Registration and Setup

Overview

Comprising of 4 basic steps to swiftly guide you to sending your first message. This section helps setup the destination country where you will be sending messages. You will be creating and connecting your SMS-Magic account with Salesforce along with choosing a plan which will help us understand your requirements in a better way. And finally, you will be ready to send your first message.

1. Destination Country and Server Location

Select the country where you want to send messages and it's server location is auto-populated. You can select a different server location if required. To make any changes after the setup is complete related to destination country get in touch with your admin.

1. Select **Destination Country**
2. Select **Server Location** if the default server location doesn't meet your requirements.
3. Click **Next**

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2. Registration, OAuth Sync and Remote Site Setting

Sync OAuth, setup account and configure remote site setting helps creating your SMS-Magic account and sync with Salesforce using the API key.

Notes: Due to pop-up blockers, the app.sms-magic.com may not be automatically synced with Salesforce. Disable the pop-up blocker and click Refresh to check if registration is successful.

2.1 Registration and OAuth Sync

1. Select the checkbox if the email looks good.
2. Click **Register**. The **Salesforce Allow Access?** pop-up appears providing further configuration details.
3. Click **Allow**. The **Account Configuration Confirmation** pop-up appears.
4. Click **Go Back To Salesforce** once the sync is complete.
5. The section now displays the API Key assigned to the account.
6. Click **Save**.

2.2 Setup Remote Site

1. Log in to Salesforce and access SMS-Magic Converse.

2. Select the Converse Settings tab.
3. On the **Registration & Remote Site Setting** page select **Remote Site Settings**.
4. Click **Configure**. A new browser window opens displaying pre-filled configuration details.
5. Click **Save**.

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3. Plan Selection

We have added 2 different trial plans for easing into messaging and getting to know the application in a better way.

1. Select a **plan**.
2. Click **Save**.

For more details on the different plans please get in touch with care@sms-magic.com

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4. Send A Test Message

The default Sender ID will be automatically populated in the 'From (SenderID) field. This will only be for the Customers who are doing a fresh install of v1.64. In the 'Registration and Setup' step of the Converse settings, as soon as you select the plan, a default Sender ID corresponding to the destination country that you selected will be assigned to your account. The Sender ID will be automatically assigned to you from the pool (you cannot choose the Sender ID at this point for this step).

If you are a paid customer, you can change the default allotted number by writing to care@sms-magic.com and choose a number of your choice from the "Sender ID & Assignment" section.

The validity of default Sender ID

- If you select 'Grow your conversation trail plan' you get 10 message credits, 1 phone number, and 2 licenses, with a validity of 7 days. So the Sender ID assigned to you will be valid for 7 days.
- If you subscribe to a paid plan, the associated Sender ID will remain active as long as the plan is active. If the plan is purchased with additional Sender ID(s) then the user can select Sender ID(s) from the 'Add SenderID' screen.

The allocation of default Sender ID

- If you select the destination country, say the U.S., then the Sender ID

allocated to you is from the pool dedicated to the U.S. numbers from the application backend.
- If you select the destination country as ‘All’, then the Sender ID allocated will be from the pool associated with the same criteria for location i.e. available Sender ID(s) will be from the pool that is for destination countries from the application backend.

If the Sender ID does not populate in the field, please contact care@sms-magic.com for further help.

FAQ’s

Q 1. How many business pages can I connect with SMS-Magic?
Ans:- Right now there is no limit on pages that you can connect as long as you are able to complete the authentication. In the future, we will update you if we introduce any limit.

Q 2. Do I need to register my facebook templates before mapping them with use-case specific ‘Message Tag’?
Ans:- No. Templates mapped with ‘Message tags’ do not require any approval or registration with Facebook. But note that the use of tags outside of the approved use cases may result in restrictions on the Page’s ability to send messages.

Q 3. Is there any limit on how many messages a page can send using ‘Message Tags’?
Ans:- No. You can send unlimited messages using ‘Message Tag’ templates provided they belong to the valid use cases given by Facebook.

Q 4. Does SMS-Magic Converse support sending messages on Facebook using Media Message Templates?
Ans:- No. Right now we do not support Media Message Templates. But it is in our roadmap. We will update you once we start supporting it.

