

# Vonage Conversations for Salesforce

## Getting Started Guide

[Pre-Requisites](#)

[Deployment](#)

[First Time Deployment](#)

[UI Setup](#)

[Add the widget to a standard sObject](#)

[Add the widget to a custom sObject](#)

[Sending Messages from the UI](#)

[Sending an SMS Message](#)

[Sending an MMS Message with an Image](#)

[Flow Development](#)

[BOT Template - Process Incoming Messages](#)

[Troubleshooting and Support](#)

[Vonage Useful links](#)

[Analyze](#)

[Support Information](#)

## Pre-Requisites

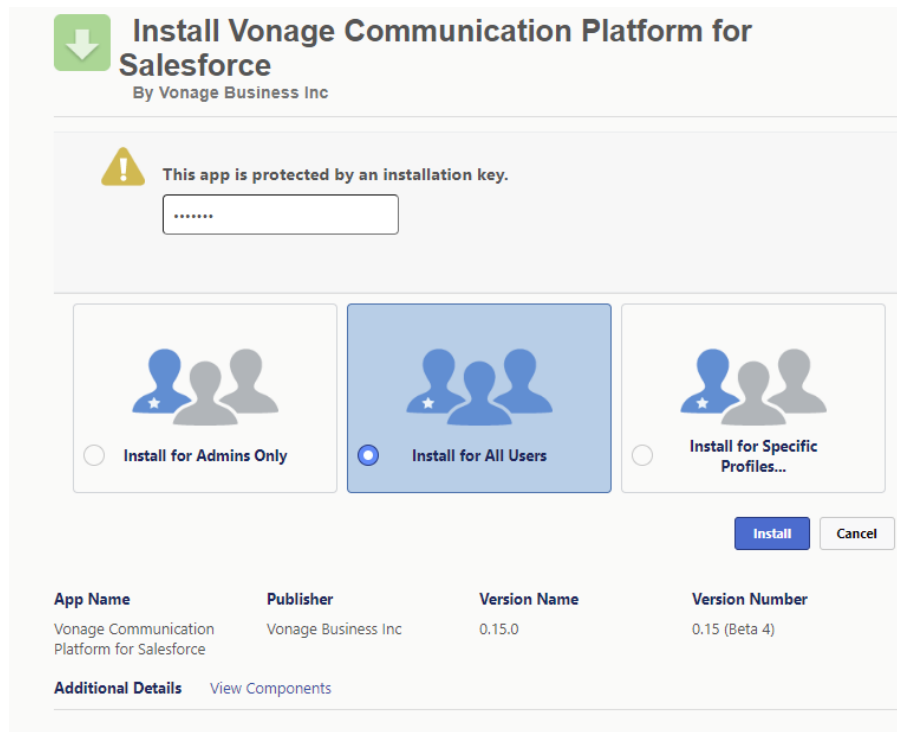
This guide will explain how to deploy the Vonage Conversations for Salesforce package and send an SMS/MMS message using the UI.

1. A [Vonage account](#) with your **api-key** and at least one [purchased long virtual number](#) (LVN).
2. The LVN should be configured to use SMS/MMS.
  - a. Note: MMS messaging is only available in the US & Canada. To use images, your LVN must be a USA/CA number that is approved for [10 DLC](#).

## Deployment

To install the package, you will need the deployment URL and installation key. These will be provided by your Vonage point of contact.

First, go to the deployment URL and login to your Salesforce organization. You will see this screen:



**Install Vonage Communication Platform for Salesforce**  
By Vonage Business Inc

 This app is protected by an installation key.

.....

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

**Install** **Cancel**

| App Name                                     | Publisher           | Version Name | Version Number |
|----------------------------------------------|---------------------|--------------|----------------|
| Vonage Communication Platform for Salesforce | Vonage Business Inc | 0.15.0       | 0.15 (Beta 4)  |

**Additional Details** [View Components](#)

Select the group that you want to install the package for, and enter the installation key provided. The warning below may appear. If it does, select "Done" and wait for the package deployment to complete.



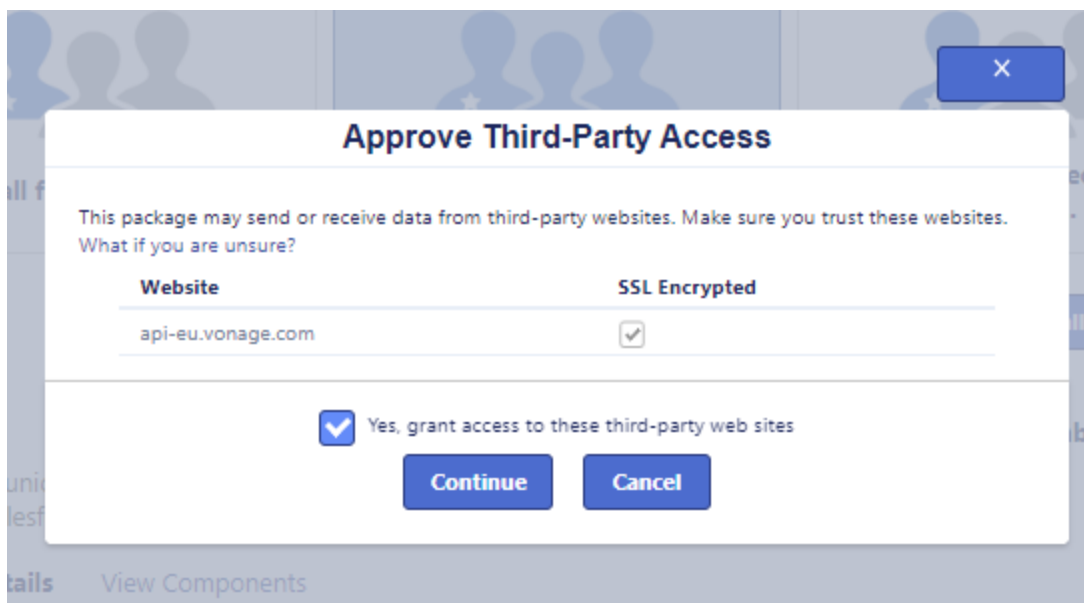
**This app is taking a long time to install.**

You will receive an email after the installation has completed.

