



SMS Ninja

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About Ksolves SMS Ninja

SMS Ninja App will provide a way for the Salesforce B2C Orgs to manage their communication with Leads, Contacts, or using any custom objects very effectively and quickly by providing a way to interact with them via SMS (Text) messages and track the entire Text communication.

Salient features of the App Include:

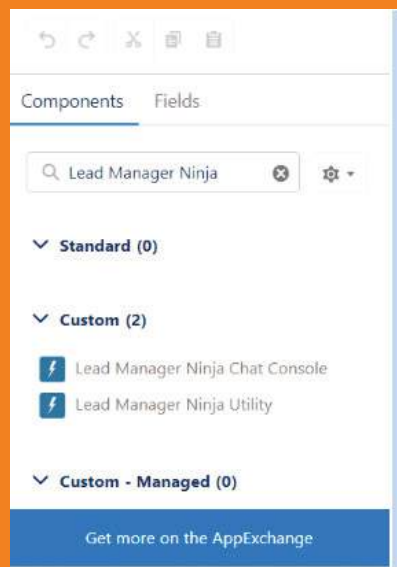
- Send and receive SMS from any standard or custom object through the Twilio, Telnyx SMS provider.
 - The SMS Ninja chat console lightning component can be placed anywhere as per your need.
 - SMS Ninja notifications show all the unread SMS for the logged-in user.
 - The SMS template screen helps in preconfiguring the SMS to save time for sales reps.
 - SMS history lists all the incoming and outgoing SMS from the org.
 - SMS Provider settings used for Twilio, Telnyx configuration.
 - Object mapping screen helps in deciding the name and phone field of any object.
 - Phone numbers feature stores and list all the virtual numbers allotted to the Twilio, Telnyx account configured.
 - The user phone number mapping screen helps in assigning virtual numbers to users of the org.
 - General settings help to configure basic settings like enabling/disabling emoticons, SMS, etc.
-

Setting up the component

After successful installation of the package, the component would need to be put on the desired page. The component named 'SMS Ninja Chat Console' needs to be placed on the desired page.

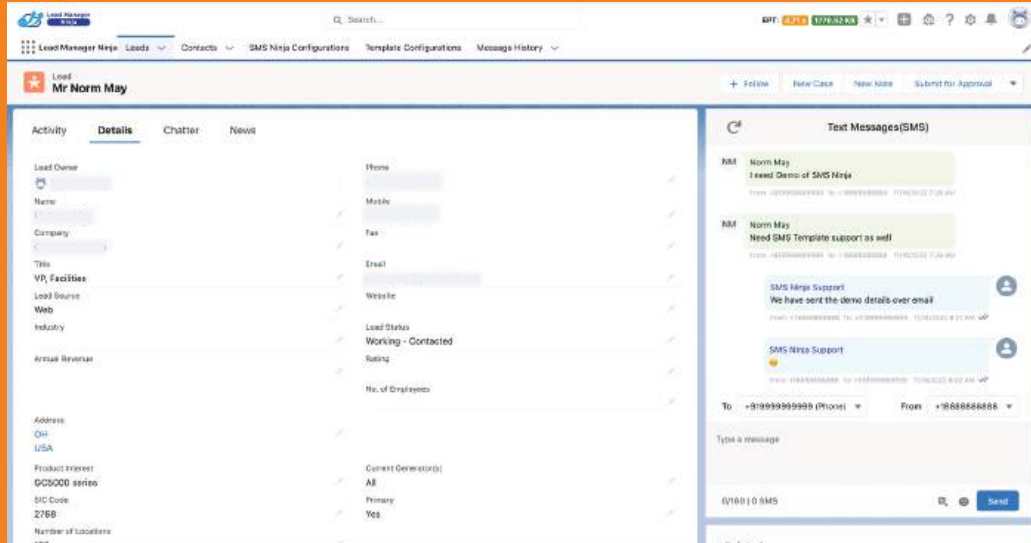
Here is an example of putting the 'SMS Ninja Chat Console' component on the Record page of the lead. Follow the steps below to embed the component to the Lead Record Detail page and similarly, we can put this on other objects Record Detail page like Contact, & Account:

- 01 Open Setup. Click on Object Manager.
- 02 Select Object for example Lead.
- 03 Click on 'Lightning Record Pages'.
- 04 Open the Lightning Record Page to which you want to add SMS Ninja Chat Console.
- 05 Find SMS Ninja Chat Console component from the components menu on the left side as shown in the Screenshot below.



06 Drag it to the page where you want it placed.

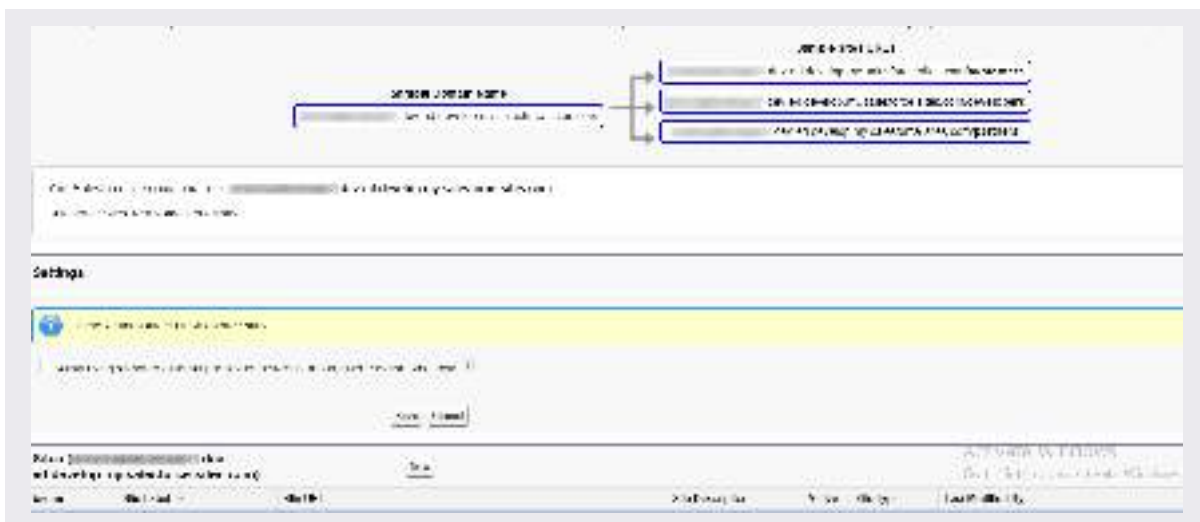
This is how the SMS Ninja chat console will look like:



Create a Site to Update SMS Delivery Status and Reply to SMS

Follow below steps

Step 1 - Go to setup → quick find box → search for "Sites" → "New"



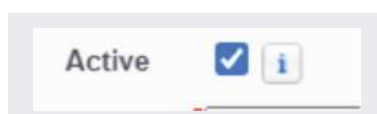
Step 2 - Enter "Site Label", it should be unique and without spaces
(This will be displayed on UI)



Step 3 - Enter "Site Name", can be the same as
(This will be used when referencing the site in API)



Step 4 - Active checkbox should be Enabled



Step 5 -

Use Visualforce pages for your site, for the "Active Site Home Page" section. Give Under construction page as given in the below screenshot.



Active Site Home Page 

Step 6 -

Keep the rest of the fields as set default and Click Save.

Step 7 -

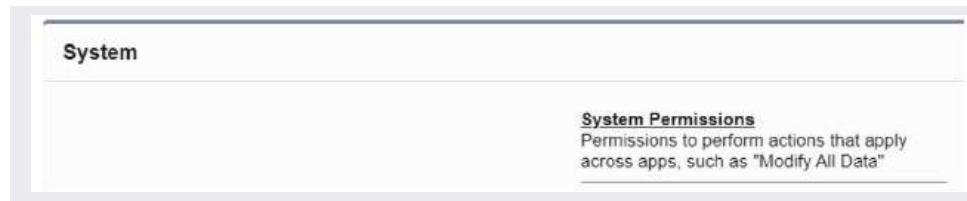
Click on the Public Access Settings button.



[Edit](#) [Public Access Settings](#) [Login Settings](#) [URL Redirects](#) [Deactivate](#)

Step 8 -

Click on System Permissions

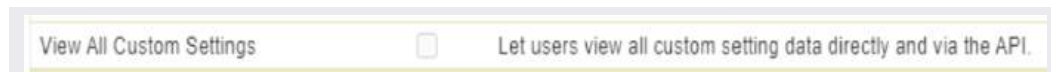


System

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

Step 9 -

Edit System Permissions and give View All Custom Settings permissions as shown below.



