

41. Can I configure Appointment reminders?

Yes, you can configure appointment reminder messages. For example, you can send reminder message one day or one hour before the appointment.

42. Can I do surveys using SMS-Magic?

Yes, with the help of Converse Apps (which can be integrated with Salesforce Automation tool – process builder/ workflow), you can configure and run Surveys.

43. Can you automate messages on Keywords?

Yes, automated messages can be triggered based on keyword.

44. Can the same incoming Number /sender ID be shared by different users?

Yes.

45. How do I create a sender Id in Converse?

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

46. What are the different fields available on SMS History and conversation objects?

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

- Campaign – Lookup of Campaign object
- Case – Lookup of Case object
- Contact – Lookup of Contact object
- Conversation – Lookup to conversation
- Converse App – Lookup to Converse app if message is triggered from converse app
- Converse App Action
- Converse App Task
- Country – If the country settings is All and country code is added to mobile number, shows the country name
- CreatedOn – Created date
- Delivery Error Message
- Delivery Status – Delivery report of outgoing message
- Direction – Shows direction of the messages IN for incoming and OUT for outgoing
- Disable SMS On Trigger
- External Field – Unique ID of the record
- Lead – Lookup of Lead object
- Message Credits – Shows how many SMS credits were consumed for that SMS
- Message Type – Shows if it is SMS /MMS
- MMS Subject – If it is MMS, show the subject of MMS.
- Mobile Number – Shows the mobile number used for sending the outgoing message
- Name
- ObjectType – Shows the object name from where the outgoing text was triggered
- Opportunity – Lookup of Opportunity object
- Previous Message – This field populated the lookup of last outgoing message in case of an incoming message

- SenderId – Shows the senderID used for sending/receiving message
- Sent Status
- SMS Template – Lookup of the SMS template used
- SMSText – Shows the message body of SMS
- Source – From where the message was triggered
- Status – Shows the overall status of message
- Status Message
- Text Unicode – Shows if the text was considered unicode
- Unformatted Phone Number – Unformats the mobile number
- User

The following Conversation Fields are available in the managed package:

- Account
- Campaign
- Case
- Contact
- Converse App
- Converse App Action
- Inbound Number
- isUnread
- Last Incoming Time
- Last Message Direction
- Last Message Time
- Last Outgoing Time
- Lead
- Mobile Number
- Mode
- New Count
- Object
- Opportunity
- Purpose
- Sender
- State

47. Where can I find my SMS-Magic account ID and available SMS credits in Salesforce?

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

48. 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.

49. 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](#).

50. Can we activate incoming alerts for the user who sent the outgoing message?

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](#).

51. 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.

52. 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.](#)

53. 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.

54. 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.

55. Can we send messages to more than one mobile number simultaneously?

Yes.

56. Where can we specify or 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.

Refer to the SMS-Magic Converse Salesforce Admin Guide for more details.

57. Can we send Bulk messages to a selected list of records?

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

58. Can we send messages from a custom object?

Yes, we can send messages from custom object.

59. Can we use a custom email template for an incoming SMS alert?

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

60. Can we create reports by extracting data (like mobile number, sent status, delivery status) from all the people to whom we sent messages from Salesforce?

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

61. Is it possible to create a group and send them messages? Is it possible to save this group for reuse?

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.

62. Do all the users assigned to the

Sender ID get the Incoming message email or is the last person who sent them the only recipient?

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.

63. 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.

64. 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.

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

account ID and credits transferred to the new Org?

Every instance of Salesforce has a unique SMS-Magic account ID. Therefore, you will need a fresh installation of SMS-Magic application in the new Salesforce org.

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

- Salesforce Org ID
- SMS-Magic Account ID

We will transfer Incoming Numbers, SMS Credits to the new Salesforce and the SMS-Magic account ID.

66. How to Send Bulk SMS from the Object list view?

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

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

67. How to resend failed outbound message?

Follow the given procedure to resend failed messages:

- 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.
- Click Resend SMS list button to resend these SMS.

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.

68. Why does a message delivery to handset fail ?

The following reasons may be responsible for the failure of message delivery to handset:

- Mobile Network is not reachable.
- Mobile can be in roaming state.
- Invalid Numbers.
- Incorrect Sender ID.
- Message Length.
- Filtered Content.
- Provider related issues.
- Issues with Salesforce SMS History records.

