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.

Understanding Who you are getting Consent from, for What & How?

Businesses are required to obtain specific consent before messaging their prospects and customers. Each regulation such as Telephone Consumer Protection Act (TCPA), General Data Protection Rights (GDPR), Canada's Anti-Spam Legislation (CASL), or California Consumer Privacy Act (CCPA) ,-California or the new California law, makes is mandatory for each business to obtain specific consent. SMS Magic has created an extensive framework which serves as a guideline for you to define

1. Who you are messaging (Customers, Prospects)
2. What you are messaging and obtain specific consent for that content (Type of messages or Content)
3. How you are obtaining the Consent (using different methods)

There are several considerations in choosing your Consent options. Consult our 3 Keys to Messaging Consents for a guideline. We advise consulting your attorneys before deciding on the Messaging consents.

Choosing a Consent Database

The applicable laws like TCPA and GDPR make it mandatory to obtain consent and keep records in a readily available audit database which can be used as evidence in case of a dispute. This database of Consent records need to be maintained for 4 years (as per GDPR) from the date of its creation.

With SMS Magic you can choose how you obtain and maintain/record your

Consent. You can choose to get a blanket consent for sending any legally possible Content or get a specific Consent. For e.g. – You can get blanket consent for sending any type of messages, service, transactional or promotional. Or you can get specific consent for sending transactional messages only.

This specific consent is recorded via Sender Id and Content Type. You can choose any of the below methods:-

1. Mobile Number Only – You Opt-in to have a blanket yes or No Consent for any recipient
2. Mobile Number and Sender Id – You record consent for specific sender Id's. You always have the option to choose "All", while creating your Consent records.
3. Mobile, Sender and Content Type – You choose to do specific Consent based on Content Type.

Recommendation – We recommend using Content Type to be specific. If you are obtaining a blanket content then choose "All"

Choosing Sender Id specific Consent records can be tricky, since you can only send Messages through that specific sender ID. We recommend using "All" here.

The compliance feature helps you create a consent database based on all these parameters. You can also enable users to create a consent record manually. However, users need to be provided with relevant permissions to create and update the consent database. For more information about configuring the audit database, see (Admin Guide Topic link).

[Configure Sender ID/Inbound Number and Assign it to Your Users, Campaigns and Programs](#)

Sender ID is an alphanumeric name or number that appears on the mobile device and helps to identify the sender of the message. It can be a long code or shortcode that you assign to a single user, multiple users, or a profile. Inbound numbers should be used as the Sender Id to receive replies to your outbound messages. Click here to view the list of countries where Inbound Number is available.

There are some countries which allow you to send SMS with Alphanumeric Sender ID. Click here to view that list. To get replies you'll need to procure an Inbound number and give reply instructions in the text of the SMS you send.

Give Example – Dear Customer, Enjoy the Rewardz Festival on your Credit Card. To know more, SMS 'JOIN' to 5676756 and register now. For TnC, please visit http://bit.ly/6463nf'.

You can configure Sender IDs for different organizations, teams, or individuals or Campaigns or Messaging Programs to appear as you want on the customer's mobile device.

How to Choose Sender ID's – link to user guide

<<Options of Sender Id's available in different countries>>> – link to user guide

General Guideline for Choosing Sender Id's

	Manual SMS	**Campaigns**	**Automations / Services**
Key Considerations	Preferable to give Reps/Agents dedicated Numbers for Personalized Conversations (Like a dedicated / direct phone line) Use one Sender Id for one type of Conversation with a recipient (Don't use too many Senders as it will confuse the Recipients)	Keep Dedicated Numbers for Campaigns (Don't mix Service Numbers and Manual SMS')	One Service One Number – Easy recall for Recipients, Compliance Management is easy, (Think of it as a Sales or Support Service line)
Exceptions		Sales Campaigns (Should use the lead/contact owner's Sender Id)	No-response Automations / Services – should have an auto-responder telling user about the same
	If a Rep is absent (Share his Conversations/Messages and Sender Id's) for someone else to respond	Campaign generated responses handled by Reps should use the same Campaign Id (for familiarity)	Preferable to have someone monitor Automation / Service responses – Key indicator of User satisfaction.
Inbox	Give dedicated inbox	Filter Campaign responses in Inbox for Sales handling	If you handle responses, filter the Converse App in Inbox