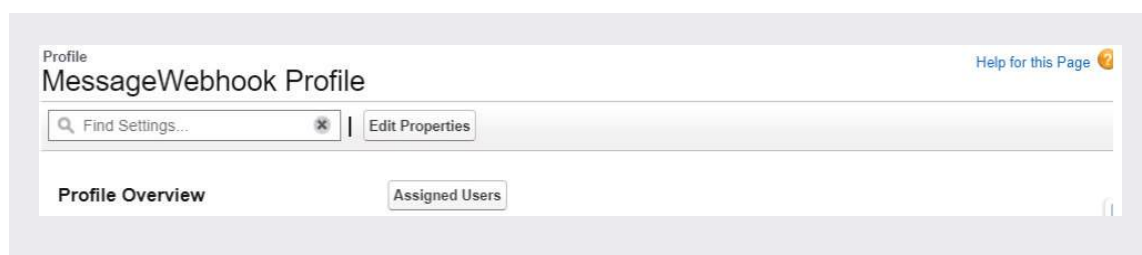
☐ View All Custom Settings ☐ Let users view all custom setting data directly and via the API.

Step 10 -

Go to Step 7 again.

Step 11 -

Click on the Assigned Users button



Profile
MessageWebhook Profile [Help for this Page](#)

 | [Edit Properties](#)

Profile Overview [Assigned Users](#)

Step 12 - Click on Site Guest User, MessageWebhook

MessageWebhook Profile [Help for this Page](#)

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Site Guest User, MessageWebhook	guest	@00ddn000000hhknma4.org.force.com		✓	MessageWebhook Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Step 13- Click on Permission Set Assignments

User
MessageWebhook Site Guest User [Help for this Page](#)

[Permission Set Assignments \(1\)](#) | [Permission Set Assignments Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Installed Mobile Apps \(0\)](#)

User Detail [Edit](#) [Sharing](#)

Name	MessageWebhook Site Guest User	User License	Guest License
Alias	guest	Profile	MessageWebhook Profile

Step 14- And assign SN Guest Permission Set to this user.

Step 15- Click on Edit and Scroll Down.

Object Manager

SETUP
Profiles

Profile
Message Webhook Profile [Help](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(12\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#)
[Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail [Edit](#) [View Users](#)

Name	Message Webhook Profile	Custom Profile	✓
User License	Guest User License		
Description			

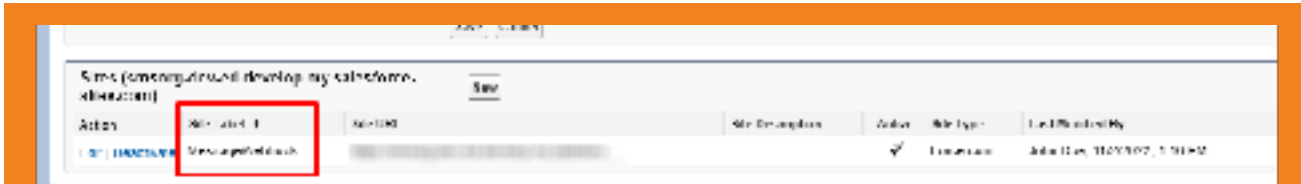
Step 16 - Click on Object read Check Box where You want to Allow Bot

Standard Object Permissions													
	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐						Incidents	☐				
Appointment Invitations	☐							Individuals	☐	☐			
Appointment Topic Time Slots	☐							Leads	☒	☐			
Assets	☐	☐						Locations	☐	☐			
Background Operations	☐							Operating Hours	☐				
Business Brands	☐							Opportunities	☐	☐			
Campaigns	☒	☐						Orders	☐	☐			
Cases	☐	☐						Party Consents	☐	☐			
Communication Subscriptions	☐							Price Books	☐				
Communication Subscription Channel Types	☐							Products	☐				
Communication Subscription Consents	☐	☐						Sellers	☐				
Communication Subscription Timings	☐	☐						Service Appointments	☐	☐			
Contacts	☐	☐						Service Resources	☐				
Contact Point Addresses	☐	☐						Service Territories	☐				

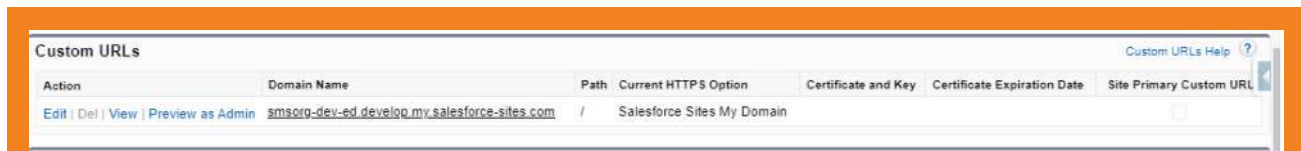
Configuring Site URL in Twilio

Configure the Site URL in Twilio to update SMS delivery status and to get a reply of SMS back in salesforce org.

- 01 Go to the Site created in the above step by clicking on the Site name.



- 02 Go to the Custom URLs section and copy the Domain Name URL.



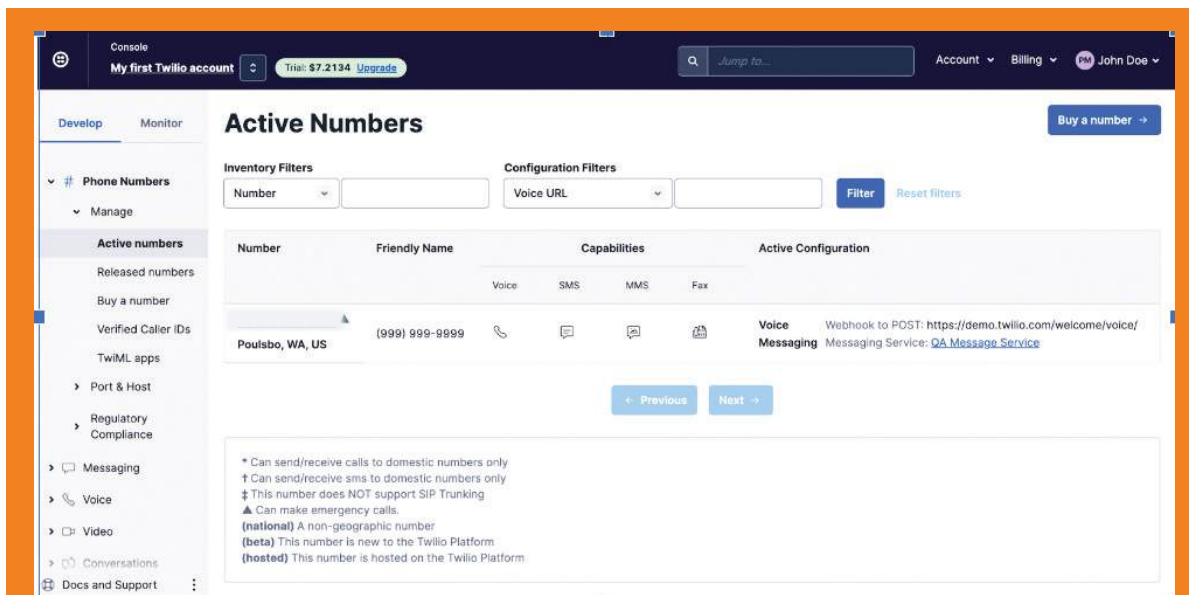
- 03 Add https:// as a prefix in this URL and suffix as /services/apexrest/**ks_sn**/incoming_message/

Add your org's namespace in the suffix part highlighted in yellow color

The final URL looks like below

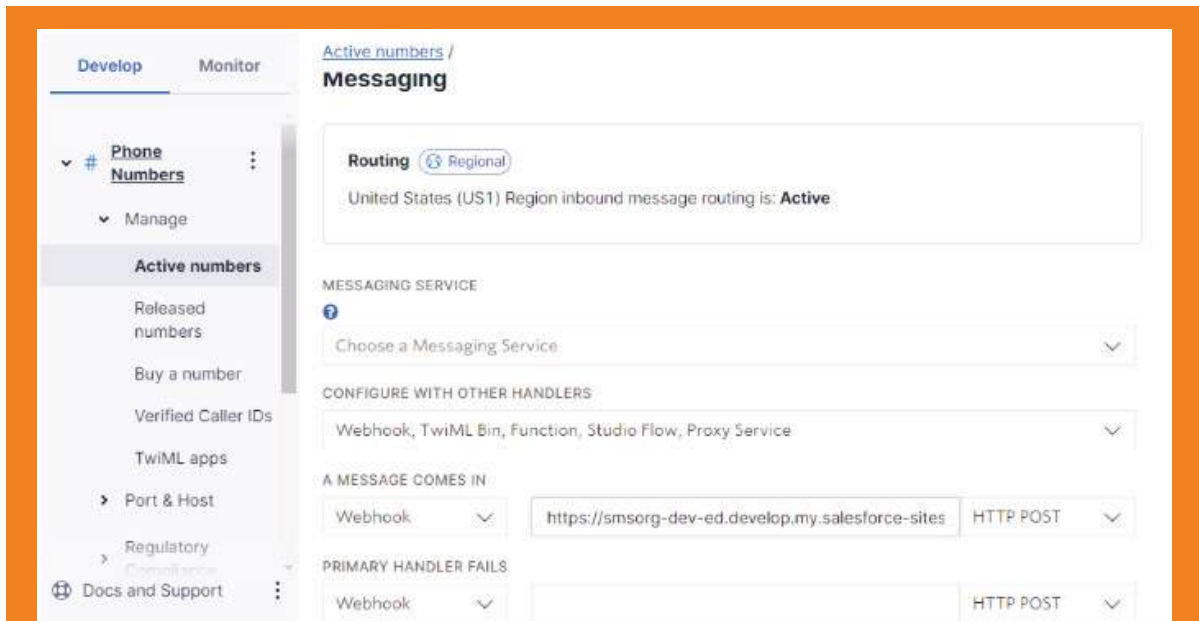
https://smsorg-dev-ed.develop.my.salesforce-sites.com/services/apexrest/ks_sn/incoming_message/

- 04 Now go to Twilio Active Numbers screen



05 For every phone number that you are going to use to send SMS follow the below steps.

- Select Number and go to Messaging section as shown in the screenshot below
- Select Webhook in A MESSAGE COMES IN dropdown
- And paste the URL created in the above step in front of this Webhook dropdown. Please refer to the screenshot below.
- Choose HTTP POST in the last dropdown as shown in the screenshot below.