69. How to configure/create SMS Templates for custom objects or standard objects other than Lead & Contact?

You can create templates on any objects, standard or custom. However, prior to creating templates you will have to configure the objects in the Message Object Configuration under Converse Settings. You will need relevant permission to create custom objects. Ensure that all permissions are added to your user profile. Refer to the section on Add New Object under Message Configuration in the [SMS-Magic Converse Guide for Salesforce Admin](#) to know more about Message Object Configuration.

Once you have added the object, you can use it to create templates. Refer to the section on [Create Converse Template](#) in the [SMS-Magic Converse Guide Salesforce Users](#).

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

Dates can be stored in various formats in the Salesforce org according to the user's preference & country. Though you see the date in your preferred format, it will be fetched with the code in the standard format of "YYYY-MM-DD" only (it gets automatically converted to the above-mentioned format and cannot be changed).

However, there is a solution for accessing the date field in the preferred format in SMS Template.

Create a new formula field, of type Text, on the same object. The 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. You can use this formula field in SMS Template in place of the Date field and view results as per your requirement.

71. How can I use the fields of Lead Owner in an SMS template?

The Lead owner is of data type Lookup (User,Queue) due to which we cannot use Lead owner information directly as merge fields in SMS Template. As a workaround for this problem, we suggest that you pull the information (which you want to use in SMS Template) of Lead owner on the Lead record itself by using formula fields. You can then use these formula fields in the SMS Template.

72. How to fetch logged in user

details in SMS Template?

While setting up the SMS Template follow the given procedure:

1. Click Insert merge field.
2. Select the User option.
3. Add the required user field in the SMS template.

73. There is a difference in the event time (by 1 hour) sent through SMS and the actual time. For example, if event start time is 6 pm and end time 9pm, the SMS time displayed is 7pm and 10pm, what can be the reason?

This seems to be due to the Daylight savings time. We query the date and time field from Salesforce database and display the same while resolving merge fields (we do not make any changes explicitly).

When Daylight savings time starts, you will see a 1-hour difference because Salesforce automatically adjusts the timezone.

In this case, you need to update the user's timezone. Please change the Timezone in Salesforce and let Salesforce handle everything.

74. 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 the given URL for more details:

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

Refer to the section on [Add Sender ID](#) in SMS-Magic Converse Guide for Salesforce Admin.

76. 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.

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

You need to configure Sharing Settings if you wish to restrict the user from viewing any sender ID other than his own.

78. Who are your customers and how are they using your App?

Our customers are spread across the Globe and are part of different industry verticals (real estate, health care, finance, education, no-profit etc).

Customers use our app for their varied use cases. As every requirement varies from one customer to the other we customize our app to meet this diverse need. Some of the business use cases include:

- Nurture Leads
 - Capture CSATs
 - Send Marketing Messages
 - Send OTP via SMS
 - Send SMS on case or lead creation
 - Conduct one to one conversations with their customers
 - Send SMS for job postings – This use case is primarily generated by Customers in the Recruitment sector.
-

79. Why am I getting an error “URL No Longer Exists” while accessing the Visualforce page?

When you add a conversation view to the page layout and try to access it, you may get the error “URL No Longer Exists” One of the possible reasons may be that Clickjack Protection for Visualforce page is enabled for your Org.

To check if Clickjack is enabled:

1. On the Setup page, search for Security.
2. Under Platform Encryption, click Sessions Settings.
3. Under Clickjack Protection, check whether the following two check boxes are enabled:
 - Enable clickjack protection for customer Visualforce pages with standard headers; and
 - Enable clickjack protection for customer Visualforce pages with headers disabled is enabled.

Solution:

If Clickjack protection is enabled, follow the given process to resolve the error:

1. On the Setup page, search for Visualforce.
2. On the Visualforce page, search for the visualforce page for which you want to resolve the error.
3. Click Edit.
4. Modify the following attribute in the first line `applyHtmlTag = "false"`

Refer the URL shown below for more details:

<https://help.salesforce.com/articleView?id=000230608&type=1>

80. How can I send automated SMS when a Task is created in Salesforce?

If you would like to send an automated SMS when a new task is created or edited to meet certain criteria, then you need to create the process builder to meet this requirement.