

## 83. Send automated SMS when Task is created in Salesforce

If you would like to send an automated SMS when a new task is created or edited to meet a certain criteria, then you need to create the process builder to meet this requirement. The XML configuration needs to be created on the Object on which you are creating the task. You can refer to the following link for steps to create the XML configuration:

<http://www.screen-magic.com/configure-sms-automation-using-workflow-rules/> In this particular scenario, you can send automated SMS when the task is created on leads object and the XML configuration is also created on lead.

Following are the steps to create the process builder:

1. Select "Task" as the object to start the process and the select the process to start only when the record is created.
2. Enter the criteria as per your requirement. In the following screenshot, I have set the criteria as the task subject should not "SMS Notification" and the task should be related to Leads object.
3. After saving the criteria, enter the immediate action as "Create a record" and select Task as the record type to create.

Specify the value for the following fields while creating the task record:

1. Description: Enter the XML configuration that you have created in order to send out the automated SMS. The configuration needs to be created on the Object from on which the task will be related to. In this case, the configuration is created on Leads object.
2. Priority: Set the priority of the task as per your requirement.
3. Status: Enter the status as completed if you would like the task to be added to the Activity History related list. Otherwise, set any other value if you would like the task to be added to Open activities related list.
4. Subject: Enter the subject as SMS Notification e.Related To Id: It should be the task What ID. f.Name Id: Set the Name Id as task Who Id. You should be able to send Automated SMS on task creation using by referring to this guide.

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## 84. How to send an auto SMS on Lead creation

To send automated SMS when a Lead is created, all you need to do is configure a workflow rule on the Lead object with the below configurations:

Go to “SMS on workflow” add-on from the app drop-down on the top-right corner in your org and create a new XML. Choose all the necessary details for the SMS to be sent out when the workflow rule is triggered. Choose the recipient type. If you wish to send SMS to the Lead, choose “Mobile phone field” and choose the field containing the contact number in the “Available Recipients” section. Choose the value for the Name field, sender ID and the Template. Click on “Create”. A new XML would be created for this which you need to copy. Create a workflow rule on Lead and set the Evaluation Criteria as “whenever the record is created”. Paste this XML configuration in the comment section of the task associated with the Workflow rule and activate it.

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## **85. How to send Auto Reply on receiving Incoming SMS**

You can set up auto response messages on incoming SMS using SMS on Workflow feature. With SMS on workflow you can define actions for workflow rules & send auto replies to incoming queries.

For e.g.: if you receive response as Yes from your customer send auto response as “Thank you for showing interest”. For this, you need to understand how to use “SMS On Workflow” feature. You will have to create a workflow rule on Incoming SMS object and then set up the workflow for sending auto message. Create SMS Template for auto response with template type as “Incoming SMS”. Generate “Configuration Name” with SMS On Workflow add-on. Setup Workflow rule on incoming SMS object. Set an action as “Create Task” & Paste the Configuration Name generated in step 2 in this Task comment section. Activate the workflow rule.

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## **86. How to restrict SenderID/Template for a particular user profile**

To enable Template/SenderID restriction for a particular user, we can create a group of users and restrict the access of these objects to those particular groups only. Below are the steps:

1. First, create two records in these objects (based on the country)
2. Create a group of users based on the privileges that you want to provide. Go to setup-> Administration Setup -> Manage Users -> Public Groups-> Click on “New” Button.

3. In search drop-down list select "User" (if you would like to do it on the basis of users)/"Role and Internal Subordinates".
  4. Click save.
  5. Now go to Setup-> Administration Setup-> "Security Control" -> "Sharing Settings"-> " SMS Template Sharing Rules"/"SMS SenderID Sharng rules" -> Click on "New" button.
  6. Give this rule a unique and self-explanatory name.
  7. For "Select your rule type" Select "Based on Criteria".
  8. In "Select which record to be shared" select "SMS template name" "starting with" "template name(starting with the country name)"
  9. In "Select the user to share with" Select "Public groups" and the group which you have created in "step 4".
  10. Sharing Setting-> Default Sharing setting-> click on Edit.
  11. Change the default access for "SMS Template"/"SMS SenderID" object to "Private". This would change the accessibility settings for all the templates/senderIDs.
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## **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 <https://www.sms-magic.com/converse-admin-guide-1-59/> SMS-Magic Converse Guide for Salesforce Admin for more details on assigning permissions in SMS-Magic Converse.

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## **88. How to Check if necessary permission is given to the Guest User to enable them to trigger SMS on Jungo Lead creation?**

Follow the below steps to troubleshoot the issue when a user with a 'Guest User' license creates Jungo Leads and tries to trigger SMS but the SMS sending fails:

1. Check if the task is getting created on lead creation. If the task is not getting created, check the XML configuration and the workflow rule, also check if the process builder is configured correctly. Also, check that the rule is active and the record qualifies all the criteria mentioned in the rule for the action to be triggered.
2. If the task is getting created and still the SMS is not sent, follow these steps: Check object level permission- We need to check if the Guest user has object level permission on Jungo Leads. In order to grant object level permission to Guest User for Jungo Leads object, please follow these steps:
  1. Login with subscriber access of the System Administrator.
  2. Click on Setup and type Users in Quick Find/Search.
  3. Click on the Username of the Guest User and select his Profile.
  4. Click Edit on the Profile and scroll down to the Custom Object Permissions section.
  5. Grant Read, Create, and Edit permission on Jungo Leads object on the profile and Save. To check if this permission is enabled on the profile, we can provide the customer with the following snippet and ask them to run the snippet in the workbench to see if the user has object-level access:
 

```
DescribeSObjectResult result =
Schema.getGlobalDescribe().get('<Put Object Name
Here>').getDescribe(); System.debug('Object
Accessible:'+result.isAccessible()); System.debug('Object
Createable:'+result.isCreateable()); System.debug('Object
Updateable:'+result.isUpdateable()); System.debug('Object
Deleteable:'+result.isDeletable()); for (Schema.Sobjectfield obj :
result.fields.getMap().values()) { Schema.DescribeFieldResult
fldResult = obj.getDescribe(); System.debug('Field
Name:'+fldResult.getLabel()+';\tField
Accessible:'+fldResult.isAccessible()+';\tField
Createable:'+fldResult.isCreateable()+';\tField
Updateable:'+fldResult.isUpdateable()); }
```

