

# **BOLD.**

## User Guide – Salesforce App

May 2026 | Version 1.4

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## Versions

| Version | Date             | Description                                                                                                                                              |
|---------|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.0     | 10 February 2026 | Initial document.                                                                                                                                        |
| 1.1     | 9 March 2026     | <ul style="list-style-type: none"><li>Removed section 3.1 – Configure the default values.</li><li>Rearranged sections and corrections.</li></ul>         |
| 1.2     | 17 March 2026    | <ul style="list-style-type: none"><li>Issue fixes – template name should not be able to change and support multiple templates in a submission.</li></ul> |
| 1.3     | 1 April 2026     | <ul style="list-style-type: none"><li>Limit template submission based on max character of 3072.</li></ul>                                                |
| 1.4     | 25 May 2026      | <ul style="list-style-type: none"><li>Support SMS characters up to 1072.</li><li>Credit deduction based on SMS count.</li></ul>                          |

## 1.0 – Introduction

BOLD. Salesforce App Integrates WhatsApp and SMS directly into Salesforce, enabling real-time customer conversations from your dashboard. Send transaction alerts, handle inquiries, and nurture leads effortlessly on preferred channels.

With easy setup, centralize communications for better efficiency, compliance, and growth.

## 2.0 – Install the application

To begin the installation, obtain the installation package and key from MACROKIOSK Technical Support [techsupport@macrokiosk.com](mailto:techsupport@macrokiosk.com).

**Install BOLD4SF\_PROD**  
By macrokiosk

**This app is protected by an installation key.**  
Password:

☒ **Install for Admins Only**
☐ **Install for All Users**
☐ **Install for Specific Profiles...**

You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☐ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

**Install** **Cancel**

On the installation setup page, enter the installation key and select the installation type: - for admin only, for all users, or specific profiles. Recommended as install for admin and assign profile/users the permission sets.

Check the acknowledgement and click the **Install** button.

To check the installation progress, go to **Setup** in the menu at top right corner and search for **Deployment Status**.

**Setup Menu**

- Setup (Setup for current app)
- Service Setup
- Salesforce Go
- Your Account
- Developer Console
- Edit Page

**Deployment Status**

**Failed**  
No records to display.

**Succeeded**

| Action                       | Name            | Status              | Date                |
|------------------------------|-----------------|---------------------|---------------------|
| <a href="#">View Details</a> | 0AfgK00000JxkAL | ✓ Deploy: Succeeded | 4/23/2026, 11:46 PM |
| <a href="#">View Details</a> | 0AfgK00000JYKhK | ✓ Deploy: Succeeded | 4/17/2026, 2:14 PM  |
| <a href="#">View Details</a> | 0AfgK00000JYN8v | ✓ Deploy: Succeeded | 4/17/2026, 2:14 PM  |
| <a href="#">View Details</a> | 0AfgK00000JY0h0 | ✓ Deploy: Succeeded | 4/17/2026, 1:58 PM  |
| <a href="#">View Details</a> | 0AfgK00000JYKz3 | ✓ Deploy: Succeeded | 4/17/2026, 1:58 PM  |

Previous (1 - 5 of 5) Next

Go to **Setup** and search for **Installed Packages** to check if the application has been installed successfully.

**Setup** Home Object Manager

Search Setup

**Installed Packages**

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

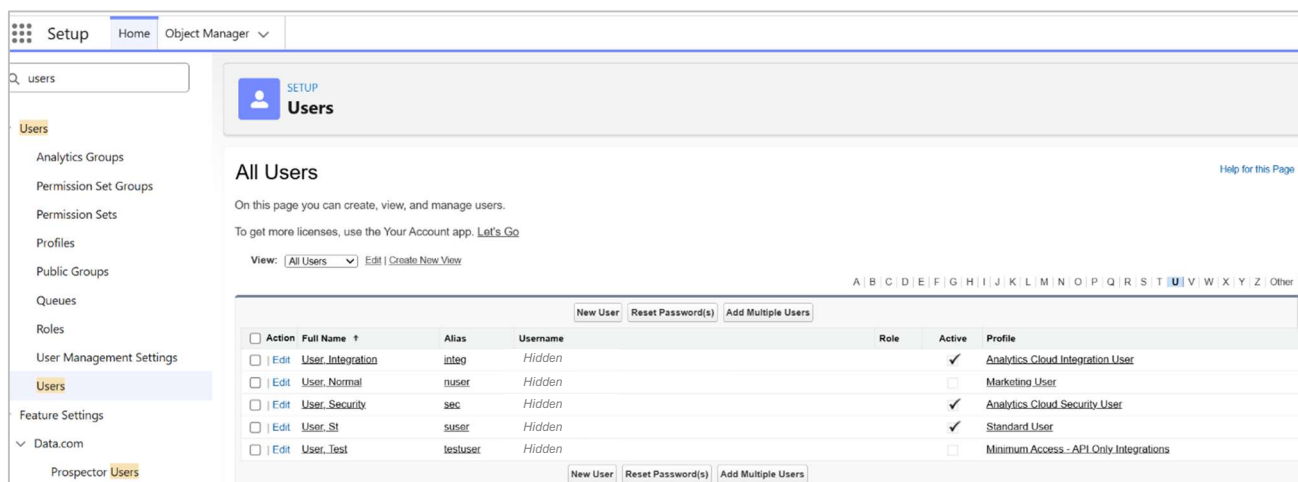
| Action                    | Package Name             | Publisher             | Version Number | Namespace Prefix | Install Date       | Limits | Apps | Tabs | Objects | AppExchange Ready |
|---------------------------|--------------------------|-----------------------|----------------|------------------|--------------------|--------|------|------|---------|-------------------|
| <a href="#">Uninstall</a> | <b>BOLD4SF_Manage</b>    | macrokiosk            | 0.9 (Beta 7)   | mbold            | 3/17/2026, 7:45 PM | ✓      | 1    | 4    | 13      | Not Passed        |
| <a href="#">Uninstall</a> | <b>Developer Edition</b> | Salesforce Developers | 0.9            | devdapp          | 3/14/2026, 7:31 AM | ✓      | 1    | 5    | 0       | Not Passed        |

