



GIRIKSMS APP

Installation and SMS Manual
Guide (2023)
(Lightning Version)

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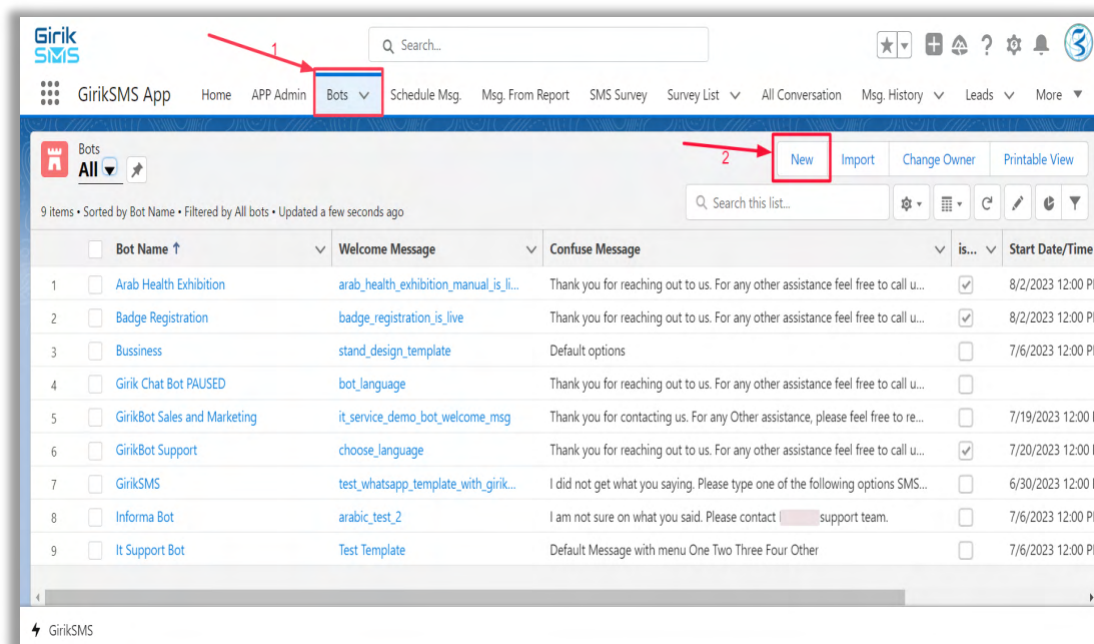
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1) Bots

a) Create Bot

- Introducing Chatbots: Revolutionizing Sales, Marketing, and Support.
- In the rapidly evolving world of customer service and communication, businesses are increasingly turning to AI-powered chatbots to enhance their operations. These intelligent virtual assistants, capable of handling various tasks, are transforming the way organizations interact with their customers. Let's explore some key aspects of chatbots and their impact on sales, marketing, and support.

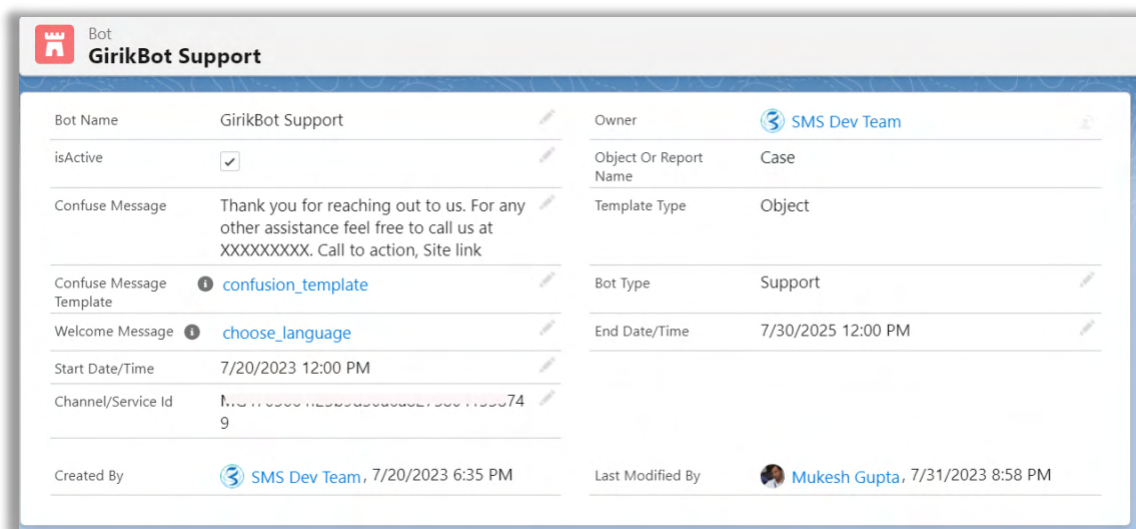


- Click on **Bots** Tab after that click on **New** button to create bots.

1. **Bot Name:** Choose unique names that align with their brand and values. These names can range from friendly and approachable to professional and formal, depending on the business's target audience. It's mandatory to fill this.
2. **IsActive:** The "isActive" feature allows businesses to enable or disable the chatbot's functionalities based on their requirements. For instance, during maintenance or off-peak hours, the chatbot can be deactivated, and users will be informed about its unavailability.
3. **Confuse Message:** In case the chatbot encounters an issue or fails to understand a user's query, it will respond with a "Confuse Message." This auto-generated message will politely inform the user that it couldn't comprehend the input and encourage them to rephrase the question. It's mandatory to fill this.
4. **Welcome Message:** The Welcome Message sets the tone for the conversation and gives users their first impression of the chatbot. Businesses can choose from a variety of **WhatsApp/SMS templates**. In cases where the chatbot is integrated with WhatsApp, it's essential to adhere to WhatsApp's approved templates to maintain a smooth user experience...
5. **Bot Type:** AI chatbots can serve two primary purposes and It's mandatory to fill this.
 - a. **Sales and Marketing:** These chatbots are designed to assist in lead generation, customer engagement, and promoting products or services. They can provide product recommendations, answer FAQs, and even run personalized marketing campaigns.
 - b. **Support:** Support chatbots excel in addressing customer queries, troubleshooting issues, and providing timely assistance. They can reduce

response times, handle repetitive inquiries, and escalate complex problems to human agents when necessary.

- 6. **Start Date/Time:** Businesses can schedule the activation of their chatbots at specific Start Date/Time. This feature enables companies to plan their bot deployment strategically and align it with product launches or marketing campaigns.
- 7. **End Date/Time:** Similarly, the End Date/Time feature allows businesses to set a date and time when the chatbot's functionality will be deactivated. This can be useful for seasonal promotions or limited-time events.
- 8. **Channel/Service Id:** The Channel/Service Id helps identify the specific communication channel or service where the chatbot operates. This could service Id from Twilio.



b) Bot Intent

- Click on **New** button to create Bot Intent.

GirikSMS App | Home | APP Admin | **Bots** | Schedule Msg. | Msg. From Report | SMS Survey | Survey List | All Conversation | Msg. History

Bot: GirikBot Support

Bot Name	GirikBot Support	Owner	SMS Dev Team
isActive	<input checked="" type="checkbox"/>	Object Or Report Name	Case
Confuse Message	Thank you for reaching out to us. For any other assistance feel free to call us at XXXXXXXXX. Call to action, Site link	Template Type	Object
Confuse Message Template	confusion_template	Bot Type	Support
Welcome Message	choose_language	End Date/Time	7/30/2023 12:00 PM
Start Date/Time	7/20/2023 12:00 PM	Created By	SMS Dev Team, 7/20/2023 6:35 PM
Channel/Service Id		Last Modified By	Mukesh Gupta, 7/31/2023 8:58 PM

Bot Intents (6+) New

Bot Intent	Message Template	Field Api Name	Action
Welcome message	choose_language		
Please Select Event	follow_up_response_1	gkn_sms_Event_Name_c	Create Record

New Bot Intent

Information

* Bot Intent: Welcome back

Bot: It Support Bot

Bot Response: [Empty field]

Message Template: Search SMS Templates...

Owner: SMS Dev Team

Object Or Report Name: This field is calculated upon save

Action: --None--

Fire Action:

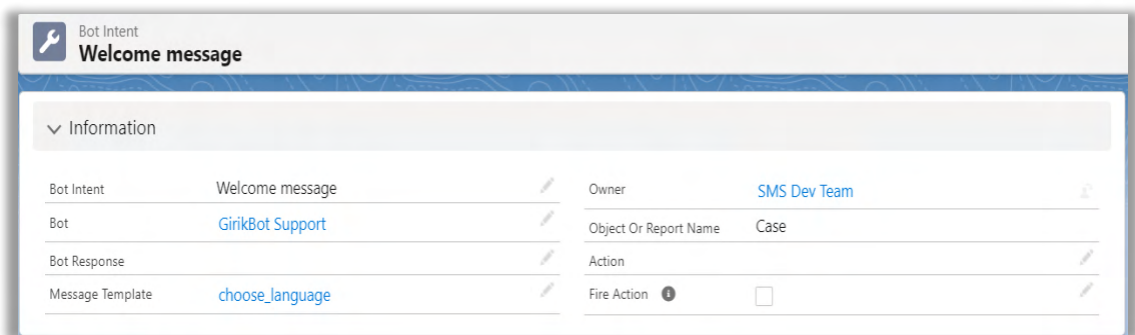
System Information

Created By: [Empty field] | Last Modified By: [Empty field]

Buttons: Cancel | Save & New | Save

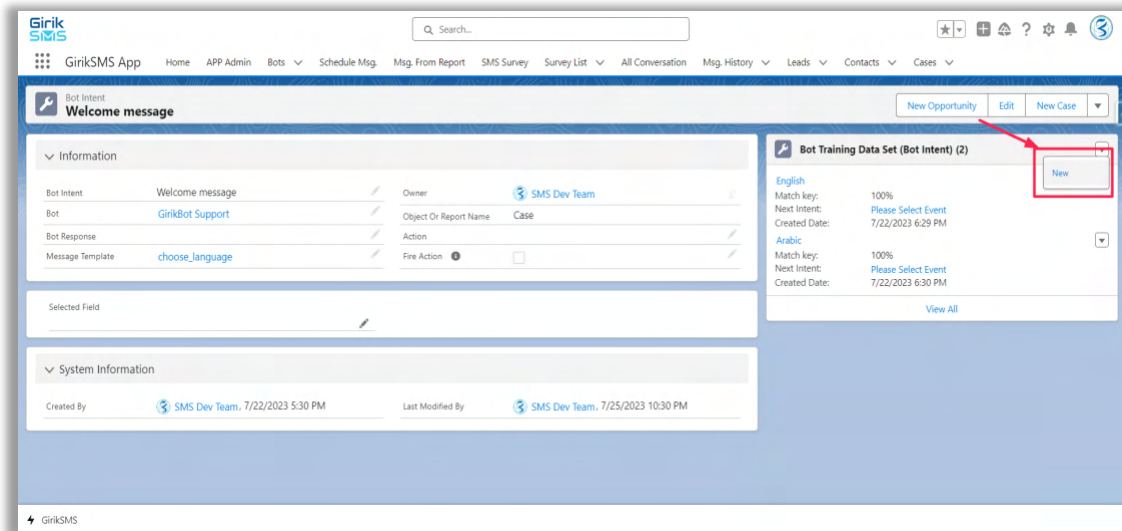
- **Bot Intent:** Give the name of bot intent to access the into while we selecting next intent.

- **Bot:** Here you will get selected Bot which is initially created and this is related to this intent.
- **Bot Response:** On choosing this Bot Intent user will show this message on response.
- **Message Template:** Here you have to search SMS/WhatsApp template to in order to response back to user while they will select this Bot Intent.
- **Fire Action:** The "Fire Action" feature allows the chatbot to execute the appropriate action (create/update) whenever it receives a response from the customer related to the specific intent. For instance, if the user confirms the information for record creation or provides updated details for a record update, the chatbot will trigger the corresponding action.
- **Action:** The chatbot will support two primary types of actions based on user queries.
 - **Create Record:** Whenever a user requests the creation of a record, the chatbot will gather relevant information from the user, validate it, and then initiate the creation process in the backend system.
 - **Update Record:** If a user asks to update an existing record, the chatbot will prompt the user to provide the necessary details for the update. It will then execute the update action once it receives valid input from the user.
 - After completing this Bot Intent fields Click on **Save** button.



c) Bot Training Data Set

- Now create the Bot Training Data Set to show user intent values for user end.



- Now click on **New** button to create sets.

The screenshot shows the 'New Bot Training Data Set' form. The form is divided into two sections: Information and System Information. The Information section contains the following fields:

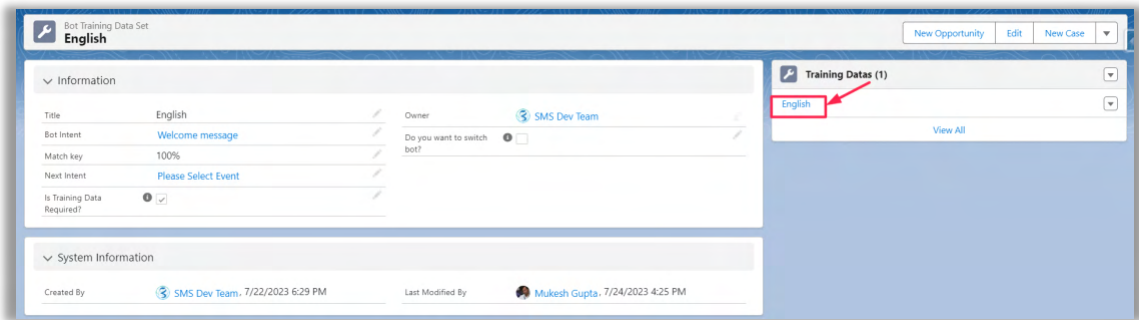
- Title:** A text input field containing 'English', highlighted in yellow.
- Bot Intent:** A dropdown menu showing 'Welcome message'.
- Match key:** A text input field containing '100%'.
- Next Intent:** A search input field with the placeholder text 'Search Bot Intents...'.
- Is Training Data Required?:** A checkbox that is checked.

 The System Information section contains fields for 'Created By' and 'Last Modified By'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

- Title:** Give the Title for Bot Training Data Set. It's mandatory to fill this field.
- Bot Intent:** This shows Bot Intent which is earlier created and its shows depends on previously created Intent value.
- Match Key:** It should be 100% for match the keywords while user gives the input.
- Next Intent:** If user selects this Bot Training Data Set value then user gets the next Bot Intent according to the flow of chat.

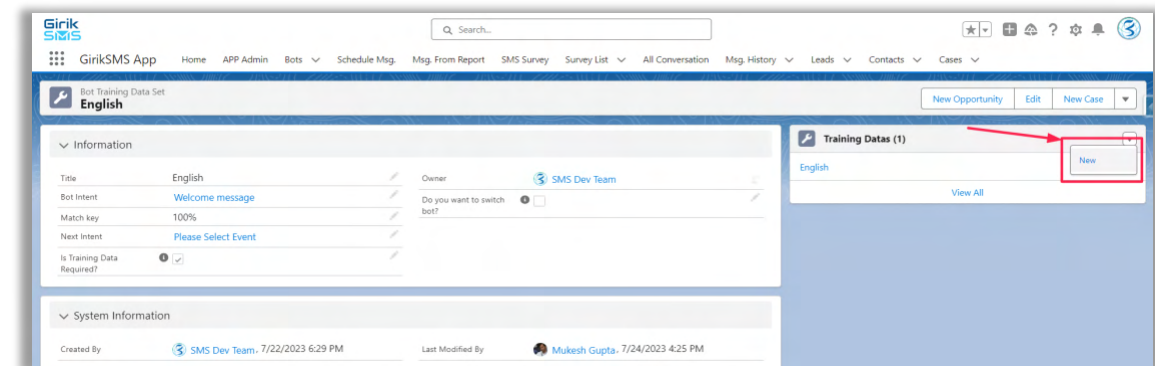
- v. **Is Training Data Required?** Its basically depends upon user input, if user keyword is like Email then this should be unchecked and if user have different keywords like e.g. English then user can train this sets in **Training Datas**.
- vi. **Do you want to switch Bot?** This is for Chat Transfer between Agent.

