

42. Can 1 Number be used between multiple users?

Yes, 1 number can be used between multiple users

43. How to get started on SMS with Converse?

One of the solution engineers can schedule a screen share call to install the SMS-Magic Converse application from the Salesforce Appexchange page & will set it up for you as per the business use case.

44. How to get started on WhatsApp with Converse?

You have to fill the provided form for whatsapp integration. The form is related to the business use-case of whatsapp. You have to get the SMS templates registered & procure a sender ID for the same

45. How to get started on Messenger with Converse?

You have to fill the provided form for Facebook integration. The form is related to the business use-case of messenger. You have to get the SMS templates registered & procure a sender ID for the same.

46. How to get started with configuring message throttling based on phone number type ?

To enable throttling you have to email us on care@screen-magic.com and we will get it done for your account.

47. Can I integrate my existing Twilio, Nexmo or other providers account and work with Converse?

Yes, you can use the TPI with your existing Twilio, Nexmo or other providers account and work with Converse

48. Can we setup business hours and avoid outgoing and for incoming sent automated alert?

Yes, you can set up business hours from the SMS Magic portal

49. How Can I get maximum delivery results?

Use long codes, text enabled numbers, toll free numbers for 1:1 communication only. Toll free can be used for Alert notifications.

Use short code- for bulk, campaign, survey and Marketing (No per day limit)

Do not send more than 250 messages/day/number using long code

50. How to integrate with other SMS providers and use Salesforce SMS magic App?

Third Party integration is possible with other SMS providers, you need to register with them and provide us with the OAuth token and Account SID.

51. How to choose a phone number

You need to provide us with an area code and we can procure the number from the Providers

52. How to do bulk Campaigns

It can be done through 3 ways where you have the options to schedule it aswell –

1. Converse app Bulk action (only for versions above 1.50)
 2. Campaign Manager (only for versions above 1.50)
 3. Salesforce Campaign.(For any version)
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53. How to manage Compliance

Salesforce-

Manage it through converse settings under compliance sections.(Above 1.50 versions) Have to select opt-in or opt-out compliance.

54. How to troubleshoot your message delivery

Salesforce/ Zoho –

1. Check the sent and the delivery status in the SMS History record. You can check the error message in the “Status message” field on the SMS history.
2. Reach out to care@screen-magic.com if the sent status is error or delivery status is undelivered.

Note :- Sent status error means message rejected at SMS Magic end and delivery status failed or undelivered is message failed at the provider's end.

55. How credits are deducted per message?

For SMS within 160 English characters, 1 SMS credit is deducted. Messages sent in non-English languages have a different length i.e. for Unicode messages, it's 70 characters per credit. Messages with character length of more than 160 characters are considered as long messages and credit deducted would 1 SMS credit = 153 characters.

56. How can we add SMS credits on our own if we have subscribed to SMS Magic app?

You can top-up from the following link :
<https://app.sms-magic.com/pricing/topup>

You can login to SMS Magic portal -> click on Balance available on the top right corner.

57. How does SMS Magic App Work ? What are its functionalities?

SMS Magic helps you send messages from CRM like Salesforce and ZOHO.
Functionalities:

1. Have one-on- one conversation with the recipient
2. Mass/Bulk/campaign texting
3. Send Automated messages
4. Email to Text functionality
5. Helps you achieve different use cases like Survey, Lead Nurturing, Capturing CSATs etc
6. Schedule messages
7. Can be integrated with Sales,Service cloud

58. How does Bulk Texting Work? What is the Limit for bulk texting?

Salesforce

There are three ways for Bulk/Mass texting:

1. Using Send Bulk SMS button available on object's list view. With this button, you can send messages upto 200 records in one go
2. Using Campaign object of Salesforce. We provide Bulk SMS button on Campaign which works for classic as well as Lightning. Since Salesforce allow only Leads and Contact to be added as Campaign Member, with this button you can only send messages to Lead and Contact. You can reach out to 50k records in one go using Bulk Campaign option available with Converse Apps. You can send bulk messages from any objects.

ZOHO

In Zoho, we provide Send Bulk SMS button on module's listview from where you can send messages to 100 records in one go.

SMS Magic Portal

We also provide the feature of running campaign from SMS Magic portal by

uploading the CSV.

59. How will SMS Magic Handle Compliance. Ie: Opt in / Opt Out?

Opt-In compliance:

If the compliance is Opt-In, you can only reach out to recipients via SMS if you received their consent for sending text messages and if the Opt-In field in that record is true.

