MCUtility Messaging USER GUIDE

Marketing Campaign

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Cloud Analogy is a Salesforce **Gold consulting partner,** that boasts a team of CRM experts delivering comprehensive Salesforce and other CRM services such as HubSpot, Zoho, and MS Nav Dynamics. We are a consortium of IT companies specializing in CRM, digital marketing, and web application development services, dedicated to helping our clients achieve success. Our offices are located in the USA, Canada, UK, Australia, and India(Noida, Kurukshetra, Chandigarh, Bengaluru, Lucknow).

Application Summary

MCUtility seamlessly integrates with Salesforce, enhancing communication capabilities across channels and sending bulk mails. Its high-level features are:

- Send Immediately and Schedule the messages
- Individual One O One Conversation
- Bulk Messaging from List Views, Reports, Campaigns
- SMS Template for both Individual and Bulk Messaging
- Chat utility to send quick messages
- Bulk email and single email to any standard or custom object.
- Email Template design
- Track emails and Anaytics

As a 100% native Salesforce solution, MCUtility ensures that third-party messaging and mailing services are invoked within the Salesforce environment, ensuring that messages are exclusively stored within Salesforce and not on external servers. The solution incorporates custom objects, buttons, VF pages, and LWC components, easily configurable by administrators into key Salesforce entities such as Leads and Contacts. MCUtility supports all Salesforce-supported objects, whether standard or custom.

After purchase, customers integrate their phone numbers with their existing service provider, with Cloud Analogy managing the setup process seamlessly.

Overview

This user manual aims to comprehensively explain the utilization of MCUtility for sending and receiving messages and attachments within Salesforce, accessible across platforms(SMS, Whatsapp) as well as send the single or unlimited email with or without attachments to any standard and custom objects.

Specifications

MCUtility is a fully on-premise Salesforce solution, eliminating the need for specific hardware or software requirements. It is compatible with the following Salesforce editions:

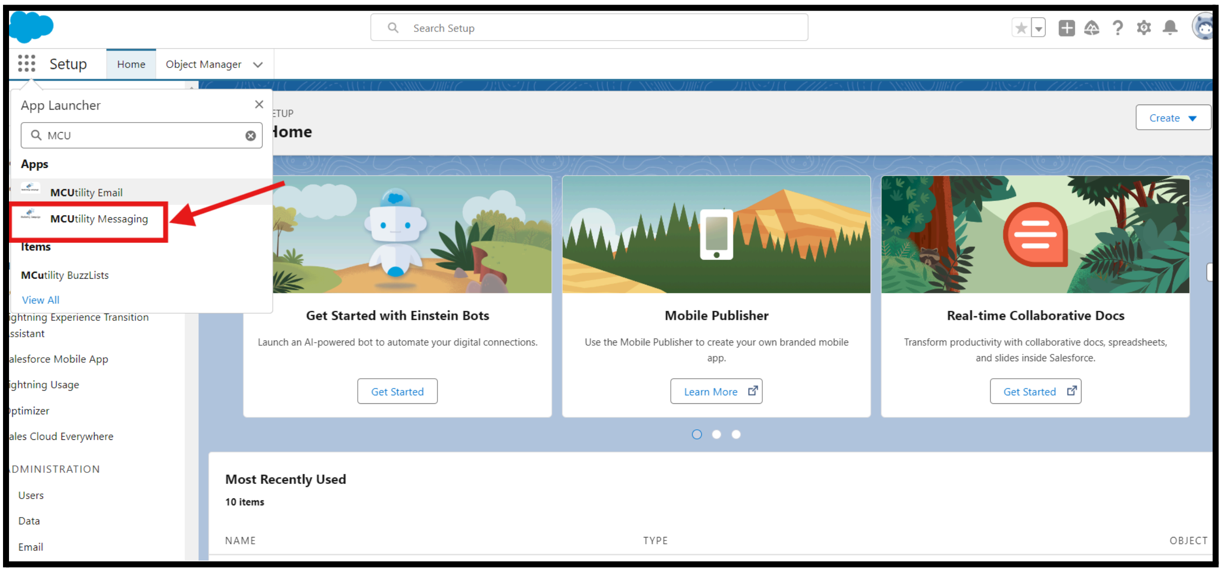
- Professional Edition
- Developer Edition
- Enterprise Edition
- Performance Edition
- Unlimited Edition

MCUtility seamlessly operates within Salesforce Lightning and supports mobile usage without any additional setup steps. Once MCUtility is integrated into your Salesforce org, you gain access to a host of powerful features. Below, you'll find a detailed guide with step-by-step instructions on utilizing these features effectively.

MCUtility Messaging

Follow the below steps to access MCUtility Messaging:

- Open the app launcher by clicking on the grid icon (9 dots) located at the top left corner.
- Type "MCUtility Messaging" into the search bar. The app will appear in the search results.
- Click on the MCUtility Messaging app to open it.
- You will be directed to the app page.



MCUtility Message Utility

By default, the Chat Utility is located at the bottom right of the MCUtility app page, within the Taskbar as a Lightning component. This component can be flexibly positioned anywhere within the app as per requirement.

Key capabilities of the utility include:

- Indicating new messages with a green dot symbol.
- Highlighting the utility whenever there is an incoming message.
- Displaying notifications for incoming messages (such as those from Whatsapp and Twilio).

- Clicking on the utility opens a popup window where messages can be viewed.

- The popup window displays all ongoing live conversations when accessed through the utility.

We can track the message delivery status from here:

- Message is Sent(✓)
- Message Read(✓✓)
- Not delivered(Red in color)

Live Chat With Customer

When a customer sends a message from their WhatsApp or another channel to a chat Utility and Chat View, the message will be received by the MCUtility on Chat utility. You'll notice the notification as a green dot indicating a new message.

Clicking on the MCUtility utility will open a popup window displaying the latest messages at the top. The conversation, along with the proper date and time stamps, will be visible in the Custom Inbox. There are two types of conversations that can occur with the customer:

1. **User-Initiated Conversations:**
   - **Initiation:** The conversation is started by the user sending a message to the bot.
   - **Record Handling:** If the user is unknown, it will be decided by them in which object that particular record will be saved. If the user already exists in the system, the conversation will be linked to their existing record.
   - **Viewing Past Conversations:** Past conversations with the user can be viewed, if available.
   - **Continuing the Conversation:** After the user initiates the conversation, the business can respond with either pre-approved message templates or random text messages to maintain the dialogue.
2. **Business-Initiated Conversations:**
   - **Initiation:** The business initiates the conversation by sending a pre-approved template message to the customer.
   - **Customer Response:** Once the customer replies, the business can continue the conversation.
   - **Continuing the Conversation:** The business can use either pre-approved message templates or random text messages to keep the conversation going.

These functionalities ensure seamless communication between the customer and the business, allowing for efficient handling of messages and maintaining a record of all interactions.

At the bottom of the Custom Inbox, you will find several components that enhance the functionality of the MCUtility:

1. **Attach Files:**
    - This feature allows you to send attachments via chat to the end customer.
    - Attachments can be of any file extension, such as .jpeg, .png, etc., with a maximum file size limit of 5 MB.
    - **Note:** Files are not stored on any middleware server.
2. **Link Customer:**
    - This option lets you link the ongoing conversation with any object based on your requirements.
    - By default, if a new message is received, it is assigned to the user designated as the Default SMS Owner.
    - For subsequent messages from the same customer, the conversation is automatically linked to the same lead or contact as before, ensuring consistency and ease of access.
3. **Emoji:**
    - Standard emojis are supported, allowing you to add a personal touch and express emotions clearly in your messages.
4. **Template:**
    - You can select a pre-approved template from a designated folder and share it with the client.
    - This feature helps maintain consistency in communication and saves time by reusing frequently sent messages.

These components facilitate effective and organized communication with your customers, providing a robust system for managing interactions and enhancing the overall user experience

Important Note:

The conversation cycle in MCUtility is limited to 24 hours. After this period, a new conversation must be initiated, either by the business or the customer. Here are the details regarding this cycle:

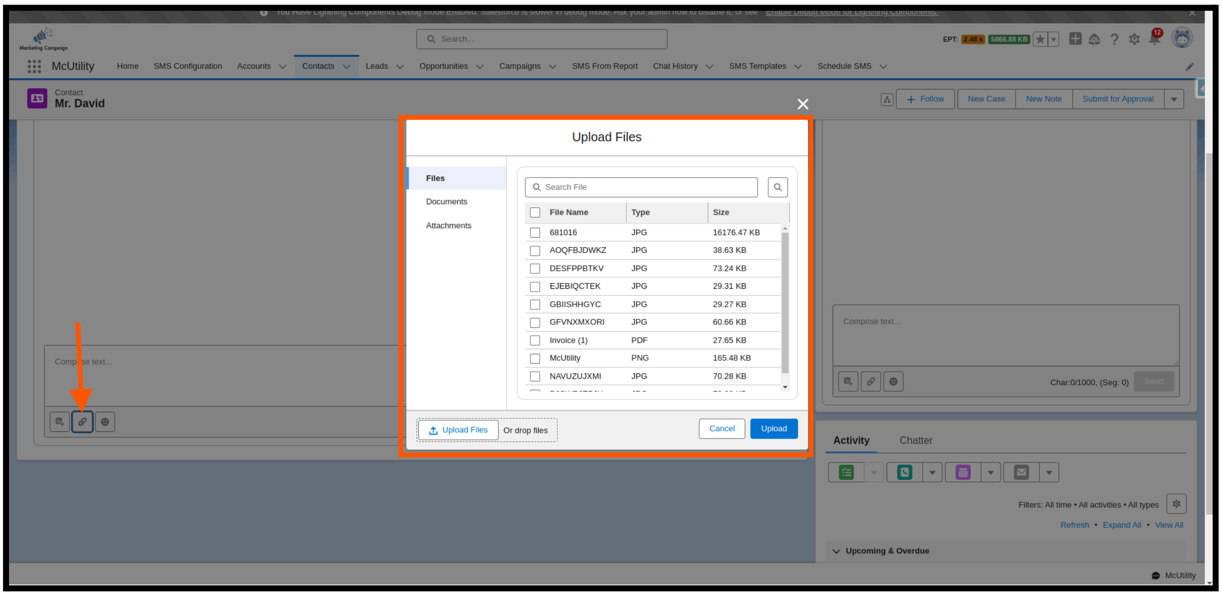
- **24-Hour Conversation Window:** Each conversation session is active for a duration of 24 hours. This means that both the business and the customer can freely exchange messages within this time frame.
- **Initiating a New Conversation:** If 24 hours have passed since the last message was sent and the customer has not replied, the conversation window closes. In this case, the business must initiate a new conversation to re-establish communication.
- **Using Pre-Approved Templates (WhatsApp Specific):** For WhatsApp, if the last conversation occurred more than 24 hours ago and the customer has not responded, the business is required to use pre-approved templates to restart the conversation. These templates must adhere to WhatsApp's messaging policies and guidelines.