Q.5 How much is the maximum MMS file size supported for Facebook Messaging?
Ans:- Right now we support MMS file size only up to 2.5 MB. But increasing the file size is in our roadmap. We will update you once we start supporting

it.

Q.6 Will we be able to initiate an outgoing message to an unknown number (subscriber ID) via Facebook?
Ans:- No. You can only initiate an outgoing message via Facebook in response to a user-initiated message to your business page.

Q.7 What should I do when the 24-hour session messaging window is closed before responding to a user-initiated message?
Ans:- You won't be able to send any messages to an unknown recipient once a 24-hour session messaging window is closed. So we recommend you to map them with objects by creating records on receiving messages from unknown recipients. Once a record is created and **you already have an explicit Messenger opt-in**, the system will allow you to send messages to these recipients using templates mapped with 'Message Tag' outside of the 24-hour messaging window. OR You can send an auto-reply informing the recipient about business hours and either ask him to provide you an explicit Messenger opt-in or send another message during your business hours on Messenger.

Q.8 As a business admin, how do I demarcate between Facebook session messages and messages sent using Facebook message tags in SMS-history?
Ans:- You will be able to demarcate between Facebook session messages and messages sent using Facebook message tags based upon the 'Channel Template Type' field value in SMS-history object. You will see the 'Channel Template Type' field value as 'Message Tag' for messages that the system sends on Facebook as templates mapped with Message Tag.

Q.9 Is office hours/Business hours configured at account level applicable for messages sent on Facebook channel?
Ans:- No. It won't be applicable.

Q.10 Is Facebook 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 developers guide.

Q.11 Is there a possibility to send a bulk message from Campaigns or using Tabular reports on Facebook?
Ans:- Considering Facebook Messenger Platform Policy, sending unwanted, non-

personal, or bulk messages is a violation of their policy. Hence we recommend you avoid sending such messages over Facebook.

Q.12 Can we schedule Facebook messages?
Ans:- Yes. But please note that considering Facebook Messenger Platform Policy, sending unwanted, non-personal, or bulk messages is a violation of their Policy. Hence we recommend you avoid sending such messages over Facebook.

FAQ's

Q.1. How do I get WhatsApp enabled business number?
Ans:- You can reach out to our sales team on sales@screen-magic.com. They will help you in procuring WhatsApp enabled business numbers for you. Typically the process takes around 4 weeks time.

Q.2. If I already have a WhatsApp enabled business number, can I use the same while integrating with SMS-Magic?
Ans:- Yes. You can reach out to our sales team on sales@screen-magic.com with your existing WhatsApp enabled number. As you know the WhatsApp account is linked with a phone number and can remain active only on one device at a time, we will have to de-register the number from your current WhatsApp business account and will have to re-register it with WhatsApp for enabling its use under WhatsApp business API. Please note that your WhatsApp enabled business number will remain the same after re-registering. It will just stop working on the device where you had previously configured it.

Q.3. Can one business or brand have two WhatsApp enabled business numbers?
Ans:- Yes. Businesses can have different WhatsApp enabled numbers for different use-cases such as different numbers for transaction, notifications and customer support etc. Businesses can't have multiple WhatsApp enabled numbers for the same use case.

Q.4. How do I get to know the status, quality rating, and messaging limit applicable to my WhatsApp enabled business number so as to take necessary action to adhere to guidelines?
Ans:- The phone number status, quality rating, and messaging limits for your WhatsApp business account are only accessible to WhatsApp partners through

whom we get your numbers procured. You can raise a request with our support team and the team will get those details for you via partners.

Q.5. How many registered WhatsApp MTM templates a single business account can have?
Ans:- You can have a maximum of 250 templates per number for your account.

Q.6. Does SMS-Magic Converse support sending messages on WhatsApp using Media Message Templates?
Ans:- Right now we do not support Media Message Templates. But it is in our roadmap. We will update you once we start supporting it.

Q.7. What will happen if the recipient tries audio/video calling our WhatsApp business account?
Ans:- WhatsApp doesn’t support Audio/Video calling over WhatsApp business enabled number.

