Overview

SMS-Magic Converse is a simple business messaging app, that enables you to text right from your Salesforce CRM. You can empower your agents to do interactive messaging, automated messaging, and campaigns. SMS-Magic Converse makes it easy for admins to set up the app with clickable wizards for even the most complex use cases, like surveys, drip campaigns, nurtures, and keyword-based automation.

This Quickstart guide will give you a headstart on your messaging journey. If you are evaluating SMS messaging for your business then this guide will help you take a positive decision by knowing the technical steps and critical considerations. It also tells you how SMS-Magic Converse can empower your business with a simple business texting solution.

Quick Snapshot to Converse Configuration Steps

You can quickstart your trial or implementation with an easy step-by-step guide. With the magical wizards in SMS-Magic Converse, this guide will reduce your onboarding time from weeks to days. We have leveraged our 11 years of experience and created this Quickstart Guide to ensure you have a good experience – whether you are evaluating SMS-Magic Converse or implementing it.

Plans and Pricing

You get a free 7-day trial and option to purchase the best plan suited to your business needs.

Trial Steps

First, install the SMS-Magic Converse package 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 can 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 (We also provide light licenses such as Converse Desk, Automation, View Only, and more on top of your Start or Grow plans. Please contact your SMS-Magic account manager to know more about custom plans.)

For more information about buying a subscription plan, see Buy a Subscription Plan.

Automated Conversations

The primary objective of automated conversations is to provide a quick and accurate response to incoming messages whenever possible. However, automation is also extensively used for campaigns as well, especially for drip or nurture campaigns.

Auto Response

Auto-response can be used for various situations and various objects. In case of a Contact, you can set up for sending the next set of information when the recipient responds with a specific keyword.

For a *Case,* if you don't get a response from the recipient in stipulated time then you can send out a reminder.

Here is the general process flow to set up auto-response:

Automated Campaign Setup

Automation can be used for setting up different campaigns as well. Here is a sample for setting a drip campaign using Marketo.

Prerequisite – SMS-Magic Converse is integrated with Marketo and Leads from Marketo are synchronized in Salesforce.

Automation can be used for setting up different campaigns as well as follows:

Check the links for more details on different scenarios and use cases.

To Set Up …	Use …	Details
Nurture or Drip Campaign	Converse Ap with Flows	Setup Nurture or Drip Campaigns
Auto Response on Keyword	Workflow	Setup Keyword-Based Auto Responses
Alerts and Reminders –	Converse App Automation	Event-Based Alerts and Reminders
Multi-touch Campaigns	Converse App with Workflow	Multi-Touch Campaigns
Marketo Campaign	Converse App with Marketo	Multi-Touch Campaigns
Pardot Campaign	Converse App with Pardot	Multi-Touch Campaigns
Salesforce Marketing Cloud	Converse App with Salesforce MC	Multi-Touch Campaigns
Run a Survey	Converse App	Run a Survey

Event-Triggered Alerts & Reminders

SMS-Magic Converse provides Converse App functionality. This can be used very effectively for bulk messaging and automated conversations.

Setup Keyword-Based Auto Responses

Keyword-based automation is the automatic sending or triggering of text messages to individuals or groups of people based on certain keywords. You can configure keyword-based automation when messages are triggered on a specific date and for a particular event. This is similar to running drip campaigns. Keyword-based automation saves time while ensuring that your customers instantly get the right response and your lists are accurately updated based on the keywords in your received messages. As a business user, you can define the automation template in the Converse App which can be used to make it work with workflows.

For more information about keyword-based automation, see Keyword-Based Automation.

Run a Survey

There are two ways to run SMS Surveys using SMS-Magic Converse:

- You can leverage the functional capability of Converse Apps to design the complete survey. The Converse App helps you create automation templates and define message flows. Once done, you can integrate those with flows to create message triggers and run the survey campaigns. You can define templates and message responses based on your business requirements.
- You can also create a simple message campaign with two message flows. Send a survey participation request upon receiving the expected response, attach the survey link in the message response template.

For more information about creating a survey, see Run a Survey.

Configure Sender ID 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.

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

Alphanumeric sender ID is not allowed in some countries including US, Canada, and Brazil because of carrier regulations. Therefore, non-compliance to these local carrier regulations may prevent your messages from getting delivered.