This 24-hour conversation cycle ensures that communications remain timely and relevant, requiring businesses to proactively manage their interactions with customers and maintain compliance with messaging platform regulations.

Attach Files

By following these below steps, you can easily attach and send files within your conversation,enhancing your communication with customers:

- Click on the attachment icon within the chat
- A file selection window will appear. Navigate to the desired file on your device.
- Select the file you wish to attach. Ensure that the file format is supported (e.g., .jpeg, .png) and that the file size does not exceed 5 MB
- Click on "Upload".

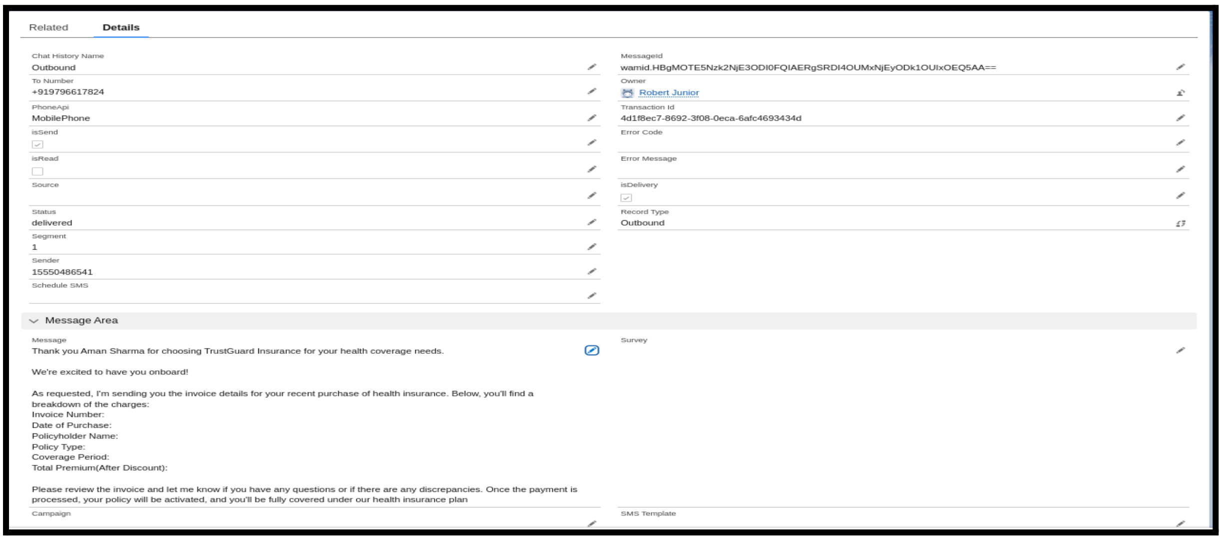


Link Customer

You can link the conversation with any object according to the requirement.

There are multiple ways to link the customer:

1. Default SMS Owner: Whenever an unknown SMS will come it will be redirected to the user which is been set as a Default SMS owner in the settings
2. Existing Conversation: A record will be created as per the flow in Chat history as per the requirement and in that particular object it will be saved.



Emojis

MCUtility fully supports the use of emojis, allowing you to add a personal touch to your messages. Select the emoji by clicking on Emoji Icon and press Send.

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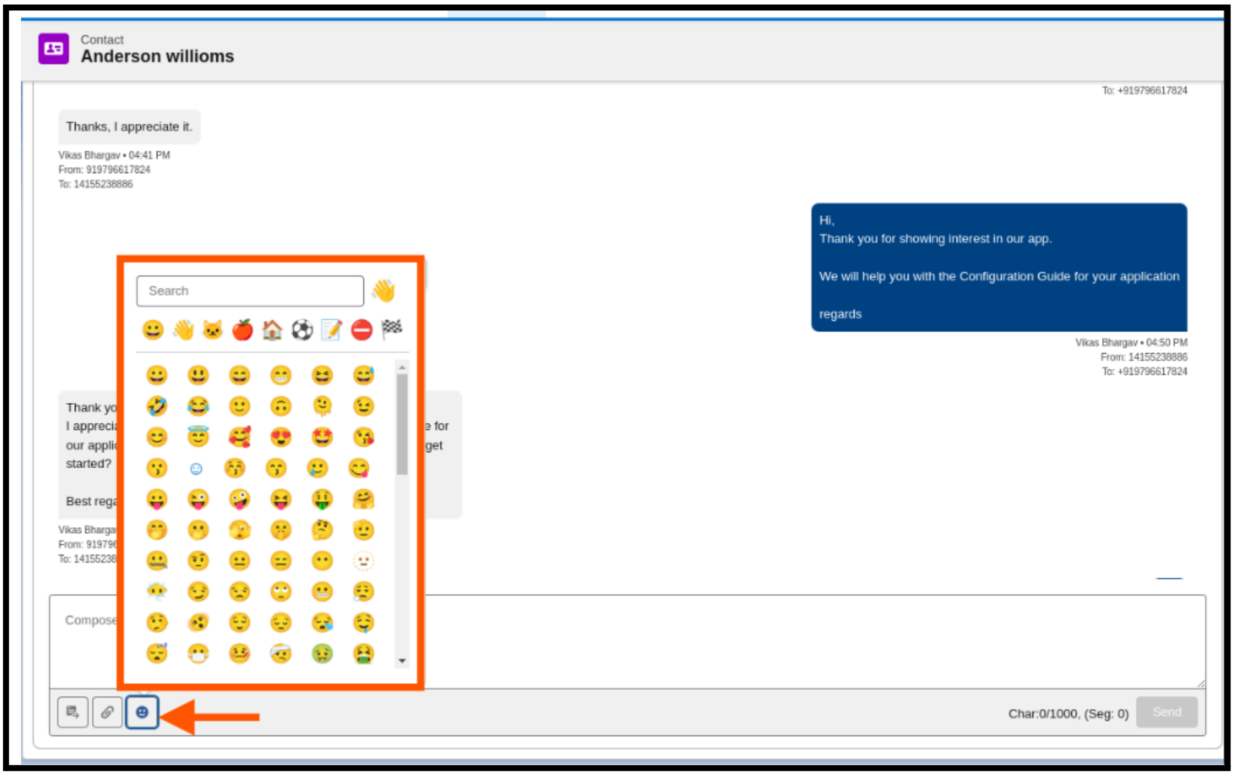


Linked Conversation with the Lead/Contact

When the conversation is linked with a Lead or Contact, clicking on the lead/contact name will direct you to the Lead/Contact standard page. We can also add the chatbox to that specific page.

End the Conversation

If the customer decides not to continue the conversation, they can end it from their side using the Subscribe and Unsubscribe keyword functionality available in the settings. Here are the details:

1. **STOP (Unsubscribe Keyword):** If the customer no longer wishes to receive messages, they can simply reply with the keyword "STOP." This will immediately halt all further messages to the customer.
2. **START (Subscribe Keyword):** If the customer wants to resume receiving messages, they can reply with the keyword "START." This will re-enable message delivery to the customer.

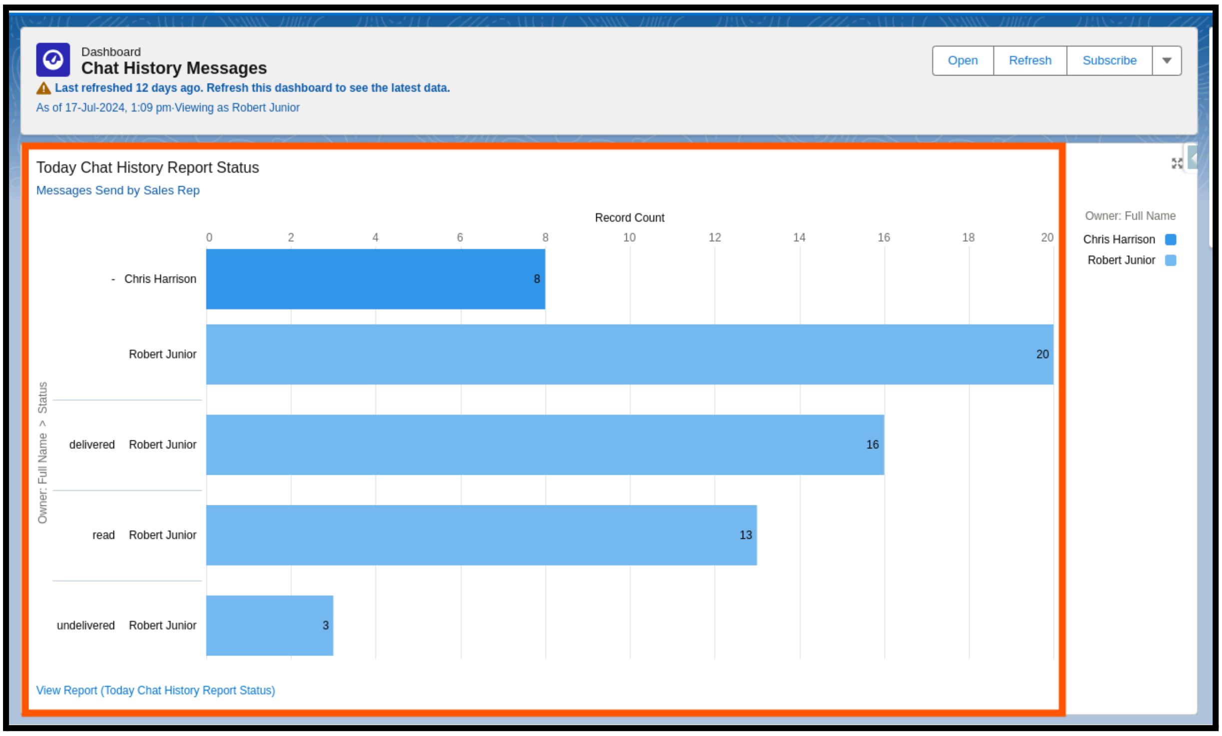
These keywords provide customers with a simple way to manage their subscription status and control their communication preferences.

Statuses for the Sales Reps

In MCUtility, there are three statuses that are tracked:

1. **Record Count:** This displays the total number of records associated with a particular Sales Rep. It provides an overview of the overall volume of data managed or assigned to that Sales Rep.
2. **Delivered/Read/Failed Messages:** This section details the status of messages sent by a Sales Rep within a day:
    - **Delivered:** Shows the number of messages successfully sent by the Sales Rep.
    - **Read:** Indicates the number of messages that have been opened and read by the Customer.
    - **Failed:** Represents the count of messages that were unsuccessfully delivered, often due to delivery issues or errors.