Q.8. Does SMS-Magic support language translation of WhatsApp templates used for sending messages internationally?
Ans:- SMS-Magic as well as WhatsApp do not take care of language translation. You have to register a single template in multiple languages with WhatsApp. Upon registering a template in a different language, WhatsApp will assign a ‘Locale (Language code)’ to it. You will have to add all these templates in your org with respective ‘Locale (Language code)’ values. So depending upon which template you choose while sending a message, the respective registered template at WhatsApp will be picked and delivered to the recipient.

Q.9. How much is the maximum MMS file size supported for WhatsApp Messaging?
Ans:- Right now we support MMS file size only up to 2.5 MB. But increasing the file size is in our roadmap. We will update you once we start supporting a larger file size.

Q.10. How do I get to know the delivery status of a message sent on WhatsApp?
Ans:- When your messages are successfully delivered and read by the recipient, you will be able to see blue tick marks on UI for WhatsApp sent messages as shown below:

Q.11 Will we be able to initiate an outgoing message to an unknown number via WhatsApp?
Ans:- No. You can only initiate an outgoing message via WhatsApp in response to a user-initiated message to your WhatsApp business account.

Q.12 What should I do when the 24-hour session messaging window is closed before responding to a user-initiated message?
Ans:- You won't be able to send any messages to an unknown recipient once the 24-hour session messaging window is closed. So we recommend you to map them with Objects by creating records on receiving messages from unknown recipients. Once a record is created and **you already have an explicit WhatsApp opt-in**, the system will allow you to send messages to these recipients using MTM templates outside the 24-hour messaging window. OR You can send an auto-reply informing the recipient about business hours and either ask him to provide you an explicit WhatsApp Opt-in or send another message during your business hours on WhatsApp.

Q.13 As a business admin, how do I demarcate between WhatsApp session messages and WhatsApp MTM messages in SMS-history?
Ans:- You will be able to demarcate between WhatsApp session messages and WhatsApp MTM messages based upon the 'Channel Template Type' field value in the SMS-history object. You will see the 'Channel Template Type' field value as 'MTM' for messages that the system sends on WhatsApp as MTM templates.

Q.14 Is office hours/Business hours configured at account level applicable for messages sent on the WhatsApp channel?
Ans:- Yes it will be applicable.

Q.15 Is WhatsApp 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 developers guide.

Q.16 Is there a possibility to send a bulk message from Campaigns or using Tabular reports on WhatsApp?
Ans:- Considering WhatsApp Business Terms of Service, sending unwanted, non-personal, or bulk messages is a violation of their Terms of Service. Hence we recommend you to avoid sending such messages over WhatsApp.

Q.17 Can we schedule WhatsApp messages?
Ans:- Yes. But please note that considering WhatsApp Business Terms of Service, sending unwanted, non-personal, or bulk messages is a violation of their Terms of Service. Hence we recommend you to avoid sending such messages over WhatsApp.

Q 18 If a customer reaches out to us for customer support, does that count as opt-in for other notifications?
Ans:- No. WhatsApp encourages all businesses to use WhatsApp as a customer support channel, but if you are also using it to send notifications, you will need to get opt-in via a third-party channel for the notifications you plan to send.

Q 19 What methods of obtaining WhatsApp opt-in are acceptable?
Ans:- As long as the opt-in method meets the above requirements, it will be policy compliant. For example, the policy allows for opt-in via website, interactive voice response (IVR), within a WhatsApp thread, or with a click to WhatsApp ad. We strongly recommend that businesses continue to optimize for the user experience when designing opt-in flows.

Q 20 Is there any file size limit applicable for receiving incoming Media Messages over WhatsApp?
Ans:- No. You will be able to receive incoming Media messages over WhatsApp of any size.

Q 21 How many characters a registered WhatsApp template can have?
Ans:- For now, we support template creation up to 700 characters only. So make sure that your registered WhatsApp template does not exceed the allowed characters limit. We do have a plan to support template creation with 700+ characters, but it is in our roadmap. We will update you once we start supporting it.

Overview

A Conversation is a thread of messages between customers and agents. It is important to track these messages in order to monitor and streamline the CRM journey of your business.