## 3.0 – Setup for the first time

After the application has been successfully installed, the account owner needs to set it up for the first time, including assigning permission to the Salesforce users and establishing the connection with the BOLD. Account.

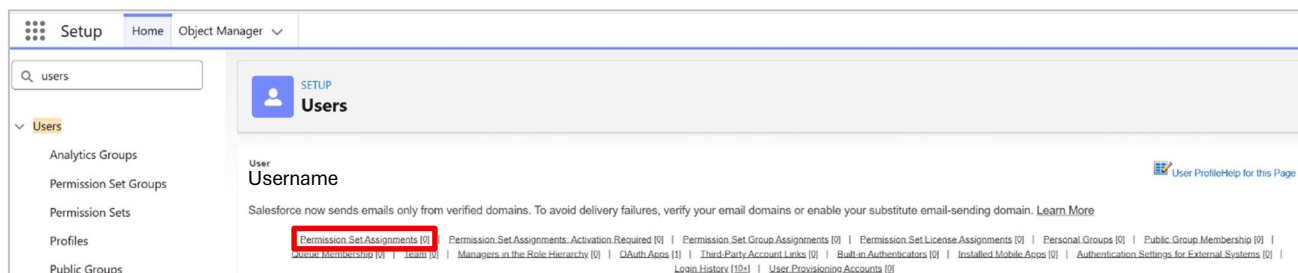
### 3.1 – User permission

Go to **Setup** and search for **Users**, click on the user account that needs permission.



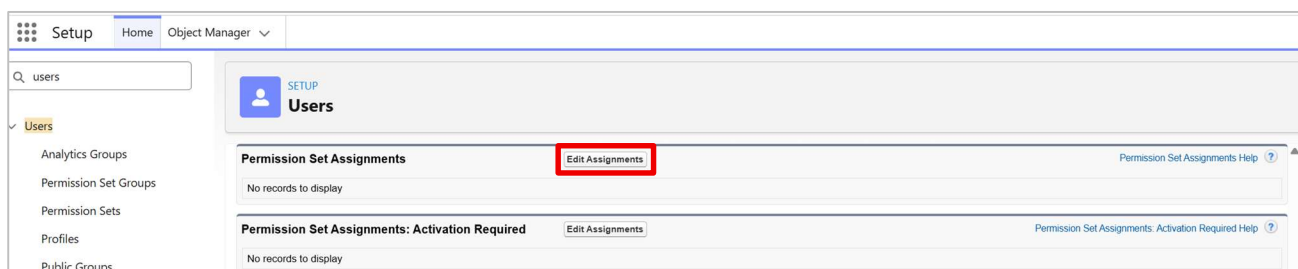
| Action                        | Full Name        | Alias    | Username | Role | Active | Profile                                |
|-------------------------------|------------------|----------|----------|------|--------|----------------------------------------|
| <input type="checkbox"/> Edit | User_Integration | integ    | Hidden   |      | ✓      | Analytics Cloud Integration User       |
| <input type="checkbox"/> Edit | User_Normal      | nuser    | Hidden   |      |        | Marketing User                         |
| <input type="checkbox"/> Edit | User_Security    | sec      | Hidden   |      | ✓      | Analytics Cloud Security User          |
| <input type="checkbox"/> Edit | User_St          | suser    | Hidden   |      | ✓      | Standard User                          |
| <input type="checkbox"/> Edit | User_Test        | testuser | Hidden   |      |        | Minimum Access - API Only Integrations |

Click **Permission Set Assignments**.