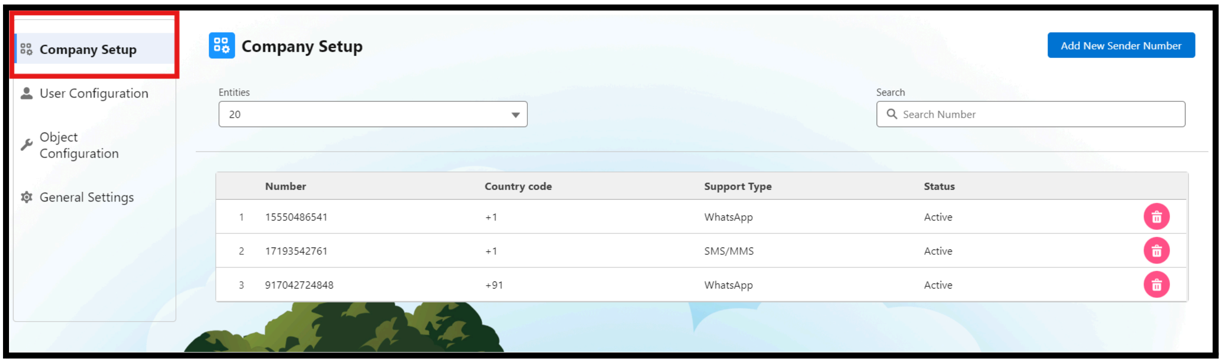
These statuses help in monitoring and evaluating communication effectiveness and engagement levels between the system and Sales Reps.



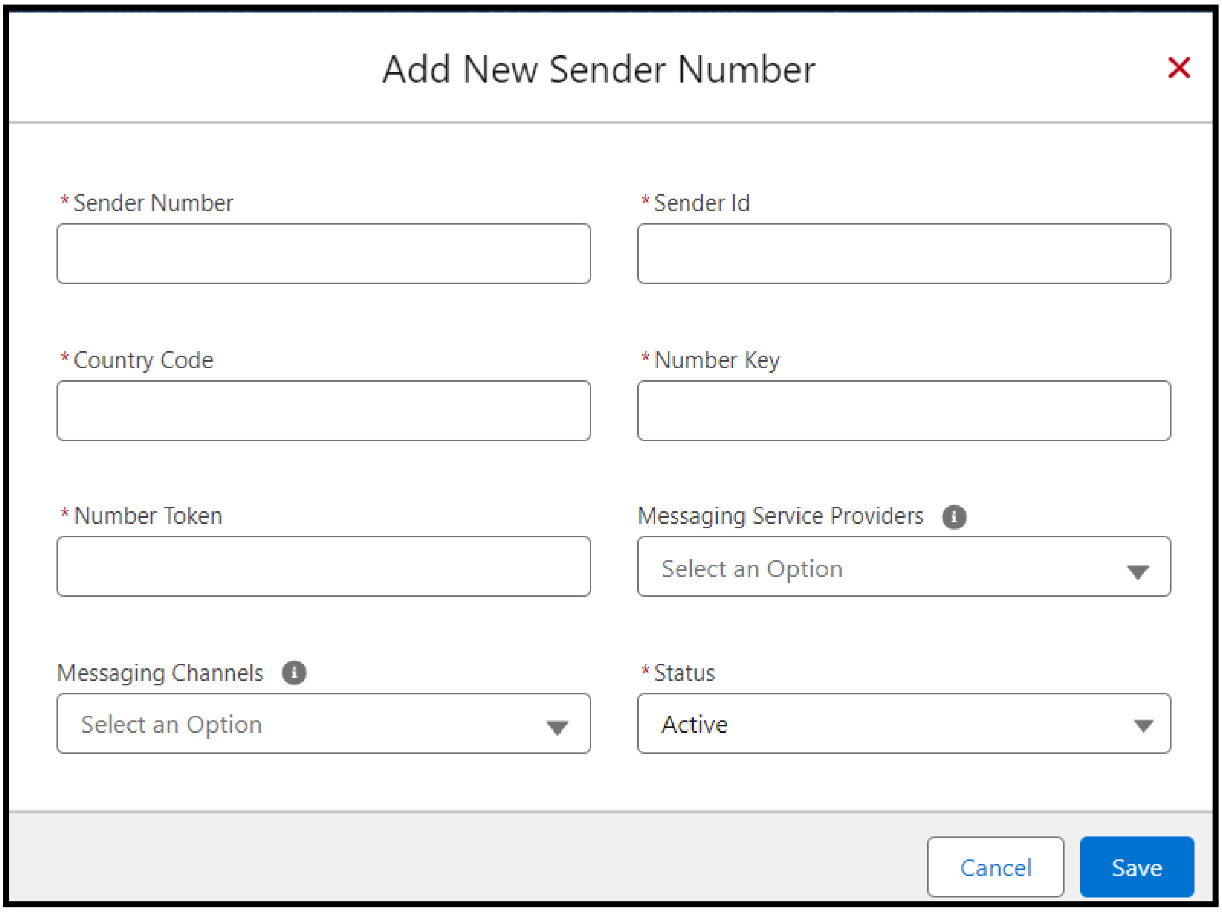
How to Setup Number

To begin using the MCUtility Message app, the first essential step is setting up a phone number, which will enable you to send and receive messages. Please follow the steps below to complete this setup:

1. Navigate to the SMS configuration page and click on "Company Setup" to add a phone number.



2. In the "Company Setup" section, select "Add New Sender Number." This will redirect you to the relevant setup screen.

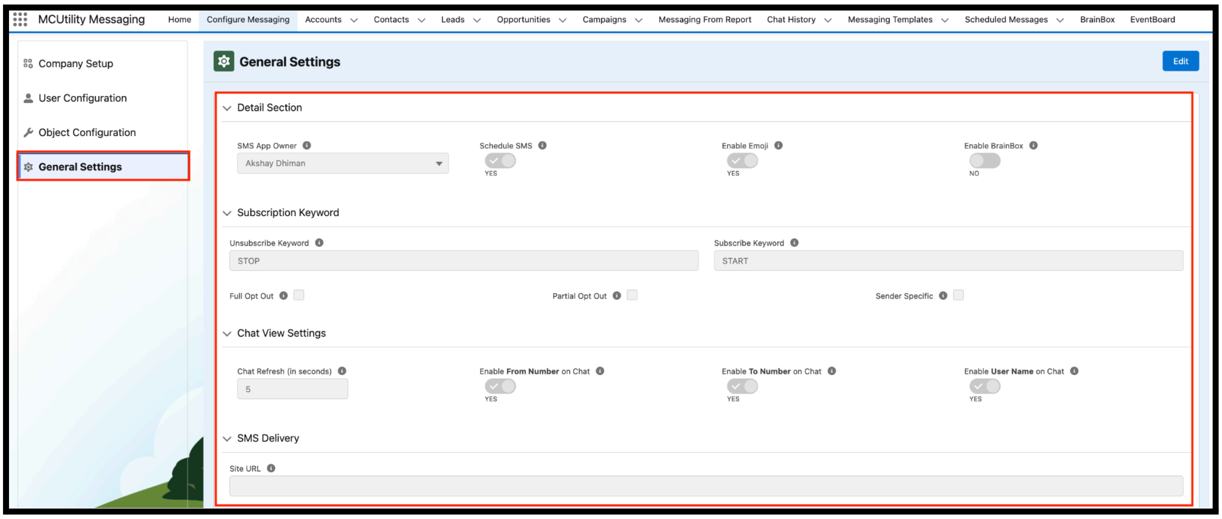


3. Fill in the required fields, including the Twilio number, and select the appropriate communication channels.

Settings

The general settings of the system can be configured according to your requirements. It provides flexibility and control over how the system operates and how messages are managed and displayed. Here are the details:

1. **Detail Section:** The detail section includes the below option-
    - SMS App Owner: This feature allows you to change the SMS owner, who is typically an admin.
    - Schedule SMS: You can enable or disable the scheduled SMS functionality from here.
    - Enable Emoji: This setting lets you enable or disable the use of emojis, which will then be displayed accordingly in the chat window.
2. **Subscription Keyword:** These keywords can be used to end the conversation. If customers no longer wish to receive messages, they can use the "STOP" keyword to end the conversation. Customers can use the "START" keyword to resume receiving messages. This also involves:
    - Full Opt-Out: When enabled, the user cannot send messages at all from any number.
    - Partial Opt-Out: When enabled, the user can still send messages using different numbers even if a customer has stopped the conversation from one number.
    - Sender Specific: When this is enabled, messages cannot be sent from a specific sender number.
3. **Chat View Settings:** You can change the chat refresh time using this setting. Apart from this you can also enable and disable the below:
    - Enable From Number on Chat
    - Enable To Number on Chat
    - Enable User Name on Chat
4. **SMS Delivery:** This setting involves configuring the site URL to show whether a message is delivered, sent, read, or not sent.



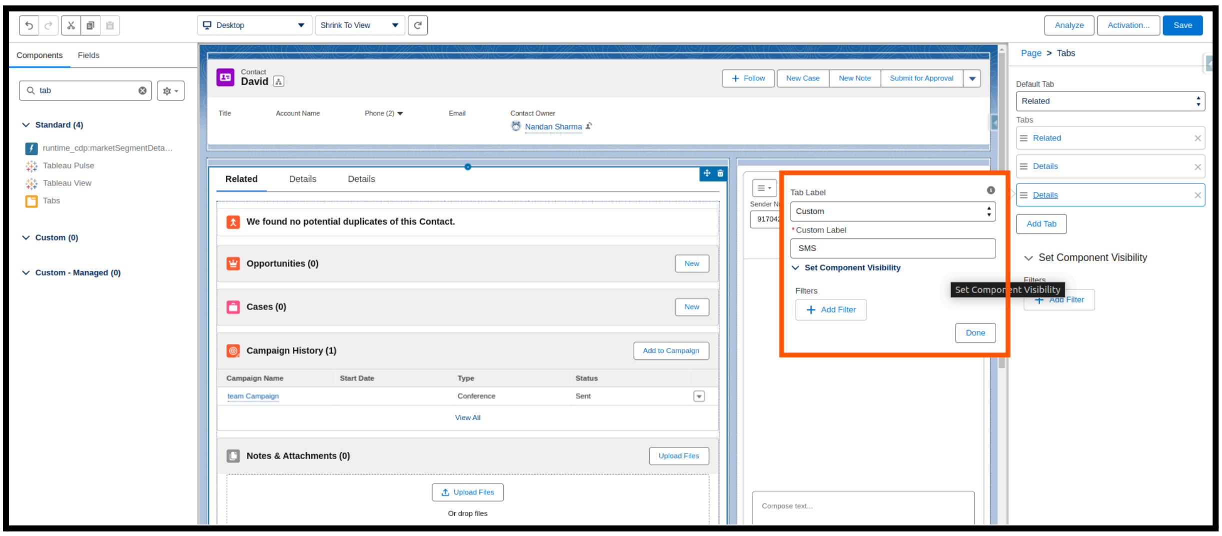
Chatting View Tab

This is the tab that needs to be set up on the objects where MCUtility is enabled. According to the requirement you can add the Chatting view Tab in any object.