Develop Monitor

Active numbers / Messaging

Routing Regional

United States (US1) Region inbound message routing is: **Active**

MESSAGING SERVICE

Choose a Messaging Service

CONFIGURE WITH OTHER HANDLERS

Webhook, TwiML Bin, Function, Studio Flow, Proxy Service

A MESSAGE COMES IN

Webhook HTTP POST

PRIMARY HANDLER FAILS

Webhook HTTP POST

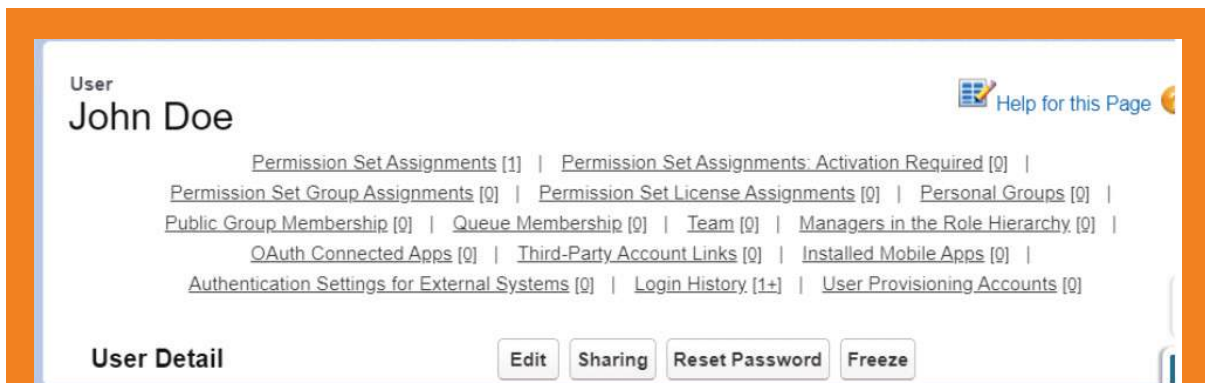
Allow user to use the Chat Console

01. To allow users to use the Chat console. Assign SN User permission set to the user.

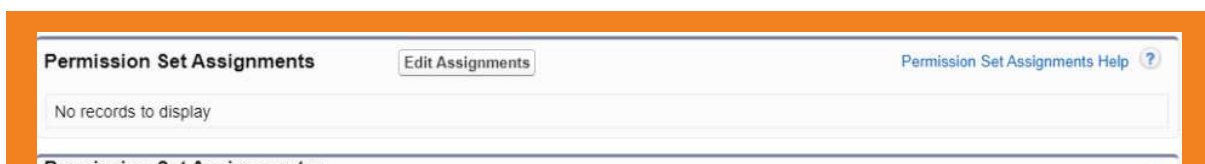
Please follow the below steps to do this.

Go to Setup → Users → Select the User to which you want to assign this permission set.

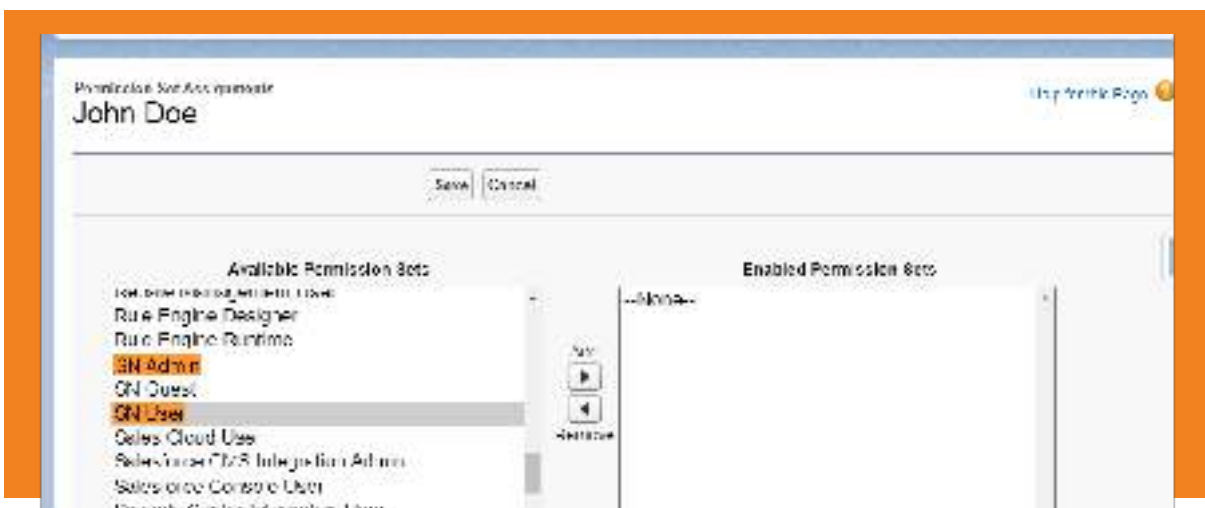
02. Click on Permission Set Assignments



03. Click on the Edit Assignments button



04. Move SN User Permissions set left to Right to assign and Add SN-Admin to the Admin of Application only and Click Save.



SMS Provider Settings

Configure SMS provider settings and start business conversations with SMS Ninja.

New

Provider	Active	Friendly Name		
Twilio	Yes	Twilio1		
Messenger	Yes	Smart Bdy		
Telnyx	Yes	Telnyx1		
Telegram	Yes	nikhilksolves		

Set up Twilio to enable SMS communication. Add your Twilio Account SID, Auth Token and Friendly Name for seamless integration.

