

Configure Marketing Cloud Account Engagement to Send SMS using Digital Engagement

Introduction

This document outlines the steps to configure Salesforce to send out SMS messages, based on automations in Marketing Cloud Account Engagement (formally Pardot). There are 2 different ways that you are able to trigger the automation - either works very similarly and will be up to your own preference and use case as to which you use.

This package contains setup to enable Marketers to send SMS messages as part of Marketing Cloud Account Engagement Automations. Note - you **MUST** have Messaging Enabled in this Org before you can install this package.

Assumptions

- You already have Marketing Cloud Account Engagement setup and are familiar with automations
- You have access to Salesforce
- Your Salesforce Org has Digital Engagement provisioned
- Digital Engagement has been setup, with a number provisioned (Messaging **MUST** be turned on to install the package)
- Your User has access to setup up and configure Messaging/Digital Engagement in Salesforce
- Marketing Cloud Account Engagement → Salesforce connector has already been setup and is running

Initial Setup Steps

Salesforce Steps

1. Install the unmanaged package (for admins only), found at this URL: <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000DYRPhUAP>
2. While that is installing, create the follow Messaging templates - for each, select "SMS" as the channel. Note - it is important that the 'Developer Name' exactly matches what is below - the example ones are optional, but recommended to help you understand how it works initially.

Template Name	Developer Name	Description	Content
---------------	----------------	-------------	---------

Campaign SMS	Campaign_SMS	Sends out the content of the 'SMS_Message__c' field on the Campaign to the members	{!Campaign.SMS_Message__c}
Contact SMS Content	Contact_SMS_Content	Sends out the content of the 'SMS_Message__c' field on the Contact	{!Contact.SMS_Message__c}
Lead SMS Content	Lead_SMS_Content	Sends out the content of the 'SMS_Message__c' field on the Lead	{!Lead.SMS_Message__c}
Contact Marketing Cloud Account Engagement Example 1	Contact_Pardot_Example_1	An example template included for demonstration purposes	Hi {!Contact.FirstName}, here is an example SMS triggered by Pardot
Contact Pardot Example 2	Contact_Pardot_Example_2	An example template included for demonstration purposes	Hi {!Contact.FirstName}, here is an a different example of a SMS triggered by Pardot
Lead Pardot Example 1	Lead_Pardot_Example_1	An example template included for demonstration purposes	Hi {!Lead.FirstName}, here is an example SMS triggered by Pardot
Lead Pardot Example 2	Lead_Pardot_Example_2	An example template included for demonstration purposes	Hi {!Lead.FirstName}, here is an a different example of a SMS triggered by Pardot

3. You can also create any extra templates you want at this stage if you want to personalize your message, but you need to create one for Contacts, and one for Leads. More information [later in this Quip doc](#)
4. Assign the 'Pardot SMS Field Access' permission set to your Pardot Integration User, usually called 'B2BMA Integration'
5. Once the package has been successfully installed, there will be 3 active Flows that are included. Go to 'Flows' in setup to view these - you may want to update them to change/select the appropriate messaging channel to use.
 - a. Campaign Member - Trigger SMS
 - b. Contact - Trigger SMS
 - c. Lead - Trigger SMS
6. Update the Campaign Page layout to include these fields (recommend creating a new section called 'Pardot SMS'):
 - a. Send SMS
 - b. SMS Message
 - c. Send SMS Template
 - d. SMS Template to Send
7. For testing purposes - you may want to update your page layouts for the Contact & Lead objects as well to include the 4 fields listed above.

Marketing Cloud Account Engagement Steps

1. Open up the Marketing Cloud Account Engagement App
2. Go to Marketing Cloud Account Engagement Settings
3. Open up 'Connectors'
4. Open up 'Prospect Fields' under 'Object and Field Configuration'
5. Click '+ Add Custom Field'
6. Add the following 4 fields - if you don't see these fields in the 'salesforce.com' drop down list, click the 'refresh' icon next to the field to get the new values.