- After completing this Bot Training Data Set Click on **Save** button.



d) Training Datas

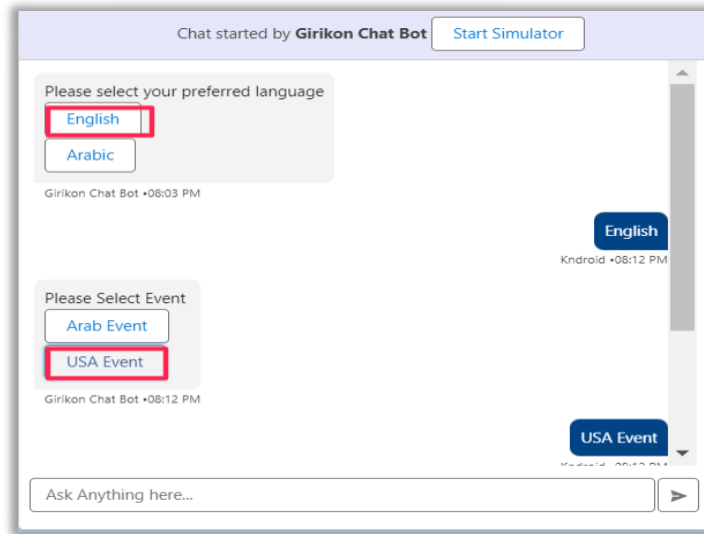
- This is for if user have different keywords like e.g. English then user can train this sets in **Training Datas**. Click on **New** button On Training Datas Action toggle.



- i. **Training Data Name:** Give the value in Training Data Name to match the keyword which is used in Bot Training Data set. It's mandatory to fill this field.
 - ii. **Bot Training Data Set:** Its Selected value came from **Bot Training Data Set**.
- Now Bot is ready to use if you want to test this bot then check Bot Simulator to test before Go Live.

2) Bot Simulator

- **Start Simulator:** For test this Start the simulator every time after refresh the tab.



- **Select Intent Keyword:** Click on the button which is given on the above simulator e.g. If You select **English** then next Intent is show and so far, now your **Bot** is ready to use in Live environment.

3) Introduction

GirikSMS App allows the owner or the super admin to send individual or bulk SMS to the object records (e.g. Account, Leads, Contacts, etc.) from the Salesforce admin panel. In this app, the super admin can create multiple users and assign them permission to send SMS (bulk & individual). After installing GirikSMS App, the super admin can create new users if there are no users. The super admin can assign GirikSMS APP User permission set to its users who can access app features like-

- Bulk SMS/WhatsApp
- Schedule Msg
- SMS Survey
- Msg History
- Msg From Report
- Chat Bot (Sales, Marketing, Services)
- Actionable Chat Bot
- WhatsApp Bot
- Drip Campaigns
- OptOuts Numbers
- SMSApp Debugs

The SmartSMS APP Admin User can view the above-mentioned tabs along with two additional tabs- SMS Admin & Schedule SMS.

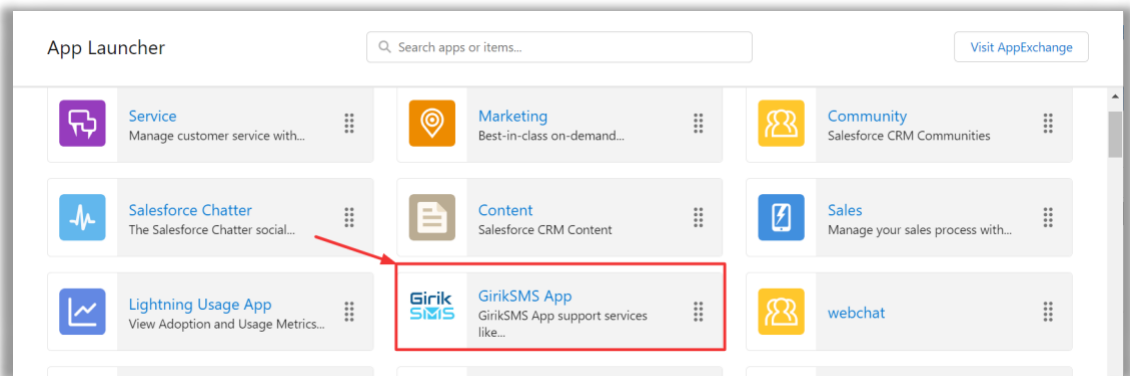
4) Installation

- You have to visit (AppExchange Product URL) for downloading and installing the app.
- Click on Get It Now button, login into your Salesforce Account, select between Sandbox or Production for the app installation and then the click on Confirm and Install.
- While installing, this will ask you to choose for:
 - ❖ Install for admins only
 - ❖ Install for all users
 - ❖ Install for specific profile.
- Choose the option as per your requirement.
- Wait for the application to get installed and then click done.
- After the app installation, you can see the components of the app under Installed Packages.

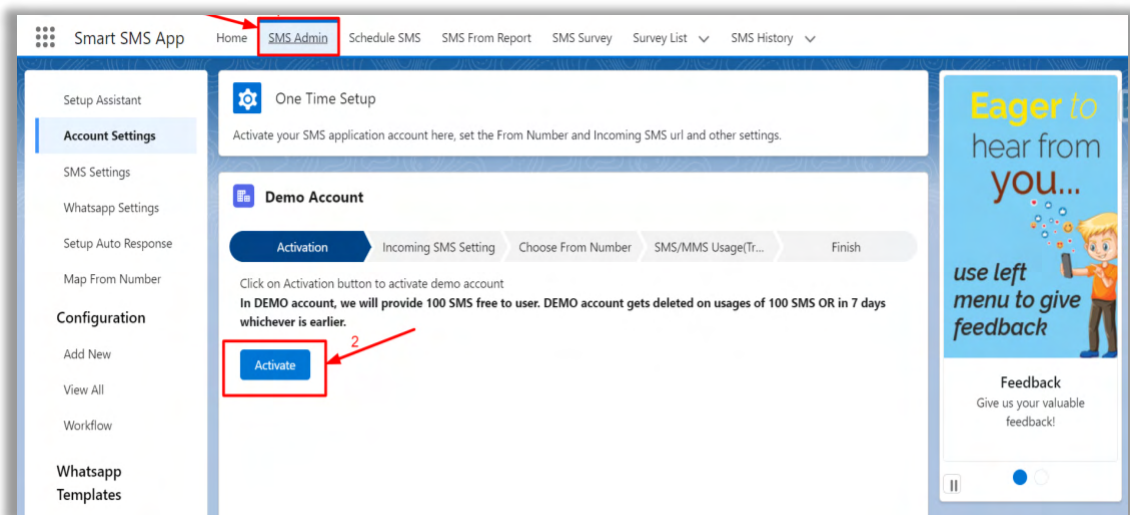
Note: *If a user has a basic permission set assigned to him and he can only view the records of a specific object and if the super admin wants to assign him SmartSMS APP Admin User permission then the admin has to first make that user Admin. The super admin can do this by editing SmartSMS APP Admin User permission and clicking System Permissions. Now enable API Enabled and Modify All Data permission names and then that simple user can be SmartSMS APP Admin and create SMS Configuration and SMS Schedule.*

5) Activating GirikSMS App

- Click **App Launcher** and then you will come across **GirikSMS App** under All Apps section. Click the app to see its other components.



- Now, click **APP Admin** tab and then you will come to the Dashboard. In the One Time Setup section, tap the **Activate** button to activate the app.



6) My Domain Setup

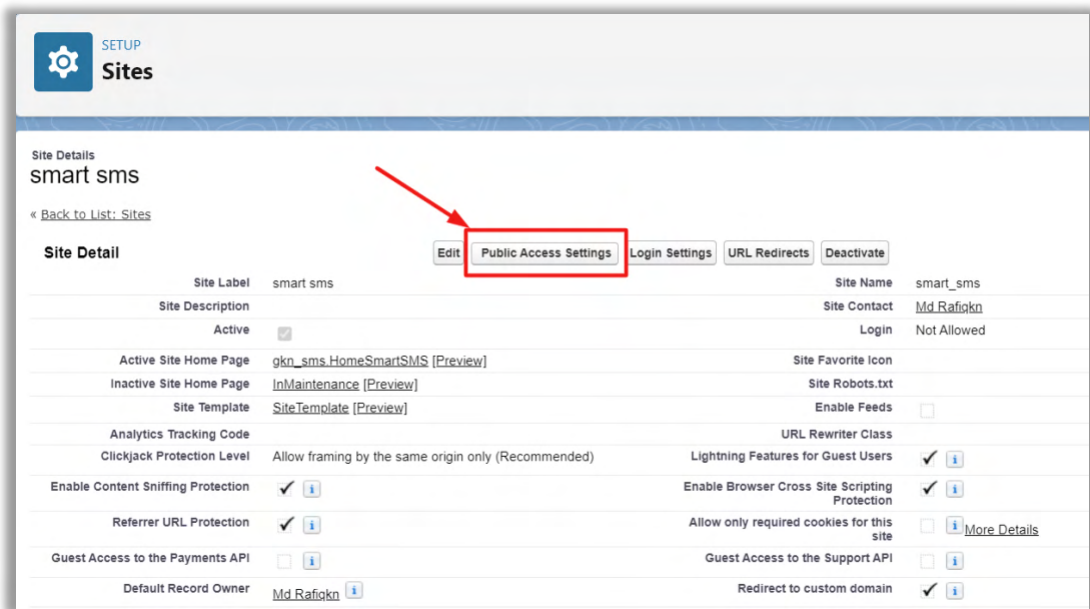
- Now, go to setup, search My Domain in the quick find box and then select **My Domain**.
- Register your domain by entering a name for your domain, check its availability and then click **Register Domain** button. Now login in your registered domain.
- My Domain setup is important as Salesforce Lightning Experience works on the registered My Domain only.

7) Site Setup

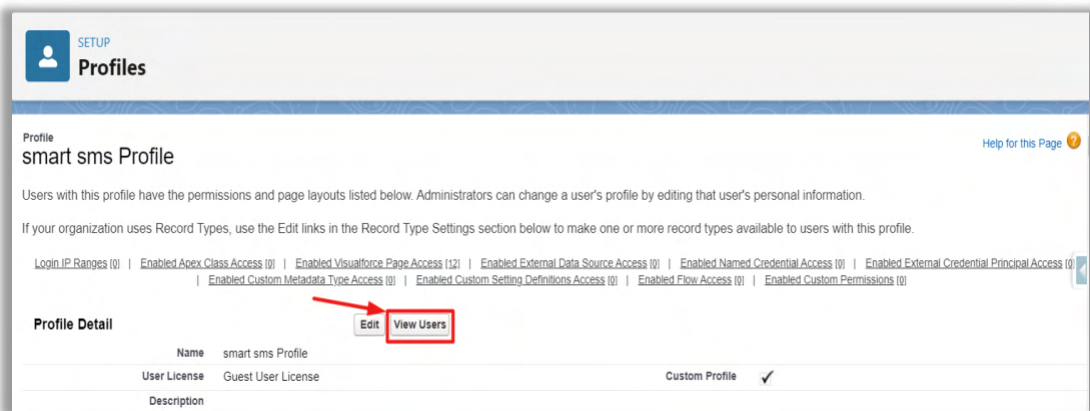
- If you haven't created any site in your org, then first you need to register your domain by entering a name for your domain, check its availability and then click Register Domain button.
- Now, go to setup, search Site in the quick find box and then select **Sites**.
- Enter details like Site Label, Site Name, Site Contact and for Active Site Home Page click on lookup icon and select **HomeSmartSMS** page (this page is included in the package) and save it.
- You also have to check Require Secure Connections (HTTPS), Upgrade all requests to HTTPS checkbox.

The screenshot shows the 'New Site' configuration page in Salesforce. The 'Active Site Home Page' dropdown menu is highlighted with a red box, and a red arrow points to it. The selected option is 'HomeSmartSMS'. Other fields include 'Site Label' (smart_sms), 'Site Name' (smart_sms), 'Site Contact' (Md Rafiqn), 'Default Record Owner' (Md Rafiqn), 'Default Web Address' (https://[redacted]-ed.develop.my.salesforce-sites.com/), 'Active' (checked), 'Inactive Site Home Page' (InMaintenance), and 'Site Template' (SiteTemplate).

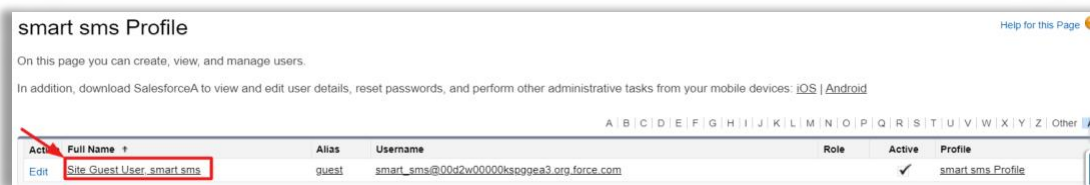
- Now, click on **Public Access Setting** button on the site detail page.



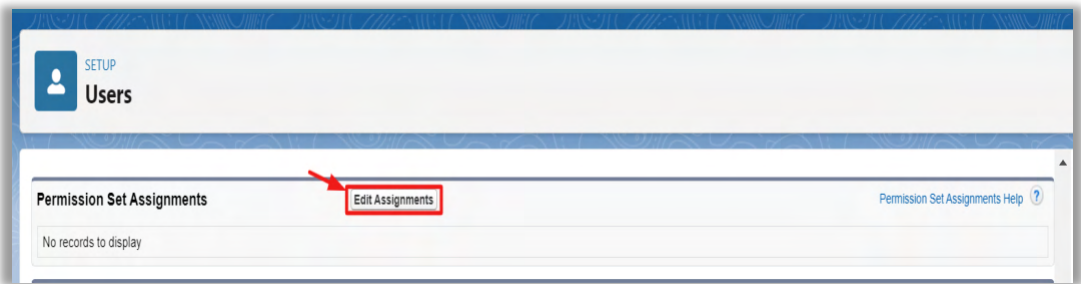
- After clicking Public Access Setting button, click on **View Users** button.