SMS Provider Settings

* Provider Name
Twilio ▼

* Account SID

* Auth Token

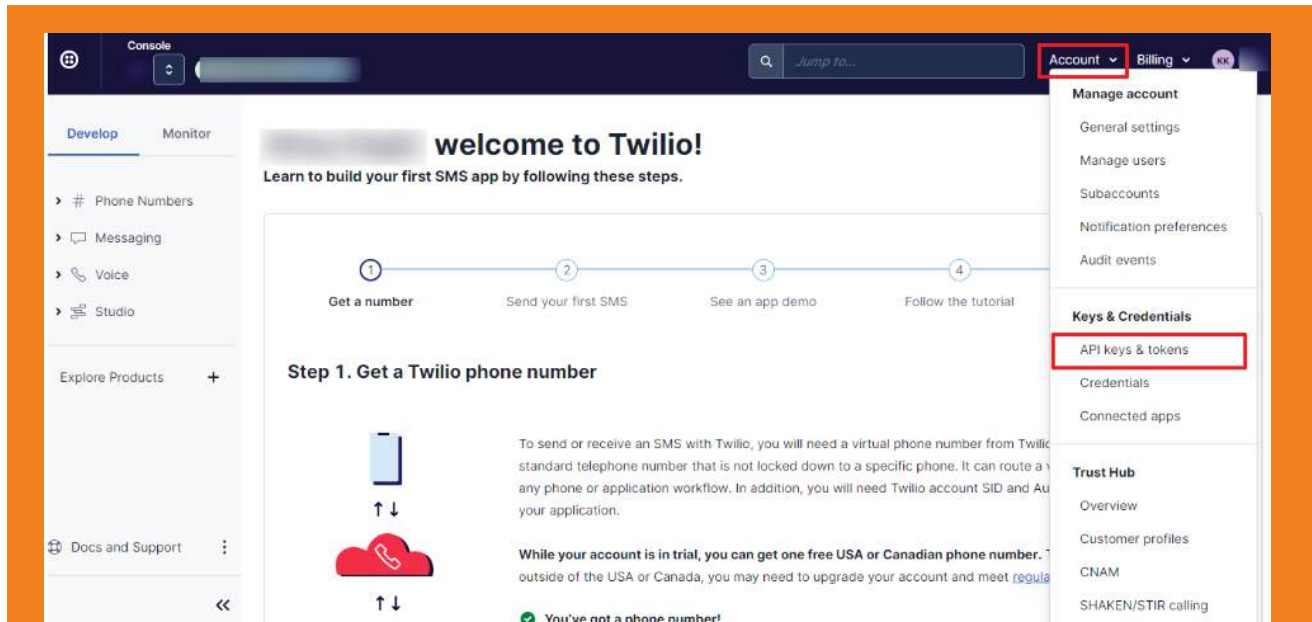
* Friendly Name

Active ☒ Active

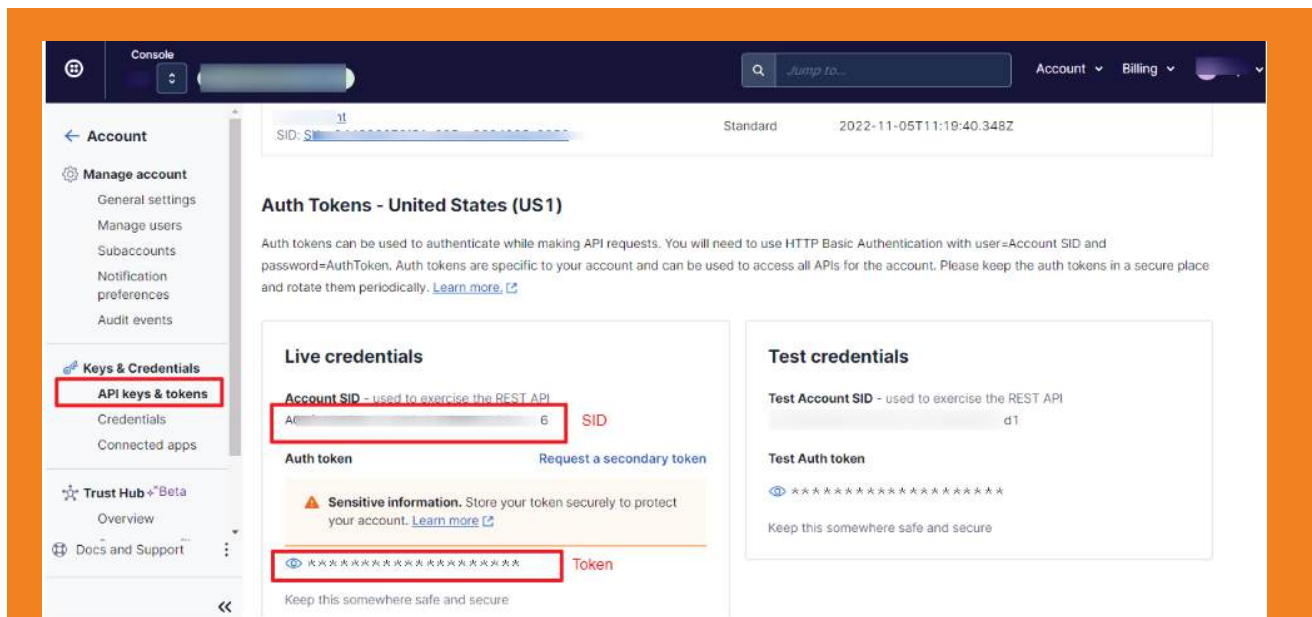
Cancel Save

To get the Account SID and Auth token, you can use the link to create the Twilio account, once you login in Twilio follow the below steps:

01 Go to Account → API Keys & Tokens



02 From the Left menu, Choose API Keys & Tokens. Copy Account SID and Token from highlighted places and save in SMS Provider settings.



Telnyx Account Configuration:

Configure your Telnyx account for SMS communication. Input your Telnyx Account SID, Auth Token and Friendly Name to establish a connection.

SMS Provider Settings

* Provider Name
Telnyx

* Account SID
[Redacted]

* Auth Token
[Redacted]

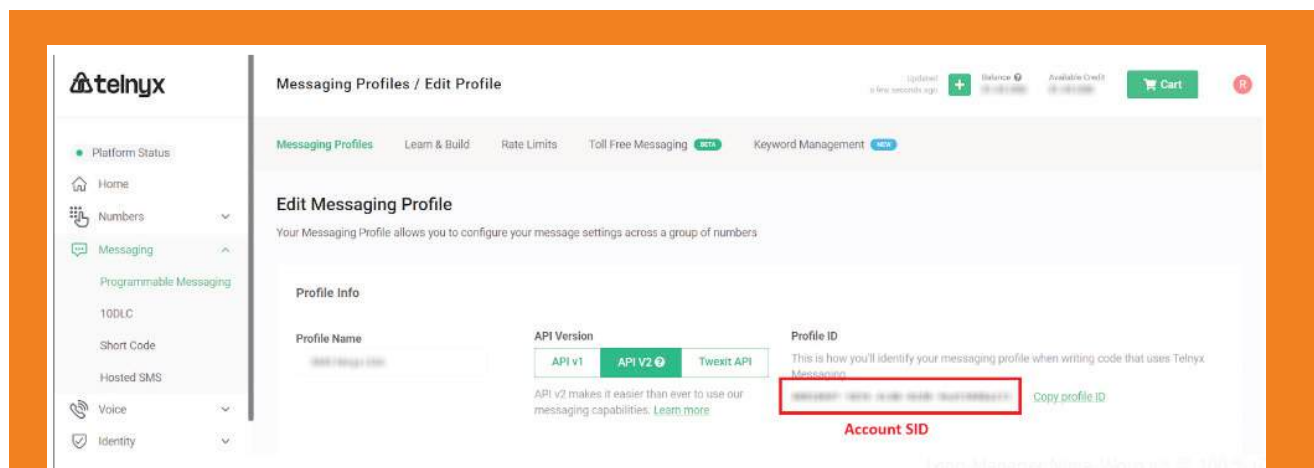
* Friendly Name
[Redacted]

Active ☒ Active

[Cancel](#) [Save](#)

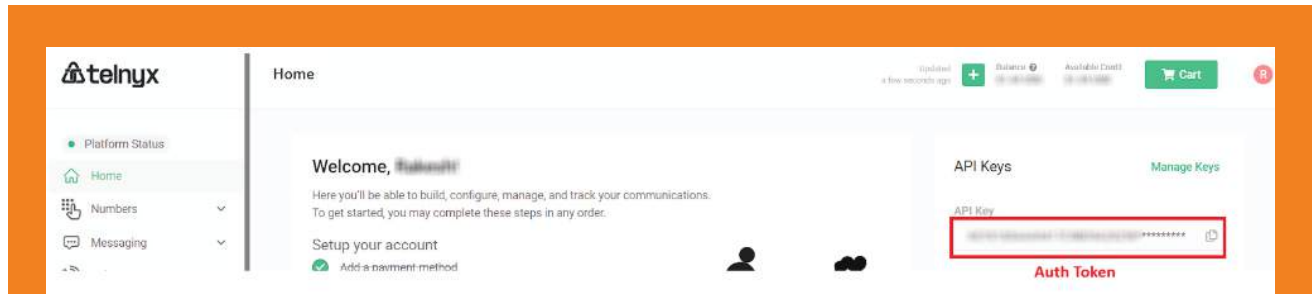
To get the Account SID and Auth token, you can use the <https://telnyx.com/sign-up> to create the Telnyx account, once you login in Telnyx follow the below steps:

01 Login to Telnyx Account → Messaging → Programmable Messaging → Profile name → Profile ID (Which will be the SID)



The screenshot shows the Telnyx web interface for editing a messaging profile. The left sidebar contains navigation links: Platform Status, Home, Numbers, Messaging, Programmable Messaging, 10DLC, Short Code, Hosted SMS, Voice, and Identity. The main content area is titled 'Messaging Profiles / Edit Profile' and includes a 'Profile Info' section. The 'Profile Name' field is redacted. The 'API Version' section shows 'API V2' as the selected option. The 'Profile ID' field is highlighted with a red box, and the text 'Account SID' is written below it. The Profile ID field contains a redacted value. A 'Copy profile ID' link is visible next to the Profile ID field.