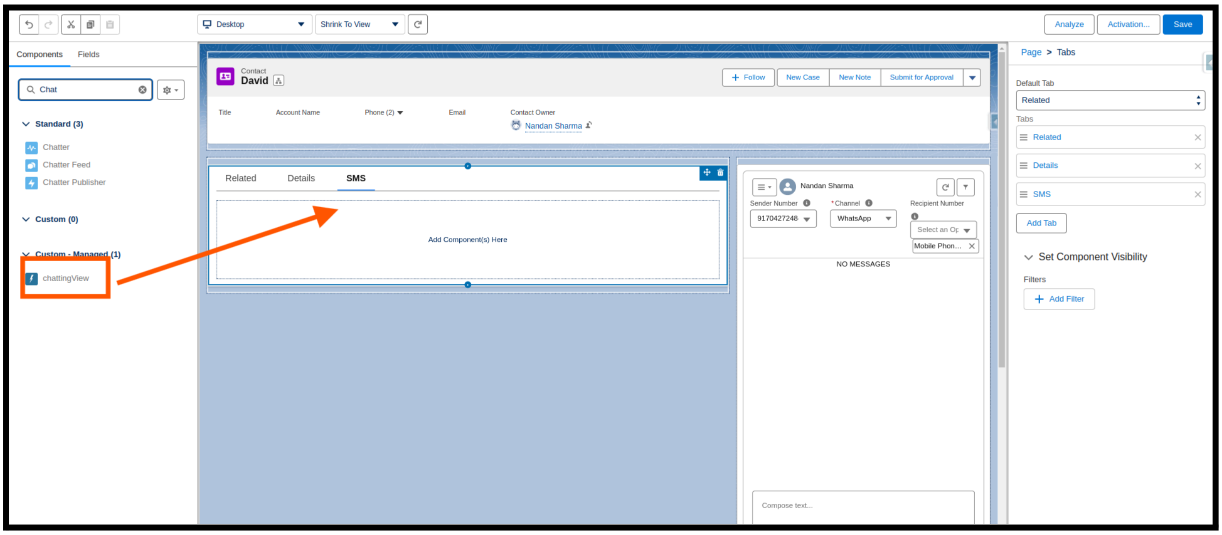
How to setup the Chat View Tab

To set up a Chat View tab for a specific object, follow these detailed steps:

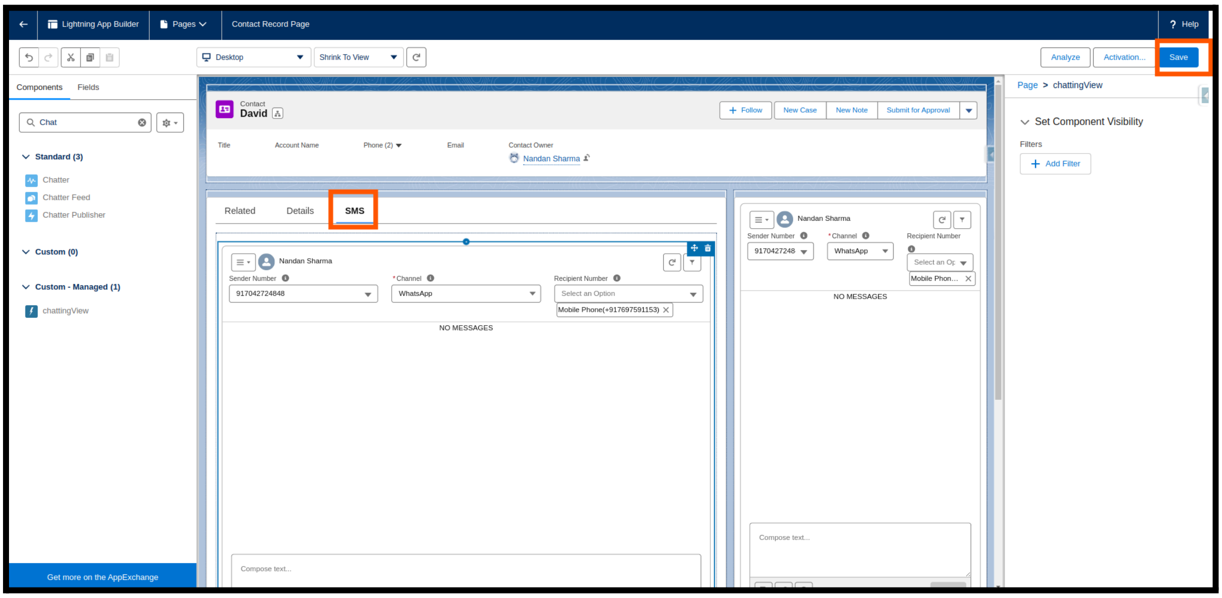
1. Click on the object on which you want the chat view tab to be enabled.
2. Go to Setup and click on Edit Page.
3. Add the SMS Tab as shown in the below screenshot.



4. Click on Chatting View and drag it to the SMS Tab.



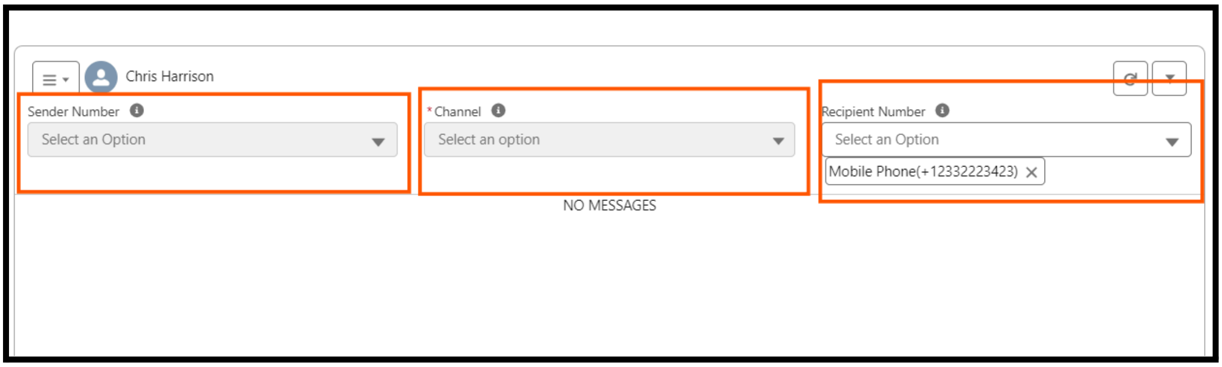
5. Click “Save”. After which the Chat View will be as shown below.



Sections in Chat View Tab:

To Initiate a message we have the below section that needs to be filled in order to send a successful message:

- **Sender Number:** Select the Sender number by which you will send the message
- **Channel:** Select the Channel(In our Case SMS and WhatsApp)



- **Recipient Number:** Select the number of the customers to which you want to send the messages.
- **Attachment and Emoji:** You can select the attachment and emoji from the icons.
- **SMS Template:** Select the Template from the folder of the template icon.

- **Schedule Message:** You can schedule the Message by clicking on the "Send SMS" and selecting the date/Time.

Schedule the Message

You can schedule an Message for both individual messages and bulk messages to be sent in the future, either for a selected template or a custom message tailored to the customer. This is achieved by specifying a particular date and time for the message delivery. The scheduling options include:

ONLY ONCE: This option allows you to send a message at a specific date and time without any repetition. It is particularly useful for sending one-time notifications, reminders, or alerts. For example, you might use this option to remind a customer about an upcoming appointment or to notify them of a special event.
EVERY DAY: This option enables you to send a message daily at the selected time. It is ideal for daily reminders, updates, or promotional messages. For instance, you might use this to send a daily motivational quote or a reminder to complete a daily task.
EVERY MONTH: With this option, you can schedule a message to be sent monthly at the specified date and time. This is useful for monthly billing reminders, subscription renewals, or regular updates.

EVERY WEEK: We can schedule the message to be sent automatically on a recurring weekly basis, specifying a particular day and time. The scheduled messaging feature helps maintain engagement, send timely updates, and improve user experience by delivering relevant information at predetermined intervals.

