Overview

SMS Magic is a Simple Business Messaging App, that lets you text/SMS right from inside your Salesforce CRM. You can empower your agents/reps to do Interactive Messaging or do Automated Messaging and Campaigns. SMS Magic makes it easy for Admins to Setup the app with clickable Wizards for even the most complex Use-Cases, like Surveys, Drip Campaigns, Nurtures, and Keyword-based automation.

The Quickstart guide will give you a headstart on your messaging journey. If you are evaluating SMS messaging for your business, it will navigate you through the Technical Steps, point you to the key considerations and decisions you need to take and also tell you how SMS Magic will empower your business with the Simple Business texting solution.

You can Quickstart your Trial or Implementation with easy step by step guide here. Together with the magical Wizards in Converse App, this Quickstart guide will reduce your Onboarding time from weeks to days. We have leveraged our 11 years of experience and built this Quickstart Guide to make sure you have a good experience – Evaluating SMS Magic or Implementing it.

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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.

Configure Compliance

1. Configure the Audit Database
2. COnfigure Consent control for layouts
3. Define Keyword (START, STOP, & HELP) Automation
4. Configure Double Opt-In

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89. How to assign permission of SMS-Magic app to users having salesforce license?

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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102. Can partner community users use SMS-Magic 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.

Overview

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 need to be maintained and recorded in a database.

Consent is recorded on the basis of the parameters defined in Step 2 of the Compliance Configuration described in the section Configure Audit Database.

Refer to the section for more details on Consent Record Parameters.

Consent can be created in the following ways:

- Create Consent Manually
- Create Consent through Process Builders

View Conversations in Converse Inbox

In addition to the default Converse Desk tab that helps you view and manage conversations, SMS-Magic Converse provides another option to view and edit conversations. The Converse Inbox provides a smaller and more compact view of all conversations.

View from Record Details

If you have added Converse Inbox to a record page such as lead or contacts as a tab, then you can view the converstions in the tab that you have added. See the SMS-Magic Converse Admin Guide for information about configuring Converse Inbox.
For example, if you have added Converse Inbox to the Contact page, then to view conversations with that contact, perform the following steps:

1. On the Salesforce Home page, click . The App Launcher page appears.
2. Under All Items, click Contacts. The Contact record details page appears.

   Under Contacts click and then select **All Contacts** to view the complete contact record list.
3. Click a contact record. The record details page appears.
4. Click the **Converse Desk** tab to see the conversation view under the record detail.

View from Home Page

1. On the Salesforce Home page, click . The App Launcher page appears.
2. Click Sales Console. The Console page appears displaying a narrow panel at the bottom of the screen comprising the Conversation View and the History tab.
3. Click the Conversation View. The conversation list displaying the conversations belonging to the contact currently active on the Salesforce page appears.

   The Converse Inbox header bar color will vary depending on your selected theme for the Converse Desk.

The header bar also displays the notifications for all new incoming messages.

4. Click next to the contact name and then click All. The available conversation details belonging to all records appear.

Click **Reset** to revert to the default view.

Manage Keywords

To comply with industry standards, you must respond to keywords for HELP & STOP. Any user who opts-out using the STOP keyword must be added to an opt-out list (blacklist) and must not be sent any further messages until or unless they opt back in. You can configure mandatory keywords for the three keyword types provided. These are:

- Opt-out
- Opt-in
- Help

For each keyword type, some default keywords have already been pre-defined. You can also create new ones following industry specific norms.

Create keywords using the following guidelines:

- Use Alphabets
- Do not add spaces
- Do not include special characters

When a customer uses the keywords defined under **Opt-out** keyword type, they will be opted out or blocked from receiving messages for all campaigns and other activities. You cannot send anymore messages to all such customers.

Similarly, when a customer uses the keywords defined under **Opt-in** keyword type, they choose to opt-in for receiving messages from any team within the organization.

You can define separate keywords to help customers opt-in for specific content type messages, for example, notification or promotions. These keywords will be considered for receiving consent for that specific content-type.
Refer to Create Content type for more details on creating Content type keywords.

Content-type opt-ins are useful in ensuring that you can continue sending messages to customers for a specific content-type. Therefore, in case the customer is applying for a blanket opt-out instruction, in the opt-out confirmation message they receive, you specify the content-type opt-in they can send if they wish to continue receiving messages for that specific content-type.

1. Under Keyword Management, click **Edit** next to the **Keyword** type you want to modify. The **Edit Keyword Configuration** pop-up window appears.

   Refer to the table below for more details on the Keyword options.

   You cannot edit the default keywords.

FIELD	DESCRIPTION
Opt-In Keywords	Displays the opt-in keywords that will be used at the organization-wide level. You can define Opt-in keywords that are specific to a content type. Refer to the section on Create Content Type for more details.
Opt-Out Keywords	Displays the opt-out keywords that will be used at the organization-wide level. This will opt-out users from all the campaigns/content types. No further messages can be sent to customers from any teams in the organization.
Help Keywords	Displays the help keywords that will be used at the organization-wide level. This will redirect customers to request for support based on the keyword you provide.

2. Enter the following details to add keyword configuration.

FIELD	DESCRIPTION
Type	Displays the keyword type that you have selected to edit. For example, Opt-out, Opt-in, Help.
Keywords	Type the new keywords that you want to configure for the keyword type. You can type multiple keywords for a single keyword type. The new keywords should not be the same as the default keywords.
Message	Type the message that will be sent to customers who have sent the consent details.
Do you wish to enable this setting?	In the drop-down, select to indicate whether you want to enable the keyword type. If you disable the keyword type configuration, then customer consent sent for the keyword type will be ignored. For example, Customers who wish to Opt-out using the defined keywords will continue to receive messages if opt-out Keyword type configuration is disabled. Similarly, customers who wish to opt-in with the defined keywords will not be included in the subscription list if Opt-in keyword type configuration is disabled.

3. Click **Save Changes**. The Keyword Management section appears.

4. Under**Opt-out instructions** click **Change** next to the pre-configured instruction. The **Opt-out Instructions** pop-up window appears.

Refer to the table below for more details on the Keyword options.

FIELD	DESCRIPTION
Auto append opt out Instruction in every message	Select the option if you want to add an opt-out instruction to every message that is sent out.
In an Interval	Select this option to send messages only after the defined number of weeks. The recommended practice is to send 1 message in every 4 weeks. You can select the interval period in the drop-down list that appears.
Do not Auto-append opt out instructions in every message	Select this option if you do not want to add an opt-out instruction to every message that is sent out.
Opt-out Message	Type the message you want to append as an opt-out instruction.This field appears only if you select the **Auto append opt out Instruction in every message**

5. Click **Save**.The opt-out instructions, if added, appears as shown.

Admin

Installation and Custom Sub-Domain

The purpose of this guide is to help you:

- Install SMS-Magic Converse on your Salesforce Organization
- Create a Custom Sub-domain for your Salesforce Organization