

# **1. Can I use SFDC Campaigns for sending bulk SMS?**

Yes, SFDC campaigns can be used to send out bulk messages, but only through Contact and leads object.

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# **2. How do I see who responded to my campaign(s)?**

You can have a related list of Incoming SMS and SMS History object on the campaign module where the responses get attached and you can view the same on the respective campaign

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# **3. Can I run drip campaigns?**

Yes, you can run drip campaigns but as per the compliance settings.

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# **4. Can I run a survey?**

Yes, with the help of Converse Apps (which can be integrated with Salesforce Automation tool – process builder/ workflow),

you can configure and run Surveys.

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## **5. Can I pause & re-run a Campaign?**

No, You cannot pause the campaign in between and rerun the campaign.

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## **6. Can I reuse a campaign on a future date?**

No, If you have already ran the campaign then you need to create a new one.

If the campaign is still scheduled for future and you need to change the date then that is possible.

Just need to edit the campaign and change the date,

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## **7. Can I round-robin incoming SMS to my agents?**

Yes, you can round-robin incoming SMS to your agents

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## **8. Can I reassign messages if one of my agents is absent?**

Yes, you can reassign the SMS conversations from the Converse Desk in Salesforce

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## **9. How do I know what agents are online?**

We have our agents available 24\*5 on intercom. You can go to our official website and click on the message icon at the bottom right

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## **10. Can my agents reply immediately from their mobile?**

Yes. In order to send the replies from the mobile, use the mobile app, which is in its Beta stage and soon it will be available on the App store & Play store

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## **11. How can I see results from different campaigns on the same set of contact records, separately?**

You can create report in Salesforce on SMS History and filter the contact records with their statuses (which we enter at the time of shooting campaign) and in this way you will be able to see the responses received from all the contacts.

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## **12. Can I assign messages to a Que and have the agents pickup from the Que?**

Yes, Round robin and queue setup, both are configurable. You can contact at [care@screen-magic.com](mailto:care@screen-magic.com).

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## **13. Can I do Custom Routing**

## **based on Keywords to my agents?**

Yes, you can configure a custom SMS routing based on the Keywords using SMS-Magic

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## **14. Can I do Custom Routing based on Lead Source to route the incoming SMS?**

Yes, you can do the custom routing based on the Lead source. You can create a process builder which will send SMS as the lead is created in the CRM.

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## **15. How can we activate alerts for incoming response?**

Yes, last sender incoming alerts can be activated in SMS-Magic Converse. For more details, refer to the Manage Notifications section in the SMS-Magic Converse Guide for Salesforce Admin.

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## **16. How to create sender Id in Converse?**

Refer to the topic on Add a Sender ID in the SMS-Magic Converse Salesforce Admin Guide.

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## **17. What are the different fields available on SMS History and conversation objects?**

The following SMS History fields are available in the managed package:

1. Campaign – Lookup of Campaign object
2. Case – Lookup of Case object
3. Contact – Lookup of Contact object
4. Conversation – Lookup to conversation
5. Converse App – Lookup to Converse app if message is triggered from converse app
6. Converse App Action
7. Converse App Task
8. Country – If the country settings is selected as 'All' and country code is added to mobile number, shows the country name
9. CreatedOn – Created date
10. Delivery Error Message
11. Delivery Status – Delivery report of outgoing message
12. Direction – Shows direction of the messages IN for

incoming and OUT for outgoing

13. Disable SMS On Trigger
14. External Field – Unique ID of the record
15. Lead – Lookup of Lead object
16. Message Credits – Shows how many SMS credits were consumed for that SMS
17. Message Type – Shows if it is SMS /MMS
18. MMS Subject – If it is MMS, show the subject of MMS.
19. Mobile Number – Shows the mobile number used for sending the outgoing message
20. ObjectType – Shows the object name from where the outgoing text was triggered
21. Opportunity – Lookup of Opportunity object
22. Previous Message – This field populated the lookup of last outgoing message in case of an incoming message
23. SenderId – Shows the senderID used for sending/receiving message
24. Sent Status
25. SMS Template – Lookup of the SMS template used
26. SMSText – Shows the message body of SMS
27. Source – From where the message was triggered
28. Status – Shows the overall status of message
29. Status Message
30. Text Unicode – Shows if the text was considered unicode
31. Unformatted Phone Number – Unformats the mobile number
32. User

The following Conversation Fields are available in the managed package:

1. Account
2. Campaign
3. Case
4. Contact
5. Converse App
6. Converse App Action
7. Inbound Number

8. isUnread
  9. Last Incoming Time
  10. Last Message Direction
  11. Last Message Time
  12. Last Outgoing Time
  13. Lead
  14. Mobile Number
  15. Mode
  16. New Count
  17. Object
  18. Opportunity
  19. Purpose
  20. Sender
  21. State
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## **18. How can we check the message was sent successfully?**

To check if the message was sent successfully, you can check the two fields available on SMS History record:

### **Sent Status**

The `SentStatus` of an SMS gives you the health of the SMS creation process from the salesforce org to the SMS-Magic portal. If it displays "Submitted" in the initial stage, it means that the SMS request has been created successfully.

### **Delivery Status**

The `deliveryStatus` of an SMS is the real-time delivery report that we receive from the SMS providers. The moment we receive them, we push them back to your SF org.