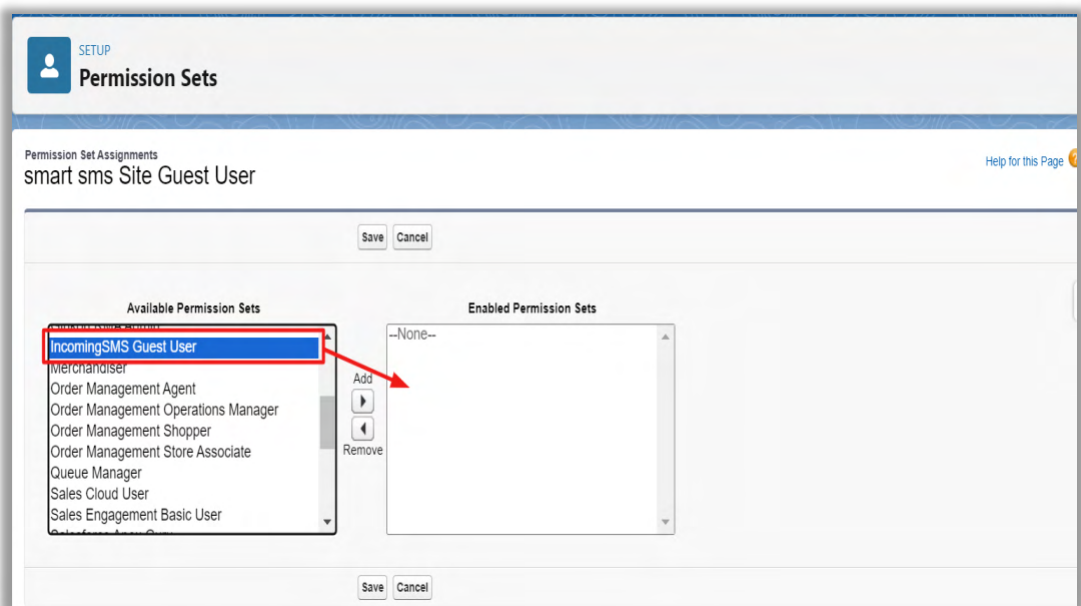
- In the next page, click on **Site Guest User ,smart sms.**



- Next setup page will open, scroll down to Permission Set Assignments Section and click on **Edit Assignments.**

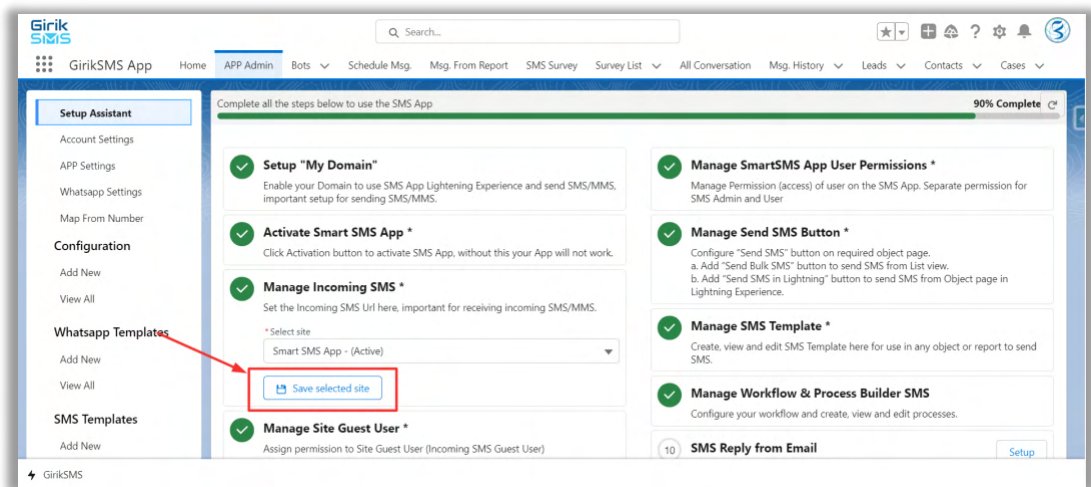


- Then, in the next page move **IncomingSMS Guest User** from **Available Permission Sets** to **Enabled Permission Sets** and **Save**.



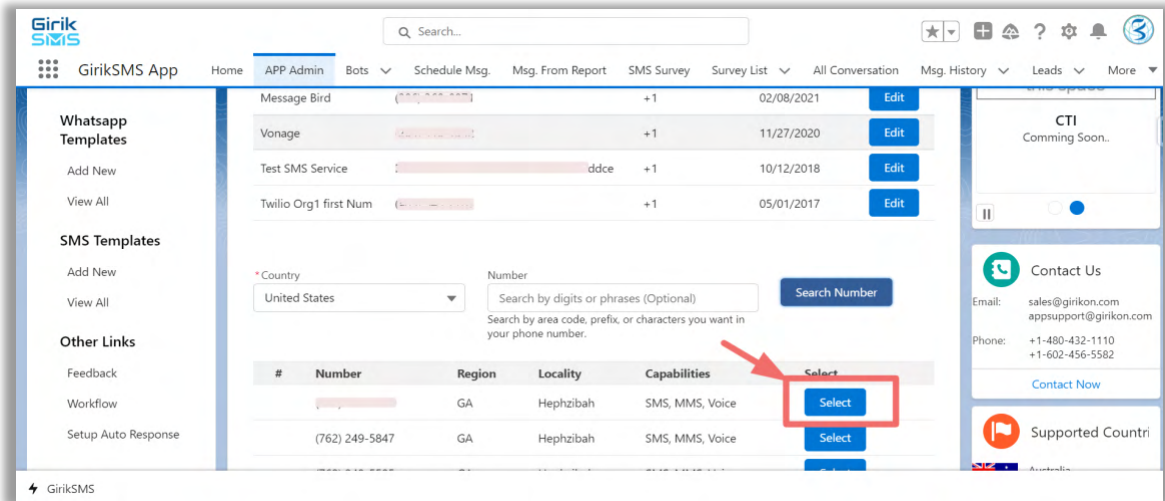
8) Manage Incoming SMS

- Now select site as **Smart SMS App** click on **Save selected site** button.



9) Manage From Number

- The **From Number** is the number using which you will send and receive SMS/MMS.
- Click on **Setup** button, then the **From Number** setup page will open.
- Here, you can add your **From Number** bought from Twilio to send SMS/MMS.
- Select the **Country** and search the **Number** using area code, prefix, or character in your phone number. You can also have and use more than one From Number, but only one at a time.
- Then a list of number will be displayed, select the required number.



- Select any one number and set the site URL and number friendly name.

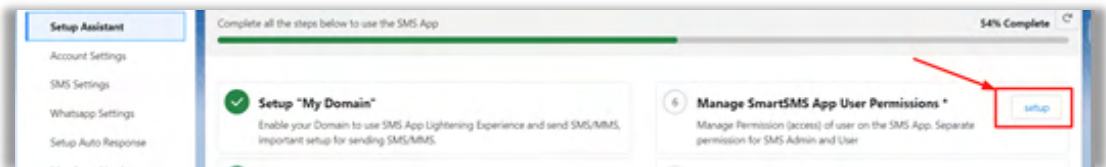
The screenshot shows a 'Confirmation' dialog box. It contains the following fields:

- * Country Code: +1
- Country Code i.e., +1 for USA, +44 for UK, +61 for Australia. For more info [Click Here](#)
- Phone Number: +1 (762) 249-5847
- * Friendly Name of Number: kndroid (highlighted with a red box)
- * Site URL: https://_...-e-dev-ed.develop.my.salesforce-sites.com

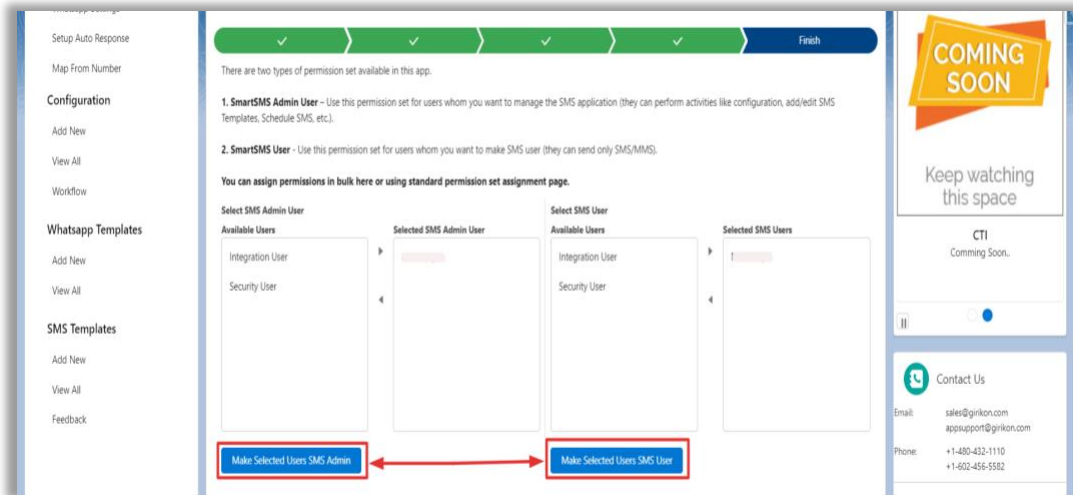
 At the bottom, there is a question: 'Do you really want to use above selected number?' and two buttons: 'Cancel' and 'Confirm'.

10) Manage SmartSMS App User Permissions

- The App user permission can be controlled from here, click on **Setup** button.



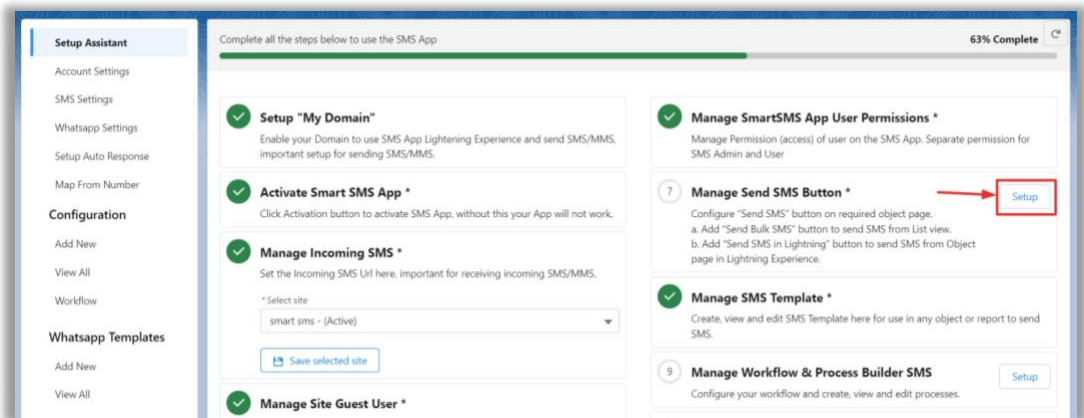
- Then, the User Permission setting page will open.



- There are two type of user permission:
 1. **SmartSMS Admin User:** Any user assigned this permission becomes the Admin and has access to every feature in the App and can manage the SMS App and control access permission of other users.
 2. **SmartSMS User:** Any user assigned this permission can access limited features as assigned by the Admin, the basic features of the SMS App excluding the control panel.
- To assign permission just move the **User Name** from **Available Users** to **Selected Users** box.

11) Manage Send SMS Button

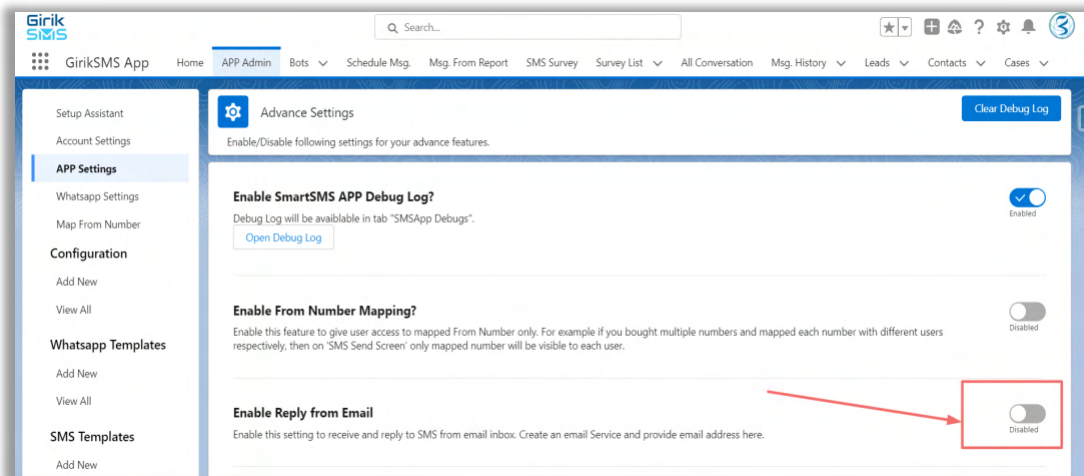
- This to set “**Send SMS Button**” on the objects both Standard and Custom from where you want to send SMS. Click on **Setup** button.



- Click on Object page layout edit then in the palette, once configured for an object, a button captioned **“Send SMS”** will be created and available for addition on all related page layouts.

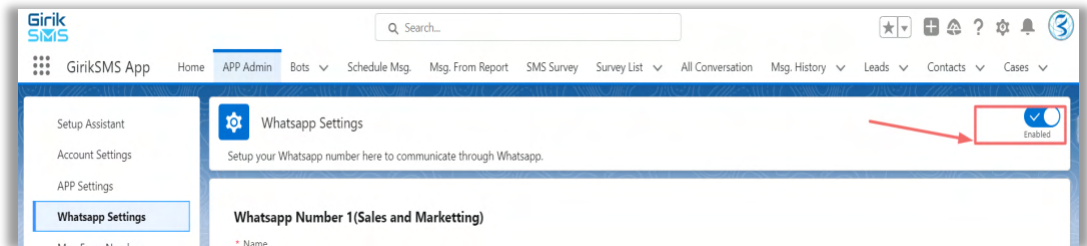
12) SMS Reply From Email

- Using this you reply to received SMS from your email. Click on **Setup** button in 10th box, you will land in the **SMS Setting** page. Enable this feature by clicking the button.



13) Manage Messaging from WhatsApp

- Click on **Setup** button in 11th box, you will land in the **WhatsApp Settings** page

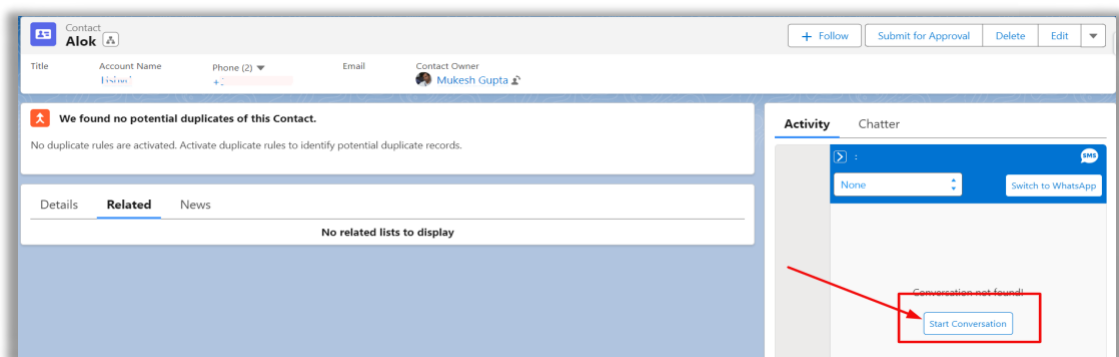


- Here if you want to send message to contacts on WhatsApp or even communicate through WhatsApp, then enable this setting. Enable this feature by clicking the button.