Opt-out compliance

By default, we provide SMS Opt-out field on the Lead and contact object. You can add the opt-out disclaimer message at the end of the message body and setup up an automation process which would automatically check the SMS Opt-out field present on the record whenever there is a reply with opt-out keyword.

We also have Opt-out functionality on the SMS Magic portal where you can configure the opt-out keyword.

61. How does Converse App Integrate with Process Builder?

Converse App integrates with the process builder using the Action Key generated for each message in a message flow of Converse App. The triggering of the messages are based on certain criteria and conditions. You can create Converse App Task as an action and pass on Action Key for the message as parameter while creating the same from Process builder.

62. How does notification on Incoming

Messages Work?

We provide following notifications for Incoming message:

1. Email notifications can be activated for Last sender or User to whom senderID is assigned.
 2. Browser notification.
 3. Creation of task under Activity History on receiving response.
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63. How does the app relate the incoming messages to record in Salesforce?

There are 2 ways Incoming messages get related to the record in Salesforce.

Whenever you send a message to a new record a Conversation Record gets created. The conversation is Parent Object to SMS History. Once the message is sent it will be attached to that Conversation. If you get a reply from that mobile number we check for Mobile Number and SenderID on the Conversation Object and attach it to the last created Conversation if there is any. If there is no Conversation for the Mobile Number and Sender id combination a new Conversation Record is created.

Whenever a new incoming message is received, we check if this message is a response to existing outgoing messages based on the Phone number and sender id combination. If there is more than one such outgoing message, we consider the response to be for the latest outgoing message. This message is looked up as the previous message. If a previously sent outgoing message is found, we associate the incoming message with the same conversation as the previous outgoing message. If a previous message is not found, we find the number in all objects configured in Object Config and populate a lookup of all such objects. After this, our application applies a logic to identify the primary object to which this message should be associated with. Finally, a conversation is created / associated for the incoming message based on Phone Number, Sender Id, Primary Object, Primary Object Id and User criteria. If an existing conversation exists where all the 5 attributes match the incoming message, it is used to associate the new incoming message. If no such conversation exists, a new conversation is created.

Creation of Conversations: When an Outgoing message is sent if there are no Conversations with the same Mobile number, Sender id, Owner id, Object and record id a new Conversations will get created. If there is an existing Conversation Record the Outgoing message will get attached to it. If any of

the value (Mobile number, Sender id, Owner id, Object and record id) changes a new Conversation record will get created. Similarly for the Incoming message when you receive it if there is a Conversation Record with the Mobile number and Sender id it will get attached to it. If there is no Conversation it will create a new one.

64. How many times can I send same message to same person ?

Salesforce:

As many times as you want. We don't have any rules which restrict you from sending the same message to the same person. However, as a best practice we would recommend not to spam the recipient with the same message.

ZOH0 :

We have a validation rule on our end that restricts sending of the same text to the same number in 24 hours.

65. How do you provide us support on the issues?

As a customer you can report all Failures and any other service issues to Screen Magic, stating the nature of the issue and information required for its resolution, using the following methods:

<https://www.sms-magic.com/support/>

or

email to care@screen-magic.com

or

Telephone to US: 1-888-568-1315 | UK: 0-808-189-1305 | AUS: 1-800-823-175

66. Who are your current customer & how are they using your app?

We have customers from all across the globe who are part of different industries (real estate, health care, finance , education, no-profit etc).

67. How can we activate alerts for incoming response?

Salesforce :

For activating alerts go to Converse Settings tab -> SenderID and Assignment -> Hover over the required senderID and three dots will appear on the right side -> Click on it and go to Manage Notification -> activate the alerts for Last senderID or user assigned to SenderID

68. How to create sender Id in Converse?

To create SenderID go to Converse Settings tab -> SenderID & Assignment -> Click Add SenderID

69. 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:

1. 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

is "Submitted" in the initial stage, it means that the SMS request has been created successfully.

2. 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 sent SMS from the SF org, a record is created in SMS History tab with the Sent Status as "Submitted" that means 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 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.

70. How can we give SMS license to users in bulk?

Yes, you can give license to users in bulk with the help of Data Loader. For more details , [click here](#) .

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

Yes, you can add a 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 and an automation process can be configured which would check the SMS opt-out field available on that record page layout.