02 To get the Auth Token go to Home → API Keys section → API Key
(Which will be the Auth Token)



Object Mapping Configuration

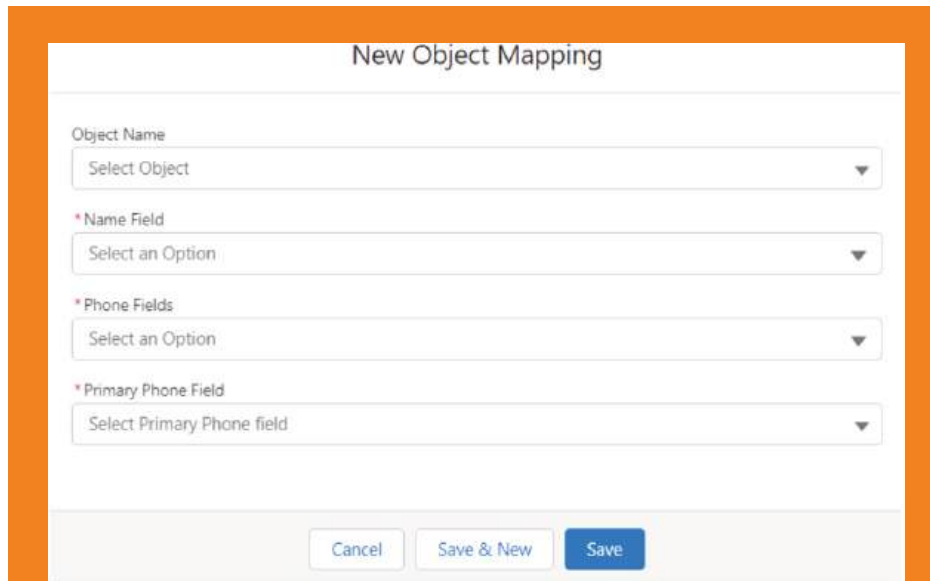
This screen helps in defining the name and phone field for any standard or custom object of the org.

- Phone fields will be displayed in To field while sending the SMS
- Name field will be used to display the name of the record in the SMS
- Primary Phone Field will be used to display the auto selected To field while sending the SMS.

For eg.

For using the feature of Bulk SMS Campaign , to send SMS to Campaign Members we need to do object mapping for "Campaign Member" by selecting the Object "Campaign Member", Name Field, Phone Fields, Primary Phone Field.

Also Follow the same Object Mapping Structure for Lead Object to send SMS or Send List SMS.

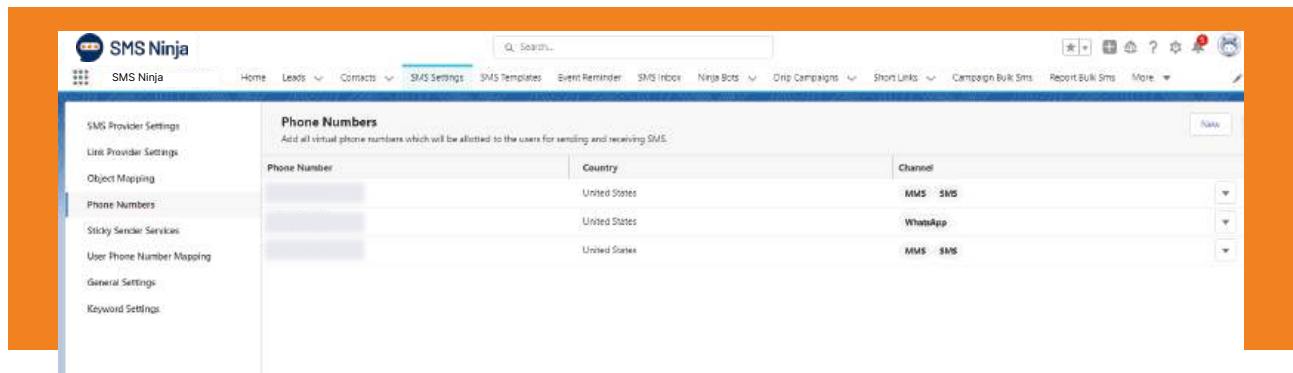


After adding the details, click on the save button and it will look like below -

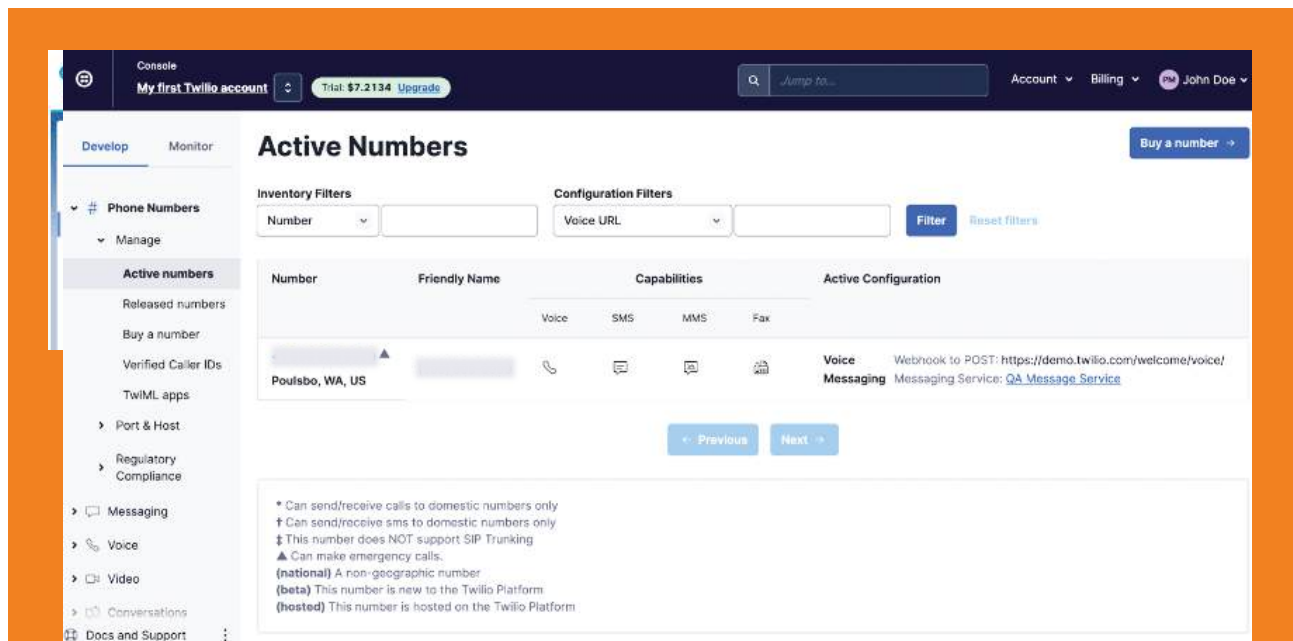
Object Mapping					New
Map name and phone fields for Objects responsible for sending and receiving messages.					
Object Name	Name Field	Phone Fields		Primary Phone Field	
CampaignMember	Name	Mobile	Phone	Mobile	▼
Lead	Name	Phone	Mobile Phone	Mobile Phone	▼

Phone Numbers Configuration

This screen helps us to add the phone numbers purchased from Twilio and Telnix in the salesforce org so that we can assign them to the users for sending and receiving SMS.

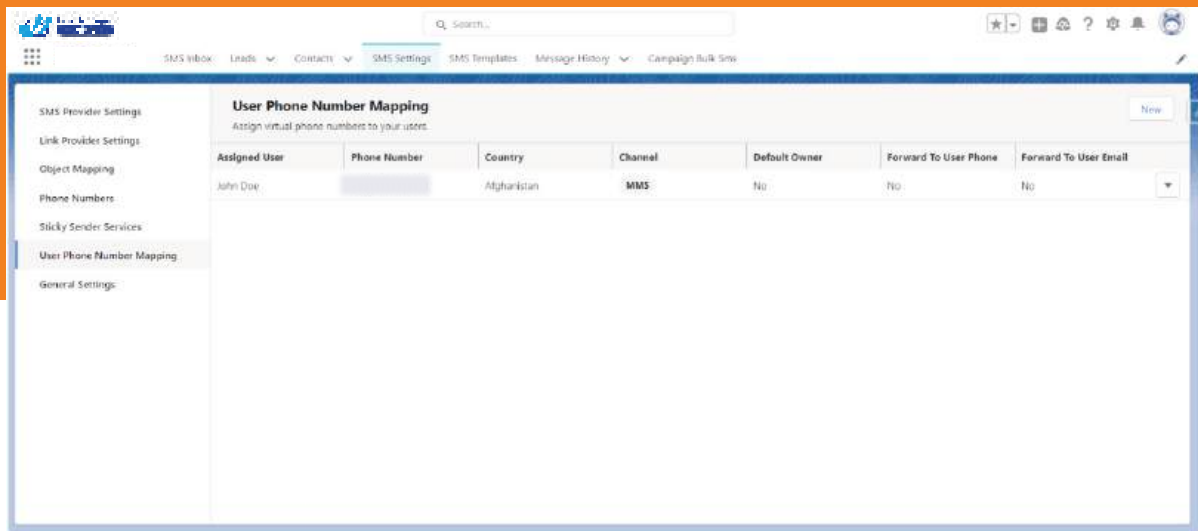


Twilio phone numbers can be purchased from the below link and a screenshot for the same is shown below



User Phone Numbers Mapping Configuration

This screen helps us to assign virtual phone numbers purchased from Twilio and Telnyx to users of our org. For the assignment, click on the New button and select the Phone number and user.