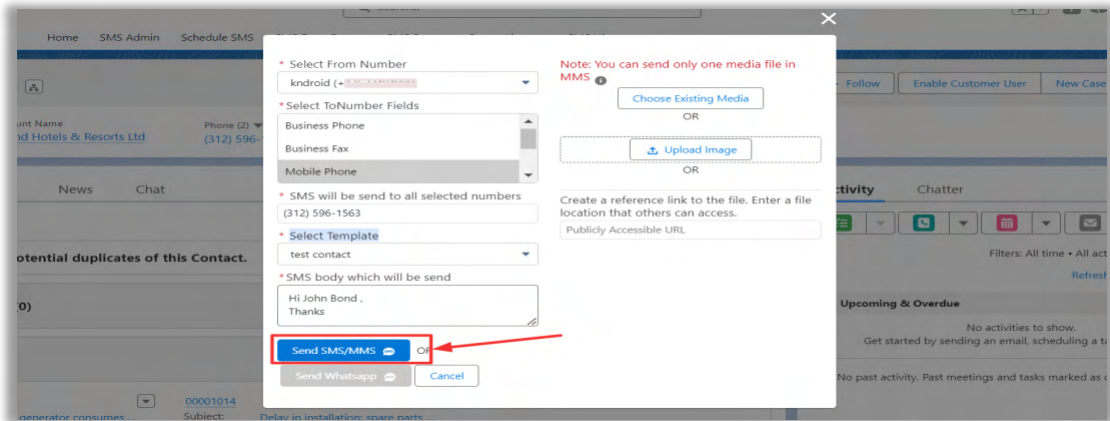
❖ **Important:** You need to have WhatsApp Business account to send message through WhatsApp.

14) Send Single SMS from Record Detail View Page

- After creating SMS configuration for objects, you can navigate to that particular object and view any of its record detail pages and select **Start Conversation** button on Activity Tab.

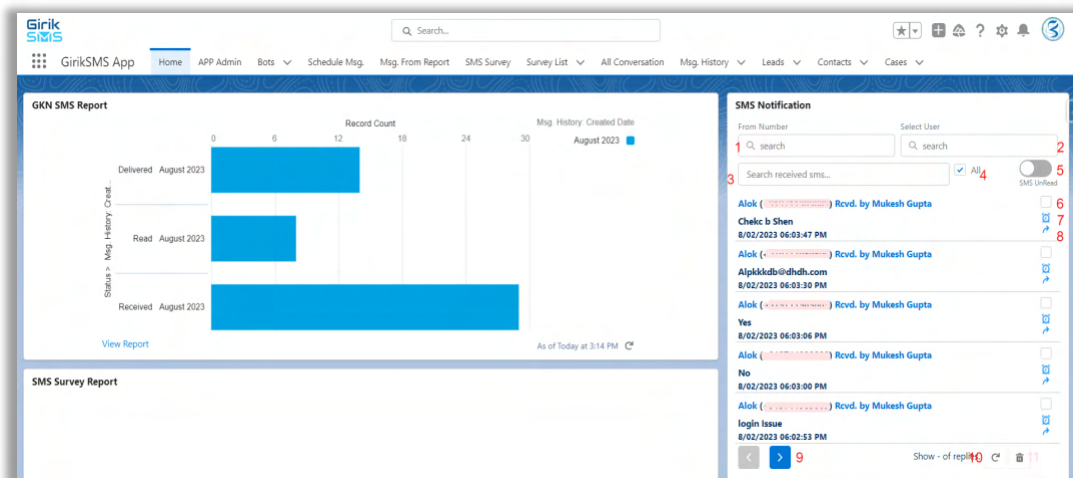


- Then **Select From Number**, **Select ToNumber Fields** after that **select Template**. If user need to add attachments like media then click on upload image button then click on **Send SMS/MMS**.



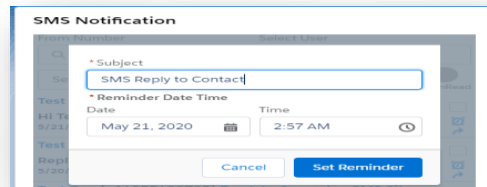
15) SMS Notification

- This is the **Home** page where you can see the **Incoming SMS Notification**. Here the incoming SMS will be displayed and you can reply here as well. Other features available here are **Search SMS** on basis of – **From Number, User, Search received SMS, Set SMS Reminder** and **Filter SMS – All, Unread and Read**.



1. Search SMS on basis of **From Number** by typing the number here.
2. Search SMS on basis of **User** by typing the name here.
3. Search received SMS by typing any keyword here.

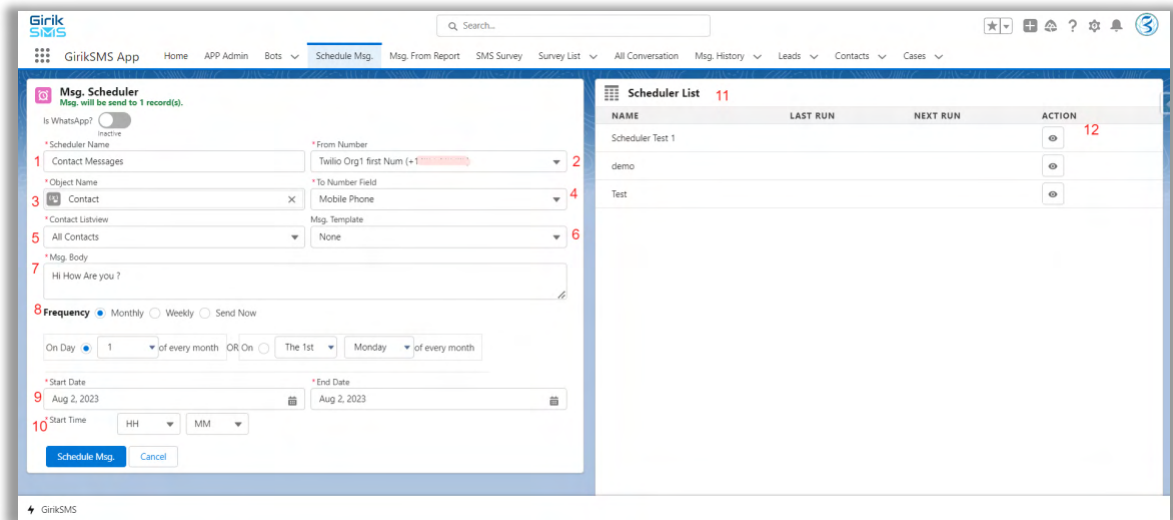
4. Click the **All** checkbox to view all received SMS (both read and unread).
5. Use this toggle button to filter the SMS – **UnRead** and **Read** for display.
6. check this checkbox and click dustbin button to delete, you can delete one or more at a time.



7. This is to set **Reminder** on SMS to remind you for reply at a particular date and time. Once you set a reminder a task will be created and then at the designated time a notification will pop-up.
8. This is the **Reply** option which you can use to reply instantly to the incoming SMS. On click a text box will open, just type your reply message and press enter button.
9. This is to navigate – Previous and Next page.
10. This is **Refresh** button.
11. This is the **Dustbin** button, select one or more messages that you want to delete (check the checkbox) and click on this button.

16) Schedule Msg

- This feature enables you to schedule SMS to the records of an object (standard and custom objects), for example, you can create a contact list view and then schedule a message (WhatsApp/SMS) to be sent to these contacts **Daily**, **Weekly**, **Monthly** or immediately i.e. **Now** and even choose the **Time** of the day. Automatically on the selected day and time SMS will be sent to the records of the chosen object.
- You can the frequency and time to send WhatsApp/SMS to any object. You can also select the day(s) on which the SMS will be sent to the records of an object.



- ❖ **Is WhatsApp:** If you toggle this option then you can send Bulk SMS through the WhatsApp, then you get the **From Number** and **Msg. Template** fields.
- 1. **Scheduler Name:** You can set a name for your **Schedule Msg**, this is a mandatory field and must be always provided.
- 2. **From Number:** The number from which you want to send SMS, this is a mandatory field and must be always provided.
- 3. **Object Name:** You can choose the object (both standard and custom) to send SMS to the respective records. This is also a mandatory field and must be always provided and must be phone number.
- 4. **To Number Field:** This field is for the phone number field in the select object, this is a mandatory field and must be always provided. For example, if you have selected **Contact object** and there are 3 phone fields in Contact, you can choose any one field and SMS will be send to the respective numbers in that field.
- 5. **List View:** This is a filter to select the respective object like **All Contacts**, **My Contacts**, **Recently Viewed**, etc. And, this is also a mandatory field and must be always provided.
- 6. **Msg. Template:** Here you can select any template that you have already saved and use it.
- 7. **Msg. Body:** This is the body of the SMS i.e. the text message will be displayed here that you will send. In case you have already selected a **Msg. Template** then this field will be auto-displayed with the text saved in the template, still you can edit the text here. If you have not selected any saved Msg. Template, then you can type your message here before sending SMS. This is a mandatory field and should not be left blank before sending SMS.
- 8. **Frequency:** You can set the frequency here –
 - a. **Monthly:**
 - You can set monthly frequency to send SMS.

- In this mode you have option to choose day when to SMS will be sent. For example, On **1st Date of the Month** or on **1st Monday of every month**.
- You can also set the **Start Date** and **End Date**.
- And, the last option is you can set the exact time of the day to send SMS.

The screenshot shows the 'Frequency' section with 'Monthly' selected. Below it, there are two options: 'On Day' (set to 1) and 'OR On' (set to The 1st Monday). The 'Start Date' and 'End Date' are both set to 'Aug 2, 2023'. The 'Start Time' is set to '00:00'. There are 'Schedule Msg.' and 'Cancel' buttons at the bottom.

b. Weekly

- Here you can set the **Weekday/Weekdays** when SMS will be sent.
- You can also set the **Start Date** and **End Date**.
- And, the last option is to set the exact time of the day to send SMS.

The screenshot shows the 'Frequency' section with 'Weekly' selected. Below it, the 'Weekdays' section has 'Sunday' checked. The 'Start Date' and 'End Date' are both set to 'Aug 2, 2023'. The 'Start Time' is set to '00:00'. There are 'Schedule Msg.' and 'Cancel' buttons at the bottom.

c. Now

- If you choose this option SMS will be send immediately after you click **Send Now** button.

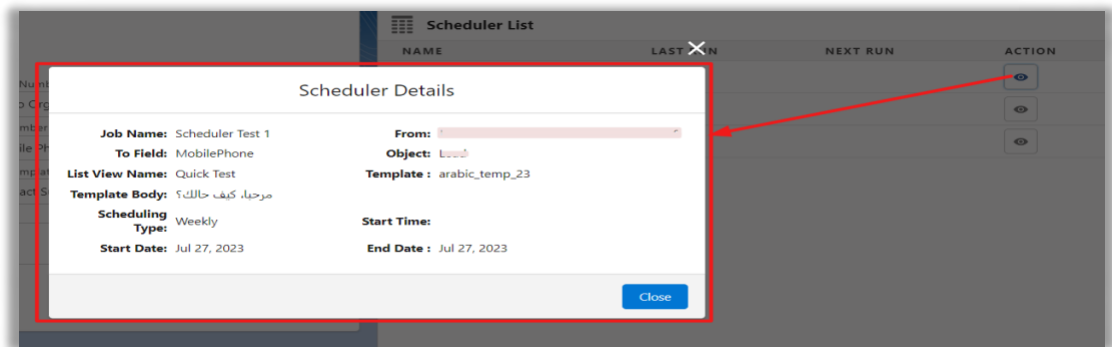
The screenshot shows the 'Frequency' section with 'Send Now' selected. There are 'Send Now' and 'Cancel' buttons at the bottom.

9. Start Date: This is the date of the month, when scheduler will start sending SMS.

10. Start Time: The date when scheduler will stop sending SMS.

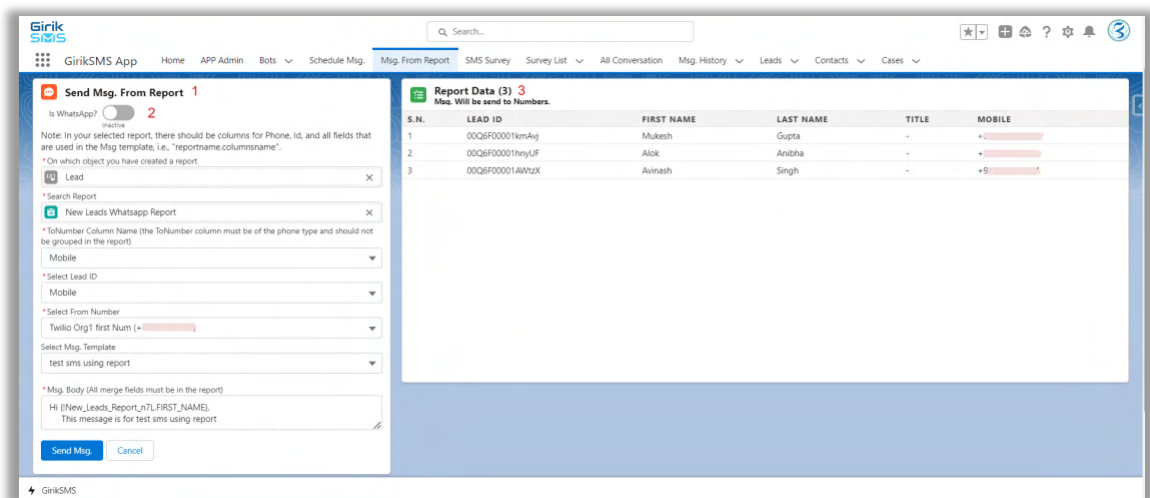
11. Scheduler List: This list will display all your scheduled SMS names.

12. Action Button: Using these buttons you can view details of the any scheduler in the list.



17) Msg From Report

- Stop the tedious job of sending SMS one by one to your contacts. Just prepare a report save it and then send WhatsApp/SMS to all the contacts in the report in one go. Before using this, you must prepare a report and save it and then select the same report here.



1. **Send SMS From Report:** Select the object first, then you can select the related saved reports, To Number, Contact ID (ID field in object), From Number, SMS Template and click on Send SMS button. All fields are mandatory here. Though you have selected a pre-saved SMS Template, still you can edit the text before you send SMS.
2. **Is WhatsApp:** If you toggle this option then you can send report to the WhatsApp, then you get the **Select From Number** and **Select Msg. Template** fields.
3. **Report Data:** Here sample records associated with the report will be displayed.

At the bottom of the page you can see [Sent Msg. From Report](#). This will display all details like Items Processed, Items Failed, Total Items and Sent Date. You can also filter and view report on basis of report name.

REPORT NAME	ITEMS PROCESSED	ITEMS FAILED	TOTAL ITEMS	SENT DATE
Test Contact Report-1589967829432	2	0	2	05/20/2020
Test Contact Report-1589961900714	2	0	2	05/20/2020

18) [SMS Survey](#)

The screenshot displays the 'Survey Scheduler' interface in the GirikSMS application. The form is titled 'Survey Scheduler' and includes a note: 'Survey will be send to 7 record(s). Note: You will have to add "Instance URL" under "Remote Site Settings"'. The form contains several numbered fields: 1. Scheduler Name (text input), 2. From Number (dropdown menu), 3. Object Name (dropdown menu), 4. Lead (dropdown menu), 5. Lead Listview (dropdown menu), 6. Survey List (dropdown menu), 7. Select Template (dropdown menu), 8. Survey Body (text area), 9. Frequency (radio buttons for Monthly, Weekly, Send Now), 10. Start Date (calendar picker), and 11. End Date (calendar picker). There are also options for 'On Day' and 'On' days. At the bottom, there are 'Schedule SMS' and 'Cancel' buttons. To the right, the 'Scheduler List' table is visible with columns: NAME, LAST RUN, NEXT RUN, and ACTION.

