

Install the SMS-Magic Converse Managed Package

This section describes the steps to install the SMS-Magic Converse managed package in your Salesforce environment. SMS-Magic Converse is a native Salesforce.com application that installs into your current Salesforce instance. Someone with a Salesforce administrator profile can install and configure the SMS-Magic Converse managed package.

It is recommended that you first install and test SMS-Magic Converse in the Salesforce.com sandbox account. Once you complete all the sanity tests, you can install the SMS-Magic Converse in your production account.

For more information about installing the SMS-Magic Converse managed package, see [Install the SMS-Magic Converse Managed Package](#).

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

Seema (Marketing) wants to run lead nurture, profiling, and keyword-based automation

Thomas (Service) wanted SMS software to manage the volume of customer issues

Morgan wants to buy additional 500 licenses and needed discount with additional dashboards

Plan

Start your Conversations

Grow your Conversations

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.)

OAuth User Management and Failover

OAuth user management and failover serve the purpose of providing customers the ability to have multiple users, wherein, when the message connection mode is enabled between SMS-Magic and Salesforce, one user will be the main user and other users will be the backup users.

If a message connection (OAuth) fails for whatever reason, the failover method will automatically switch the standby users to the main user and vice versa. Using this feature, message synchronization will not be interrupted, and incoming messages and delivery reports for messages will be synced on a regular basis.

Admin will be able to add 3 users. When the OAuth connection fails then automatically it will connect to the next connected user.

This section can be accessible from Get Started -> Connected Users

Once the user is added for OAuth, their status can be 'Connected', 'Requested', or 'Disconnected':

- Connected – The user is connected with a message connection



- Requested – The admin user has requested another user to be a part of the OAuth user management



- Disconnected – The user is disconnected

Add User

The Admin can add up to 3 users.

For new users “Add only Admin Users for standby users”.



When a user is added, an email notification is sent to the requested user and the status is mapped as ‘Requested’. The requested user has to log in to the portal and connect to Salesforce, then the status will be mapped as ‘Connected’.

The system recognizes all users that are in ‘Connected’ status and will automatically connect with them whenever the OAuth message connection fails. This ensures that the message sync remains uninterrupted. The auto failover feature will work only for the users who are in ‘Connected’ status.