In short, when we send an SMS from the SF org, a record is created in SMS History tab with the Sent Status as "Submitted". This means that the SMS has been sent from Salesforce to the SMS Magic portal for further processing. When we receive the delivery report from the provider, we push it back to your org and the Sent Status is updated to "Success" and the Delivery Status is updated with the one shared by the SMS provider.

Additionally, the Status field shows the overall status of the outgoing messages.

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## **19. Where to find my SMS Magic account ID and SMS credits available in salesforce ?**

The SMS-Magic Account Id and remaining SMS credits are displayed on the SMS Home or Converse Home tab.

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## **20. Does the user need SMS license to send messages from**

# Converse ?

Any user who would be triggering manual or automatic message, needs an SMS-Magic license to send messages.

Please note that for automated messages, the user who would be fulfilling the criteria (mentioned in the automation flow) needs to have the SMS-Magic license. In short, when the conditions are satisfied by the respective user, as per Salesforce functionality, that user will become the owner of History record and our logic checks if that user has SMS-Magic license.

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## **21. Can a sender Id be assigned to a user?**

Yes, Sender IDs can be assigned to a user or a profile in the SMS-Magic Converse version. Refer to the Sender Id and assignment section in the SMS-Magic Converse Salesforce Admin Guide.

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## **22. Can we activate incoming alerts to the user who sent**

# **the outgoing message?**

Salesforce:

Yes, last sender incoming alerts can be activated in SMS Converse.

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## **23. Can we assign a sender Id to multiple users?**

Yes, Sender ID can be assigned to multiple users and also have incoming email alerts enabled.

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## **24. How can we give SMS license to users in bulk?**

Bulk SMS licenses can be provided to users with the help of Data Loader. Click [here](#) for more details.

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## **25. What is Oauth? Is it**

# necessary to enable the OAuth?

SMS-Magic is a connected app on Salesforce for authentication of Data and to push data into Salesforce. As SMS-Magic sends Delivery reports and Incoming SMS back to Salesforce we use OAuth for this purpose.

Setting up OAuth with SMS-Magic is pretty simple.

1. Under the Converse Settings tab from SMS-Magic Converse click Reset . You can also avail the option from 'All' tab.
2. View the API key generated.
3. Click Go Back to Salesforce and OAuth configuration is completed.

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## 26. Can we give our recipients the option to opt out of the messaging service? If yes, how?

Yes, you can add an opt-out message disclaimer at the end of the message body asking your recipients to opt-out by replying with the opt-out keyword e.g. To opt-out reply with STOP. You can also configure an automation process that checks the SMS opt-out field available on that record page layout.

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## **27. Can we restrict users from sending messages to Opted out records?**

Yes, we have custom settings named SMS-Magic Converse.smagicinteract.AllowToChangeOptout which can be disabled at the profile level. On removing this permission the user will no longer be able to send messages to opted-out records.

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## **28. Can we send messages to more than one mobile number in a go?**

Yes, we can send messages to more than one mobile number in a go

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## **29. Where can we**

# **specify/change the mobile number fields used for sending messages?**

Follow the given procedure to specify or change the mobile number fields:

1. Under Converse Settings, click Message object configuration.
  2. Select the Object.
  3. Select the Name field.
  4. Add or Edit the Mobile Phone.
  5. Refer to the SMS-Magic Converse Salesforce Admin Guide for more details.
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## **30. Can we send Bulk messages to selected list of records?**

Yes, we can send Bulk messages to a selected list of records in Salesforce.

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## **31. Can partner community**

## **users use SMS Converse and, if so, what permissions do they need?**

Yes. SMS-Magic Works with partner community user of Salesforce. You can give the users “SMS-Magic Converse User” Permission Set and grant access to the Visualforce pages for Conversation View.

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.

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## **32. Can we send messages from custom object?**

Yes, we can send messages from custom object.

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## **33. Can we use custom email template for incoming SMS alert?**

Yes, we can use a custom email template for an incoming SMS alert.

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**34. Can we create reports by extracting data from all the people we sent the messages from salesforce i.e mobile number, sent status, delivery status etc?**

Yes, we can create the report on SMS History object by referring the fields mobile number, sent status, delivery status and so on.

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**35. Is it possible to set up groups to text at once? Is it possible to save this group for re use?**

Yes you can create groups. Though you cannot reuse groups, however, if a custom list is created as per their condition, on the object, you can send bulk messages to those list of records selected from the List view.



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## **36. Do all the users assigned to the sender ID get the Incoming message email or just the last person who texted them?**

All incoming notifications in the managed package can be defined under Converse Settings. You can configure the settings to allow email alerts for incoming notification to be sent to the last sender or the user to whom the Sender ID is assigned. This is the default setting the app offers.

In addition to this, we can also customize the configurations for alert notifications on Incoming messages based on individual requirement.

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## **37. What permission sets do I need to give a user to have access to the dashboard ?**

User should have the object level & field level permission on all the SMS objects.

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**38. Can we change our standard SF mobile field to a custom field? If yes, can we still map this to send SMS's?**

You can map standard as well as custom mobile fields to pick the mobile number from, while Sending SMS.

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**39. Can we create a new case on receiving incoming message?**

No, this works as per the incoming SMS notification which is configured from the Converse settings tab.

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**40. Can we update a field on receiving incoming response?**

Yes. Using Salesforce's process builder tool we can update a field on receiving incoming response.