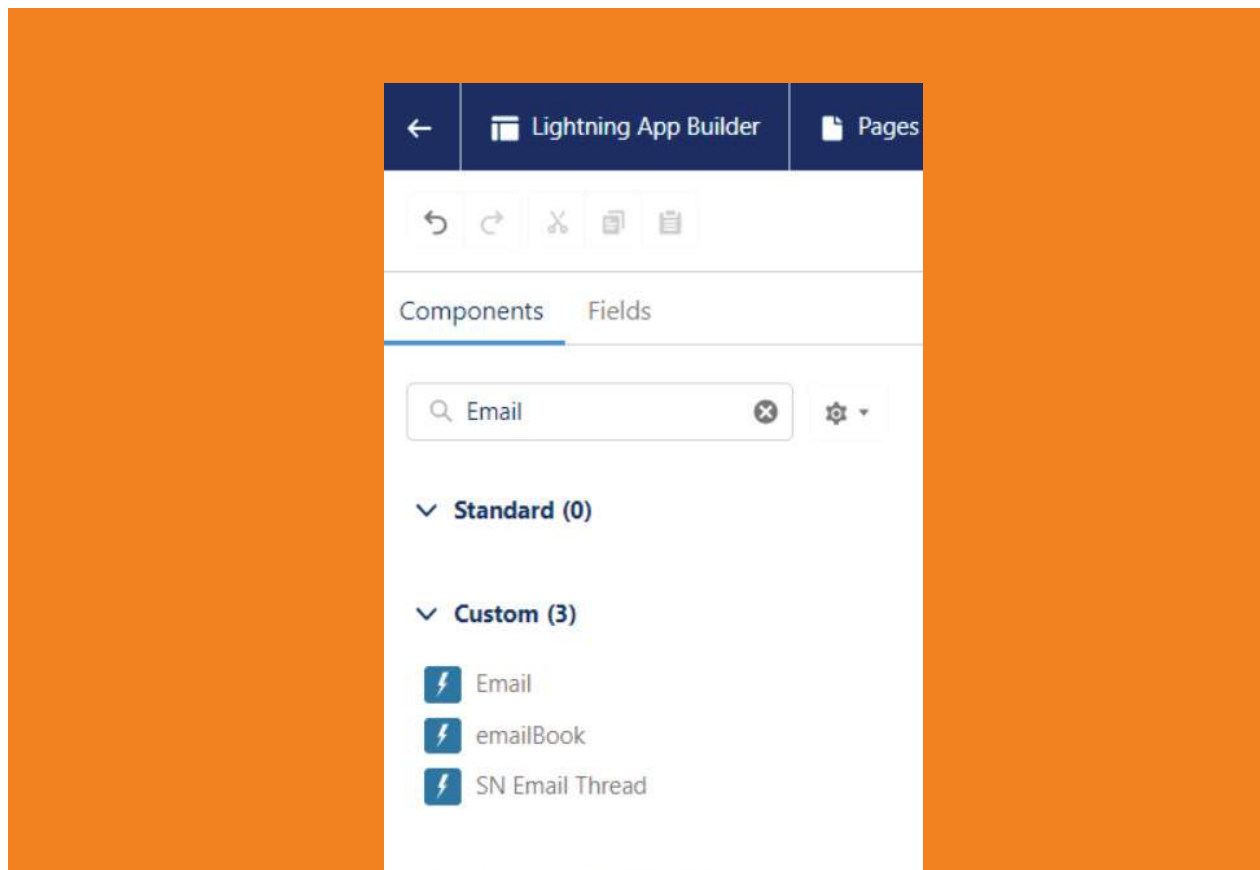


Send an Email

For sending an email, the component would need to be put on the desired page. The component named 'Email' and 'emailBook' needs to be placed on the desired page.

Here is an example of putting the 'Email' and 'emailBook' component on the Record page of the lead. Follow the steps below to embed the component to the Lead Record Detail page and similarly, we can put this on other objects Record Detail page like Contact, and Account:

- Open Setup. Click on Object Manager.
- Select Object for example Lead.
- Click on 'Lightning Record Pages'.
- Open the Lightning Record Page to which you want to add Email Activity and Email Composer
- Find 'Email' and 'emailBook' component from the components menu on the left side as shown in the Screenshot below.



Below screen helps us to display the emails sent for the Particular Object records

Activity Details **Email Activity** Email Composer

No Emails related to this record

Below screen assists in adding all necessary email details, such as the sender's email, recipient's email, CC, BCC, subject, body, attachments, etc., and facilitates the process of sending the email.

Activity Details Email Activity **Email Composer**

From *

To

Cc

Bcc

Subject *

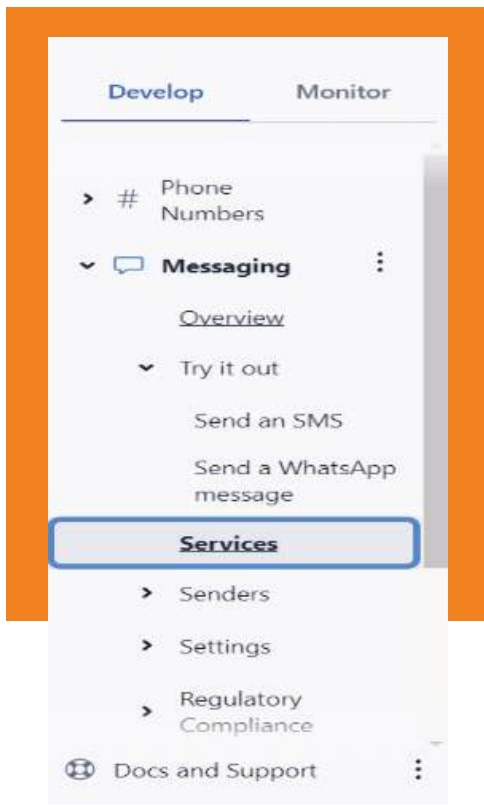
Salesforce Sans 12  **B** *I* U         

Type here

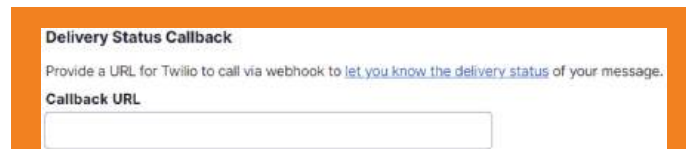
  Upload Files Or drop files

Creating Message Service

1. Navigate to the Services section in your Twilio account to create a Message Service
2. Select Create Message Service and follow the the steps as given in the process



- a. Provide a friendly name to message service
- b. In Step 2 , Add senders in the sender pool, these will be the numbers that will send the message to the customer.
- c. In Step 3, add the callback URL this, will be the same URL as setup in section 4.3.c



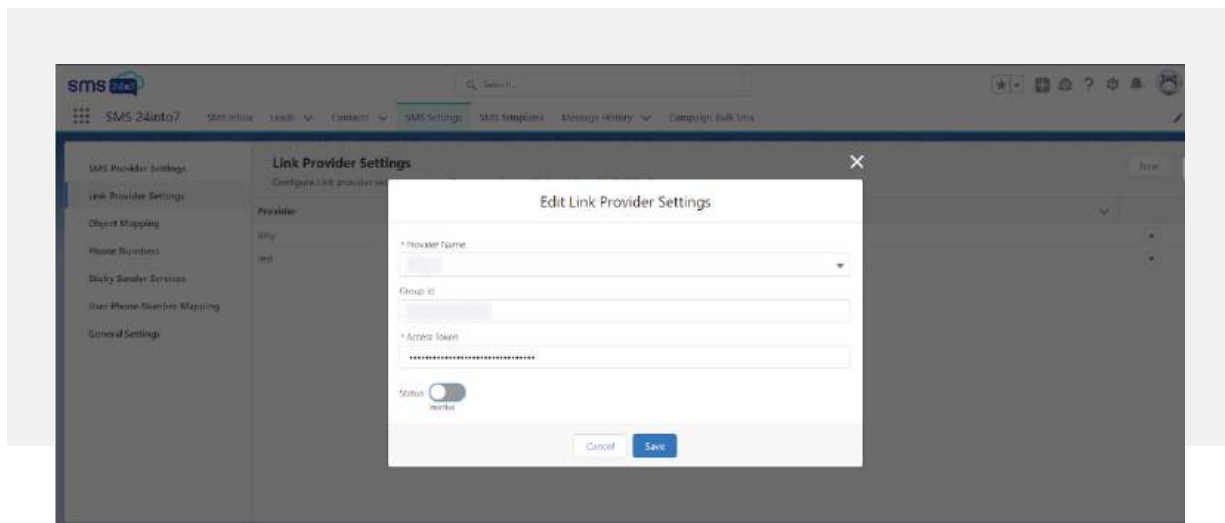
3. Finally, submit compliance info and create a Message Service.
4. In the SMS Ninja app, under the Sticky Sender Services section under the SMS Settings Tab, click the New button and add details of the message service.

Provider Name, Message Service Name, and Message Service Id and Save the message service.