72. We have setup a new Salesforce org. How can we get our SMS Magic

account ID and credits transferred across?

Fresh installation of SMS-Magic application is required in new Salesforce org. Every instance of salesforce have unique SMS-Magic account ID.

You have to raise a case by sending email at care@screen-magic.com with the following details of new and old org –

1. Salesforce Org ID
 2. SMS Magic Account ID We will transfer Incoming Numbers, SMS Credits to the new Salesforce and SMS Magic account ID.
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73. How to Send Bulk SMS from record list view?

There are two options for sending bulk SMS from record list view –

With the help of Send Bulk SMS button, you can send/schedule SMS from the record list view. Using Converse App Bulk Action you can send/schedule bulk SMS from the record list view.

74. How to resend failed outbound message?

Follow the given procedure to resend failed messages:

1. Under SMS History object, check the Sent Status field for the SMS. – If the sent status of the SMS displays Failed, select all such failed SMS from the list view.
2. Click Resend SMS list button to resend these SMS.
3. If SMS delivery fails due to insufficient SMS credits, customers can recharge their SMS-Magic account and raise a case to resend failed SMS. Our Customer Success team can help you in the process if you provide them with the following details – The preferred date range for sending the SMS – Your account ID.

75. How to configure/create SMS Templates for custom objects or standard objects other than lead & contact?

By default you can create templates for Leads & Contacts. But if you want to create template for any other object, then you first need to create Template Type for that object from SMS Settings tab of SMS Magic Interact app. Then you can create template for that object by selecting "template type" as that object from SMS Template tab. To configure the template type please goto "<http://www.sms-magic.com/sms-templates/>" and follow the steps mentioned to configure template type.

76. How to get standard UK format of DD/MM/YYYY for date fields in templates?

Dates can be stored in various formats in the SF org according to user's preference & country. Though you see the date in your preferred format, it will get fetched with the code in standard format of "YYYY-MM-DD" only (it gets automatically converted to the above mentioned format and It can not be changed). But there is a work around with which you can access date field in required format in SMS Template. The workaround is- You can create new formula field on the same object of type text Formula value should be – TEXT(DAY(Date Field)) & "/" & TEXT(MONTH(Date Field)) & "/"& TEXT(YEAR(Date Field)) This field will store the text version of Date Field in dd/mm/yyyy format. Then you can use this formula field in SMS Template in place of Date field and it will work as per your requirement.

77. How can I use the fields of Lead

Owner in a SMS template?

We support lookup fields in SMS template e.g. you can fetch the owner information of Contact by selecting Owner from the second drop down (As Contact Owner field is of data type "Lookup(User)") But SMS Template do not support fields with data type Lookup(User,Queue) Lead owner is of data type Lookup(User,Queue) due to which we can't use Lead owner information directly as merge fields in SMS Template. As a workaround for this problem, we suggest you to pull the information (which you want to use in SMS Template) of Lead owner on Lead record itself by using formula fields and then you can use these formula fields created in SMS Template.

78. How to fetch logged in user details in SMS Template?

The field which will populate the name of the user who is sending messages is `{!$User.name}` You can get this from the drop-down list while creating templates. Once you select user, you can select any user field from the second drop down which you want to use in SMS Template. After selecting field, click on insert button and automatically that field of the user who is sending message would be rendered when you will use this template while sending out message.

79. How to render SMS templates via Apex code with merge fields

If you are using your own code to send SMS and automate the process and you are also looking forward to using dynamic fields in the SMS text, you would need an additional bunch of code to resolve the merge fields before sending the SMS. Check this for more details:

<http://www.screen-magic.com/resolve-templates/>

80. How to setup new sender Id from SMS Magic Converse?

Follow the below steps to setup new sender ID from SMS-Magic Converse:

Converse settings >> Sender ID & Assignment >> Add Sender ID.

81. Can I use Sender Id as company name and still receive response on incoming number?

Sender IDs are governed by country-specific restrictions. You can configure the Company name as a Sender ID only if the country in which your business is operating, permits it.

82. How to set sender Id specific to users so that only the sender Id assigned to user should be visible to him while sending messages?

You need to assign a sender ID to the user from the converse settings under sender ID and assignment. Also, you can set the sharing settings rule to make the sender ID visible only to that user.

Also, if you want to set the default sender ID for a user, you need to raise a case at care@screen-magic.com and the support agent will configure the same through the grant account login access.