Sharing #'s

Configure User Notification on Incoming SMS'

You can configure User Notification on new incoming messages. You can setup email templates if you want to customize notification.In case the Sender ID is assigned to multiple users or a profile, the incoming message notification

is sent as per the rules defined in the Sender ID assignment settings page. For more information about configuring the sender ID, see (Admin Guide Topic link).

[Configure Conversation View on Page Layouts](#)

Conversation View gives a 360 history of SMS' sent and received from a particular prospect or Customer.

Configure your Conversation View

You can configure your Conversation View on the Object to show all Conversations in a single thread or show separate Conversations. <<<View below illustration for an example>>>

Recommendation:-

For Person Objects (like Lead, Contacts) – We recommend to configure one View for all Conversations. You can still see the Source and User for each SMS' and maintain the Context. You can switch views anytime.

For Business Objects (like Cases, or opportunities) – We recommend to configure separate Conversations, so you can see the Conversations related to different Cases, Contacts distinctly.

What is a Conversation?

A thread of incoming and outgoing SMS' with a particular prospect or customer related to a certain topic like a Case, or an Opportunity is called a Conversation.

Contextual Conversations?

A prospect can have multiple conversations through his buying journey with the Company or Business, for e.g. – His conversation may start from an Enquiry (as a Lead) to being a Customer / Account, who has Cases associated with it. SMS Magic creates separate Conversations based on the stage of the Journey (aka Object from which messaging Conversation has initiated, aka MoC Object). You can view the entire history of the Conversation/s in a single thread on the Lead or Contact Object. Or view it by Context on the associated object record like a Case, Opportunity etc.

Related Conversations?

A Prospect or Lead can have multiple Conversations with a Business, for e.g. – A Case, An Opportunity etc. All these are Related Conversations between the

business agents / reps and the prospect.

To add Conversation View to a page, add a new section to your page layout and drag the Conversation View custom component to that section. For more information about setting up Conversation View in Classic, see (Admin Guide Topic link).

[Manage SMS-Magic Converse User Licences](#)

You can assign SMS-Magic Converse App license to users. . By default, the System admin who has installed the SMS-Magic Converse App, is assigned 1 trial licenses and that user(admin) can assign a trial license to other users.

You can purchase more required user licenses after registration. For more information about adding user licenses, see (Admin Guide Topic link).

[Register your SMS-Magic Converse Account](#)

After you install SMS-Magic Converse App, register the application. It will setup SMS magic account for your organization users or user groups. Select the right subscription plan as per your requirements. For more information about registering & choosing right subscription plan for your SMS-Magic Converse account, see (User User Guide Topic link).

You get a free 14-day trial and option to purchase the best plan suited to your business needs. Let me help you choose the best plan for you.

Trial Steps

First, install the SMS magic converse app on salesforce with the installation link in the first section and then set up the app in converse settings. You will have to register with SMS Magic before opting for trial. Post-registration step, you get "Start your Conversation" and "Grow your conversation" plans trial for 7 days each. You may switch your trial in between the trial period which starts from the day you register with SMS magic. Go to converse Home to see manage your plans.

Available plans are Start your Conversations, Grow your Conversations and Custom Plans

Business Requirements	Plan
Seema(Marketing) wants to run lead nurture, profiling, and keyword-based automation	Start your Conversations
Thomas(Service) wanted SMS software to manage the volume of customer issues	Grow your Conversations
Morgan wants to buy additional 500 licenses and needed discount with additional dashboards	Custom Plan

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.

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.

[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.