You need to reach out to sales@screen-magic.com to get the sender ID added to your org. The sender ID will then be populated in the Sender ID & Assigment section in th configuration steps.

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.

You can configure the default templates you wish to use to notify the User assigned to a Sender ID on any incoming message.

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 example, if the Notification Recipient field displays Last Sender as its value, then the incoming message goes to the last user (within the profile or group of users) who sent the message.

In the Manage Notification pop-up window, you can configure the notification of a Sender ID. You set the recipient of the notification as well as select the email template to be used for notifying the recipients.

To know more about email templates and how to create them, see [Email Templates].

You can associate an incoming number to a Sender ID only if it is defined for outgoing messages. Country-wise restrictions determine if the same Sender ID can be used for both incoming or outgoing messages.

Guidelines for Choosing Sender ID's

	Manual SMS	**Campaigns**	**Automations / Services**
Key Considerations	Better to give reps or agents dedicated numbers for personalized conversations (Similar to a dedicated phone line) Use one Sender ID for one type of conversation with a recipient (Do not use many senders because it will confuse the recipients)	Keep dedicated numbers for campaigns (Do not mix service numbers and manual SMS')	One Service One Number – It helps in easy recall for recipients, makes compliance management easier (Think of it as a sales or support service line)
Exceptions		Sales campaigns (Must use the lead or contact owner's sender ID)	No-Response Automations / Services (Must have an auto-responder telling user about the same)
	If a rep or agent is absent (Share conversations, messages, and sender IDs for someone else to respond)	The campaign generated responses handled by reps should use the same campaign ID (for familiarity)	Preferable to have someone monitor automation or service responses (Key indicator of user satisfaction)

Inbox	Give dedicated inbox	Filter campaign responses in inbox for sales handling	If you handle responses, then filter the Converse App in inbox

Configure User Notification on Incoming SMS

You can configure User Notification on new incoming messages. You can configure the default email templates that you wish to use to notify the User assigned to a Sender ID on any incoming message. 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 example, if the Notification Recipient field displays Last Sender as its value, then the incoming message goes to the last user (within the profile or group of users) who sent the message.

In the Manage Notification pop-up window, you can configure the notification of a Sender ID. You set the recipient of the notification as well as select the email template to be used for notifying the recipients.

For more information about configuring the sender ID, see [Configure and Assign Sender ID].

[Managing Responses and Working as an Effective Team]

We solve messaging for sales, service, marketing, and other teams and following are the key use cases that get you quickly started:

- Managing responses to Customers
- Working as an Effective Team

Managing responses to Customers

Team Specific	Use cases	How to Get Started
Sales	**How to see all my Unread Conversations ?:** Ben and John in Morgans team wants to act on unread messages	Use the “Unread conversation” filter for the sales team
Sales	**How to View and Act on Multiple Conversations ?:** Ben and John again want to manage multiple conversations at a go in a single window	Click on “View Details” on each conversation opens it on a separate tab within the converse desk

Service	**Open Conversations:** Thomas works to close cases and he wants to act on open cases conversations	Use “Open Conversations” and “Close conversations” filters in Desk
Marketing	**Automated Conversations:**Seema got progressive profiling setup from Rony and now she wants to interact with users who have left out automation flow and are cold	Use Global filter help to filter conversations based on “Converse apps”
Sales, Service, Marketing	**Filtered Conversations:** Teams want to act on custom inbox with their list of conversations only	Custom Listview on Contact, Sales, Cases, Leads, Opportunity, Conversations object, and custom objects helps to create a custom inbox
General	**Multimedia Messaging:** John wants to send images, videos, emojis, and templates for each conversation and use CRM actions (create a new lead, new case, new contact, etc.) to act right away within conversations	Images, Videos, Emojis, Templates (Primary and Cross Objects), CRM Actions are all supported in Desk with individual conversations threads
General	**Search Conversations:** John searches usually conversations by phone number or name	Search conversations based on the mobile number and the name of the recipient