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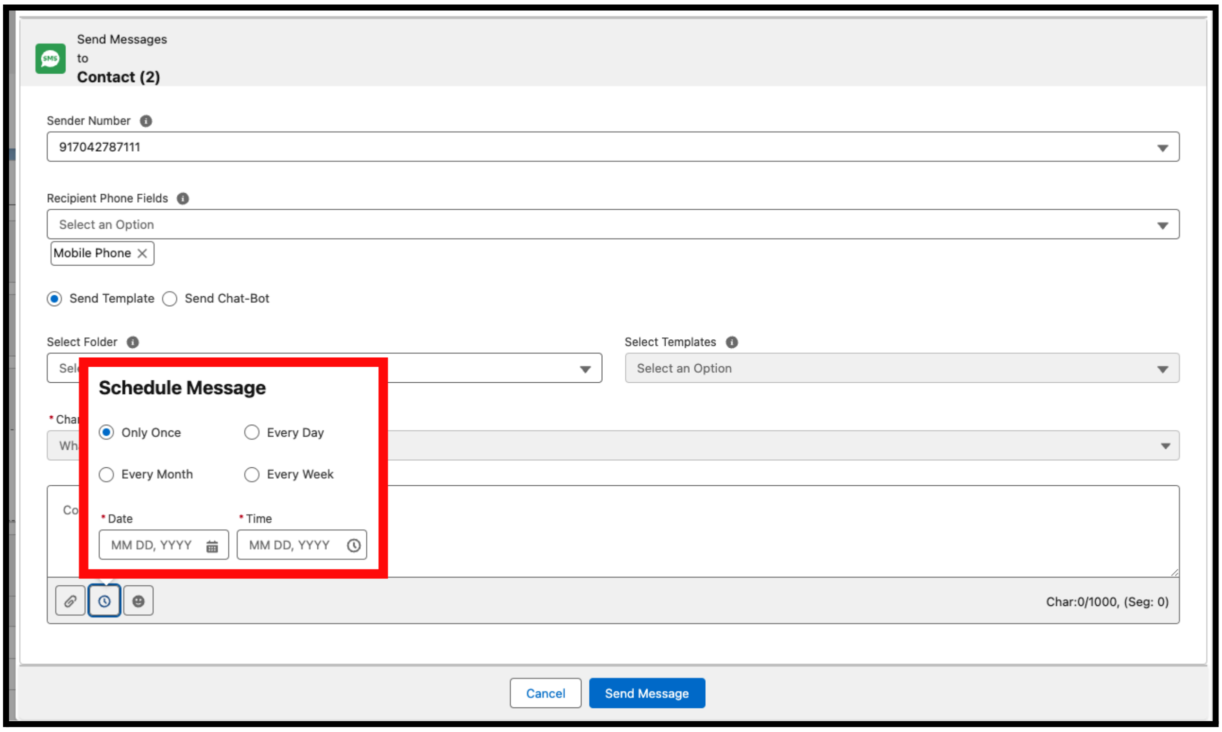
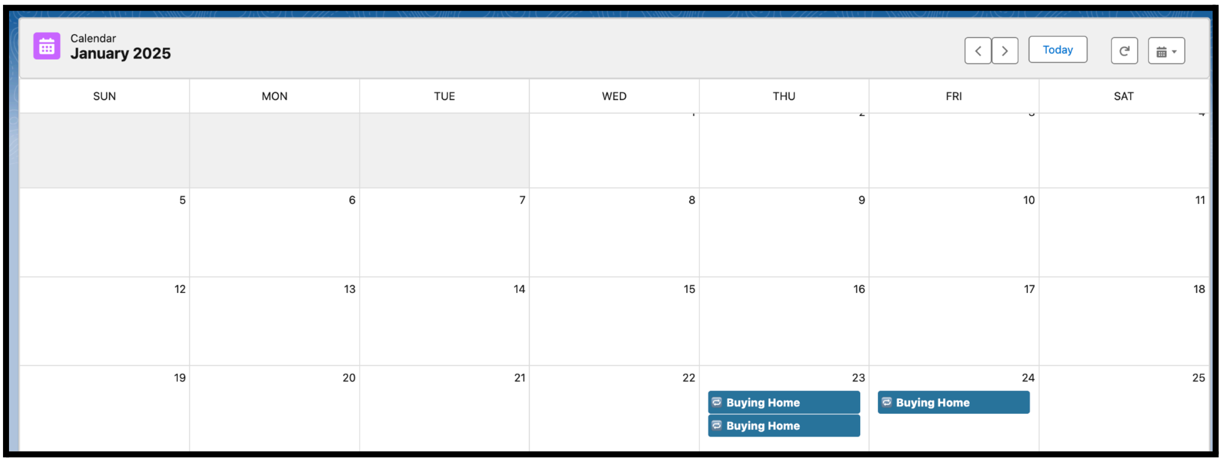


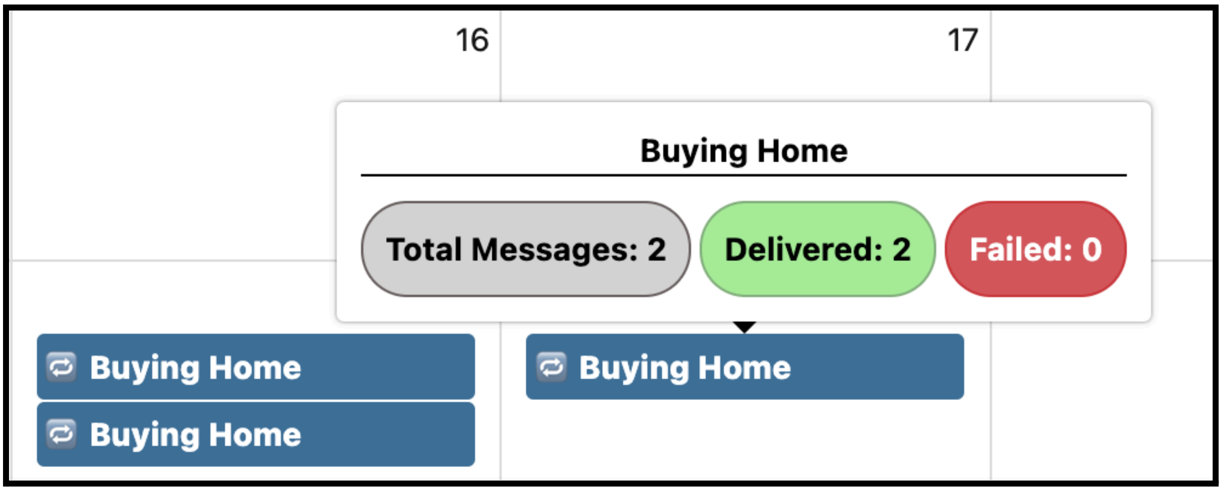
Viewing and Managing Scheduled messages

The **EventBoard** provides a calendar-style view of all scheduled messages, along with a detailed breakdown of delivered, sent, and failed messages. This feature allows users to efficiently track and manage their messaging activities.

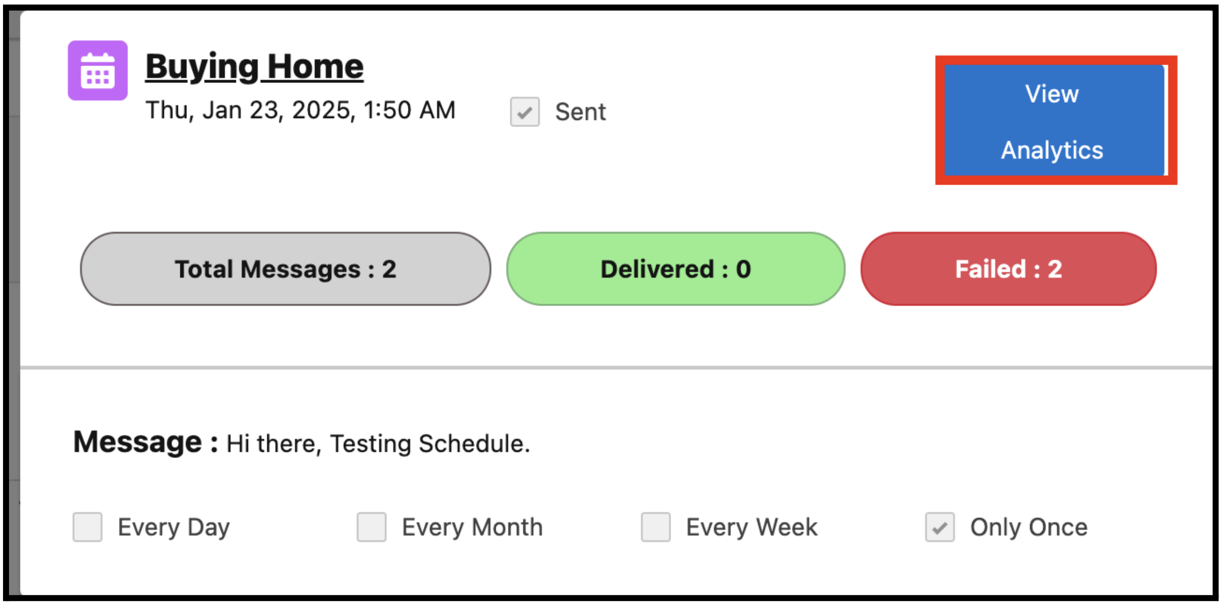


Key Features:

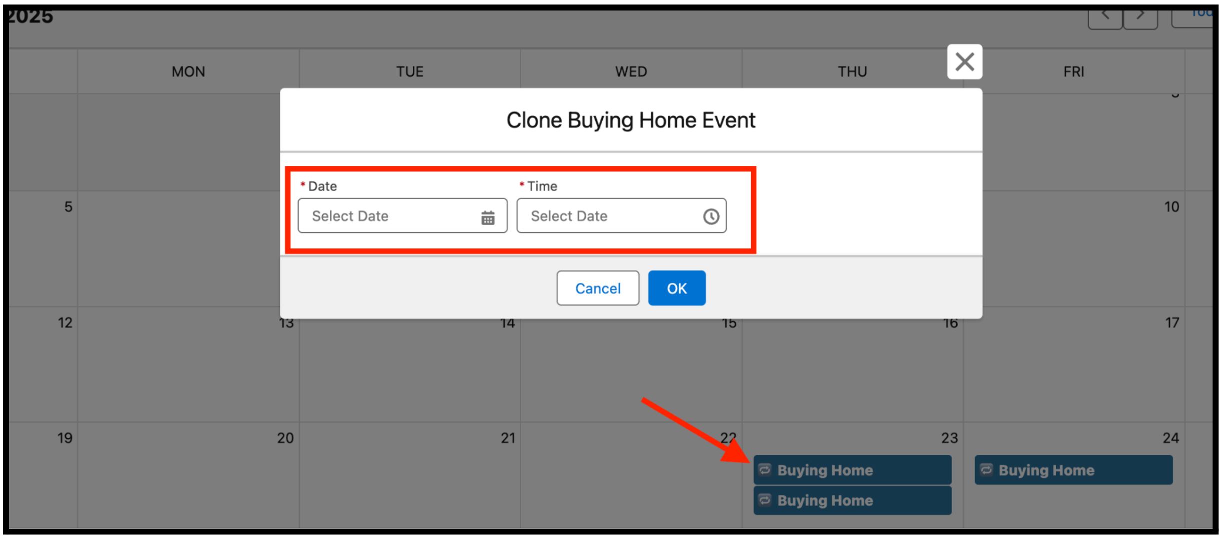
- **Message Overview on Hover**: Hover over any scheduled message box to view a quick summary of the number of delivered, sent, and failed messages.



- **Detailed Message Insights**: Click on a specific scheduled message to access its full details, including status updates and delivery metrics.



- **Cloning a Scheduled Message**: Easily duplicate an already scheduled message by clicking the clone icon (located on the left), then select a new date and time for the cloned message.