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.

You can interact with Converse Desks from a variety of devices. You can use it as a standalone, embed the Desk in Salesforce records, or manage conversations in your Salesforce1 mobile app. All conversations are stored in Salesforce and updated across devices as you continue any conversation.

The new Converse Desk is also customized to display details as per your user profile. It can be configured to display the layout or information as per your profile preferences.

The **System Administrator** configures all themes and layouts for business use.

The Converse Desk intelligently helps you quickly find and respond to conversations. You can do the following:

- Filter conversations by standard or custom Salesforce objects.
- Review a complete Conversation History, from lead to prospect to contact.
- Sort their Inbox to find specific conversation types or a single conversation.
- Check related conversations, so they have all the information they need.

Unable to Define a Default Sender ID for Users

Issue Scenario

User is unable to configure a default Sender ID for their users.

Solution

1.Refer to the topic on SMS History Visibility with Sharing Setting Rules for more details on assigning sender IDs.

2.Also refer the topic **Add Sender IDs** under **Sender ID and Assignment** in the **Admin Guide**.

Unable to Send or Receive Messages Due to Insufficient Privileges

Issue Scenario

User is unable to send or receive messages owing to insufficient privileges.

Possible Causes

The user does not have appropriate permissions to create SMS records.

Solution

A minimum set of access is required to send and receive text messages. Refer the section on SMS-Magic Converse Permission Details in the SMS-Magic Converse Guide for Salesforce Admin following link to review and grant appropriate access.

You can also grant the SMS-Magic Permission sets to users.
The Permission Management section under Converse Settings provides the details on available permissions.

Incoming SMS Alerts are Sent to Incorrect Recipient

Issue Scenario

The incoming SMS alerts are sent to unintended recipient.

Possible Causes

The following are the possible causes for the issue:

•Data indexing issue – There are more than 200,000 records on which the query runs. Therefore the incoming SMS is assigned to the OAuth user.

•Notification settings are not configured correctly.

•The Previous message lookup did not happen.

•Incoming SMS was received from an unknown number.

•User does not have permissions for updating the Previous Lookup or the related SMS History

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Solution

Do the following to resolve the issue:

•Index all mobile fields. Refer to the document in the link provided below for more details on Field Indexing. https://docs.google.com/document/d/1PsBNr8PQuKD_abbRwggCZTtfGQqedAdAU74tzqlZ10k/edit?usp=sharing

•Configure all notifications correctly. For more details, refer the section on **Configure Incoming Notifications** under Sender ID and Assignment in the **SMS-Magic Converse Guide for Salesforce Admin**: https://www.sms-magic.com/technical-resource-center/sms-magic-guide-for-salesforce-admin/

Unable to Send Messages Using Conversation View/Converse Desk/ECD

Issue Scenario

A user tries to send messages using Conversation View/Converse desk/ECD is unable to do so.

Possible Causes

The following reasons may have caused the issue:

•The user is not assigned an SMS-Magic License.

•The user does not have permissions for SMS-Magic object granted either for permission sets or at the profile level

•The user does not have read access to the name field, mobile field or SMS Opt Out/SMS Opt In field referenced in the MOC.

•SMS Credits are exhausted

•Mobile field used in MOC is empty

•SMS History record is created but SMS is not delivered (due to issue on providers end)

•A custom automation rule is causing an error with SMS History record creation.

Solution

Make sure that the user has a license assigned to him/her as well as he/she has appropriate permissions assigned.

Click the following link to review the minimum access level – https://www.sms-magic.com/technical-resource-center/sms-magic-guide-for-salesforce-admin/sms-magic-converse-guide-for-salesforce-admin/

Follow the procedure given below to resolve the issue caused owing to any custom automation rule:

1.Ensure that all process builder/workflow/flow/triggers on the SMS History object in the Customer’s Org is configured correctly. Incorrect values definitions may result in the SMS History record not being created properly.

2.Review the configurations and modify them if required.

3.Reach out to the Dev team if the issues persists even after reviewing and consulting with the CS team.