Working as an Effective Team

Team Specific	Use cases	How to Get Started
Sales	**How to Assign Conversations ?:** Morgan figures out a salesforce queue with Rony’s help and he got ben and john included there and now he wants to assign conversations to queue	Use the “Assign Conversations” feature to assign the single or bulk conversation to a queue or user
Sales	**How to do Round-robin Assignment ?:** Morgan has figured out that queue setup is taking time and he wants leads to be assigned in a round-robin fashion to agents	Round robin and queue setup, both are configurable, contact at care@screen-magic.com
Service	**Canned Templates:** Thomas is allowed to communicate to customers using canned responses only	Canned responses use pre-defined templates, configure it in conversations sections in Settings
Marketing	**Bulk Campaigns:** Seema runs bulk campaigns to list of leads and nurture them with automation	Bulk SMS feature with trigger sources can fulfill this use-case
Marketing	**Recurring Messaging:** Seema uses the marketing plan to run SMS scheduled recurring campaigns across weeks	Use the “Schedule” feature on Bulk SMS on the list, reports, salesforce campaigns & campaign manager

General	**Related Conversations across Objects:** John was working along with Thomas on one customer issue and he wants to see all communications to customer across salesforce org	With "Related conversations" you can pull up parent and siblings conversations
General	**Templated Messaging:** John wanted multiple predefined templates with merge fields	Set Object-specific templates and use information objects for cross objects merge fields

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Register your SMS-Magic Converse Account

After you install SMS-Magic Converse, register the application. It will set up the SMS magic account for your organization users or user groups. Select the right subscription plan as per your requirements. Then configure the remote site settings for the user's Salesforce organization. For more information about registering and selecting the right subscription plan for your SMS-Magic Converse account, see Register your SMS-Magic Converse Account.

You get a **free 7-day trial** and you have the option to purchase the best plan suited to your business needs.

Trial Steps

First, install the SMS-Magic Converse package on Salesforce and then set up the app in Converse Settings. You will have to register with SMS-Magic before opting for the trial. Post-registration step, you get **"Start your Conversation"** and **"Grow your conversation"** plans **trial for seven days each.** You can switch your trial in between the trial period which starts from the day you register with SMS-Magic.

You can manage your plans in Converse Settings. Available plans are **Start your Conversations, Grow your Conversations**, and **Custom Plan**.

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 (We also provide light licenses such as Converse Desk, Automation, View Only, and more on top of your Start or Grow plans. Please contact your SMS-Magic account manager to know more about custom plans.)

[Assign Custom Permissions](#)

You can assign custom permission to profiles of your Salesforce Org to control access of features of SMS-Magic Objects. For more information about custom permissions and how to **create**, **edit**, and **remove** permission sets, see [Custom Permissions](#).

The following are key use business use cases that would help you to get started on user permissions.

Use-cases	**Salesforce Permissions (MOC)**	**Permission Sets (Users)**	**Custom Permission (Profiles)**
Conversation User: Ben is a sales agent and wants to interact with an Opportunity through SMS on SMS Magic Converse App with pre-defined templates	Read Access to Opportunity – Object-defined through MOC	SMS Converse Conversation User	AllowToUseSMSInsight, AllowToSendMMS, AllowToChangeConversationOwner, AllowToTakeActionOnConversation,
Campaign User: Seema is a marketing associate and she wants to run recurring campaigns	Read Access to Campaign Object-defined through MOC	SMS Converse Conversation User	AllowToSendBulkMessage, AllowToSendCampaignMessage, AllowToSendListViewMessage, AllowToSendMMS, AllowToScheduleMessage, AllowToScheduleRecurringMessage,
Automation User: Shelly wants to run promotional offer notifications on SMS for its customers	Read Access to Contacts Object-defined through MOC	SMS Converse Conversation User	AllowToUseSMSInsight, AllowToSendMMS

Admin User: Rony is salesforce consultant to the Org and he handles all configuration and needed to setup custom templates for sales, marketing, etc.		SMS Converse Template Author	AllowToEditSMSSettings
Conversation User: Morgan is the boss of Jen and he interacts with healthy prospects with opportunity value > $10k	Read Access to Opportunity defined through MOC	SMS Converse Conversation User	AllowToUseSMSInsight, AllowToSendMMS, AllowToChangeConversationOwner, AllowToTakeActionOnConversation, AllowToChangeTemplateSelection, AllowToChangeOptout
Admin User: Rony is tasked to assign 4 sender ID to Sales team, 4 to service team, 2 to marketing team and restrict its usage to these teams		SMS Converse Permission Set	AllowToEditSMSSettings