- Scheduler Name:** You can set a name for your [Schedule Msg](#), this is a mandatory field and must be always provided.
- From Number:** The number from which you want to send SMS, this is a mandatory field and must be always provided.
- Object Name:** You can choose the object (both standard and custom) to send SMS to the respective records. This is also a mandatory field and must be always provided and must be phone number.
- To Number Field:** This field is for the phone number field in the select object, this is a mandatory field and must be always provided. For example, if you have selected [Lead object](#) and there are 3 phone fields in Lead, you can choose any one field and SMS will be send to the respective numbers in that field.

5. **List View:** This is a filter to select the respective object like **All Leads**, **My Leads**, **Recently Viewed**, etc. And, this is also a mandatory field and must be always provided.
6. **Survey List:**
7. **SMS Template:** Here you can select any template that you have already saved and use it.
8. **Survey Body:** This is the body of the SMS i.e. the text message will be displayed here that you will send. In case you have already selected a **SMS Template** then this field will be auto-displayed with the text saved in the template, still you can edit the text here. If you have not selected any saved Msg. Template, then you can type your message here before sending SMS. This is a mandatory field and should not be left blank before sending SMS.
9. **Frequency:** You can set the frequency here –
 - a. **Monthly:**
 - You can set monthly frequency to send SMS.
 - In this mode you have option to choose day when to SMS will be sent. For example, On **1st Date of the Month** or on **1st Monday of every month**.
 - You can also set the **Start Date** and **End Date**
 - And, the last option is you can set the exact time of the day to send SMS.

The screenshot shows the 'Frequency' section of the SMS scheduling interface. The 'Monthly' radio button is selected and highlighted with a red box. Below it, there are two options for scheduling: 'On Day' (selected) with a dropdown set to '1' and 'of every month', and 'OR On' with a dropdown set to 'The 1st' and 'Monday' and 'of every month'. There are also fields for '* Start Date' (Aug 2, 2023) and '* End Date' (Aug 2, 2023), and '* Start Time' (00:00). At the bottom, there are 'Schedule Msg.' and 'Cancel' buttons.

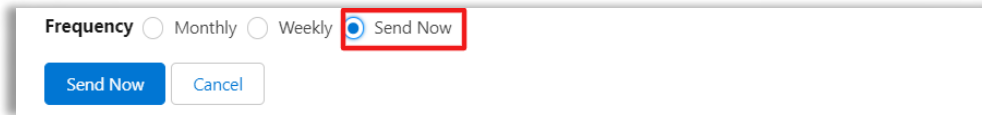
b. Weekly

- Here you can set the **Weekday/Weekdays** when SMS will be sent.
- You can also set the **Start Date** and **End Date**.
- And, the last option is to set the exact time of the day to send SMS.

The screenshot shows the 'Frequency' section of the SMS scheduling interface. The 'Weekly' radio button is selected and highlighted with a red box. Below it, there is a 'Weekdays' section with checkboxes for Sunday (checked), Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. There are also fields for '* Start Date' (Aug 2, 2023) and '* End Date' (Aug 2, 2023), and '* Start Time' (00:00). At the bottom, there are 'Schedule Msg.' and 'Cancel' buttons.

c. **Now**

- If you choose this option SMS will be send immediately after you click **Send Now** button.



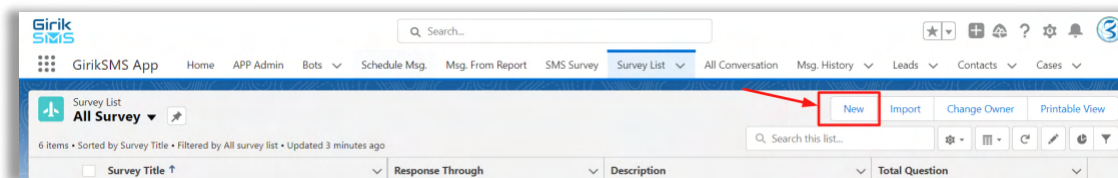
10. Start Date: This is the date of the month, when scheduler will start sending SMS.

11. Start Time: The date when scheduler will stop sending SMS.

12. Scheduler List: This list will display all your scheduled SMS names.

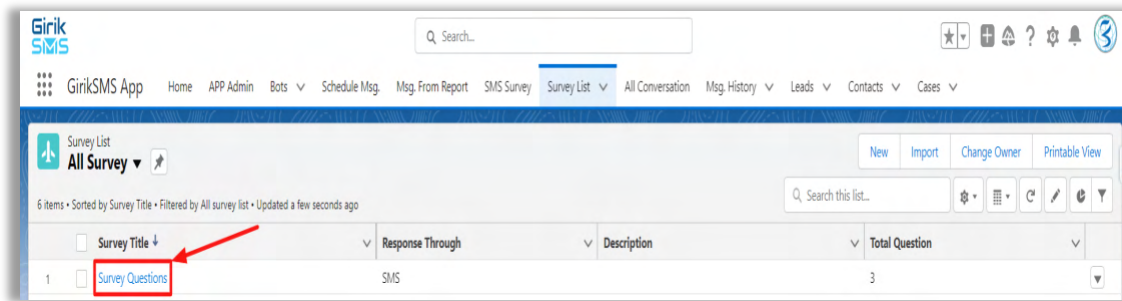
19) Survey List

- To send **SMS Survey** you have to first create a **Survey** and then send **SMS Survey** to contact numbers.
- Let's create a Survey
- Click on **Survey List** tab and then click on **New** button.

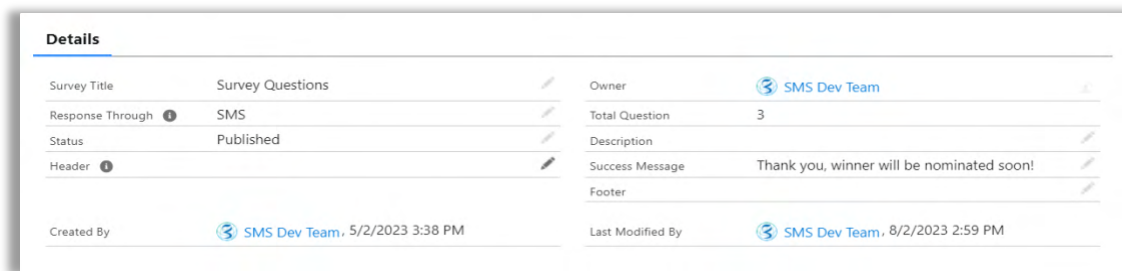


- Then, create a **New Survey**.

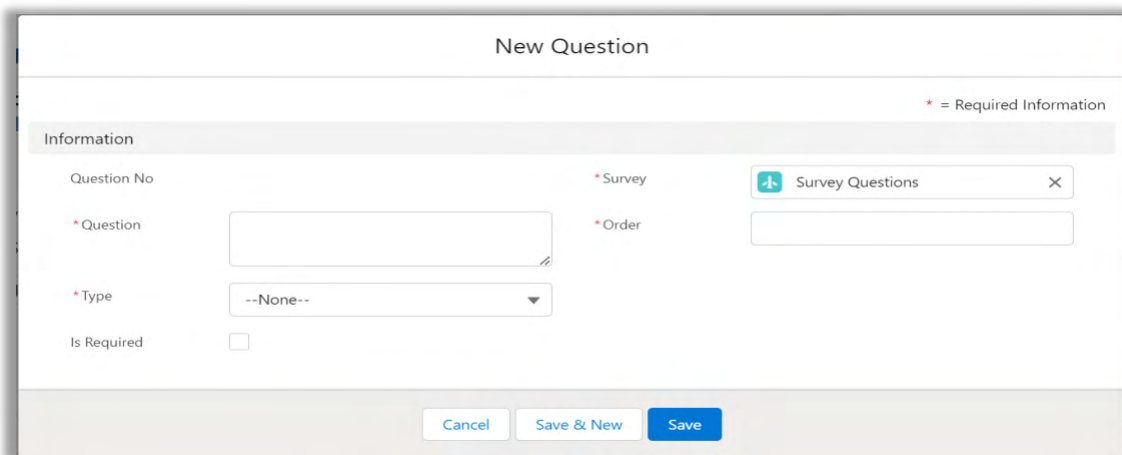
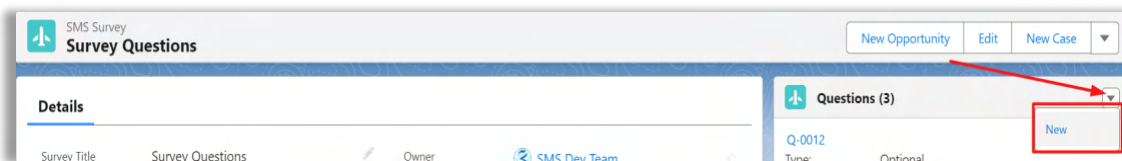
1. **Survey Name:** The name that you want to give to your survey.
 2. **Response Through:** There are two ways through which one can reply to the Survey –
 - a. **SMS:** The contact can reply to your survey (question) by sending SMS against the received SMS. In this mode only one SMS can be sent at a time.
 - b. **Link:** The contact will receive a link (URL) in SMS, he/she has to open the link/URL in any browser, read the survey question and answer/reply there itself. In this mode more than one question can be set for survey.
 3. **Status:** This is important, as in **Draft** mode you cannot send SMS Survey. You can send SMS Survey only in **Published** mode. And, **Closed** mode means you cannot use the SMS Survey.
 4. **Header:** This is the header part of your Survey SMS.
 5. **Description:** This is where you can mention description of your survey.
 6. **Success Message:** The message that will be displayed when one fills the survey and submits it.
 7. **Footer:** This is the footer part of your Survey SMS.
- After filling all the required fields, **Save** it. Then, go to your saved survey, click on the **Survey Name**.



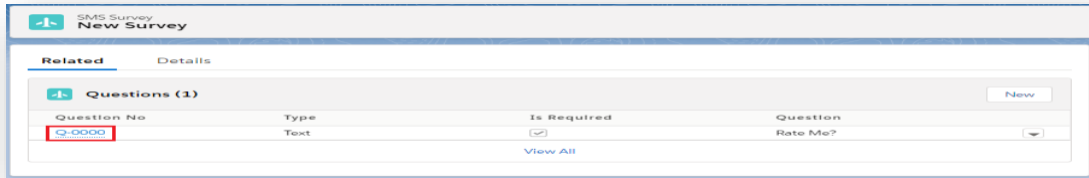
- Then detail page will open.



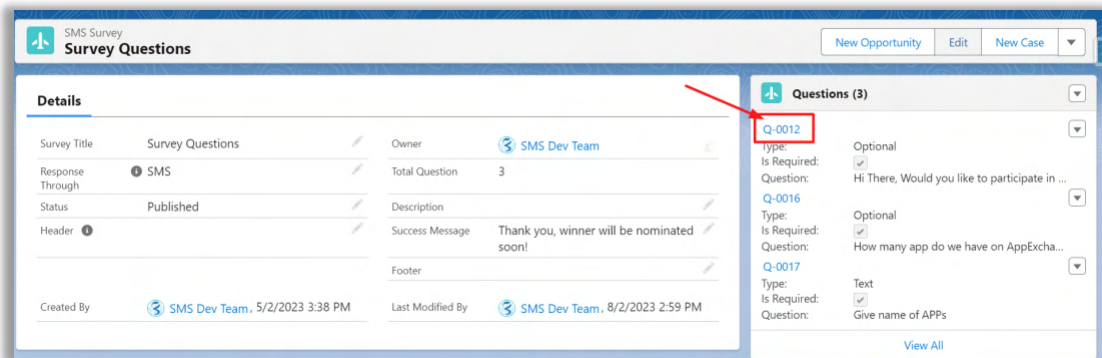
- Click on **New** button on **Questions** Tab. Set your question for survey here.



1. **Question:** The question that you want to ask in your Survey.
 2. **Type:** **This** are the option that you give in your Survey –
 - a. **Text:** A text box for the contacts to write in their reply.
 - b. **Optional:** Few options that you provide and contact can choose any one from them.
 3. **Is Required:** Check the checkbox to make it mandatory question in your survey.
 4. **Survey:** The name of your survey, you can choose from the saved surveys.
 5. **Order:** The order this question appears in the survey.
- Fill the details and click **Save**. Now, click on the saved question.

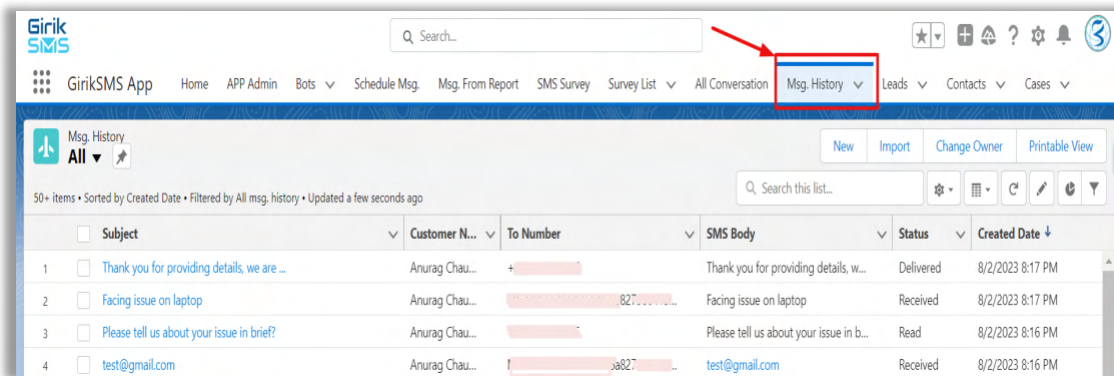


- The details page of your question will open.

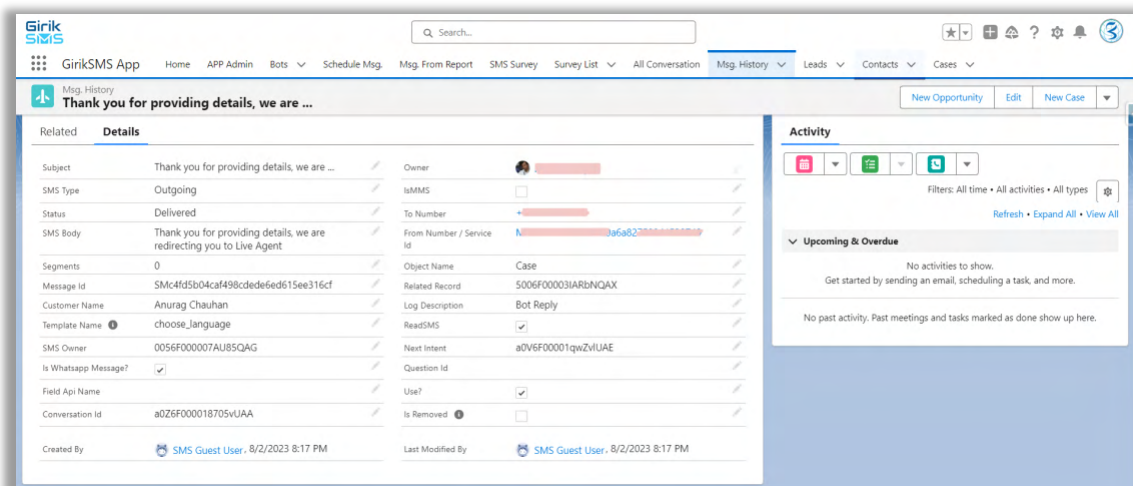


20) Msg History

- Here you can see your **SMS History** i.e. list of SMS sent (Outgoing) or received (Incoming).