Add Link Provider

- 01 Create account on Bitly to use as a Link Tracking provider
- 02 In the API section copy the Access token provided by bitly.
- 03 In the SMS Ninja app in Link Provider Setting under SMS Setting Tab set up the link tracking provider details like, provider name, provider group id and Access Token as shown below and click Save



Multi-Channel Messaging

Multi-channel messaging is a powerful approach that enables businesses and applications to communicate with users across various platforms, enhancing engagement and customer interactions. This strategy involves sending and receiving messages through different communication channels to reach users wherever they prefer to connect. Here's an overview of multi-channel messaging:

Multi-channel messaging involves sending and receiving messages through a combination of communication platforms.

These platforms can include SMS, email, messaging apps like WhatsApp.

By utilizing multiple channels, businesses can ensure their messages reach users in a way that suits their preferences.

Choose Channel

Channels

3 Options Selected

- ✓ SMS/MMS
- ✓ WhatsApp
- ✓ Email

To (Mobile Phone) From (Twilio1) SMS X

To (Phone) From (Twilio1) WhatsApp X

Email X

* From Email

* To Emails

Enter To Emails

Cc Emails

Bcc Emails

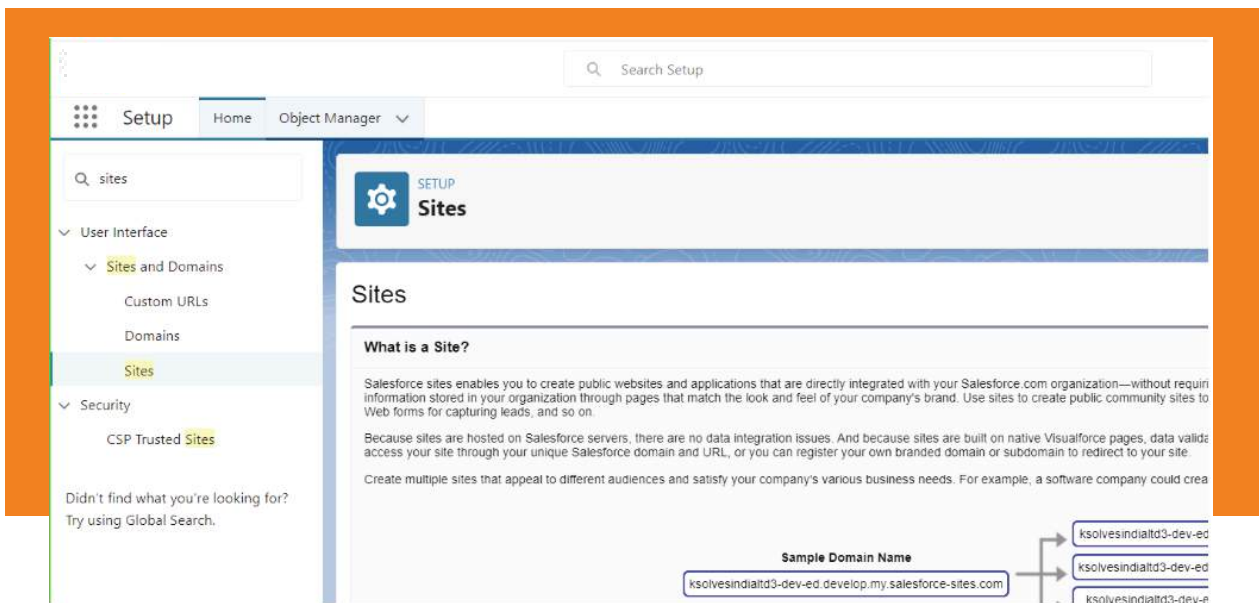
Enter CC Emails

Enter BCC Emails

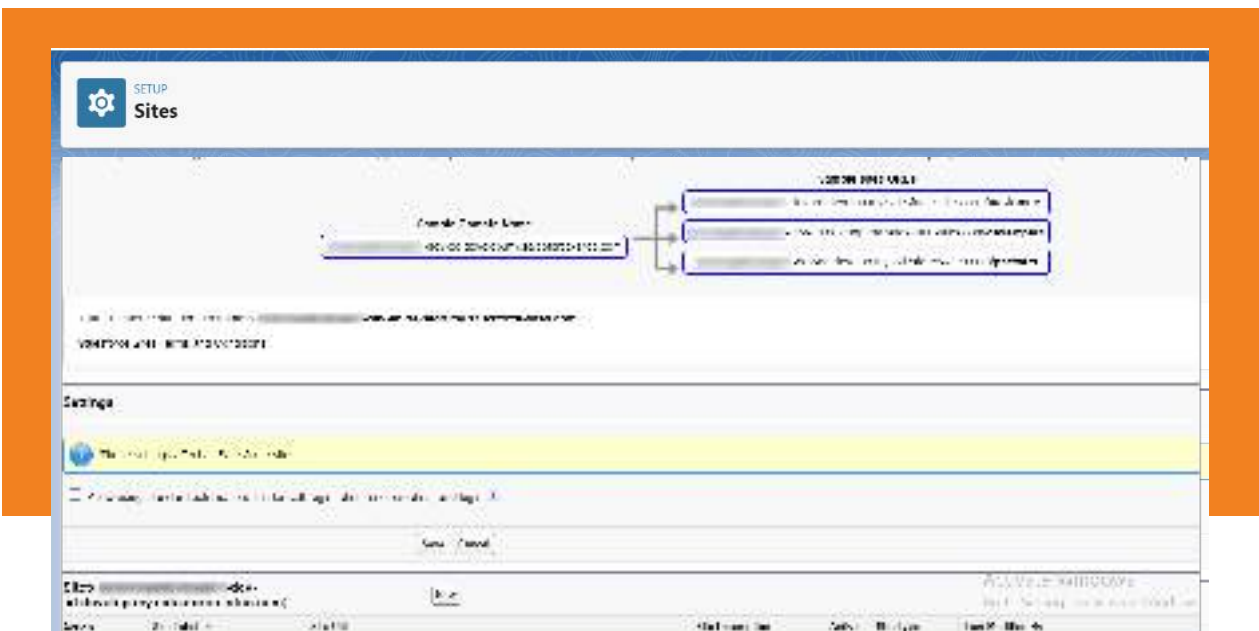
Cancel Choose Channel

Enable Object Permission For Site User

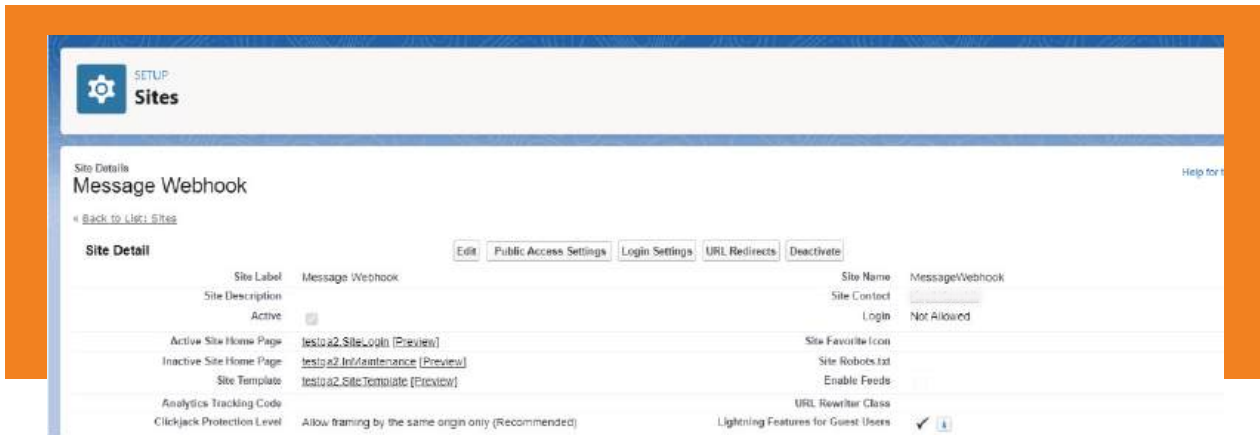
01. Click on the Setup>Search Box(Sites)