Done

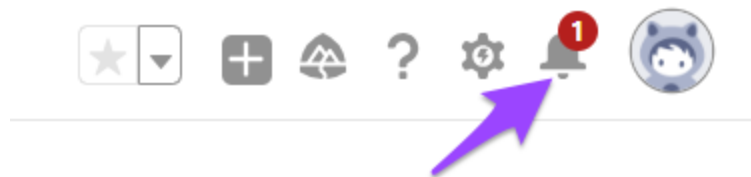
| App Name                                     | Publisher           | Version Name | Version Number |
|----------------------------------------------|---------------------|--------------|----------------|
| Vonage Communication Platform for Salesforce | Vonage Business Inc | 0.15.0       | 0.15 (Beta 4)  |

Should the following window popup, please grant access, as the URL is used by the package to access Vonage services:

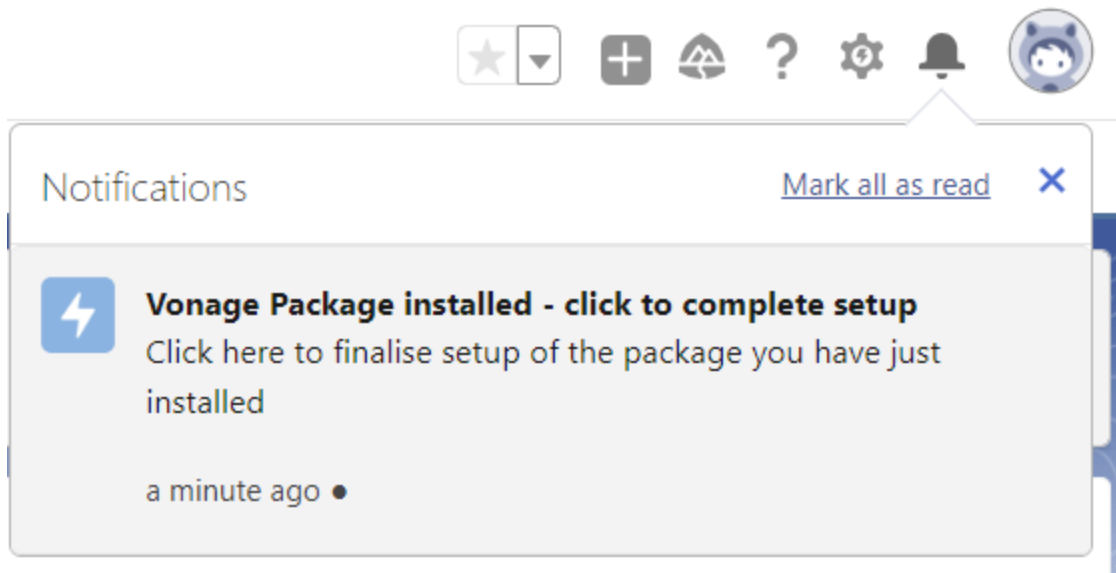


## First Time Deployment

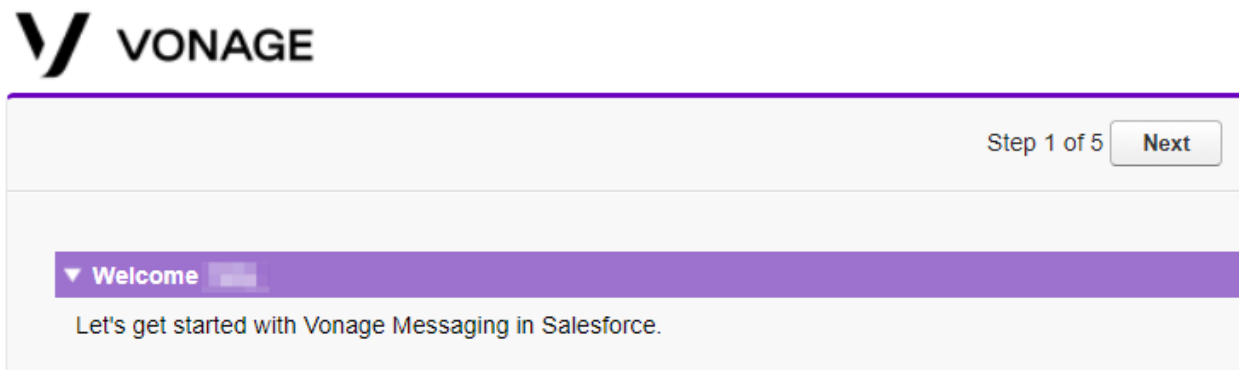
Once the initial deployment is done, the 'Bell Notification' will indicate a new message:



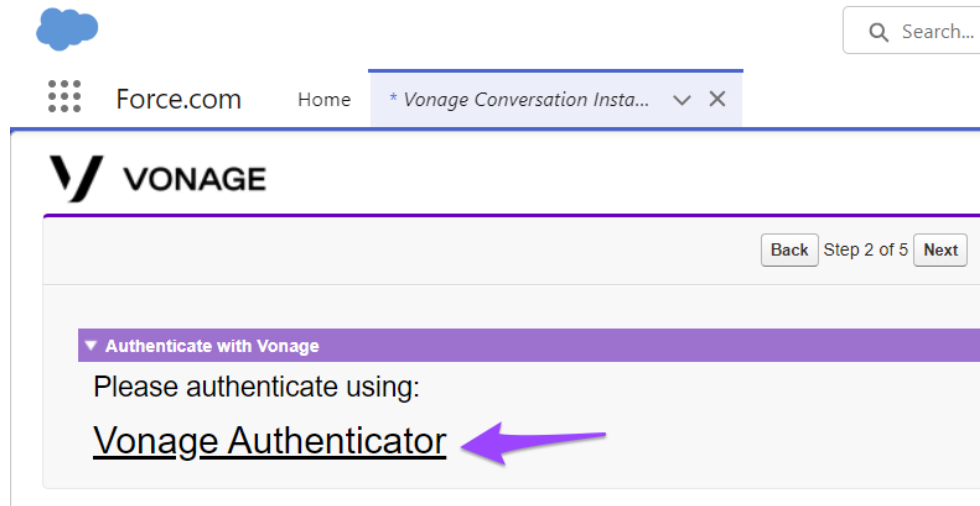
Select the link in the message to complete the setup:



Click 'Next' to start the deployment process:

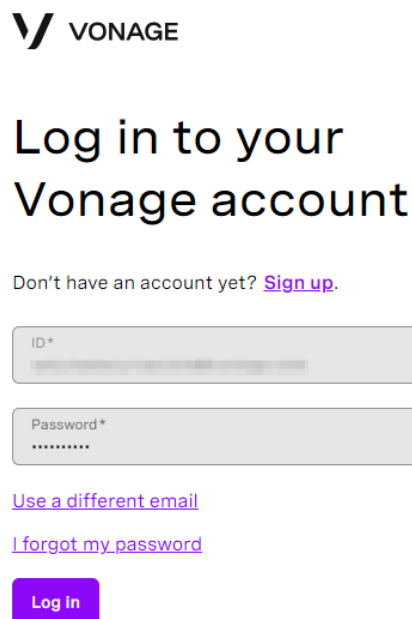


For Step 2, click the link to authenticate with Vonage - please ensure that you are logged-off from any other Salesforce ORG while completing this process:

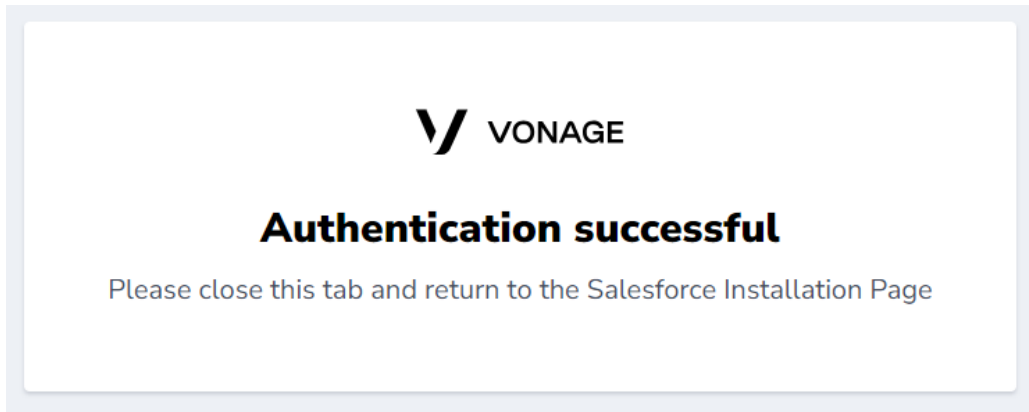


**Failure to complete the authentication will cause errors in later stages of the wizard.**

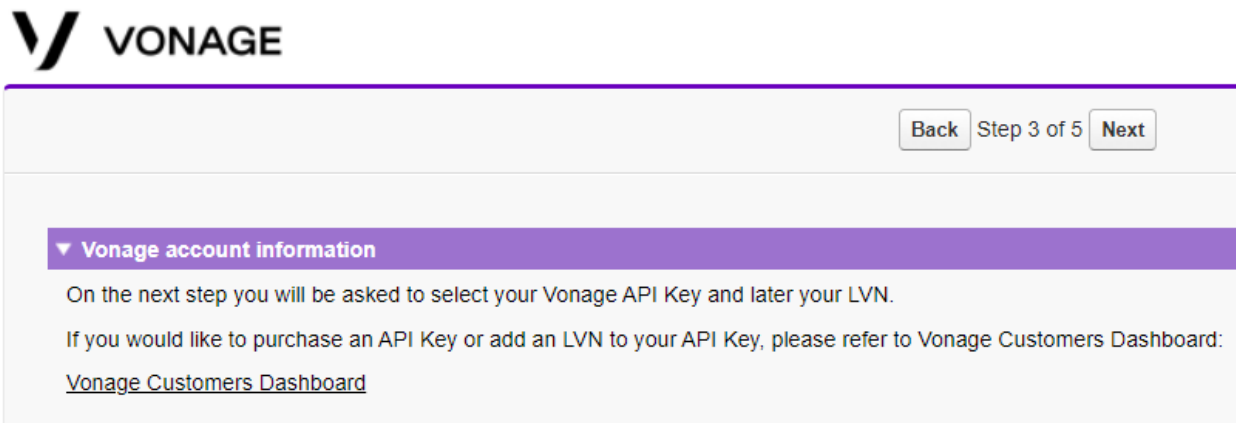
Next, you will be taken to the Vonage customer dashboard to login:



Once authentication is completed, you will see this confirmation and can return to Salesforce:



Step 3 of the installation wizard contains a link back to the Vonage customer dashboard, where you can configure your account, add API keys, and rent additional LVNs:



In step 4, select the API key you want to use:



Back Step 4 of 5 Next

▼ Vonage API Key Selection

Please select which one of your Vonage API Keys to use:

- ☐ [redacted] Key
- ☐ [redacted] Key
- ☐ [redacted] Key
- ☒ [redacted] Key
- ☐ [redacted] Key
- ☐ [redacted] Key
- ☐ [redacted] Key
- ☐ [redacted] Key
- ☐ [redacted] Key

The final step will show the LVNs associated with that API key, along with the channels those numbers support. Select a number, then click Finish:



Back Step 5 of 5 Finish

▼ Number Selection

Please select one of Vonage APIKey [redacted] numbers to use, then click the **Finish** button to complete the setup. This is a long process. Please do not close or refresh this window before the operation is completed.

- ☐ 1 [redacted] - Country: US, supported channels: MMS;SMS
- ☐ 1 [redacted] - Country: US, supported channels: MMS;SMS
- ☐ 447 [redacted] - Country: GB, supported channels: SMS
- ☒ 447 [redacted] - Country: GB, supported channels: SMS;WHATSAPP, WABA: [redacted]
- ☐ 447 [redacted] - Country: GB, supported channels: SMS

After the initial deployment it will be possible to add additional numbers.

Once this is complete, setup is done and you will see the following message:

Post Setup

## The setup is done!

Please assign the **Vonage Connector User Permissions Set** to the relevant users.

The **Vonage Conversation** Lightning Web Component is ready to be added to any record page.

### Release Notes

**\*\* Release 0.14 \*\***

Target: Early access customers

Minor fixes:

1. WhatsApp templates configuration save failure
2. Rolling log cleanup

**\*\* Release 0.13 \*\***

Target: Early access customers

New Features:

1. WhatsApp templates support
2. External channel support
3. Delivery status support

The next step is to set the permissions for which users can use the Vonage package. To do this, navigate to 'Permission Sets', then select 'Vonage Connector User' and click Manage Assignments:

Setup
Home
Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

SETUP
Permission Sets

Permission Set
**Vonage Connector User**

Find Settings...