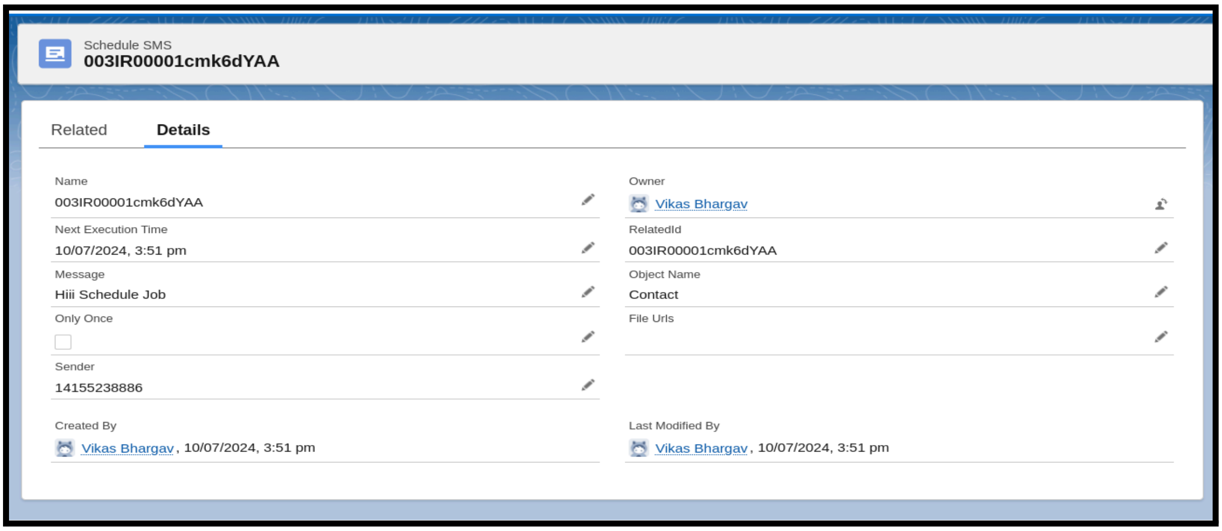


- **Rescheduling via Drag-and-Drop**: If a message has not yet been sent, you can reschedule it by simply dragging and dropping it to a new date and time on the EventBoard.

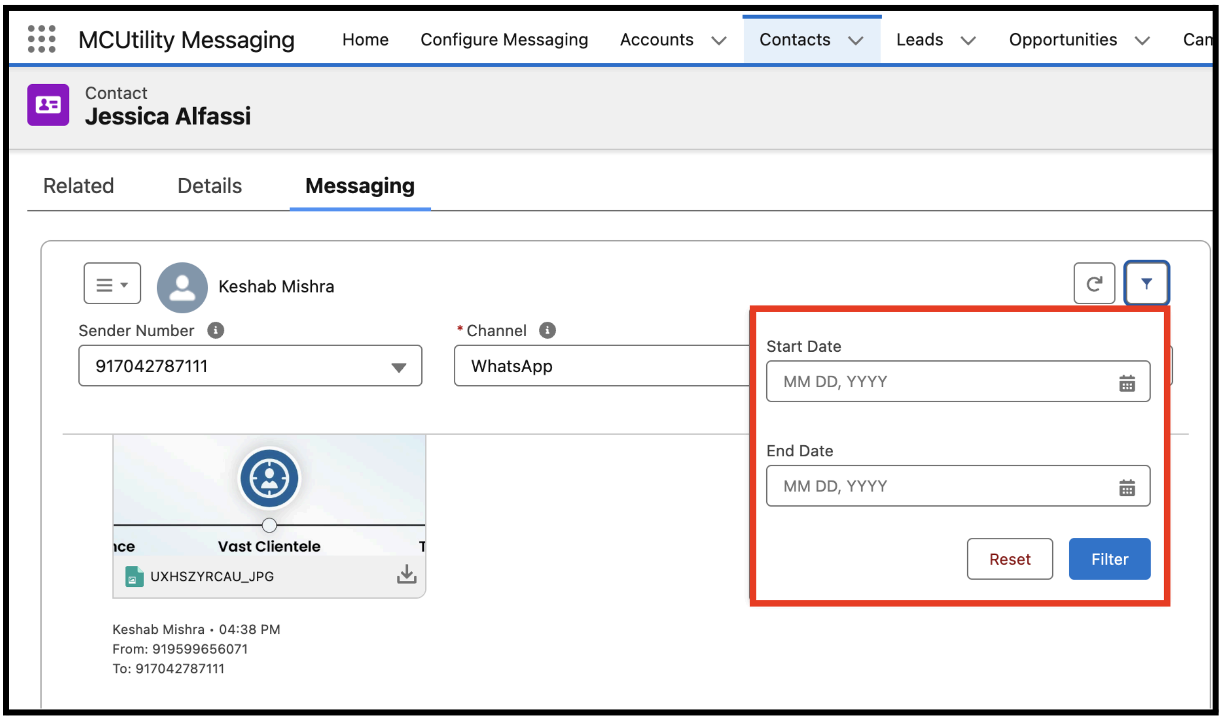
This functionality ensures greater control over your messaging schedule while providing a clear, intuitive interface for message tracking.

Schedule Message Tab

Whenever an Message is scheduled, a record is created to capture all the relevant details of that particular message. This record includes comprehensive information about the scheduled Message, ensuring proper tracking and management.



Past Conversation- You can view the past conversion using the filter option available in Chat. Select the “Start Date” and “End Date” on Filter after which you can be able to see the chats of that range.



Bulk Messaging

In addition to sending individual messages, you can also send bulk messages to selected customers using three primary methods:

- List View
- Campaigns
- Using Reports

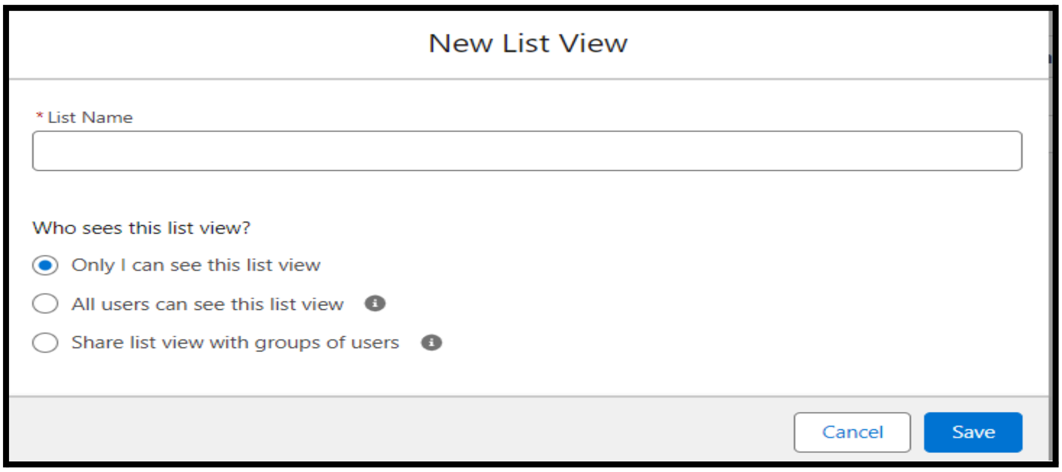
List View

List view is a method used to send bulk messages to your targeted customers on any platform. It can be created on the Objects like Lead/Contacts or any standard object or custom object.

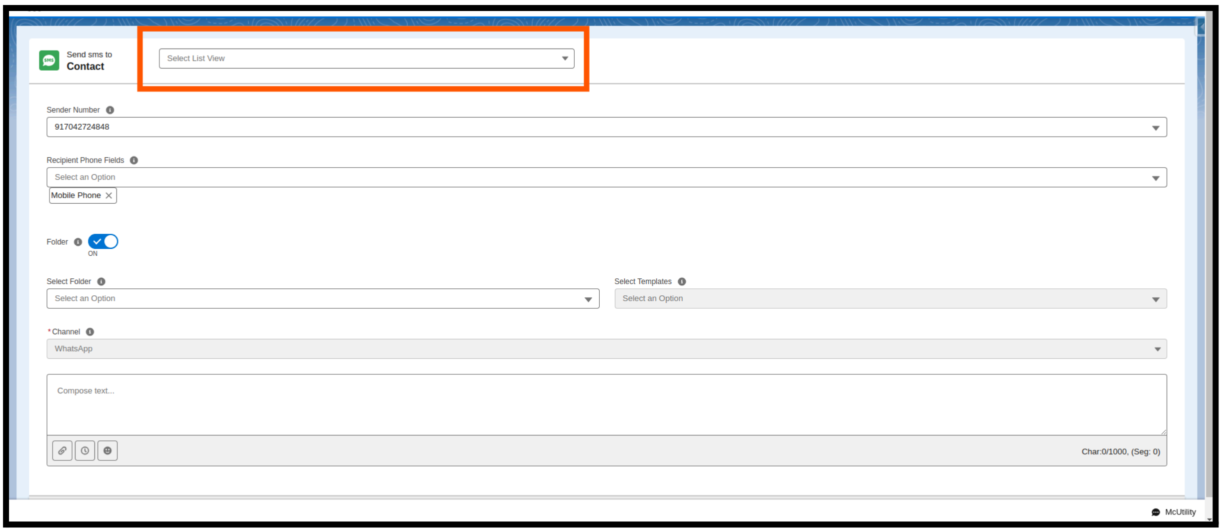
You can create a list view by clicking the "New" button in the List View Controls. Existing lists can also be accessed, and you can view the details of a particular list by selecting it.

Steps to create a new list view and send bulk messages:

1. Navigate to the List View Controls and click on the "New" button. Enter the name for the new list view and specify the access settings.



2. Select the newly created list view to enter the necessary details
    - Type of Channel: Choose the communication channel(Whatsapp,SMS)
    - SMS Template: Select the appropriate template for the SMS.
    - Body of the message: Compose the message content.
    - Schedule SMS: If the SMS needs to be sent at a specific time, set the schedule accordingly.



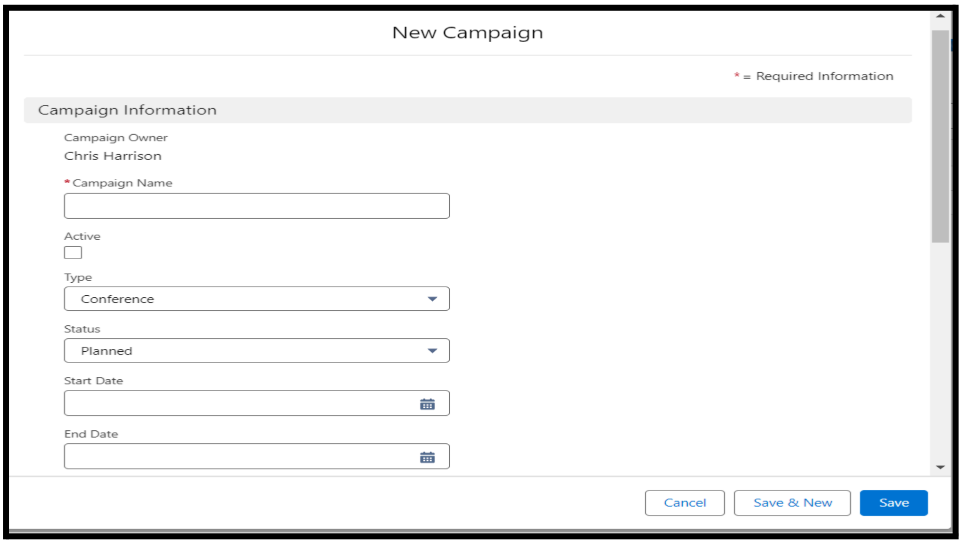
3. Click on “Save”