Create a Consent Database

Consent records are the most important prerequisites for sending messages to your customers. It defines the necessary permissions that are required for you to send messages to customers.

Double opt-in consents are another essential requirement in order to continue your messaging practices. These are received in response to requests sent to customers using non-handset sources, like web forms or emails, to record their compliance.

As per regulatory guidelines, all consent, collected through non-handset sources or created manually needs to be maintained and recorded in a database.

Consent is recorded on the basis of the parameters defined in the Compliance Configuration.

Consent can be created in the following ways:

- Create Consent through Process Builders
- Create Consent Manually

Create Consent through Process Builders

1. Under **Setup**, click **Process Builder** and then click **New**. The New Process pop-up window appears

   .

2. Enter the following information.
   - The Process Name
   - The API name
   - A Description of the process
   - The Action trigger indicating when the process will begin
3. Click **Save**.
4. In the Process Builder page click **Add Object**.
5. Under Object, type the object that will be modified, for example, Contact or Lead.
6. Click **Save**.
7. Click **Add Criteria.**
8. Define the criteria as **Whenever a new lead is created for the action group.**
9. Click **Add Action** . The Action fields appear.
10. Enter the details, as required. Refer to the table below for more details.
11. Click **Add Row** to include additional fields.

FIELD	DESCRIPTION
Action	Define the Action as: Create a Record.
Action Name	Provide a name for the Action.
Define Fields	these fields need to be configured during the Compliance Configuration process.
Mobile Number	Select the Mobile Number that is selected as the consent parameter for creating the consent record.

Sender ID	Select the Sender ID that will be used to create the consent record. This field is important only if you select Sender ID as one of the parameters for creating the consent record. You may skip this field if it has not been defined as a parameter in your compliance configurations. In such a scenario consent record will be created irrespective of the Sender ID the request is received from.
Content	Select the Content type for which the consent request will be created. You may skip this field if content type is not selected as a parameter to collect consent requests in your compliance configurations.
Confirmation Config	Select the confirmation configuration ID from the **Confirmation Config** object. This ID comprises the Sender Id from which the confirmation message will be sent. This configuration is completed in Step 3 of the compliance configuration process and will be displayed for Opt-in, optout and double opt-in consent requests.
Do Not Send Confirmation	Select this value as true if you do not wish to send a confirmation message.
Compliance Status	Select the consent status that shall be recorded i.e. Opt-Out, Opt-In, etc. You will need to create multiple process builders to generate consent records with different compliance status.
Source	Select the source for generating the consent and set the value as Non-handset
Lead	Select Lead as a record field and select the value for the lead lookup. This can also be contact depending on which object you are selecting.

12. Click **Save**.
13. Click **Activate** and then click **Confirm.**
    You can also import consents by creating a CSV with all the fields mentioned above. Click **Import** to start importing consents.

Create Consent Manually

1. Click. The app launcher appears.
2. Under **All Items**, click **Consents**. The **Consent List view** page appears.
3. Click **New**. The **Add New Consent Record** pop-up window appears.

   If the button is disabled, enable the **Allow users to manually Add/Edit Consent Records** option in Step 2 of the Compliance Configuration process.

4. Enter the details as required.

   Refer to the table below for more details on individual fields.
5. Click **Save**. The Consent Record List is added to the consent database and appears as shown.

6. Click individual record and the record details appears as shown.

FIELD	DESCRIPTION
Select Object	Select the object for which you want to create the consent record.
Phone field	Select the phone field from which consent records will be considered.
Search By name	Search the Contact name for which the consent record will be created.
Comment	Type a comment for the record.
Content Type	Select the appropriate checkbox next to select the appropriate content type. This parameter will appear only if they have been configured in Step 1 of the Compliance Configuration process. Contact your System Admin for more details on the consent record parameters configured.
Sender ID	Select the Sender ID from which consent will be initiated. This is available only if Sender ID is configured as a consent record parameter in Step 1 of the Compliance Configuration process. Contact your System Admin for more details on consent record parameters configured. If Sender ID is not configured then consent will be created from any Sender ID. Once the consent record is created, a confirmation message is sent back to the same Sender ID to complete the process. If a Sender ID is configured then consent will be created only when request is received from the specified Sender ID.
Consent Status	In the drop-down list select the status of your consent. The available options are: Opt-In, Opt-Out, and Pending.
Do not send Confirmation Message	Select this check-box to avoid sending a message to confirm the consent status of the customer.
Confirmation Message Sender ID	Select the sender ID that will be displayed when the confirmation message is sent to the customer.