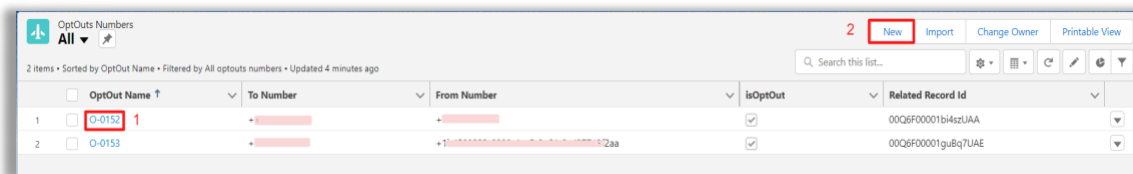


- To view more details of each SMS, click on the **subject**, then the detail page will open.



21) OptOuts Numbers

This is the option using which you can remove the numbers (of contacts) who do not want to receive any kind of SMS in future from you i.e. **OptOut**. Here you can also view the list of numbers who have opted out from receiving SMS.



1. **OptOut Name:** The number which has opted out of SMS. You can view more details by clicking it and going to the details page.
2. **New:** Use this option to add new numbers to OptOut List. Click on **New** to do this.

1. **To Number:** The number which is to be Opted Out.
2. **From Number:** Your **From Number**.
3. **isOptOut:** Check this checkbox to OptOut Number.

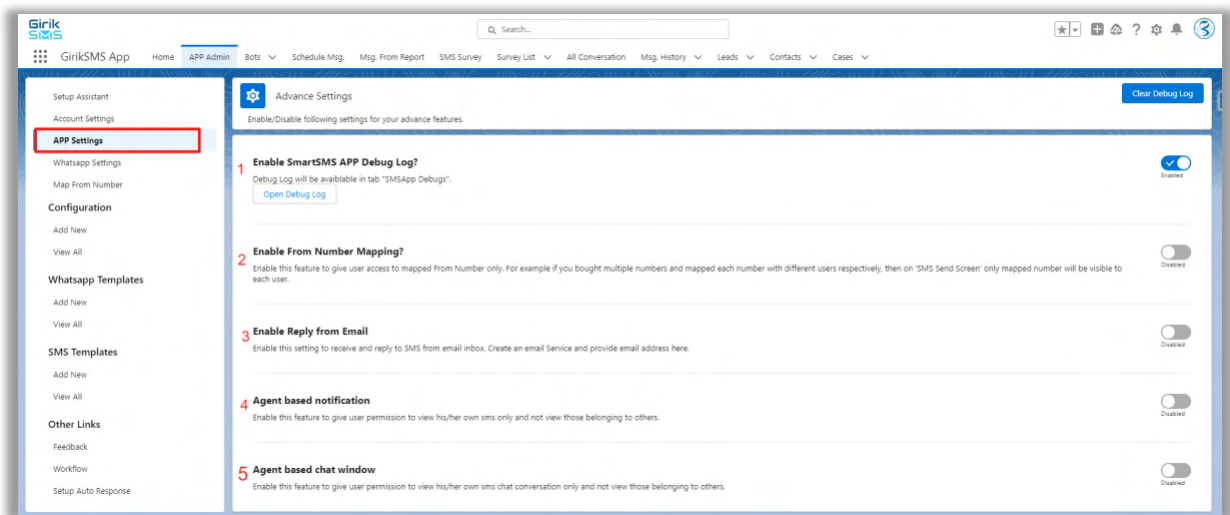
☞ *Another way to **OptOut** from the SMS service is user can send sending a text message like **Cancel** or **Stop** then that user is added to the OptOut list automatically.*

In the contact page also, you can use **SMS OptIn/OptOut** button in the Quick action of Lightning.

- The end user can opt out from receiving the SMS by sending a text like **STOP** or **CANCEL**.
- The end user can again start receiving the SMS by sending text SMS like **START**.

22) APP Settings

- Here you set advanced features of your SMS as per your requirement.

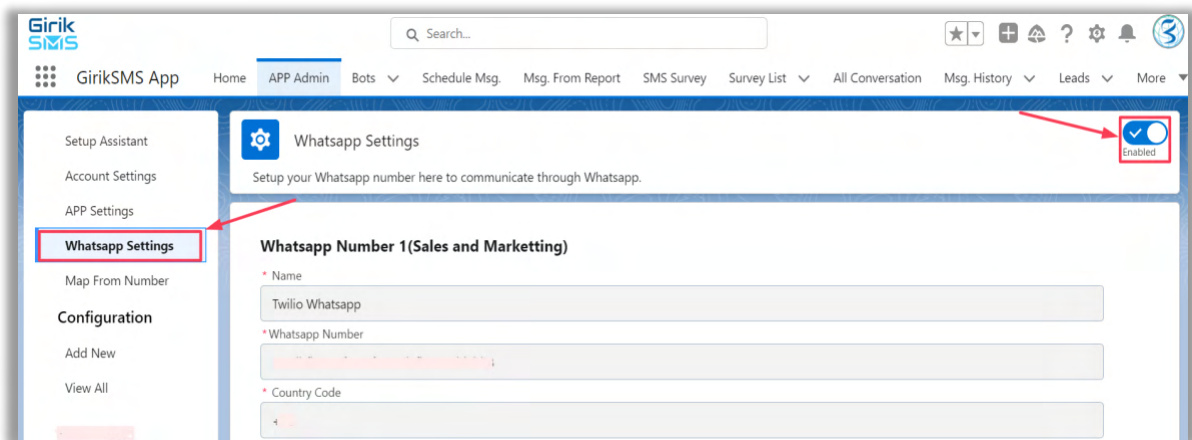


1. **Enable SmartSMS APP Debug Log?** If you want to view the Debug logs, then enable this setting. And, Debug Log will be available in tab "**SMSApp Debugs**".
2. **Enable From Number Mapping?** Enable this feature to give user access to mapped From Number only. For example, if you bought multiple numbers and mapped each number with different users respectively, then on '**SMS Send Screen**' only mapped number will be visible to each user.
3. **Enable Reply from Email:** Enable this setting to receive and reply to SMS from email inbox. Create an email Service and provide email address here.
4. **Agent based notification:** Enable this feature to give user permission to view his/her own SMS only and not view those belonging to others.
5. **Agent based chat window:** Enable this feature to give user permission to view his/her own SMS chat conversation only and not view those belonging to others.

23) WhatsApp Settings

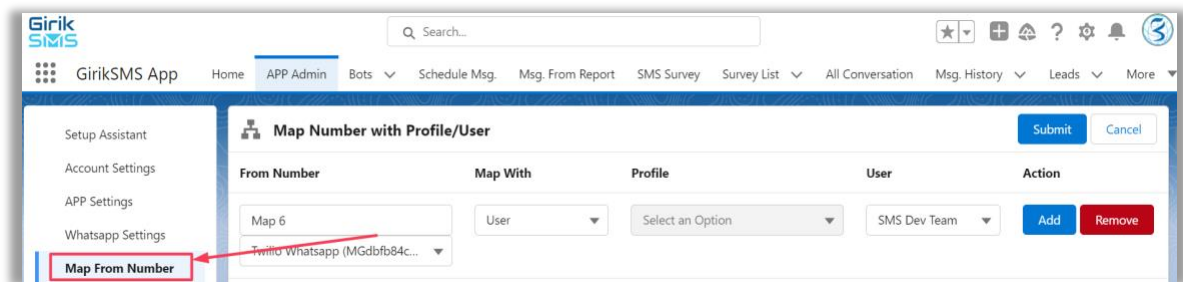
Here if you want to send message to contacts on WhatsApp or even communicate through WhatsApp, then enable this setting. Then, fill the details Name, From Number and Country Code and Save.

Important: *You need to have WhatsApp Business account to send message through WhatsApp.*



24) Map From Number

- Here you can map the From Number to User and they will be able to use that number only.



25) SMS Reply from Email Setup

- Click on New Email Service Button to create a new email service).
- In Apex Class lookup field select gkn_sms. ReplyFromEmailToSMS class and save email service.
- Click on New Email Address Button to add email address.
- Enter email address in Email Address Name field and click Save button

Setup Home Object Manager

Search Setup

5:38 1865.66 KB

email service

Email

Send through External Email ...

Custom Code

Email Services

Didn't find what you're looking for? Try using Global Search.

SETUP Email Services

Email Services

Email services are automated processes that use Apex classes to process the contents, headers, and attachments of inbound email. For example, you can create an email service that automatically creates contact records based on contact information in messages. Each email service has one or more email service addresses that can receive messages for processing.

Before creating email services, create Apex classes that implement the `Messaging.InboundEmailHandler` interface.

```
global class myHandler implements Messaging.InboundEmailHandler {
    global Messaging.InboundEmailResult handleInboundEmail(Messaging.InboundEmail email, Messaging.InboundEnvelope envelope) {
        Messaging.InboundEmailResult result = new Messaging.InboundEmailResult();
        return result;
    }
}
```

View: All Create New View

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	Active	Email Service Name ↑	Apex Class	New Email Service	Last Modified By	Last Modified Date
--------	--------	----------------------	------------	-------------------	------------------	--------------------

Setup Home Object Manager

Search Setup

5:38 1865.66 KB

email service

Email

Send through External Email ...

Custom Code

Email Services

Didn't find what you're looking for? Try using Global Search.

SETUP Email Services

messages for processing

Save Save and New Email Address Cancel

Email Service Information

Email Service Name SMS Reply from email

Apex Class ReplyFromEmailToSMS

Accept Attachments None

Advanced Email Security Settings

Accept Email From

Convert Text Attachments to Binary Attachments

Active

Failure Response Settings

Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below.

Over Email Rate Limit Action Discard message

Deactivated Email Address Action Discard message

Deactivated Email Service Action Discard message

Unauthenticated Sender Action Discard message

Unauthorized Sender Action Discard message

Enable Error Routing

Setup Home Object Manager

email service

- Email
 - Send through External Email ...
- Custom Code
 - Email Services**

Didn't find what you're looking for? Try using Global Search.

SETUP Email Services

Email Service: SMS Reply from email

Edit Activate Deactivate Delete Cancel

Email Service Name SMS Reply from email

Apex Class [ReplyFromEmailToSMS](#)

Accept Attachments None

Advanced Email Security Settings [i](#)

Accept Email From All email addresses (subject to security settings)

Convert Text Attachments to Binary Attachments [i](#)

Active

Failure Response Settings

Over Email Rate Limit Action Discard message

Deactivated Email Address Action Discard message

Deactivated Email Service Action Discard message

Unauthenticated Sender Action Discard message

Unauthorized Sender Action Discard message

Enable Error Routing [i](#)

Email Addresses [New Email Address](#)

Action	Email Address Name	Email Address	Context User
--------	--------------------	---------------	--------------

Setup Home Object Manager

email service

- Email
 - Send through External Email ...
- Custom Code
 - Email Services**

Didn't find what you're looking for? Try using Global Search.

SETUP Email Services

Email Service Address

Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.

Email Service Information

Email Service Name SMS Reply from email

Accept Email From All email addresses (subject to security settings)

Email Address Information

Email Address Name

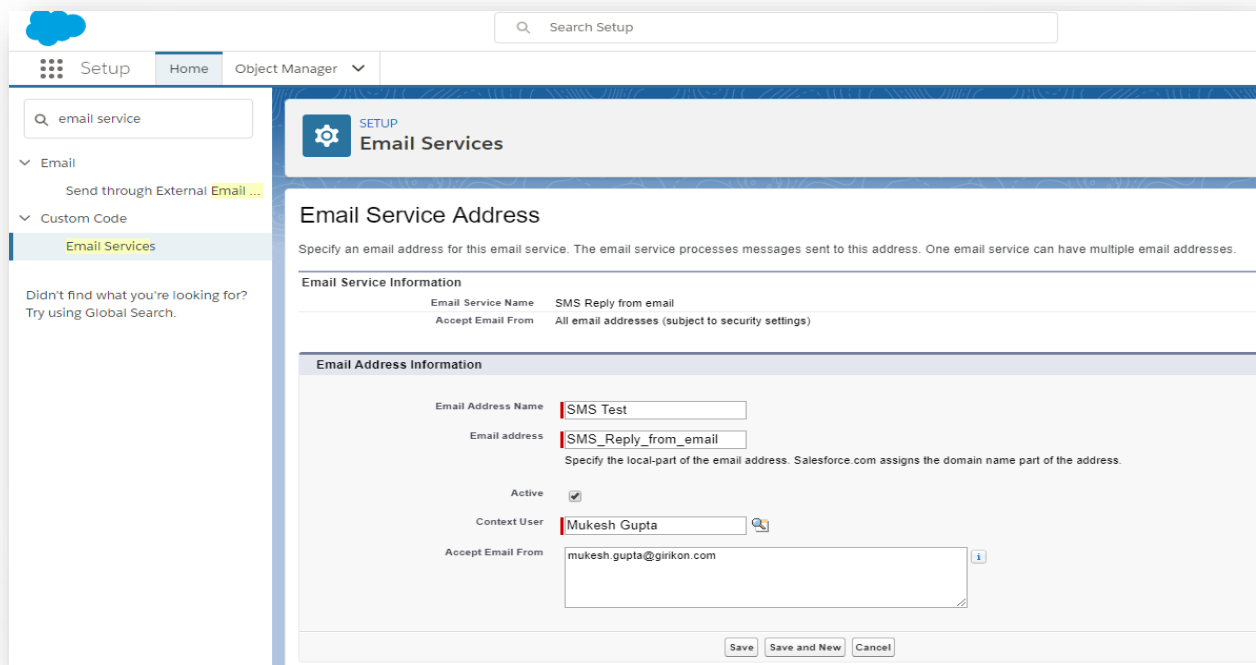
Email address
Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.

Active

Context User [i](#)

Accept Email From [i](#)

Save Save and New Cancel



26) Send SMS from your own Apex class by using SMSSender class

- You can create process builder to send SMS by using our "Send SMS" invocable method of SMSSender global class.

b) Used to send BulkSMS from List View

```

/**
 * [Use send method to send MMS on one or more number with comma separated
 tonumber. SMSBody should be common for all MMS.]
 * [Remember that we are provide only domestic MMS]
 * @param recordId [List of recordId of object]
 * @param countryCode [Country code ]
 * @param toNumberField [to number field of object]
 * @param fromNumber [fromnumber/serviceid without country code]
 * @param SMSBody [SMSBody along with merge field ]
 * @param objectName [objectName from where you want to send]
 * @return [return job id, on the base of job id you can check how many item process

```

and how many remain]

```
*/
```

```
public class SendSMS {

    public static void bulkMessage(){
        String recordId='0035w000035SfHVAA0';
        String fromNumber='+12057821060';
        String SMSBody ='Hello Testing From Apex With Media URL';
        String countryCode='+1';
        String toNumberField='Phone';
        String SMSBody='Testing for Bulk SMS';
        String objectName ='Contact';
        List<String> recordId= new list<String> { '0035w000035SfHVAA0','0035w000035UQgcAAG'};
// recordId of object
        gkn_sms.SMSSender.sendBulkSMS(recordId,countryCode,toNumberField,fromNumber,SMSBody,objectName);
    }
}
```

c) Used to send SMS with Media

```
/**
 * [Use send method to send MMS on one or more number with comma separated
 tonumber. SMSBody should be common for all MMS.]
 * [Remember that we are provide only domestic MMS.]
 * @param recordId [recordId of object]
 * @param toNumber [comma separated to number with country code i.e.,
 +12244668877,+19988776655]
 * @param fromNumber [fromNumber with country code provided by Twilio i.e.,
 +15555332233]
 * @param SMSBody [SMSBody plain text max characters length 1500]
 * @param mediaURL [mediaURL Public accessible url MIME type image or video]
 */
```

```
public class SendSMS {

    public static void sendMessage(){
        String recordId='0035w000035SfHVAA0';
        String toNumber='+917042145596';
        String fromNumber='+12057821060';
        String SMSBody ='Hello Testing From Apex With Media URL';
```

```

        String mediaURL='https://sms172--
c.documentforce.com/servlet/servlet.ImageServer?id=0155w000002dtoY&oid=00D5w0
00003xEC3';
        gkn_sms.SMSSender.send(recordId,toNumber,fromNumber,SMSBody,mediaURL);
    }
}

```

c) Used to send SMS without Media

```

/**
 * [Use send method to send MMS on one or more number with comma separated
tonumber. SMSBody should be common for all MMS.]
 * [Remember that we are provide only domestic MMS.]
 * @param recordId [recordId of object]
 * @param toNumber [comma seperated to number with country code i.e.,
+12244668877,+19988776655]
 * @param fromNumber [fromNumber with country code provided by Twilio i.e.,
+15555332233]
 * @param SMSBody [SMSBody plain text max characters length 1500]
 */
public class SendSMS {
    public static void sendMessage(){
        String recordId='0035w000035SfHVAA0';
        String toNumber='+917042145596';
        String fromNumber='+12057821060';
        String SMSBody ='Hello Testing From Apex With Media URL';
        gkn_sms.SMSSender.send(recordId,toNumber,fromNumber,SMSBody,mediaURL);
    }
}

```

27) Other Links

a) Feedback

You can send us your feedback and/or suggestions using the **Feedback** option available.

b) Workflow

Using this you send SMS through customized Workflow.