Clone

Manage Assignments

**Permission Set Overview**

|                             |                                                                                   |                  |                     |
|-----------------------------|-----------------------------------------------------------------------------------|------------------|---------------------|
| Description                 | Necessary objects field and APEX class permissions for using the Vonage Connector | API Name         | VonageConnectorUser |
| License                     | Salesforce                                                                        | Namespace Prefix | VC                  |
| Session Activation Required | <input type="checkbox"/>                                                          | Created By       | 23/08/2023, 16:28   |
| Last Modified By            | 23/08/2023, 16:28                                                                 |                  |                     |

Assign the permission set to the agents you want to use the Vonage package to complete deployment.



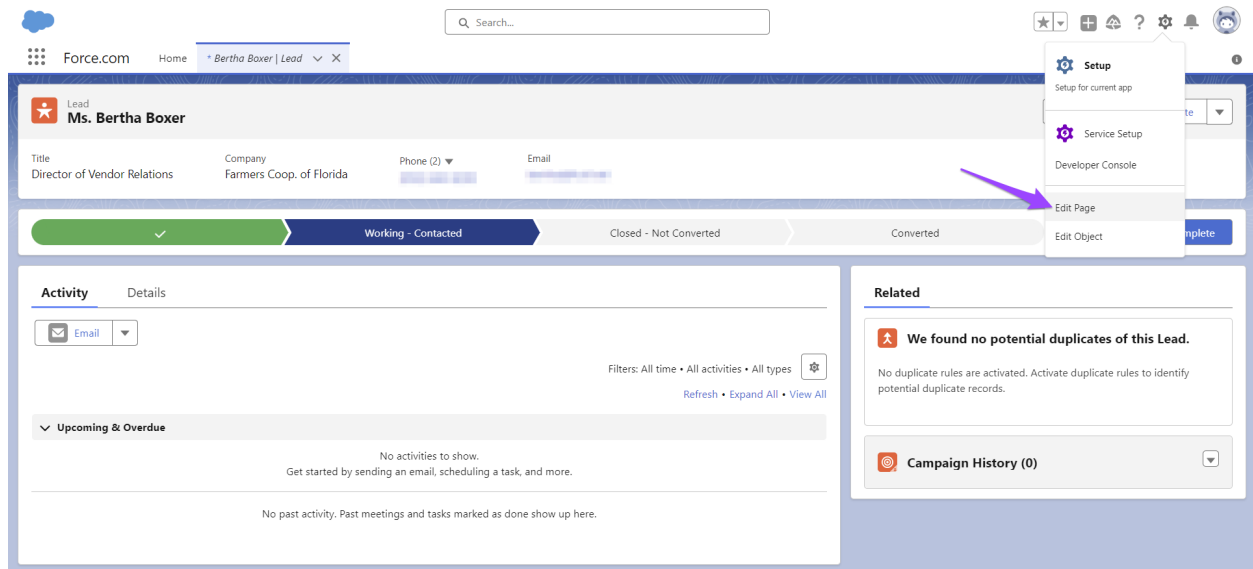
The next section will explain how to add the UI widget to a record page.

## UI Setup

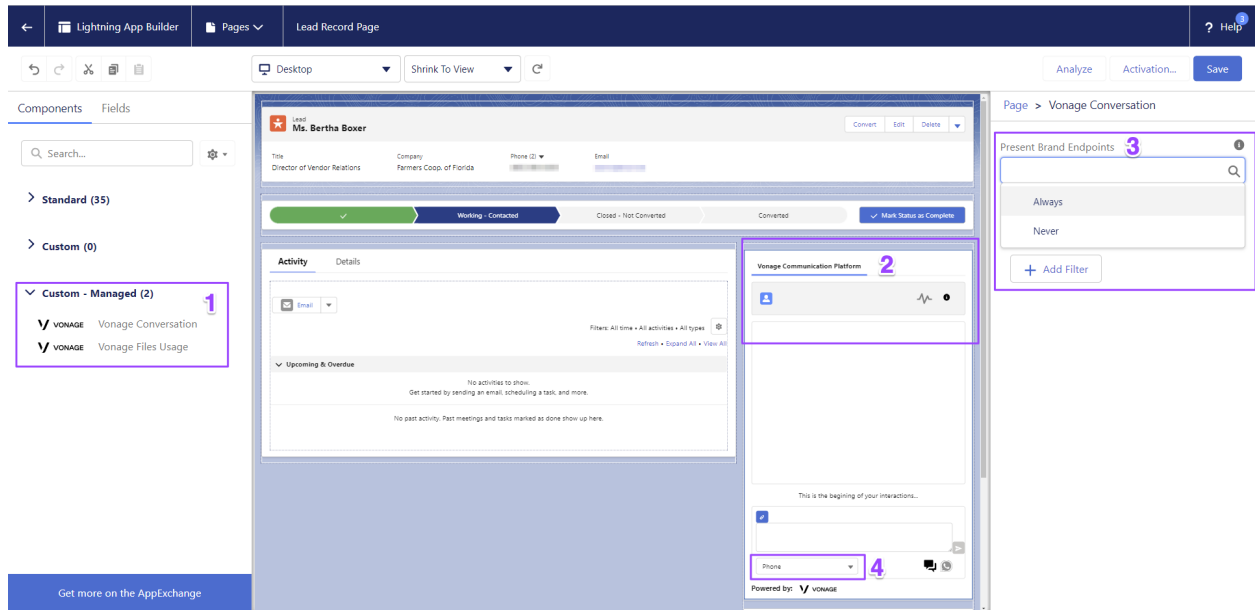
The UI Widget can be added to the record page of any standard SObject or custom SObject.