Edit Content Records

1. Select the checkbox adjacent to the consent record you want to edit.
2. Click  and then select edit. The **Edit Consent Record for <phone number>** pop-up window appears.

3. Edit the details as required. Refer to the table below for more details on individual fields.

FIELD	DESCRIPTION
Content Type	Displays the content type for which consent has been added.
Sender ID	Displays the default Sender ID for receiving the consent.
Current Status	Displays the current consent status.
Change Status To	Select the new consent status.
Do not send Confirmation Message	Select this check-box to send a message confirming the consent status of the customer.
Confirmation Message Sender ID	Select the Sender ID that will be displayed when the confirmation message is sent to the customer.
Opt-out confirmation message	Type the confirmation message that will be sent in case the consent status is set to Opt-Out.

4. Click **Save Changes**. Consent Record is updated in the list view.
   Click on the list view to edit the record phone number.
   Click and then select **Delete** to delete a consent record.
5. Click the record number. The Consent Details appear.

FIELD	DESCRIPTION
Content Type	Displays the content type for which consent has been added.
Sender ID	Displays the default Sender ID for receiving the consent.
Current Status	Displays the current consent status.
Change Status To	Select the new consent status.
Do not send Confirmation Message	Select this check-box to send a message confirming the consent status of the customer.
Confirmation Message Sender ID	Select the Sender ID that will be displayed when the confirmation message is sent to the customer.
Opt-out confirmation message	Type the confirmation message that will be sent in case the consent status is set to Opt-Out.

Change Consent Record Owner

1. Log in to Salesforce.
2. Click . The App Launcher pop-up window appears.
3. Under **All items**, click **Consents**. The Consents record page appears.
4. Click and select **All** to remove filters and view all records. The **All**

records view appears.

5. Select the checkbox adjacent to the consent record you want to edit.
6. Click and then select **Change Owner**. The **Change Owner** pop-up window appears.

7. Type the first three letters to search for the user you want to move the consent record. The search results appear as a drop-down list.
8. Select a user.

   Prior to selecting a user, ensure that read permissions are enabled for the current record and all related records.

9. Clear the **Send Notification Email** checkbox if you do not want to send an email to notify the selected user of being assigned as the consent record owner.
10. Click **Submit**.

View Audit History

1. Log in to Salesforce.
2. Click . The App Launcher pop-up window appears.

3. Under **All items**, click **Consents**. The Consents record page appears.

4. Click and select **All** to remove filters and view all records. The **All** records view appears.

5. Click a consent record to view details. The Consent details page appears.

6. Click a consent status on the right to view the audit history details.

   Refer to the table below for more details on individual fields.

FIELD	DESCRIPTION
Sender ID	Displays the Sender ID who sent the consent.

Confirmation Sent	Displays whether a confirmation message has been sent out for the consent received.
Source	Displays the source from which the consent is received.
Double Opt-In	Displays whether a double opt-in request is sent to the customer.
Double Opt-in Keyword	Displays the Double opt-in keywords that is shared with customer. This field displays value only if the Double opt-in request is sent to customers.
Status	Displays the current consent status of the record. For example, Opt-in, Opt-out or Pending.
SMS Record Reference	Displays the reference number of the SMS History record.
Old Status	Displays the previous consent status of the record.
Modified By	Displays the ID of the user who modified the record.

Change Consent Owner

1. Log in to Salesforce.
2. Click . The App Launcher pop-up window appears.
3. Under **All items**, click **Consents**. The Consents record page appears.
4. Click and select **All** to remove filters and view all records. The **All** records view appears.
5. Select the checkbox adjacent to the consent record you want to edit.
6. Click and then select **Change Owner** from the drop-down list that appears. The **Change Owner** pop-up window appears.
7. Type the first three letters to search for the user to whom you want to assign the consent record. The search results appear as a drop-down list.
8. Select the user.
9. Prior to selecting a user, ensure that read permissions are enabled for the current record and all related records.
10. Clear the **Send Notification Email** checkbox if you do not want to notify the selected user of being assigned as the consent record owner.
11. Click **Submit**

Upload Existing Consent Database

Why do I Need to Create a Consent Record for Using SMS-Magic Converse with the Compliance Feature?

