook Messenger, and Line. It helps you to easily manage and organize all templates that are necessary to conduct messaging campaigns. SMS-Magic helps Salesforce Experience users create their own templates before they decide to use them on 1-1 or bulk messaging.

To know more, refer to the detailed guide.

FAQ’s

Q.1. What is the difference between the LINE provider and the LINE channel?

Ans:- The LINE provider is the entity that offers the app for your channel. For example, you can use your own name or the name of your company or business as the provider. You can create providers in the LINE Developers Console.

The LINE Channels a communication path for using the functions provided by the LINE Platform in the services developed by the provider. You can create channels in the LINE Developers Console. Channels must have a name, description, and icon image.

Q.2. What is a LINE user ID?

Ans:- It is a unique identifier for users. Note that the user ID is only unique to an individual provider. The same LINE user will have a different user ID for different providers

- The value is generated by the LINE Platform, not by a user
- This is different from the LINE ID on LINE used to search for friends
- Different user IDs are generated based on the provider of the channel
- As long as channels have the same provider, regardless of whether the channel is for LINE Login or Messaging API, the same user ID is used for the users of the channels
- The user ID value is a string that matches the regular expression, U[0-9a-f]{32}

Q.3. How many channels can I create?

Ans:- LINE Developers Console allows developers to create up to 100 channels per provider.

Q.4. Does SMS-Magic Converse support send messages on LINE using Media Message Templates, Carousel, button templates?

Ans:- Right now, we only support free text messages, text templates, and media messages. We do not support Media Message Templates, Carousel templates, and button templates. But it is in our roadmap. We will update you once we start supporting it.

Q.5. Does SMS-Magic support language translation of LINE templates used for sending messages internationally?

Ans:- SMS-Magic, as well as LINE, do not take care of language translation. You will have to format messages into respective languages before using them via SMS-Magic.

Q.6. What is the maximum MMS file size supported for LINE Messaging?

Ans:- Maximum media file size supported over Line is 1 MB. We support only media messages of type Image, Video, and Audio, etc.

Q.7. How do I get to know the delivery status of a message sent on LINE?

Ans:- LINE only provides read receipts inside the LINE Official Account Chat Console. This information is not provided to business messaging platforms connected via API. So you won't be able to know the delivery status of messages sent via SMS-Magic.

Q.8 Will we be able to initiate an outgoing message to an unknown subscriber via LINE?

Ans:- No. You can only initiate an outgoing message via LINE in response to a user-initiated message to your LINE business channel.

Q.9 Is office hours/Business hours configured at the account level applicable for messages sent on the LINE channel?

Ans:- No, it will not be applicable.

Q.10 Is LINE messaging supported from Non-UI sources such as Web service, APEX API, Workflow, Email to text?

Ans:- Yes it is supported. You can check more details on this in the SMS-Magic developer's guide.

Q.11 Can we schedule LINE messages?

Ans:- Yes.

Q 12. Is there any file size limit applicable for receiving incoming Media Messages over LINE?

Ans:- No. You will be able to receive incoming Media messages over LINE of any size.

Q 13. Do we support broadcast messaging and narrowcast messaging over LINE?

Ans:- No. Right now we do not support broadcast messaging and narrowcast messaging. But it is in our roadmap. We will update you once we start supporting it.

Compliance with LINE Messaging

LINE guidelines on user consent

As per Line Messaging Guidelines, user consent is required for the LINE Official Account to be able to access user profile information, which includes display name, profile image, status message, and user ID.

Users who add your LINE Official Account as a friend or invite it to a chat automatically consent to their profile information being obtained.

SMS-Magic Compliance with LINE

Businesses capturing the recipient's explicit LINE opt-ins as per the LINE guidelines mentioned above can use our out of box compliance configuration feature to set up and enforce compliance checks for LINE outbound messages.

Note:

1.Whenever a LINE user will add your Business LINE Official Account as a friend or invite it to a chat, SMS-Magic captures this 'follow' request by the LINE user, and our out-of-box compliance feature will automatically create an opt-in consent record against the LINE user ID. You will then be able to respond to the user.