### Add the widget to a standard sObject

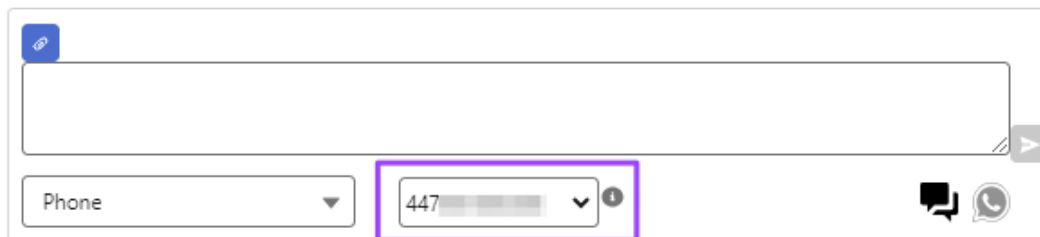
To add the widget to a standard sObject, go to the record page and select "edit page":



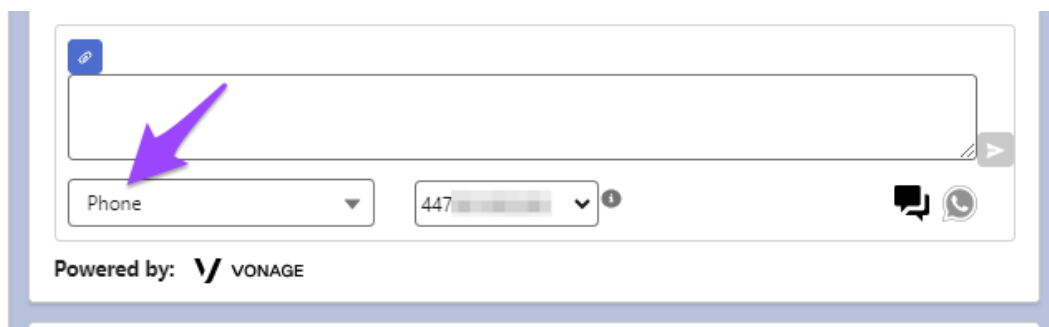
Drag the widget to the suitable place on the page. For example, editing the page for a lead would take you to this screen:



1. Locate the 'Vonage Conversation' UI widget in the Components menu.
2. Drag it to its designated location on the screen.
3. Set if the agent can select the Brand Endpoint. If **Never** - the agent cannot select the Brand Endpoint and the default one will be used automatically. If **Always** - the agent will be able to choose the Brand Endpoint from the drop-down list (4):



The widget will automatically identify all the populated "Phone" type fields in the record and will add them to the drop down to allow the agent to select which number to send messages to:



Note that the drop down uses the field label and not the phone number itself in order to allow the admin to hide the original phone numbers if they wish to do so.

Finally, save to activate the widget on the record page. The agents with the Vonage permissions set assigned will be able to see the widget and start sending messages:

Vonage Communication Platform

 **Bertha Boxer**



23-Aug-2023

Hello Ms. Boxer, we are happy to let you know your car is ready for you !

16:45



 Thank you! I will arrive to pick it up at 4pm 😊

16:46





Phone

447





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## Add the widget to a custom sObject

In this example, we'll add the UI to a custom sObject named **Car\_\_c**. The sObject must include at least one field of type "Phone", such as 'Driver Mobile' here:



SETUP > OBJECT MANAGER

Car

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

9 Items. Sorted by Field Label

| FIELD LABEL      | FIELD NAME       | DATA TYPE          |
|------------------|------------------|--------------------|
| Car Name         | Name             | Auto Number        |
| Created By       | CreatedById      | Lookup(User)       |
| Driver Mobile    | Driver_Mobile__c | Phone              |
| Driver Name      | Driver_Name__c   | Text(50)           |
| Last Modified By | LastModifiedById | Lookup(User)       |
| Manufacture      | Manufacture__c   | Text(20)           |
| Model            | Model__c         | Text(20)           |
| Owner            | OwnerId          | Lookup(User,Group) |
| Plate Number     | Plate_Number__c  | Text(11)           |

The **VC\_Interaction\_\_c** sObject should also contain a field that has a lookup relationship with the **Car\_\_c** sObject:

SETUP > OBJECT MANAGER

Interaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

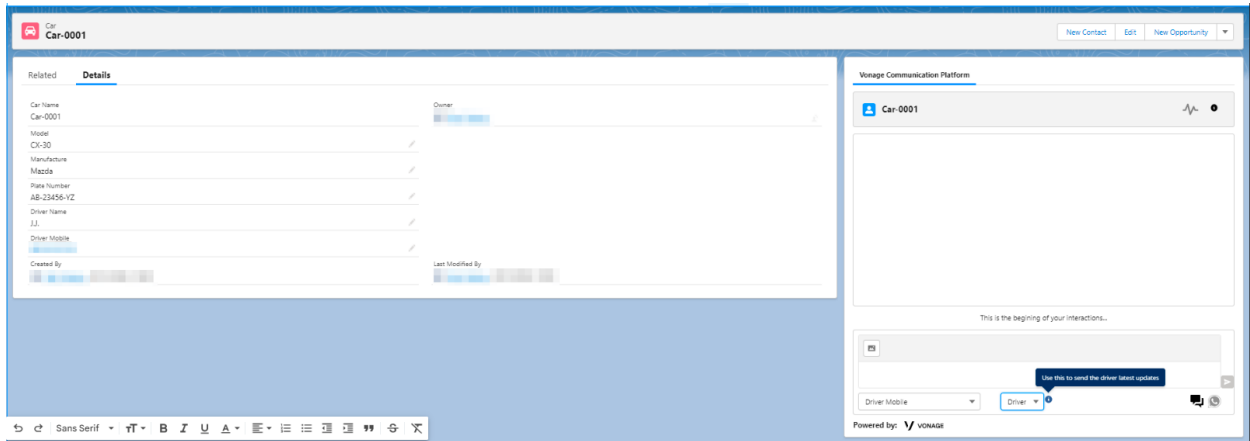
Object Limits

Fields & Relationships

36 Items. Sorted by Field Label

| FIELD LABEL    | FIELD NAME           | DATA TYPE       |
|----------------|----------------------|-----------------|
| Account        | VC_Account__c        | Lookup(Account) |
| Brand Endpoint | VC_Brand_Endpoint__c | Text(255)       |
| Car            | Car__c               | Lookup(Car)     |
| Case           | VC_Case__c           | Lookup(Case)    |

Once that's in place, it is possible to add the widget to the **Car\_\_c** record page:



The screenshot shows a Salesforce record page for 'Car-0001'. The page is divided into two main sections. The left section, titled 'Details', contains a table of car specifications:

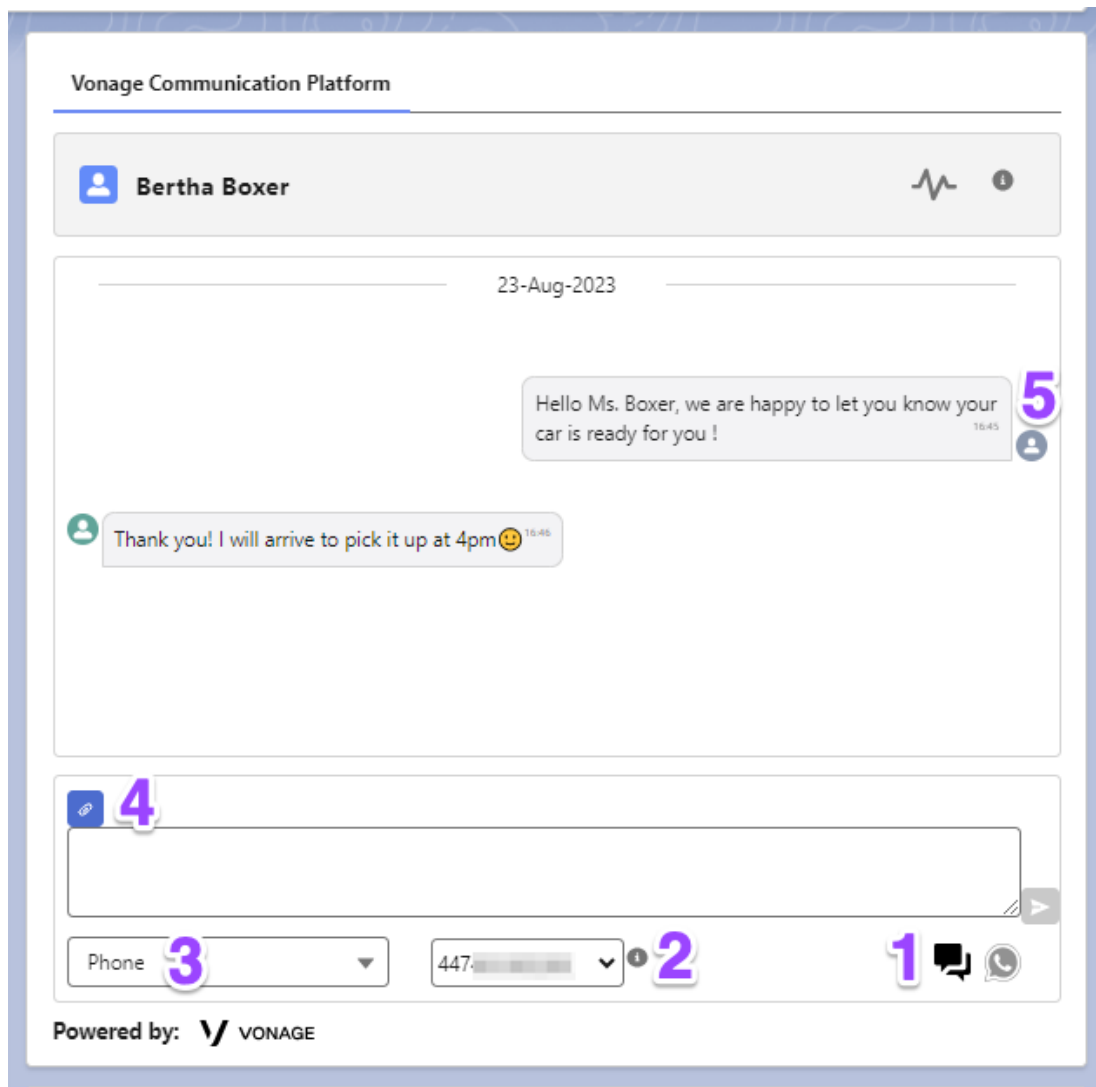
| Field            | Value       |
|------------------|-------------|
| Car Name         | Car-0001    |
| Model            | CX-30       |
| Manufacturer     | Mazda       |
| Plate Number     | AB-23456-VZ |
| Driver Name      | J.J.        |
| Driver Mobile    | [Redacted]  |
| Created By       | [Redacted]  |
| Last Modified By | [Redacted]  |

The right section, titled 'Vonage Communication Platform', contains a large empty box for interactions. Below this box is a text prompt: 'This is the beginning of your interactions...'. At the bottom of this section is a 'Driver' dropdown menu with 'Driver Mobile' selected. A tooltip above the dropdown says 'Use this to send the driver latest updates'. The bottom of the page features a rich text editor toolbar and a 'Powered by: VONAGE' logo.

# Sending Messages from the UI

## Sending an SMS Message

To send a message, navigate to the record for the recipient of that message. You will see this UI on the page:

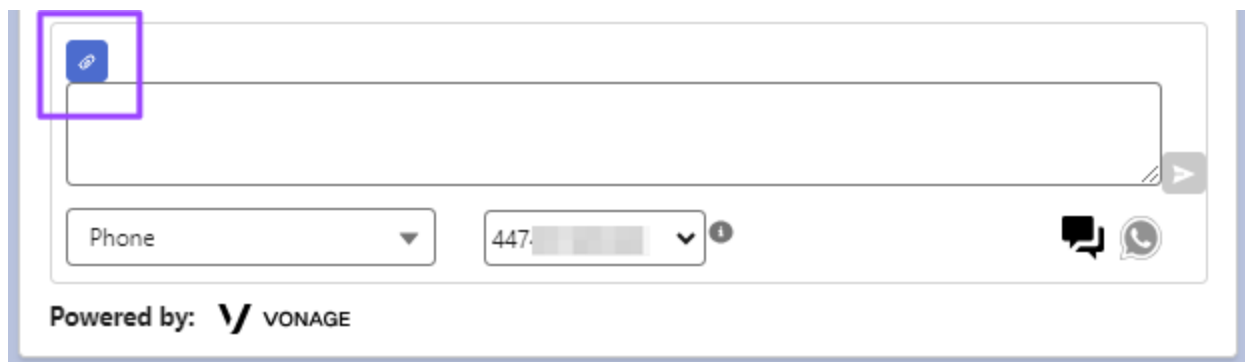


2. Next, choose the phone number that you want to send the message to; the drop down is automatically populated with all phone numbers associated with that record.
3. The next drop down shows the brand number the recipient will see. For example, you may have one brand number for communications in the USA and another for communications within the UK. If the permissions have been enabled, you can use the drop down to choose between the numbers; if not, the default number will be selected.
4. You can attach an image to the message using the link button; see the [next section](#) for more information.
5. Once you've sent a message, you will be able to see it in the conversation history. By hovering over the sender icon, you will also be able to see the agent that sent that message.