Check Field Level Permission- Check whether the Guest User has access to all the fields on Jungo Leads object. We can check Field level permissions by following these steps:

1. Click on Setup and type Users in Quick Find/Search
2. Click on the Username of the Guest User and select the Profile of that user.
3. On the Profile, scroll down to the Field-Level Security section and click on View next to Jungo Leads object.
4. Click on the Edit button and grant Edit Access to all the fields wherever applicable. Read Access will be granted by default on system generated and formula fields.
5. Click on Save Check Record Level Permission- We also need to check whether the Guest user has record level accessibility for a particular Jungo Lead record. In order to check this permission, we need to check Sharing Settings for Jungo Leads in the Org. If the Sharing Setting is set to Private then we need to create a Jungo Lead sharing rule in order to grant

access to the user.

Following are the steps to create a Sharing rule on Jungo Leads:

1. Click Setup and type Public Groups in Quick Find/Search.
2. Create a new Public Group which consists of the Guest User so that we can share records with this Public group.
3. Once the group is created, Go to Sharing Setting and scroll down to Jungo Leads Sharing Rules section.
4. Click on New to create a new sharing rule and enter the criteria for sharing records with the Guest User.
5. Click on Save and the sharing settings of the Org will be recalculated.

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## 89. How to enable access to SMS Magic Interact for a newly created profile

Here is the list of different categories where you should provide the complete access to all the objects belonging to SMS-Magic Interact application:

1. Apex class permissions
2. VF page permissions(To be able to send SMS)
3. Custom permissions(to enable the Send SMS buttons for these profiles)
4. Object permissions for all the objects belonging to SMS Magic Interact.  
To enable this, go to Setup -> Manage -> Profiles and make the necessary changes.

Due of the same lack of permissions, sometimes SMS records are created in SMS History tab, but SMS are not delivered to the handset. This issue occurs when the User who is trying to send the SMS, doesn't have the permission to edit the below objects:

1. Object's Name:
  1. Action On Incoming SMS
  2. Error Log
  3. Filter Setting
  4. Incoming Alert Configuration
  5. Incoming Lookup
  6. Incoming MMS Detail
  7. Incoming SMS h.LV MMS Detail
  8. List View Configuration j.List View Execution
  9. MMS Detail
  10. Optout Settings
  11. SMS Alert

12. SMS Batch Execution Tracker
  13. SMS History
  14. SMS Schedule
  15. SMS SenderId
  16. SMS Template
  17. SMS Template Type
  18. Scheduled SMS
  19. SenderId Profile Map
2. Custom Setting's Name:
    1. Accessible Channels
    2. Acknowledgment Popup Setting
    3. Conversation View Setting
    4. Duration To View History For Incoming
    5. SMS Magic Package Type
    6. SMS Magic Security Setting
    7. SMS Magic SetUp Tracker
    8. SMS Magic URL Setting
  3. Update Related List On Lead Conversion If the user is using a pre-configured template, they also need to have a complete access to the Dynamic fields used in the SMS template.

Please check the profile of the user and the field-level access of this profile to the above-mentioned objects. You can do the same by following the below steps:

1. Go to Setup -> Manage users -> Profiles
2. Select the profile and edit it
3. Go to "Custom object permissions" section, make the above three objects permission for both "View all" and "Modify all" and Save If the above settings have been done and the user is still not to send an SMS successfully, please check the field-level security permissions for the objects (SMS History, SMS SenderIDs and SMS templates) as well. Go to Setup -> Create -> Objects -> Select the object In the "Custom fields and relationships" section, check that the fields have the access "Field-level accessibility" to the User profile in the picture. Once all these settings are taken care off, the User will be able to send the SMS successfully.

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## **90. How does TCPA apply to messaging?**

SMS-Magic Provides you Compliance Framework that you configure to be TCPA Complaint. We can setup the configurations with respect to either the sender ID or the mobile number wise or with both the configurations in salesforce. You can write down to [care@screen-magic.com](mailto:care@screen-magic.com) to know more.

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## **91. How does GDPR apply to messaging?**

The GDPR regulates the “processing” of personal data of any EU resident (who is referred to as a “data subject”). “Processing” includes the collection, storage, transfer, or use, of personal data. This means that any company that processes the personal data of any data subject, regardless of where the company is based, is subject to the rules of the GDPR. Additionally, the GDPR defines personal data very broadly, and includes name, email, demographic information, real-time location, online activity, and health information, to name a few. As the messaging service platform, Screen Magic receives billions of data points from all over the globe, including data points that are or contain personal data from data subjects. This means that both Screen Magic and our customers sending us data will need to comply with the requirements of the GDPR.

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## **92. How to configure your Desk?**

To configure your desk, refer to the Admin Guide [here](#).

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## **93. How to do Event based triggers / Automation?**

You can use process builders along with the converse app to do event based triggers or automation

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## **94. How to build/Choose a Dashboard?**

You can create a dashboard through “Report” object in the salesforce CRM.

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## **95. How are you different compared to other competitors?**

To get a detailed comparison sheet, write to us at [sales@sms-magic.com](mailto:sales@sms-magic.com).