Channel Events:

- First, the Channel Events gets captured as shown in the image below. Under the 'Message' section, you can see whether the user has followed or unfollowed your channel.

Consent Creation:

- Then, based on the follow/unfollow status, opt-in and opt-out consent will be mapped and the Consent will get created against that channel:

Channel event in conversation UI:

- Then the same event will be seen in the conversation UI as shown below:

2.Similarly, upon receiving the un-follow request from the user, the system will automatically create/update the consent record associated with the LINE user.

3.System will apply a compliance check for all the LINE messages sent across all UI and non-UI sources considering the multichannel compliance configurations done at the org level.

Please click here to know detailed information on setting up Multichannel Compliance.

FAQ's

Q.1. What is the difference between the LINE provider and the LINE channel?

Ans:- The LINE provider is the entity that offers the app for your channel. For example, you can use your own name or the name of your company or business as the provider. You can create providers in the LINE Developers Console.

The LINE Channel is a communication path for using the functions provided by the LINE Platform in the services developed by the provider. You can create channels in the LINE Developers Console. Channels must have a name, description, and icon image.

Q.2. What is a LINE user ID?

Ans:- It is a unique identifier for users. Note that the user ID is only unique to an individual provider. The same LINE user will have a different user ID for different providers

- The value is generated by the LINE Platform, not by a user
- This is different from the LINE ID on LINE used to search for friends
- Different user IDs are generated based on the provider of the channel
- As long as channels have the same provider, regardless of whether the channel is for LINE Login or Messaging API, the same user ID is used for the users of the channels
- The user ID value is a string that matches the regular expression, U[0-9a-f]{32}

Q.3. How many channels can I create?

Ans:- LINE Developers Console allows developers to create up to 100 channels per provider.

Q.4. Does SMS-Magic Converse support send messages on LINE using Media Message Templates, Carousel, button templates?

Ans:- Right now, we only support free text messages, text templates, and media messages. We do not support Media Message Templates, Carousel templates, and button templates. But it is in our roadmap. We will update you once we start supporting it.

Q.5. Does SMS-Magic support language translation of LINE templates used for sending messages internationally?

Ans:- SMS-Magic, as well as LINE, do not take care of language translation. You will have to format messages into respective languages before using them via SMS-Magic.

Q.6. What is the maximum MMS file size supported for LINE Messaging?

Ans:- Maximum media file size supported over Line is 1 MB. We support only media messages of type Image, Video, and Audio, etc.

Q.7. How do I get to know the delivery status of a message sent on LINE?

Ans:- LINE only provides read receipts inside the LINE Official Account Chat Console. This information is not provided to business messaging platforms connected via API. So you won’t be able to know the delivery status of messages sent via SMS-Magic.

Q.8 Will we be able to initiate an outgoing message to an unknown subscriber via LINE?

Ans:- No. You can only initiate an outgoing message via LINE in response to a user-initiated message to your LINE business channel.

Q.9 Is office hours/Business hours configured at the account level applicable for messages sent on the LINE channel?

Ans:- No, it will not be applicable.

Q.10 Is LINE messaging supported from Non-UI sources such as Web service, APEX API, Workflow, Email to text?

Ans:- Yes it is supported. You can check more details on this in the SMS-Magic developer’s guide.

Q.11 Can we schedule LINE messages?

Ans:- Yes.

Q 12. Is there any file size limit applicable for receiving incoming Media Messages over LINE?

Ans:- No. You will be able to receive incoming Media messages over LINE of any size.

Q 13. Do we support broadcast messaging and narrowcast messaging over LINE?

Ans:- No. Right now we do not support broadcast messaging and narrowcast messaging. But it is in our roadmap. We will update you once we start supporting it.

Compliance with LINE Messaging

LINE guidelines on user consent

As per Line Messaging Guidelines, user consent is required for the LINE Official Account to be able to access user profile information, which includes display name, profile image, status message, and user ID.