Campaigns

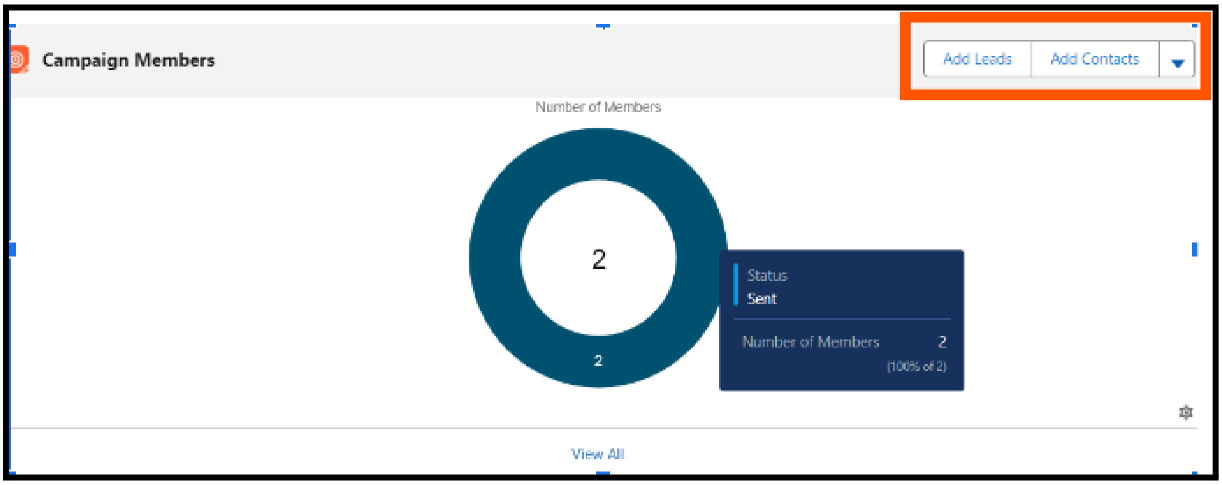
Similar to the List view, you can send bulk messages using Campaigns. The below steps allow you to efficiently manage and send bulk messages to a targeted group of leads and contacts through campaigns.

Steps to create a new Campaigns and send bulk message:

1. Create a New Campaign:
- Navigate to the "Campaign" tab and Click on the "New" button to initiate the creation of a new campaign.
- Fill in the necessary details for the campaign and Click "Save" to create the campaign.

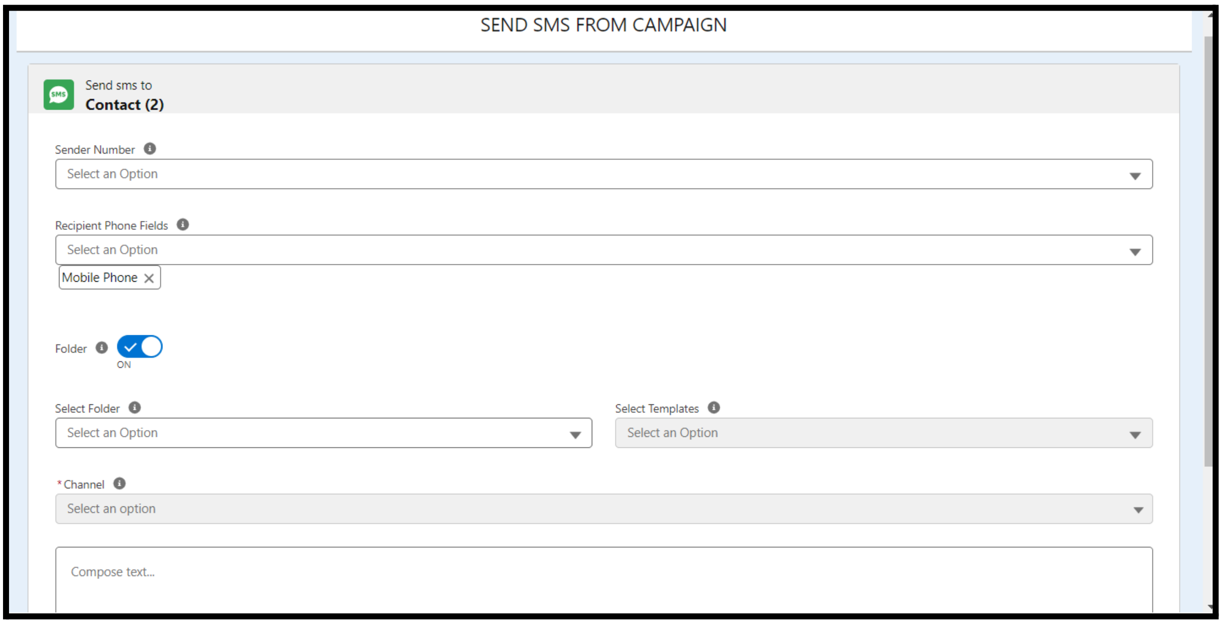


2. Add Campaign Members:
- Once the campaign is created, you can add members to the campaign by adding leads and contacts.
- The total number of campaign members, along with their message delivery status, will be visually represented in a donut chart. This chart helps you track the progress and status of the messages sent to the members.



3. Send Bulk SMS:

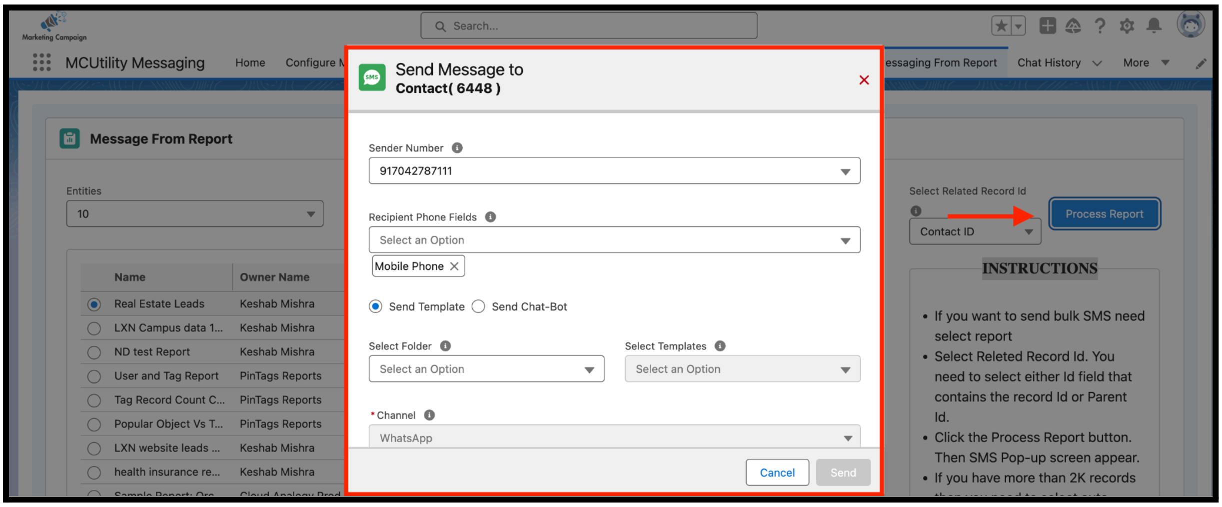
- Click on the “Send SMS” button, which will redirect you to the SMS sending screen specific to the campaign.
- On this screen, you can compose your message, customize it as needed, and then send it to all the campaign members in bulk.



Reports

The last way to send bulk messages is by using reports. Once the reports are created you can follow the below steps to send the bulk messages:

1. Navigate to the "SMS Form Report" tab.
2. Select the reports you wish to use.
3. Click on "Process Report."
4. After processing, you will be redirected to the "Send SMS" page.
5. Fill in the necessary details and compose your message.
6. Send the message to your bulk customers.



SMS Templates

It is a pre-defined text message format that you can use to communicate consistently and efficiently with your customers. Creating pre-defined templates for messaging platforms in our case SMS and WhatsApp requires obtaining approval from the respective service providers. Here is a more detailed explanation of the process:

1. **WhatsApp Cloud Templates**: For WhatsApp, you need to get your templates approved through Meta Business Portal. This involves submitting your message templates for review, where they will be evaluated to ensure they comply with WhatsApp's policies and guidelines. The approval process is necessary to prevent spam and ensure the quality and relevance of messages being sent to users.
2. **SMS Templates**: For SMS messaging, the process varies depending on the service provider you use. For example, if you use Twilio, you will need to submit your templates for approval through Twilio's platform. Each service provider has its own set of rules and guidelines that your templates must adhere to, and the approval process ensures that your messages are compliant with these standards.

Steps to Follow for Creating SMS Templates in Salesforce.

Once the template is approved by the service provider, you can follow the below steps to create SMS Template -

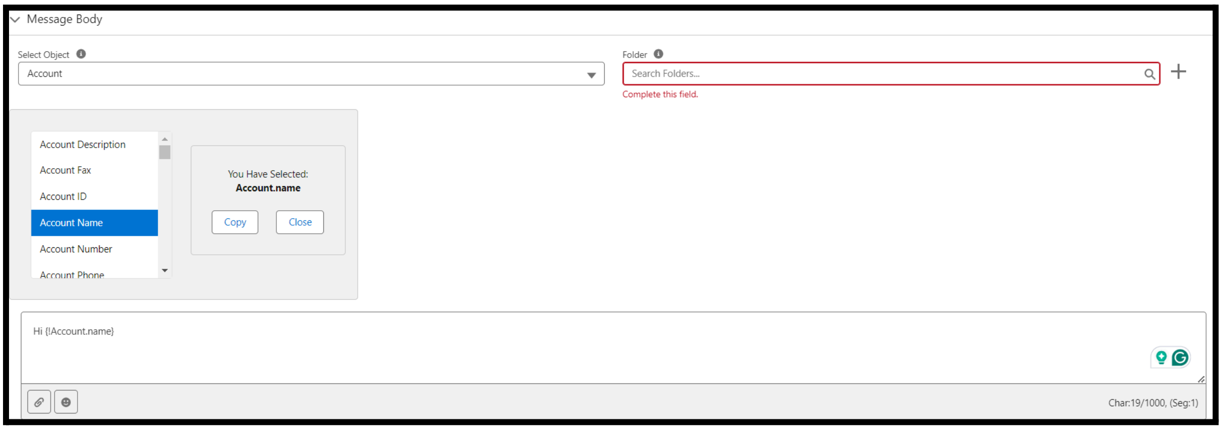
- Navigate to App Launcher or you can select the SMS template from the Tab.
- In the Search bar type SMS Template and Select SMS Template from the results.
- To create a New Template click on New or to update an existing template, click on the specific template you wish to edit.