02. Click on the Site Label (eg. message Webhook)



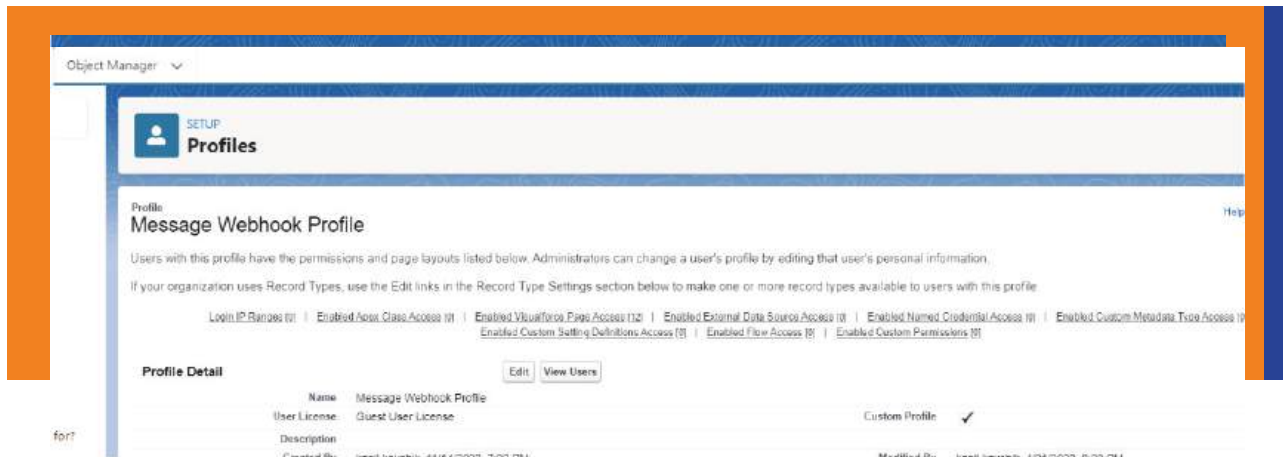
03. Click on the Public Access Setting



Site Detail

Site Label	Message Webhook	Site Name	MessageWebhook
Site Description		Site Contact	Not Allowed
Active	☒	Login	Not Allowed
Active Site Home Page	test002.SiteLogin (Preview)	Site Favorite Icon	
Inactive Site Home Page	test002.IntroMaintenance (Preview)	Site Robots.txt	
Site Template	test002.SiteTemplate (Preview)	Enable Feeds	
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Lightning Features for Guest Users	☒

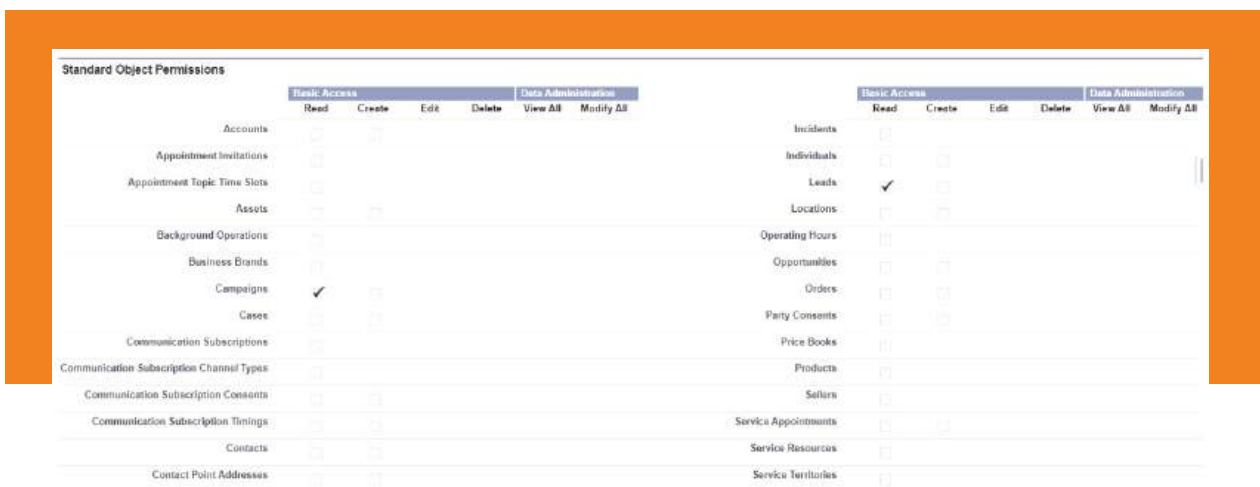
04. Click on the Edit And Scroll Down.



Profile Detail

Name	Message Webhook Profile	Custom Profile	☒
User License	Guest User License		
Description			

05. Click on the Object Read Check Box



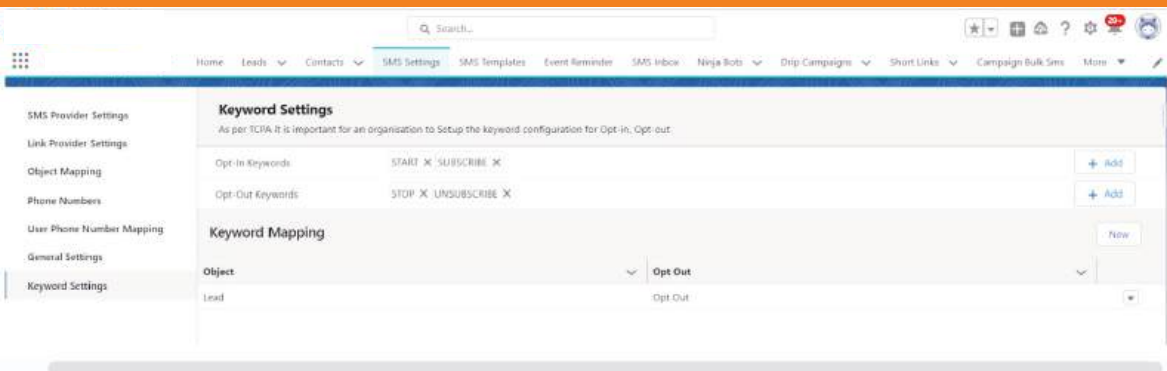
	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐					Incidents	☐					
Appointment Invitations	☐						Individuals	☐	☐				
Appointment Topic Time Slots	☐						Leads	☒	☐				
Assots	☐	☐					Locations	☐	☐				
Background Operations	☐						Operating Hours	☐					
Business Brands	☐						Opportunities	☐	☐				
Campaigns	☒	☐					Orders	☐	☐				
Cases	☐	☐					Party Consents	☐	☐				
Communication Subscriptions	☐						Price Books	☐					
Communication Subscription Channel Types	☐						Products	☐					
Communication Subscription Consents	☐	☐					Sellers	☐					
Communication Subscription Timings	☐	☐					Service Appointments	☐	☐				
Contacts	☐	☐					Service Resources	☐					
Contact Point Addresses	☐	☐					Service Territories	☐					

06. Follow similar steps in case of any custom objects.

Opt-In Opt-Out

Opt-in Opt-out keywords for customers to receive/not receive messages from salesforce org. By clicking on +Add button users can add keywords. By clicking on the New button user Map the fields as per objects for opt-out.

This screen helps us to add the Opt-in And Opt-out keywords in the salesforce org and field mapping for Opt-out.



The screenshot displays the 'Keyword Settings' page in the SMS Ninja application. The interface includes a top navigation bar with a search field and various menu items like Home, Leads, Contacts, SMS Settings, SMS Templates, Event Reminder, SMS Inbox, Ninja Bot, Drip Campaigns, Short Links, Campaign Bulk Sms, and More. A left sidebar lists settings categories: SMS Provider Settings, Link Provider Settings, Object Mapping, Phone Numbers, User Phone Number Mapping, General Settings, and Keyword Settings (which is currently selected). The main content area is titled 'Keyword Settings' and contains a note about TCRA. It features two sections: 'Opt-In Keywords' with a table showing 'START' and 'SUBSCRIBE' keywords, and 'Opt-Out Keywords' with a table showing 'STOP' and 'UNSUBSCRIBE' keywords. Both sections have '+ Add' buttons. Below these is the 'Keyword Mapping' section, which includes a 'New' button and a table with columns for 'Object' and 'Opt Out'. The 'Object' column has a dropdown menu, and the 'Opt Out' column has a dropdown menu with 'Opt Out' selected.

Scheduling the Batch Class

- The system will execute/process the scheduled messages at an interval of every 15 minutes. For this to work a schedulable class, SendSMSSchedule must be scheduled.
- It can be done from an anonymous window by the system admin by executing the below code. Ensure that the user executing the schedulable has permission to access records in org.

For this -

```
String Every15Min1 = '0 0 * * * ?';  
System.schedule('SMSUpdate1', Every15Min1, new ks_sn.SendSMSSchedule());
```

```
String Every15Min2 = '0 15 * * * ?';  
System.schedule('SMSUpdate2', Every15Min2, new ks_sn.SendSMSSchedule());
```

```
String Every15Min3 = '0 30 * * * ?';  
System.schedule('SMSUpdate3', Every15Min3, new ks_sn.SendSMSSchedule());
```

```
String Every15Min4 = '0 45 * * * ?';  
System.schedule('SMSUpdate4', Every15Min4, new ks_sn.SendSMSSchedule());
```

White labeling

White labeling is the practice of customizing and branding a product developed by one company to appear as though it's produced by another company. In your app, white labeling lets clients present the app as their own, maintaining their brand's identity while using your app's features. To do this

Go to Setup → Quick Find Box → Search for 'App Manager' → Edit the app and customize.

Support

Need help with Ksolves SMS Ninja? Have questions? Have a feature you'd like to see.

included? Drop us a line, we would love to hear from you.

Ksolves is continually working on improving our products and your feedback is critical to that process.

We appreciate hearing details about what is or isn't working for you or ideas you have for how to make the app better.

Please contact us at sales@ksolves.com.

Thank You!