S.NO.	CONFIG NAME	OBJECT	TO NUMBER	FROM NUMBER	COUNTRY CODE	UNIQUE KEY	ACTION
-------	-------------	--------	-----------	-------------	--------------	------------	--------

- Fill details in the required fields and save. After setting up the workflow create a Process Builder to send SMS.
- The admin can create workflow configuration to send SMS from a workflow.
- Enter Title, select From Number, Object, To Number Field, Template. SMS message will get populated automatically in the SMS Content field as the template is selected from the picklist.

- In the Workflow Configuration List, you will see a list of SMS workflow configurations created for different objects with edit and delete buttons.

S.NO.	CONFIG NAME	OBJECT	TO NUMBER	FROM NUMBER	COUNTRY CODE	UNIQUE KEY	ACTION
1	SMS Workflow Configuration Contact	Contact	MobilePhone	5802192726	+1	Workflow-Config-2	Edit Delete
2	SMS Workflow Configuration Account	Account	Phone	4059902111	+1	Workflow-Config-1	Edit Delete

- After creating the SMS Workflow configuration, search workflow rules in the quick search box and click on it.
- Now click New Rule button to create a new rule. Select the object from the drop-down to which the workflow rule will apply.
- Enter the rule name, description. In Evaluation Criteria section, select the option which suits your requirement.

Edit Rule

Object: Contact

Rule Name:

Description:

Evaluation Criteria

Evaluate the rule when a record is:

created
 created, and every time it's edited
 created, and any time it's edited to subsequently meet criteria i

How do I choose?

- In the Rule Criteria section, create the criteria and click on Save & Next button.

Rule Criteria

Run this rule if the following :

Field	Operator	Value	
Contact: Mobile	not equal to		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

- In Immediate Workflow Actions section, add a new workflow action by selecting New Task from the picklist.
- Choose user for Assigned to look-up field, enter Subject, Unique Name and Due Date.
- In the Comments field, you have to paste the Unique Key of SMS Workflow Configuration of the same object which you have created for sending SMS.

Object Case

Assigned To

Subject

Unique Name

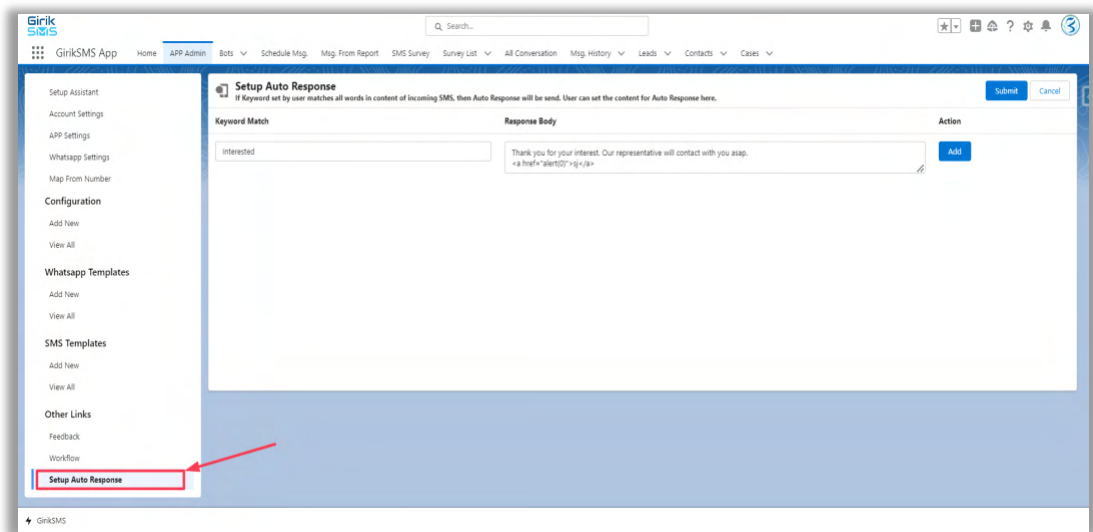
Due Date days

Description Information

Comments

c) [Setup Auto Response](#)

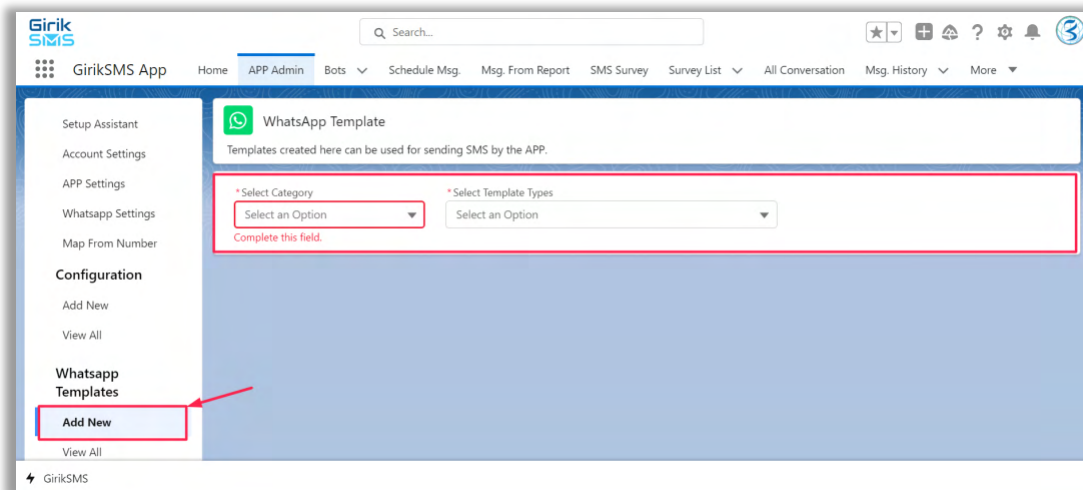
Here you set Auto-Response, if Keyword set by user matches all words in content of incoming SMS, then Auto Response will be send. You have to set the **Keyword** and the **Response Body**.



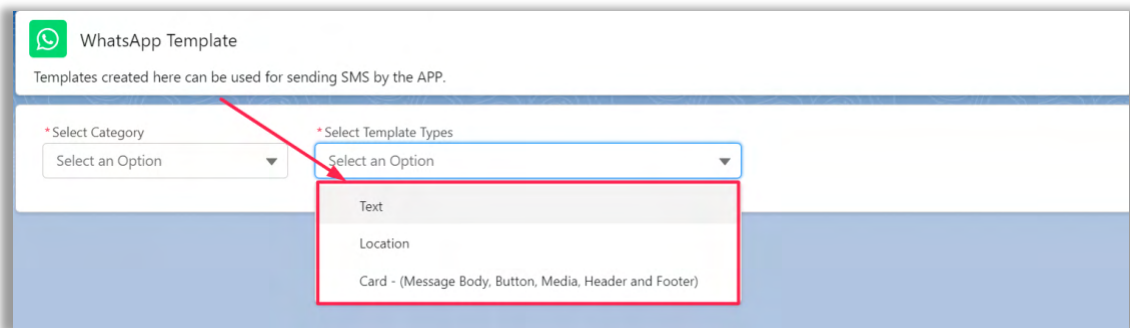
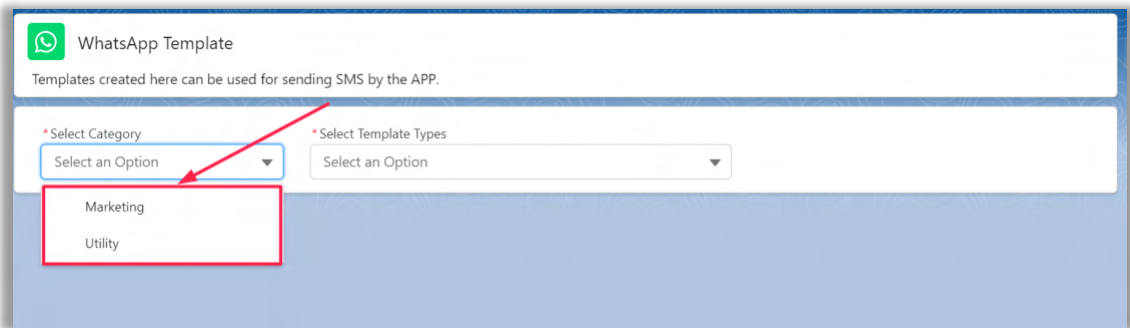
28) WhatsApp Templates

a) Add New

Here you can create WhatsApp template. Which you can use as template while sending WhatsApp/SMS.



- Click on **Add New**, here you can Select Category and Template Types.



- In Category there is two types
 - Marketing** - This type of template can be used to promote your products or services. For example, you could create a template that announces a new product launch, offers a discount, or reminds customers about an upcoming event
 - Utility** - This type of template can be used to provide customer service or other helpful information. For example, you could create a template that provides directions to your store, answers frequently asked questions, or reminds customers about their account balance.
- In Template Types there is three types
 - 1) **Text**
 - 2) **Location**
 - 3) **Card- (Message Body, Button, Media, Header and Footer)**

The screenshot shows the WhatsApp Template creation interface. It includes the following fields and options:

- 1 Select Category:** Marketing
- 2 Select Template Types:** Text
- 3 Template Name:** (Empty)
- 4 Type:** None
- 5 Restrict Visibility:** Visible only to me (selected)
- 6 Select:** search
- 7 Language:** Select an Option
- 8 Select Button Type:** None
- 9 Select Fields:** Select an Option
- 10 Merge Field:** (Empty)
- 11 Template Body:** (Empty)

At the bottom, it displays: Characters Left: 160, Segments: 0, Total Characters: 0, 160 Characters = 1 Segment, Max. Length = 1024.

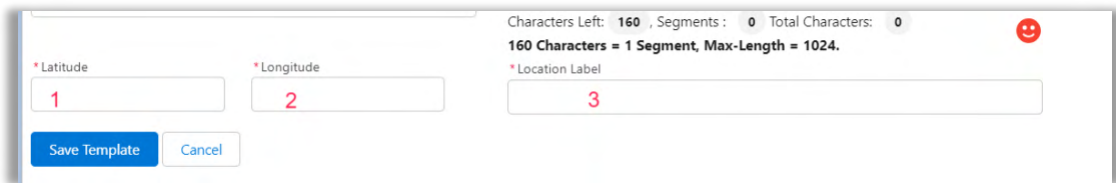
1. **Select Category:** Select the "Marketing" or "Utility" category for your template. This is a mandatory field and should not be left blank before creating Template.
2. **Select template Types:** Select Text, Location, Card- (Message Body, Button, Media, Header and Footer). This is a mandatory field and should not be left blank before creating Template.
3. **Template Name:** Enter a name for your template, don't use underscore and small case while entering name. This is a mandatory field and should not be left blank before creating Template.
4. **Type:** Select types **Object** or **Report**. This is a mandatory field and should not be left blank before creating Template.
5. **Restricted Visibility:** Select **Visible only to me** or **Visible to all users**. This is a mandatory field and should not be left blank before creating Template.
6. **Select:** The type of button you select depends on whether you want to create a button for an object or a report. This is a mandatory field and should not be left blank before creating Template.
7. **Language:** Select appropriate language for your template. This is a mandatory field and should not be left blank before creating Template.
8. **Select Button Type:** Here are the button types for call to action and quick reply in Templates
 - a). **Call to action:** It can be either URL buttons or PHONE_NUMBER buttons. URL buttons will open a website when clicked, while PHONE_NUMBER buttons will initiate a phone call.
 - b). **Quick reply:** Text buttons simply contains text.
9. **Select Field:** Select field and use merge field in your Template body.
10. **Merge Field:** Get the Field values here which can be used in Template Body.

11. **Template Body:** This is the body of the SMS i.e. the text message will be displayed here that you will send. You can also use Merge Field. This is a mandatory field and should not be left blank before sending SMS.

12. **Preview:** You can check the Template Body final outcome in Preview.

Note: If You select the Template Type- **Location**

13. **Location:** Here you can specify the Latitude and Longitude for the location.



The screenshot shows a form for configuring a Location template. At the top right, it displays 'Characters Left: 160', 'Segments: 0', and 'Total Characters: 0'. Below this, it states '160 Characters = 1 Segment, Max-Length = 1024.' and includes a red smiley face icon. The form has three input fields: '*Latitude' with a red '1' next to it, '*Longitude' with a red '2' next to it, and '*Location Label' with a red '3' next to it. At the bottom left, there are two buttons: 'Save Template' and 'Cancel'.

13.1 **Latitude:** Specify the desired Latitude value.

13.2 **Longitude:** Specify the desired Longitude value.

13.3 **Location Label:** Specify the Location label.

Note: If You select the Template Type- Card- (Message Body, Button, Media, Header and Footer)

14. **Location:**



The screenshot shows a form for configuring a Card template. At the top right, it displays 'Characters Left: 160', 'Segments: 0', and 'Total Characters: 0'. Below this, it states '160 Characters = 1 Segment, Max-L' and includes a red smiley face icon. The form has three main sections: 'Media URL' with a red '1' next to it and a 'Select Media' button with a red '3' next to it; 'Footer Text' with a red '2' next to it and the text 'maximum 60 characters' below the input field.

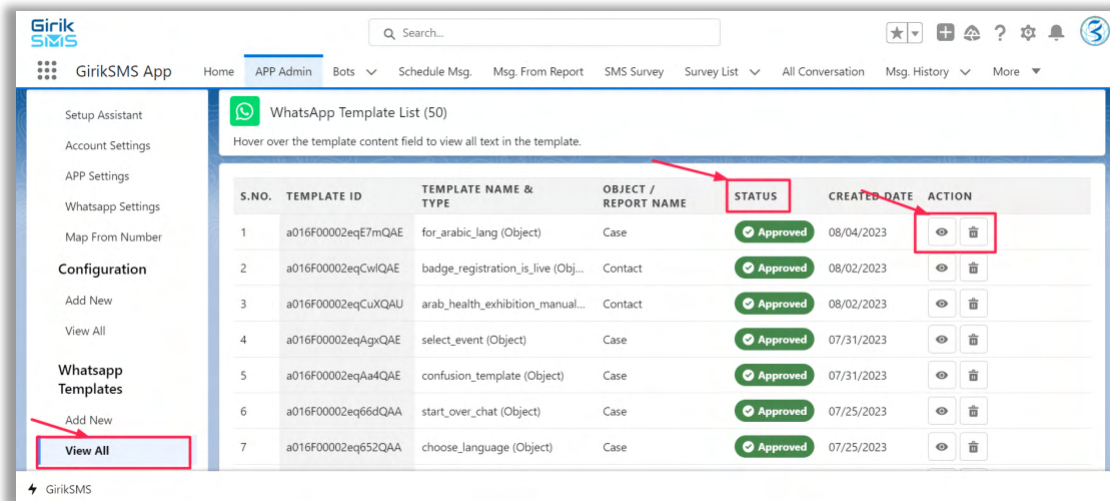
14.1 **Media URL:** Specify the **URL**.