## Sending an MMS Message with an Image

**Note: MMS Images are only supported for USA or Canada numbers. The LVNs used must be approved for [10DLC](#).**

When sending messages, you can attach **one** image by selecting the link button in the top left:



You will see a list of images that you are permitted to send, and can preview the image by clicking the eye icon on the right:



Select/Reset the resources for your message

| Label                               | Description | Preview                                                                             |
|-------------------------------------|-------------|-------------------------------------------------------------------------------------|
| <input type="radio"/> rose          |             |  |
| <input type="radio"/> sofa_armchair |             |  |
| <input type="radio"/> Miss you      |             |  |
| <input type="radio"/> dog           |             |  |

OK
Reset
Cancel

These images are managed through the 'Files' section. Once selected the image will be presented in the message editor:



Hello there!



Mobile Phone
12



Powered by:  VONAGE

Once sent, it will be shown in the conversation history:

Hello there!

13:00



Mobile Phone
12



Powered by:  VONAGE

# Flow Development

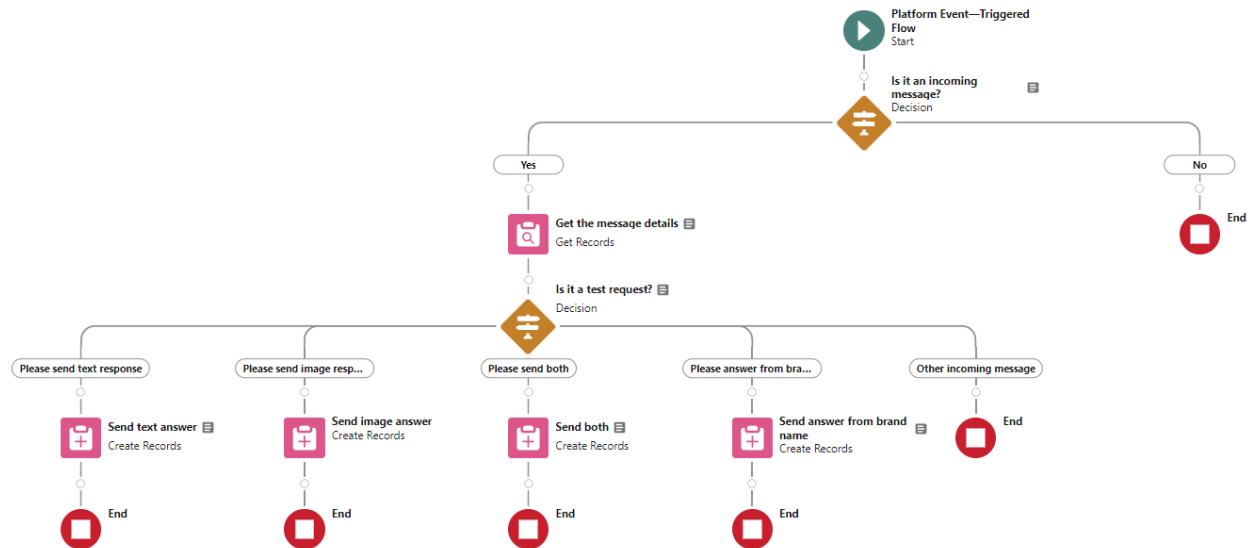
## BOT Template - Process Incoming Messages

The Vonage package contains a Salesforce Flow Template for creating a BOT that can recognise an incoming message and send an automatic response depending on the contents of that message.

The options are:

| Incoming Message<br>(Case sensitive) | Expected Response                                                 | Response sender<br>identification                        | Notes                                                 |
|--------------------------------------|-------------------------------------------------------------------|----------------------------------------------------------|-------------------------------------------------------|
| Please send text                     | Hello from Vonage<br>BOT example                                  | The configured phone<br>number (Vonage LVN)              |                                                       |
| Please send image                    | An image, as<br>configured in the Flow                            | The configured phone<br>number (Vonage LVN)              | Available only for<br>USA and Canada<br>10DLC numbers |
| Please send both                     | Hello from Vonage<br>BOT + an image, as<br>configured in the flow | The configured phone<br>number (Vonage LVN)              | Available only for<br>USA and Canada<br>10DLC numbers |
| Please answer from<br>brand name     | Hello from Vonage<br>BOT example                                  | The updated Brand<br>Name (as configured<br>in the Flow) |                                                       |
| Any other text                       | No answer                                                         |                                                          |                                                       |

The flow is as follows:

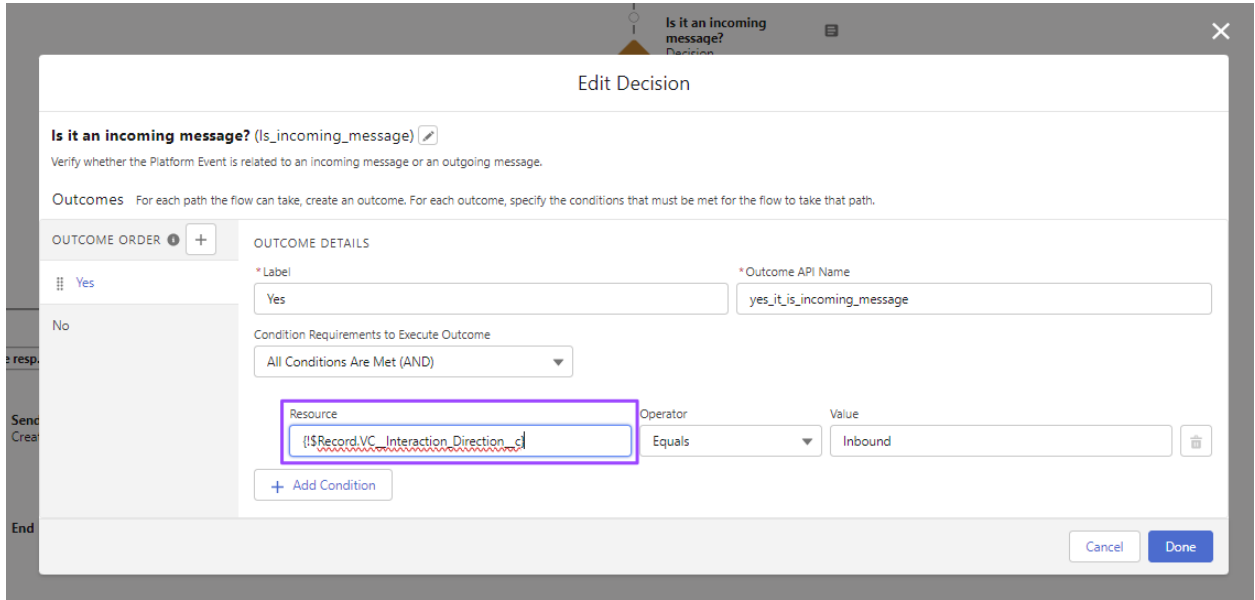


1. First, the flow is triggered by a Platform Event, in this case the creation of an interaction.
2. Next, it will check if the message is an incoming message. If it's not, the flow ends, but if it is incoming the BOT will retrieve the message details.
3. From there, the contents of the message are analyzed to determine what kind of response should be sent.

## Creating the BOT

On install, the BOT template is deactivated. To use it, go to Setup, then Flows, and find the 'Vonage BOT Example' template. Then, copy it to amend it to your specific ORG needs.

While doing this, make sure that the relevant field names are updated throughout to reflect the package namespace:



Please also update the following elements:

- **'Send image answer'** - Update the resource value with one of the images for your ORG. These are managed in the 'Files' application.
- **'Send both'** - Update the resource values with files for your ORG. These are managed in the 'Files' application.

| Field            |   | Value              |
|------------------|---|--------------------|
| VC__Resources__c | ← | 0698d00000F4grxAAB |

- **'Send answer from brand name'** - replace the brand name value with your preferred name.

| Field                 |   | Value                                                      |
|-----------------------|---|------------------------------------------------------------|
| VC__Brand_Endpoint__c | ← | Aa Interaction from Get_the_message_details > Brand E... X |

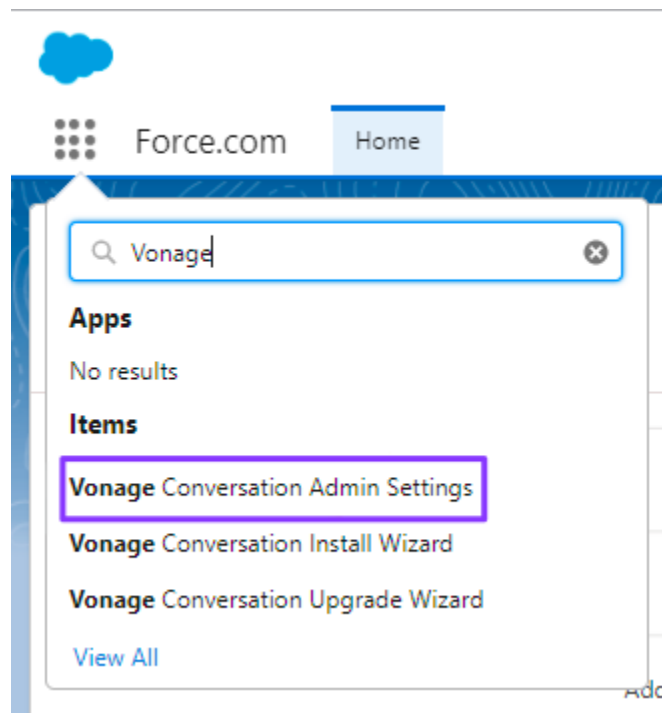
Finally, activate the Flow to activate the BOT. You can now send text messages to your configured LVN and receive responses from the BOT based on the content of the incoming request.

## Troubleshooting and Support

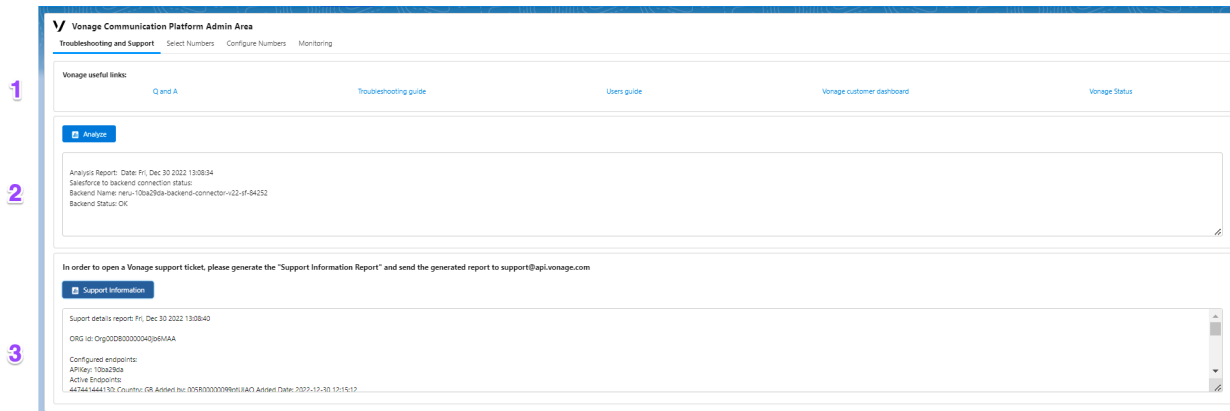
The Admin Configuration Page allows the admin to access several useful troubleshooting and support functions:

1. Check the backend connectivity status.
2. Fetch logs.
3. See shortcuts to the Vonage documentation, status page and customer dashboard.

To access the page search Vonage to find the 'Vonage Conversation Admin Settings':



The 'Troubleshooting and Support' tab contains three sections:



## Vonage Useful links

Links to the Vonage documentation, status page and customer dashboard.

## Analyze

Clicking the 'Analyze' button will fetch the latest status of the connection between the ORG and the Vonage backend connector. You will see the name of the backend connector instance, along with the backend status. This information can be used for further communications with [Vonage support](#) in case of connectivity issues - any tickets raised should be under the category 'Using Conversations for Salesforce'.

## Support Information

Clicking the 'Support Information' button will fetch the latest connection status, current configuration details and logs in one report. This information can be used for troubleshooting and further communications with the Vonage [support team](#) - any tickets raised should be under the category 'Using Conversations for Salesforce'.