- Creating a New SMS Template

a. Details:
   - Status - You can activate or deactivate the template using the Status toggle.
   - Name – Enter the name of your template
   - All Objects - You can select an object from drop-down list
   - Description- Provide a detailed description of the template.

b. Message Body:
   - Select Object- Choose an object and copy/paste it into the body of the template as needed.
   - Folder-
     I. To create a new folder, click the "+" icon, enter a folder name and description, and save all templates of a particular type in this folder.
     II. Search for the existing folder and you can save in that as well.
   - Compose Text- This will contain the body of the template which is been approved. You can include the Emoji and files using the respective icons.

c. Click on Save

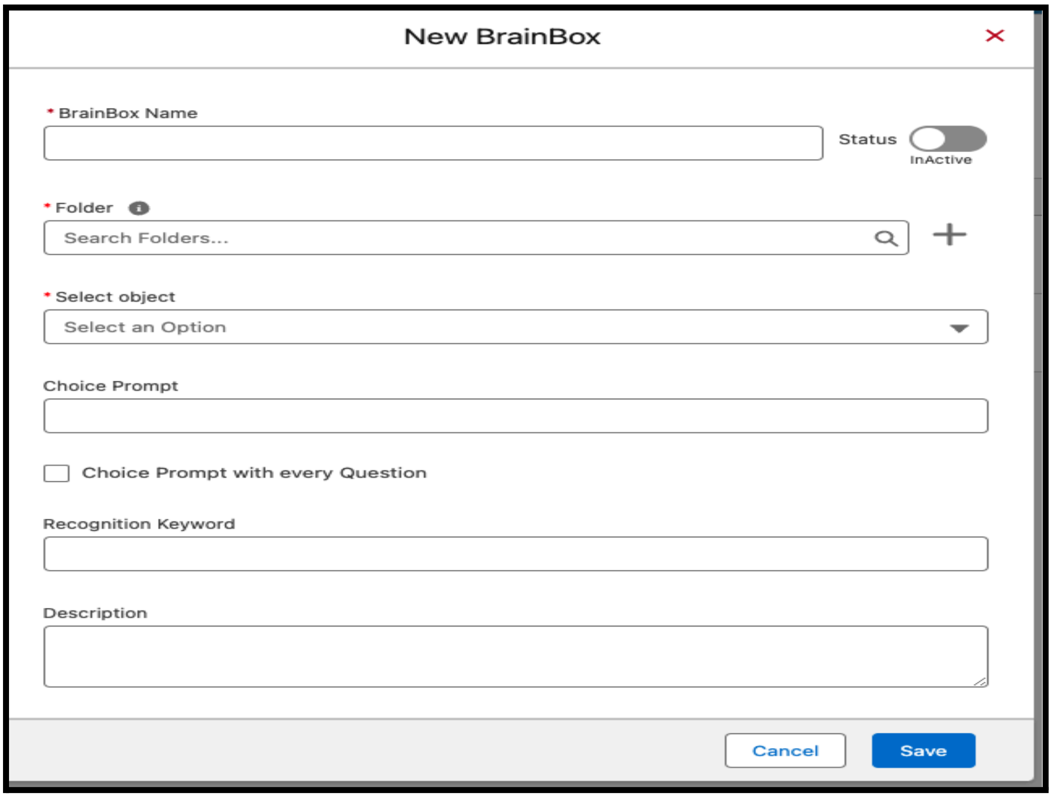


BrainBox- Chatbot for MCUtility App

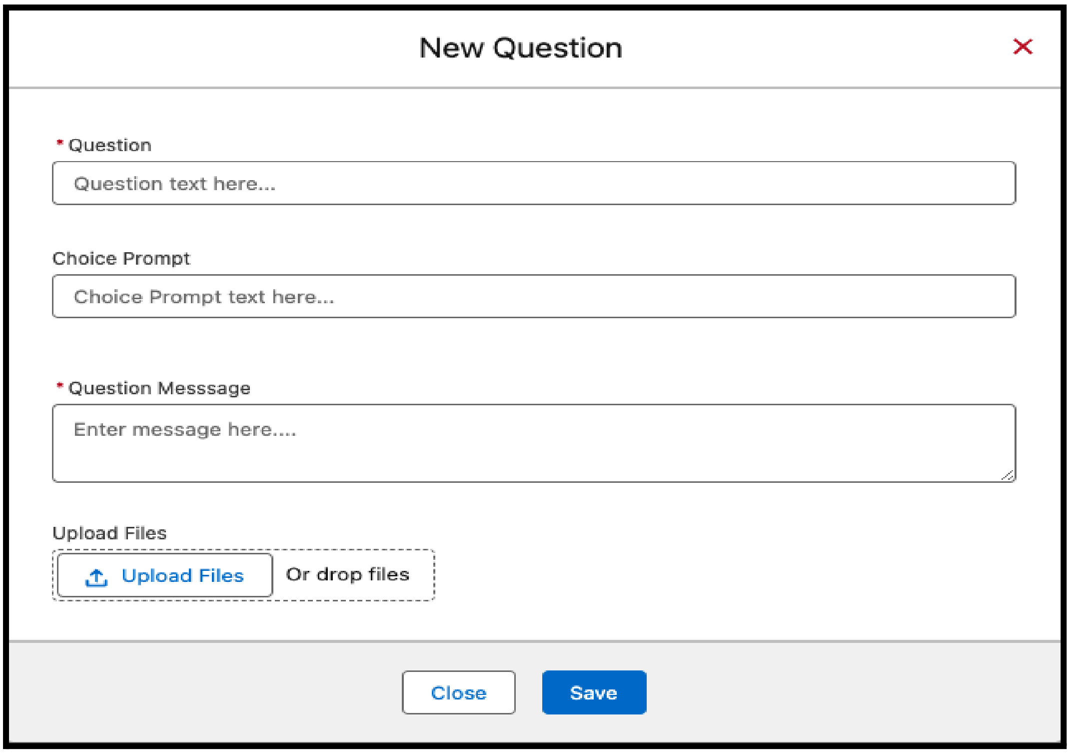
BrainBox is an AI-powered chatbot integrated into the **MCUtility app** to enhance user interaction by providing **automated responses, streamlining communication, and improving operational efficiency**. It assists users in navigating the platform, resolving queries, and managing tasks with ease.

Steps to create a Chatbot in BrainBox

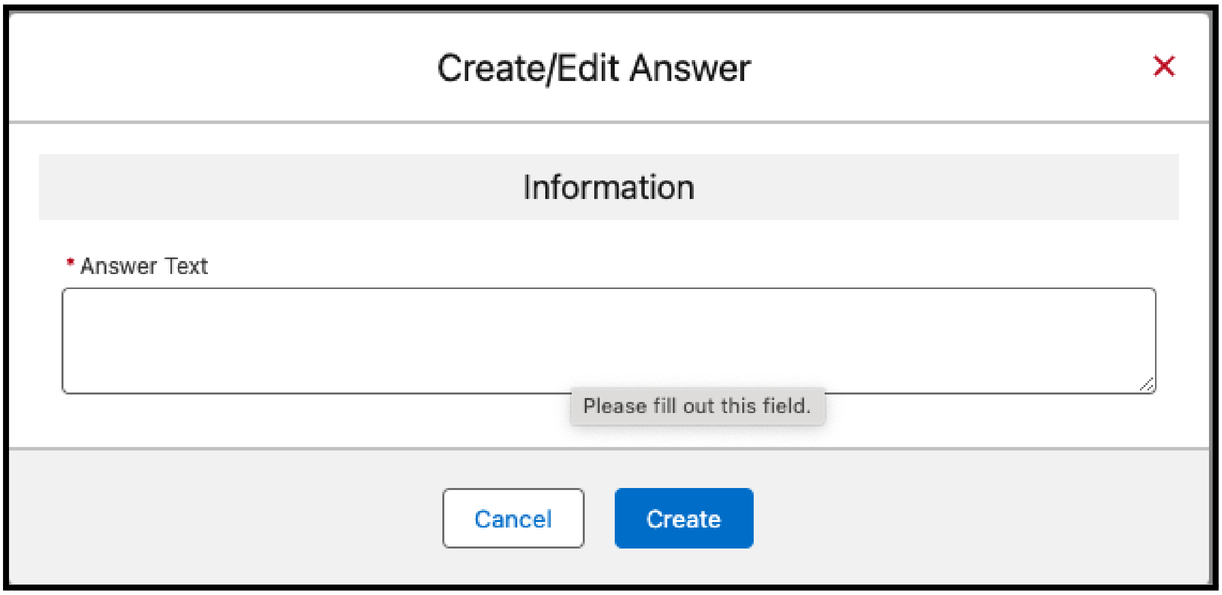
1. Navigate to the **BrainBox** tab in the MCUtility app. This section allows users to create, configure, and manage chatbot journeys.
2. Click on the **"NEW"** button to initiate a new chatbot journey. A setup screen will appear where users can define the chatbot's configurations.



3. Users need to update the following fields to personalize the chatbot's functionality:
   - **BrainBox Name:** Enter a unique name for the chatbot based on its purpose.
   - **Folder Selection:** Choose an existing folder or create a new one to organize chatbot journeys.
   - **Status Activation:** Toggle the **Active** button to enable or disable the chatbot journey.
   - **Select Object:** Define the Salesforce object on which the chatbot will operate (e.g., Leads, Contacts, Cases).
   - **Recognition Keyword:** Specify a keyword that will trigger and initiate the chatbot conversation by users.
   - **Description:** Provide a brief description of the chatbot's role and purpose.
4. Click on "Save" to finalize the chatbot setup.
5. After saving, start defining the chatbot's conversational flow by clicking **"Create a Question."** Enter the questions to create the chat.



6. For each question, add multiple possible responses to guide users effectively. Ensure answers are clear, precise, and relevant to improve user experience.



7. You can **view, delete, or update** your chatbot journeys using the available action icons. Click on the respective icons to make modifications as needed.

THANK YOU

We sincerely appreciate your choice to use our **Marketing Campaign Utility App** to manage your daily marketing needs. Your trust is invaluable to us, and we are dedicated to delivering the best possible experience.

We hope this user guide has provided clear guidance on navigating our system's various features and functionalities. Our primary aim is to streamline your messaging processes, making them more efficient and effective, and we are committed to supporting you in reaching your marketing objectives.

If you have any questions, need further assistance, or have feedback on how we can improve, please do not hesitate to contact our support team at info@cloudanalogy.com. Your feedback is invaluable to us and helps us continually enhance our service.

Thank you once again for your trust and support. We look forward to continuing to assist you with your marketing endeavors.