14.2 **Footer Text:** Specify the footer text.

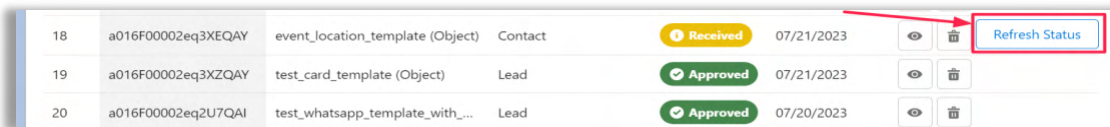
14.3 **Select Media:** Here you can select the media file from your saved Media on org.

b) View All

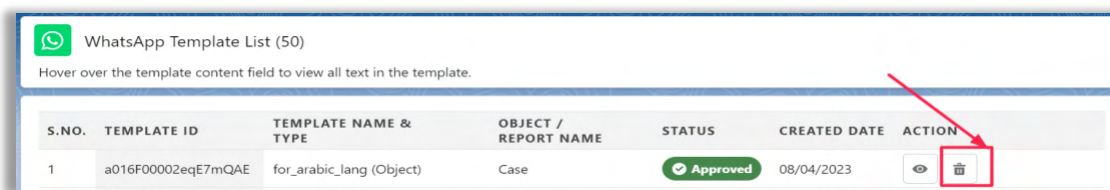
- Here you view created WhatsApp templates. Also, you can view, Delete and check status of your WhatsApp template.
- Click on **View All** under WhatsApp Templates



(a) To check the **status** of a WhatsApp template, you can click the Status button next to the template. This will show you the current status of the template, such as whether it is pending approval, approved, or rejected.



(b) To **delete** a WhatsApp template, you can simply click the Delete button next to the template. You will be asked to confirm your deletion.



Note: Once your WhatsApp template is approved, you can use it to send SMS or WhatsApp messages to your customers. To do this, you will need to create a new message and select the template from the Templates list.

29) SMS Templates

a) Add New

Here you can create SMS template. Which you can use as template while sending WhatsApp/SMS.

The screenshot shows the 'SMS Template' creation interface in the GirikSMS Admin Panel. The left sidebar has a red box around the 'Add New' link under 'SMS Templates'. The main form area is titled 'SMS Template' and contains the following fields and options:

- 1. Template Name: A text input field.
- 2. Type: A dropdown menu with 'None' selected.
- 3. Restrict Visibility: Radio buttons for 'Visible only to me' and 'Visible to all users'.
- 4. Select: A dropdown menu with 'search' selected.
- 5. Select Fields: A dropdown menu with 'Select an Option' selected.
- 6. Merge Field: A text input field.
- 7. Select Survey: A dropdown menu with 'None' selected.
- 8. Survey Link: A text input field.
- 9. Template Body: A large text area for the message content.
- 10. Template preview: A preview of the template body.

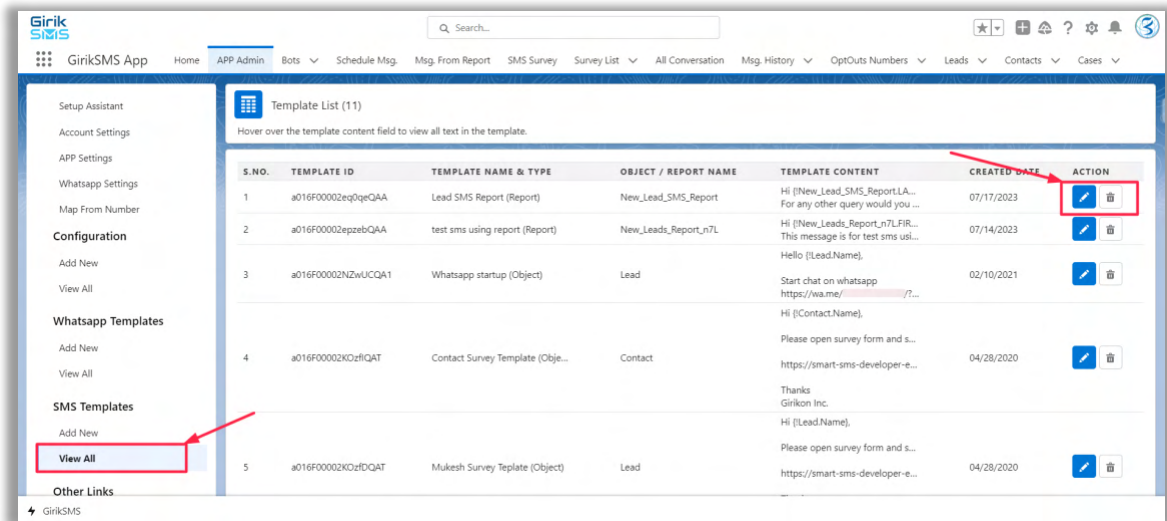
At the bottom of the form, there are 'Save Template' and 'Cancel' buttons. A character count at the bottom right shows: 'Characters Left: 160, Segments: 0, Total Characters: 0, 160 Characters = 1 Segment, Max-Length = 1440'.

1. **Template Name:** Enter a name for your template, don't use underscore and small case while entering name. This is a mandatory field and should not be left blank before creating Template.
2. **Type:** Select types **Object** or **Report**. This is a mandatory field and should not be left blank before creating Template.
3. **Restricted Visibility:** Select **Visible only to me** or **Visible to all users**. This is a mandatory field and should not be left blank before creating Template.
4. **Select:** The type of button you select depends on whether you want to create a button for an object or a report. This is a mandatory field and should not be left blank before creating Template.
5. **Select Field:** Select field and use merge field in your Template body.
6. **Merge Field:** Get the Field values here which can be used in Template Body.
7. **Select survey:** Select created SMS Template in survey and if there is any link is present then it would be appeared in **Survey Link**.
8. **Survey Link:** It appeared if Select survey field is having any URL.
9. **Template Body:** This is the body of the SMS i.e. the text message will be displayed here that you will send. You can also use Merge Field. This is a mandatory field and should not be left blank before sending SMS.
10. **Preview:** You can check the Template Body final outcome in Preview.

b) View All

Here you view created SMS templates. Also, you can edit and Delete.

Click on **View All** under SMS Templates



S.NO.	TEMPLATE ID	TEMPLATE NAME & TYPE	OBJECT / REPORT NAME	TEMPLATE CONTENT	CREATED DATE	ACTION
1	a016F0002eq0qeQAA	Lead SMS Report (Report)	New_Lead_SMS_Report	Hi ([New_Lead_SMS_Report.LA... For any other query would you ...	07/17/2023	[Edit] [Delete]
2	a016F0002epzebQAA	test sms using report (Report)	New_Leads_Report_n7L	Hi ([New_Leads_Report_n7L.FIR... This message is for test sms usl...	07/14/2023	[Edit] [Delete]
3	a016F0002NZwUCQA1	Whatsapp startup (Object)	Lead	Hello ([Lead.Name]). Start chat on whatsapp https://wa.me/.../?... Hi ([Contact.Name]).	02/10/2021	[Edit] [Delete]
4	a016F0002K0zflQAT	Contact Survey Template (Obj...	Contact	Please open survey form and s... https://smart-sms-developer-e... Thanks Girikon Inc.	04/28/2020	[Edit] [Delete]
5	a016F0002K0zflQAT	Mukesh Survey Teplate (Object)	Lead	Hi ([Lead.Name]). Please open survey form and s... https://smart-sms-developer-e...	04/28/2020	[Edit] [Delete]

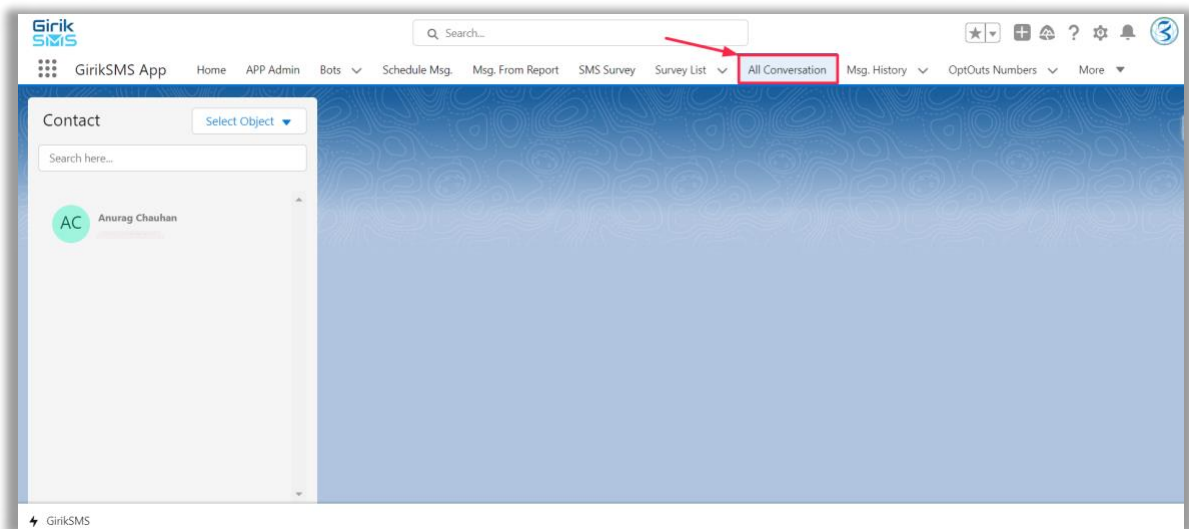
30) Get Notification for New Case

- User interacts with chatbot
- Can create Case through WhatsApp / SMS
- Can raise enquiry through WhatsApp / SMS
- Chatbot prompts user to create case

31) All Conversation

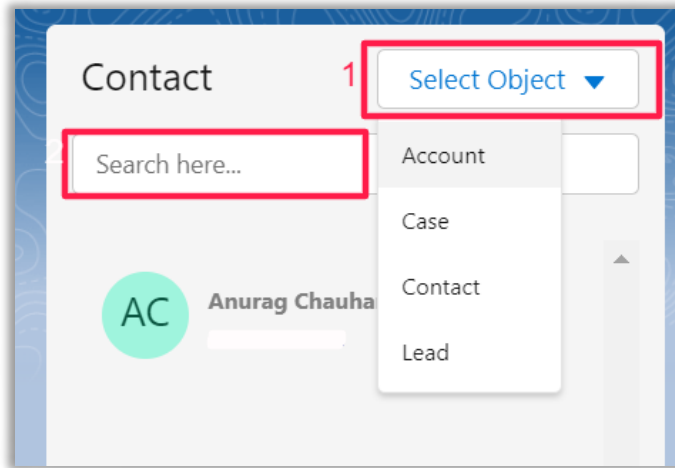
Here you can chat directly to object records that consist Mobile phone, Phone details.

Click on **All Conversation** Tab.

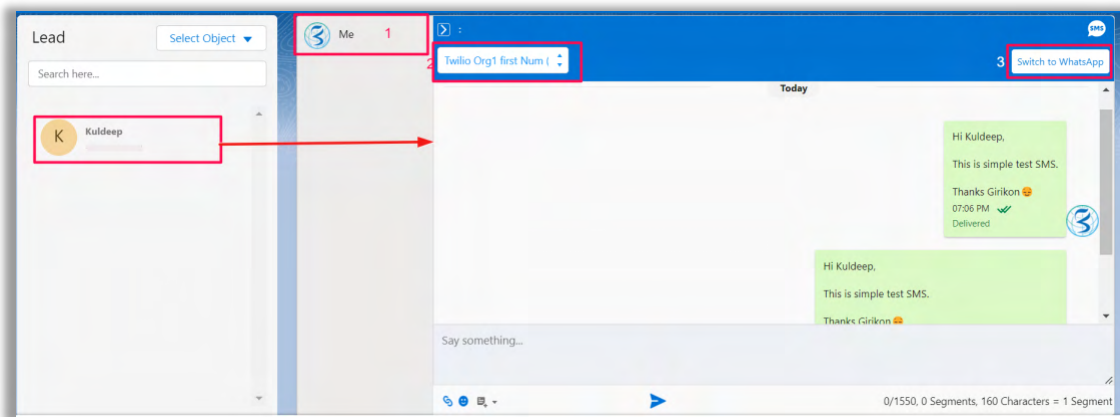


a) Agent Searching Customer Name for Specific Object:

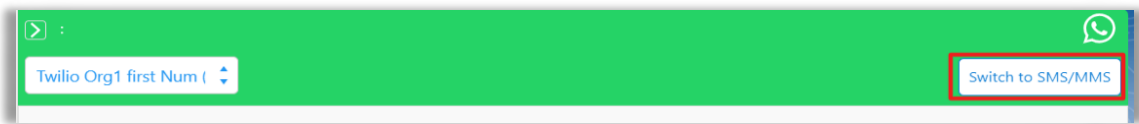
The agent has the ability to search for a particular customer's name with respect to a specific object. This means the agent can input a customer's name and find all relevant interactions or conversations related to that customer in relation to a particular item, topic, or issue.



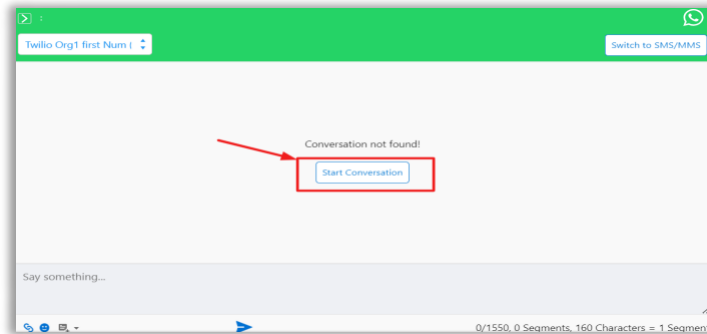
- (i) **Select Object:** Here you can select the object type which you can find the related record related contacts to start the chart.
- (ii) **Search here:** Here you can search the record related details like Name and phone number and can select to start the chart.



- Select the Lead related record like here in screenshot after that You can select the number
 - (1) **Select User/Bot:** Here you can switch between Bot and Agent.
 - (2) **Select vendor type:** Here you can choose between different vendors like Twilio.
 - (3) **Switch Between SMS/WhatsApp:** As you change between SMS and WhatsApp the vendor number get also changed according to licensees from different vendors.



Note: If you haven't created any conversation then you to click on Start Conversation button.



32) Drip Campaign

A drip campaign is a marketing strategy used to send automated and scheduled messages, such as WhatsApp or SMS, to users over a period of time. These messages are typically triggered based on the recipient's status or response to previous messages.

33) Chat Analysis

1. Click on **All conversation** tab.
2. After that click on number 2 as shown in screenshot