Name	salesforce.com Field Name	Sync Behavior	Type
SMS Message	SMS_Message__c	Use the most recently updated record	Text
SMS Template to Send	SMS_Template_to_Send__c	Use the most recently updated record	Dropdown (use/sync values from SF)
Send SMS	Send_SMS	Use the most recently updated record	Radio Button (true/false)
Send SMS Template	Send_SMS_Template	Use the most recently updated record	Radio Button (true/false)

That is it! You are now ready to start sending SMS messages during Marketing Cloud Account Engagement Automations.

Sending the Message from Marketing Cloud Account Engagement

You have 2 different ways of sending the message from Marketing Cloud Account Engagement, one is to add a prospect to a campaign which will trigger it, the other is to directly update the prospect records, triggering an update to the Contact/Lead record in Salesforce which will trigger it.

Further to that - you can 2 different types of messages you can send - either a fixed free text message, that you can define within the Marketing Cloud Account Engagement workflow, or you can use a template which you need to pre-define in Salesforce, but means you can support personalization in the messages, with this like first and last name.

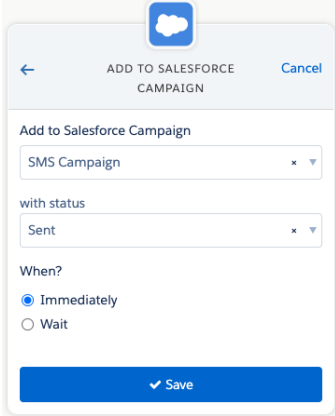
Using the Campaign

To trigger the message from a campaign you need a few initial setup steps

1. If you didn't already add these fields to the page layout, then do so now. In Salesforce, edit the 'Campaign' object and add these fields to the page layout so they are visible and you can edit them (you may need to grant your user permissions to these fields via the 'Pardot SMS Field Access' permission set if you aren't a system admin)
 - a. Send SMS
 - b. Send SMS Template
 - c. SMS Message
 - d. SMS Template to Send
2. Create a new campaign and set the SMS fields as appropriate - if you want a fixed message (meaning all campaign members get the exact same message), then check 'Send SMS' and enter the message you want to send in the 'SMS Message' box. If you want to use [a template you've created](#) earlier, then check the 'Send SMS Template' box, and select the relevant template.
3. Ensure that the 'Campaign Member - Trigger SMS' Flow is activated
 - a. You may want to update this to load the appropriate messaging channel if you have multiple numbers in your org.
 - b. You may also want to change the conditions that start the flow, to match the campaign member status relevant to your org, as well as the final update step to a status that works for your (or even delete the record afterwards).
4. You can now test it is working by adding members to the Campaign manually from Salesforce - try a lead and a contact with a mobile or phone number that you have access too
5. Once you've confirmed this is working as expected, you can add this update to some automation from Marketing Cloud Account Engagement

6. Open the Automation/Engagement Program you wish to add SMS to from the Marketing Cloud Account Engagement app
7. Add an 'Action' element to your Engagement Program and select 'Add to Salesforce Campaign'
8. Select the appropriate Campaign and status and click Save

9.



10. Complete the rest of your engagement, and when ready click 'Start'
11. Track your automation - it when it runs the action to add to the campaign, it should trigger the Flow from earlier to send out the SMS.

Using the Prospect Records

1. Ensure that the 'Lead - Send SMS triggered' and 'Contact - Send SMS triggered' Flows are activated
 - a. You may want to update these to load the appropriate messaging channel if you have multiple numbers in your org.
2. Open the Automation/Engagement Program you wish to add SMS to from the Marketing Cloud Account Engagement app
3. Add an 'Action' element to your Engagement Program and select 'Change Prospect Field Value'
4. Select either 'SMS Message' or 'SMS Template to Send'
 - a. Select 'SMS Message' if you want to hard-code the message to send within this automation. Note: this can't be personalized with the prospect information (e.g. first name)
 - b. Select 'SMS Template to Send' if you want to send a personalized message, with a template you've [previously created in Salesforce](#)
5. Add a second 'Action' element to your Engagement Program after the first one, and select 'Change Prospect Field Value'
6. If you used 'SMS Message' above, then select 'Send SMS' and set it to true
7. If you used 'SMS Template to Send' above, then select 'Send SMS Template' and set it to true
8. Complete the rest of your engagement, and when ready click 'Start'
9. Track your automation - it when it runs the action to update the Prospect record, it should trigger the Flow from earlier to send out the SMS.