We store the consent record in ***Converse 1.59*** differently as compared to the previous version of *SMS-Magic Converse*.

Prior to the 1.59 release, we used to store consent information like Opted-In or Opted-Out on the object record detail page. The disadvantage of this style of storing consent information is that if the same number exist for two lead records and one record has opted-in and another record has opted-out information. The system will block one message but will still send the message to another record.

To overcome the above problem, we maintain consent information in *Consent* object and not at the object record level. These consent records are referred to when a user attempts to send messages via bulk, automated or manually. So, for example, the *Bulk* source, the *Consent Required* is configured, the system will always check for an Opt-In entry in *Consent* object.

When Do I Need to Create or Migrate Consent Records?

Consent migration is required for the following scenarios:

- If you have explicit consent obtained via the website, email or mobile handset captured at the object record level.
- If you have explicit consent obtained via contract or paper forms.

Consent Obtained via Website, Email, or Mobile Handset

You have explicitly obtained consent for the recipient via Web, Email or Mobile Handset and stored at the object record level. SMS-Magic Converse have no information where and how the consent information is stored. In order to map this consent information with the SMS-Magic Converse, admins need to create these records in Consent object along with consent type (Opt-in or Opt-Out).

To create consent records previously obtained from the recipient’s mobile numbers, you need to create a CSV file with all the fields mentioned below.

FIELD	DESCRIPTION
Phone Number	The mobile phone number from which the consent is obtained.
SenderId	The phone number or virtual number used by SMS-Magic customers to obtain consent.
Content Type	If the consent has been obtained for a specific program.
Compliance Status	Opt-In or Opt-Out or Pending (In case of double opt-in).

Lead, Contact or Custom Object	Lookup Id for lead, contact, or any custom object.
Confirmation Config	Id of confirmation configuration created in Step 3 of the compliance setup.
Do Not Send Confirmation	When set true, no confirmation message will be sent to the recipient mobile number.
Comment	Add text on how the consent was obtained.

Once the consent record is created for the recipient from whom the consent is obtained. The next step is to define the configuration when the record is created in CRM so that the consent record is automatically created.

Consent Obtained via Contract or Paper Forms

Steps remain the same as above for creating consent via contract or paper forms.

How to Ensure that Consent Records are Created Automatically for a New Contact?

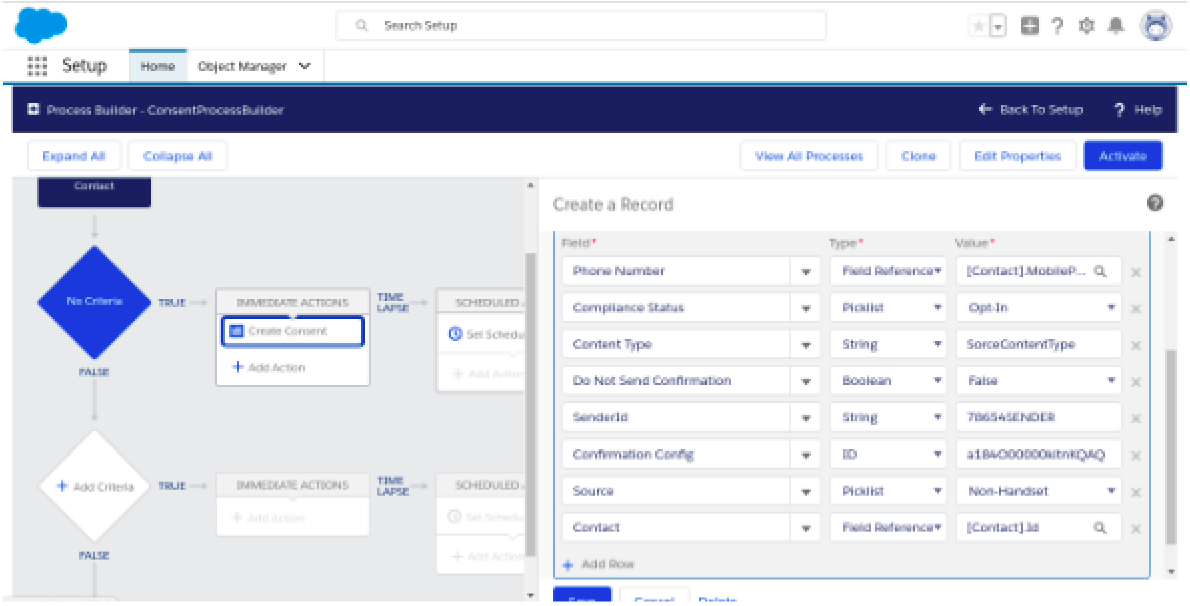
Again, you would need to create a consent record for contacts for the following scenarios:

- Explicit consent obtained via the website, email or mobile handset captured at the object record level.
- Explicit consent obtained via contract or paper forms.

Explicit Consent Obtained via Website, Email, or Mobile Handset

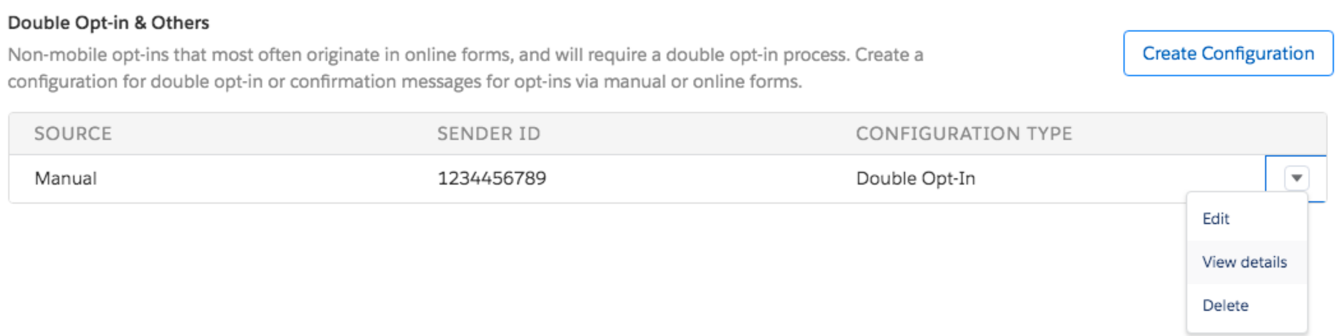
We recommend that you use a process builder and create the consent record when the record is created or edited. Write a process builder on record creation and create a consent record with the below fields.

FIELD	DESCRIPTION
Phone Number	The mobile phone number from which the consent is obtained.
SenderId	The phone number or virtual number used by SMS-Magic customers to obtain consent.
Content Type	If the consent has been obtained for a specific program
Compliance Status	Opt-In or Opt-Out or Pending (In case of double opt-in)
Lead, Contact or Custom Object	Lookup Id for lead, contact or any custom object
Confirmation Config	Id of confirmation configuration created in Step 3 of the compliance setup.
Do Not Send Confirmation	When set true, no confirmation message will be sent to the recipient mobile number.
Comment	Add text on how the consent was obtained.



Please note, when records are created via non-mobile handset like web forms, one needs to get the opt-in via a mobile handset. This process of confirming consent via mobile handset by contact created by web forms is called as Double Opt-in.

To initiate double opt-in, the admin needs to use *Confirmation Config* field and add *Compliance Status* to Pending to initiate a double opt-in process. One can find *Confirmation Config Id* under *Converse Settings > Compliance > Double Opt-In & Other > View Details*.



Explicit Consent Obtained via Contract or Paper Forms

If you need to capture the consent on a continuous basis and whenever the records are created or edited. We recommended the same process as mentioned above. You must use the comment fields when creating a consent record so that during the audit process you can confirm the source of the consent.

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.