Send Your First SMS

Here are the prerequisites to trigger any SMS:

- Make sure your admin has configured objects on which you want to trigger SMS.
- Make sure you have required permission sets and custom settings.
- Mandatory inputs to trigger any SMS are the recipient's phone number, your sender ID, and text message (text/media/templates).

You can trigger SMS from the following sources:

Messaging	**Methods**
Single SMS	• Converse Desk for Sales, Service consoles and Omnichannel. • Record Detail Page Layout (Send SMS Button & Conversation View). • Converse Desk/Inbox for Salesforce1 Mobile App. • Converse Inbox in Lightning Utility Bar for lightning users and Notifications on the sidebar for classic users
Bulk SMS	• List View • Converse Campaign Manager • Salesforce Campaigns • Reports

For more information about sending messages, see Send Messages in SMS-Magic Converse.

Bulk Messaging

Every text messaging initiative geared to drive sales typically would begin with a Bulk messaging activity. You may need to address a group of people within a geographic region or community and send a bulk message to all or a few of them from the list.

The messages can be text (SMS) or Multimedia (MMS) based and follow the same mechanisms to set up and send as a single SMS.

For sending MMS from Salesforce, make sure that your Org is setup for MMS. Contact your Org admin for the details.

Bulk Messaging can be done manually as well as in an automated way. See the use-case for Automated Campaign Setup for automated bulk messaging.

Bulk messages from a List

You can send bulk messages from the List View of Salesforce for Contacts or Leads.

Similarly, you can send bulk messages from Campaign Manager, Salesforce Campaign, and Reports.

For more information about sending bulk messages, see [Send Bulk SMS].

Create or Use SMS Templates

The Converse Template is a library of all the SMS templates created for different purposes. It helps you to easily manage and organize all templates that are necessary to conduct messaging campaigns. You can create new templates, edit existing templates, change a template owner, and attach a template to an object. Also, it is easy to add merge fields to the templates in order to personalize each of the outgoing messages.

Use Case	**Which type of Template?**	**How to set up?**
Thomas as service agents uses only predefined templates on case object with contact name from the contact object	Single Object Template	Setup case as Primary object and Name and Phone field on Contact ID -> Full Name in MOC
Henry is a recruiter and he wants to send job offers information to his students object records	Cross Object Template	Setup Students as Primary Object and Job Offers as information Object in MOC

Post MOC configuration, you will be able to create the above templates in the converse template and incorporate merge fields as per use case.

Single Object Templates – Send SMS to Lead, Contact, or Account with merge fields.

Cross Object Templates – Sending SMS to a case, pull information from Contact, as well as Account without creating formula fields.

You get an option to set up a standard Salesforce approval process on templates to make sure your template content is verified before it’s available to users.

You can restrict users to send SMS ONLY using templates for sending canned responses & Not compose their own free text. We support to create templates of more than 160 characters, Unicode, multi-lingual, and Emojis.

For more information about creating or using templates, see Create and use Converse Templates.

Incoming SMS Alerts

SMS is a high-velocity and instant channel of communication. It's essential to reply to prospects within a certain time or they move to your competition. Incoming SMS alerts are critical for a business to know which prospect has replied instantly, and ensure that the prospect is replied to in a timely manner.

With SMS Magic there are multiple ways and methods to be alerted of an Incoming SMS such as:

- SMS
- Email
- Chatter
- Browser Notification
- Tab
- Inbox blinking on Utility Bar

Who gets alerted?

You can configure incoming SMS alerts to go to the Last Sender (of an SMS to that particular recipient), or Record Owner (of the Contact record**); Or Sender ID Assigned User (The user who has been assigned the Sender ID).

You always have the option to view "All" in your SMS Inbox to view all Incoming SMS and filter them by different CRM criteria. Alerting the Record Owner is achieved by flows.

Messaging Alerts/Notifications

Team Specific	Use cases	How to Get Started
General	**Reply from Notifications:** John wants to reply to incoming notifications and be proactive	Reply from email, utility bar, sidebar, browser notifications
General	**Alerts/Notifications:** John wants to be notified of all incoming messages	Alerts/ notifications can be set on chatter, email, utility bar, sidebar, browser notifications & Salesforce bell icon

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