Adding new Messaging Templates

To add a new template, you need to add one for both Contacts and for Leads (if you are using merge fields). There are various steps to do this:

1. First, [create the new Messaging Template\(s\)](#) in your Salesforce org, if you are using merge fields (e.g. first name), then you will need 1 for contacts, one for leads. Ensure that you remember the developer name of the new templates
2. We now need to add the meta-data for these templates - open up 'Custom Metadata Types' from the admin screens
3. Click 'Manage Records' next to the 'Messaging Template Object Map' Type
4. Click 'New'
5. Give it a name and a label that make sense, then enter the name for the Messaging Template you created in step 1 for the lead, and for the contact as appropriate. Remember/copy the 'Name' if you give this Messaging Template Object Map record and 'Save'
 - a. You can use the same value for the contact and lead values if you don't have any merge fields in your template
6. Open up 'Picklist Value Sets' from the setup options
7. Click on the 'Messaging Templates' Picklist Value Set label (don't click 'Edit')
8. In the 'Values' section, click 'New'
9. Add a new value with the exact name we used when creating the 'Messaging Template Object Map' record in step 5 above.
10. Click 'Save'
11. This final step is to enable this new value in Marketing Cloud Account Engagement - to do that, go to your Marketing Cloud Account Engagement Settings, and select 'Prospect Fields'.
12. Edit your 'SMS Template to Send' field
13. This option should now be available as an option on the Prospect records in Marketing Cloud Account Engagement (once the data is synced), and available to update on the Campaign record in Salesforce.

Troubleshooting

If you aren't receiving the messages, the first step is to test it out from Salesforce, without the Marketing Cloud Account Engagement updates.

1. For sending from the Campaign - simply add a Campaign Member with your phone number set on the record (in either the mobile or phone fields or both). This should trigger it
2. For sending from a Prospect record, you'll need to add the relevant fields to the Contact and Lead page layouts (the 4 fields mentioned earlier in this document. Once you have added those, edit your Contact and/or Lead (with your phone number set in either the phone, or mobile fields or both), to trigger the SMS (by setting the 'Send SMS' or 'Send SMS Template' fields to true, and updating the 'SMS Message' or 'SMS Template to Send' fields as appropriate).

If the SMS is sent in these instances, then your Salesforce setup is correct, however either your contact/lead isn't being updated by Marketing Cloud Account Engagement (isn't in the segmentation list) or the sync is still waiting to happen - so it may send it later on.

You can see if a Messaging Session was created by looking for the 'Messaging Sessions' object, and viewing the list - select 'All' as the list view, and order by created date descending. You should see the latest message at the top, open it up and view the content.

Known Limitations

THROUGHPUT/VOLUME

Digital Engagement doesn't publish throughput values, but you can consult this knowledge article for general guidelines:

<https://help.salesforce.com/articleView?id=000352413&type=1&mode=1>

This article also includes some information on SMS regulations for the US:

https://help.salesforce.com/articleView?id=000352463&language=en_US&mode=1&type=1

You will at minimum want to use a Toll Free number for this implementation, but a short code may be more appropriate depending on the volumes.

For very high volumes, you may want to check with your account team who may engage product management.

ARE IMAGES SUPPORTED?

No, images cannot be sent via templates in Digital Engagement today.

CAN WE REPORT ON DELIVERABILITY?

No, we do not have the ability to report on whether a SMS was delivered or not today, however you can check for errors with delivery by creating a report to see if any 'Conversation Entry' records have a 'Messaging Status Code'. The code will match one of the ones [found on the help page](#).

There is also a [reporting package for Digital Engagement on the AppExchange](#) which includes a Messaging Error report.

WHAT ABOUT OTHER CHANNELS LIKE WHATSAPP AND FACEBOOK?

This solution only supports SMS, but could be adapted/extended to support the other channels. For WhatsApp, you need to ensure you add 'whatsapp+' and the country code, then the number you are sending to as the phone number. However, for Facebook, you need to already have a Messaging User created and send to that.

Note: for WhatsApp, you'll also need to own WhatsApp Outbound Messaging packs.

Future development ideas

- Link Messaging Sessions to the Campaign they were sent in relation to
-