Users who add your LINE Official Account as a friend or invite it to a chat automatically consent to their profile information being obtained.

SMS-Magic Compliance with LINE

Businesses capturing the recipient’s explicit LINE opt-ins as per the LINE guidelines mentioned above can use our out of box compliance configuration feature to set up and enforce compliance checks for LINE outbound messages.

Note:1.Whenever a LINE user will add your Business LINE Official Account as a friend or invite it to a chat, SMS-Magic captures this ‘follow’ request by the LINE user, and our out-of-box compliance feature will automatically create an opt-in consent record against the LINE user ID. You will then be able to respond to the user.

Channel Events:

- First, the Channel Events gets captured as shown in the image below. Under the ‘Message’ section, you can see whether the user has followed or unfollowed your channel.

Consent Creation:

- Then, based on the follow/unfollow status, opt-in and opt-out consent will be mapped and the Consent will get created against that channel:

Channel event in conversation UI:

- Then the same event will be seen in the conversation UI as shown below:

- Similarly, upon receiving the un-follow request from the user, the system will automatically create/update the consent record associated with the LINE user.
- System will apply a compliance check for all the LINE messages sent across all UI and non-UI sources considering the multichannel compliance configurations done at the org level.

Please click here to know detailed information on setting up Multichannel Compliance.

---

87. How to assign permission of SMS Magic app to user having salesforce license?

Refer to the section on SMS-Magic Converse Permission Details in the SMS-Magic Converse Guide for Salesforce Admin for more details on assigning permissions in SMS-Magic Converse.

Add and Assign Sender ID

With v1.64, we are giving users an ability to choose and assign Sender IDs on your own, of type 'long code' corresponding to the destination country selected. To procure and assign channel-specific Sender IDs or Shortcodes or toll-free numbers you will have to contact sales@sms-magic.com. To know more about bringing your own numbers/providers you can check details at link BYON (Bring your own Number) or BYOP (Bring your own Provider).

Add Sender ID

1. Add Sender ID

- Click on the 'Add SenderID' button

- If you have chosen a specific country as the destination for your messages, the country selection dropdown will be disabled
- Users can select number type as 'Long code'
- Select the Sender ID(s) from the list displayed on the page
- Click on the 'Save' button

2. For Destination Country= 'All'

- Click on the 'Add SenderID' button

- If you have selected the destination country as 'All ' in the Registration & Setup step from the Converse Setting considering you want to do messaging in multiple countries, the 'Add Sender ID' section allows you to choose a specific country; and on search, the associated country-specific Sender IDs will be displayed provided the number licenses for the selected country are available.
- You can select the Sender ID from the search result and click on the 'Save' button to get the Sender ID assigned.
- Repeat the same steps for the other destination countries where you want to assign Sender IDs.

3. Channel Type Assignment

On the Sender ID and Assignment section page, a table will display the 'Channel(s)' for associated Sender ID.

To procure and assign channel-specific Sender IDs or Shortcodes or toll-free numbers, you will have to contact sales@sms-magic.com. Our support team will help you with the required information and configuration from our end. The channel type associated with the Sender ID will be reflected in the Sender ID & Assignment table.

The available channel types are:

- Whatsapp
- Facebook
- LINE

4. Channel Type Assignment in Inbox

The Sender ID selection drop-down in the conversation view should display separate rows with Sender ID & channel information.

Assigne Sender ID

- Assign Sender ID

Once you complete the steps for adding a Sender ID, you then need to assign it to the users. Click on the ‘Assign Sender ID’ tab, the following page will appear:

Here, you can see the details such as user name, email ID, default Sender IDs, and assigned Sender IDs.

- Click on the checkbox beside the user name to select one or multiple users
- Click on the ‘Assign Sender ID(s) button. The following window will open:

- Select Sender ID, channel, or label from the ‘Sender ID’ dropdown field:

- Select the default Sender ID:

- Click on the ‘Assign’ button to assign the selected Sender ID(s)