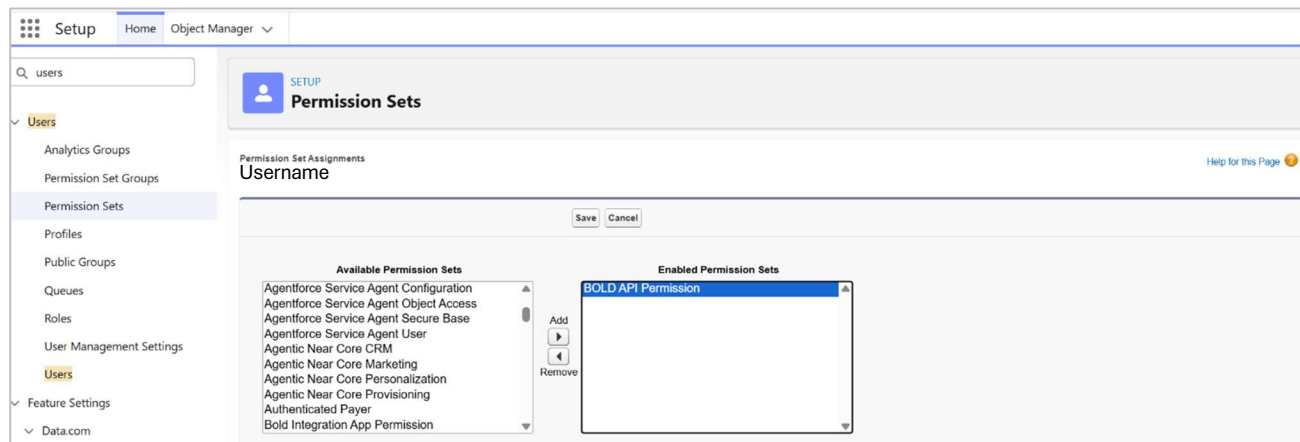
Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Profile Membership (0) | Admin (0) | Managers in the Role Hierarchy (0) | OAuth Apps (1) | Third-Party Account Links (0) | Built-in Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (10x) | User Provisioning Accounts (0)

Click **Edit Assignments** button in Permission Set Assignments section.



Permission Set Assignments: Activation Required | Edit Assignments | Permission Set Assignments: Activation Required Help

Look for BOLD API Permission in the list of **Available Permission Sets**, click the right arrow button to assign permission to the user. Click **Save** button to complete.

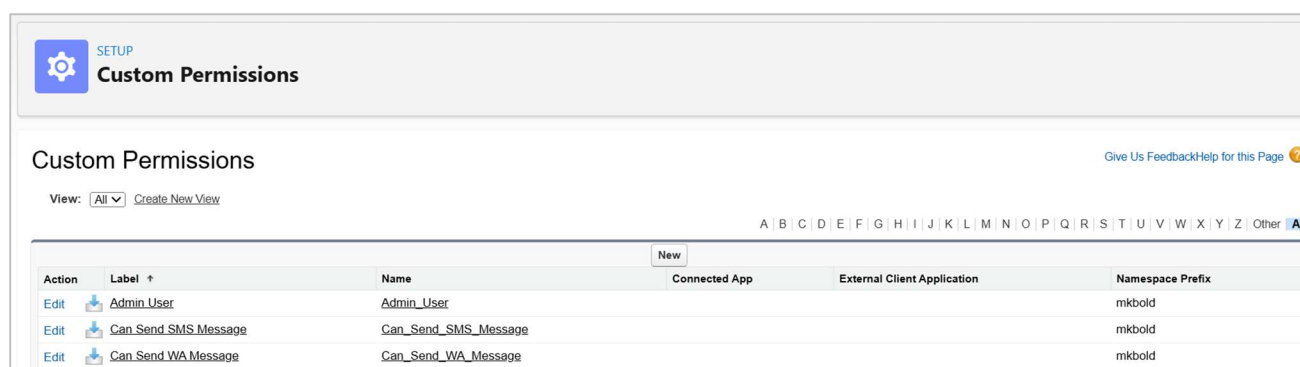


| Permission Set                  | Description                                                                                                          |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------|
| BOLD API Permission             | Administrator users to establish connection with BOLD. account, create WhatsApp templates, and check logs / reports. |
| BOLD Integration App Permission | System integration users to update status to Salesforce.                                                             |
| Normal User Permission          | Normal users use BOLD. Service.                                                                                      |

Administrator can create new permission by cloning the current permissions and disable the functionalities by removing the custom permissions from the new permission set.

Example: Clone the permission set **BOLD API Permission** will give you the admin access. If you remove the custom permission **Can Send SMS Message**, this will disable the functionality of sending SMS permission.

The app provides 3 types of custom permissions to authorize the functionalities.

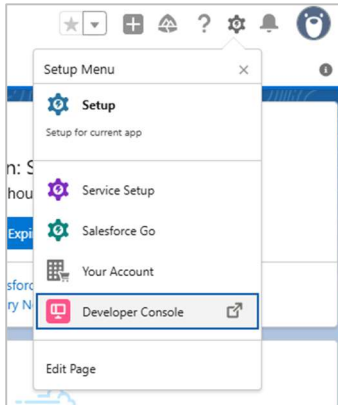


| Permissions          | Description                                                                                                            |
|----------------------|------------------------------------------------------------------------------------------------------------------------|
| Admin User           | Access to the app's tabs <b>Configuration Settings</b> , <b>WA Templates</b> , <b>Log Details</b> and <b>Reports</b> . |
| Can Send SMS Message | Can send SMS messages.                                                                                                 |
| Can Send WA Message  | Can send WhatsApp messages.                                                                                            |

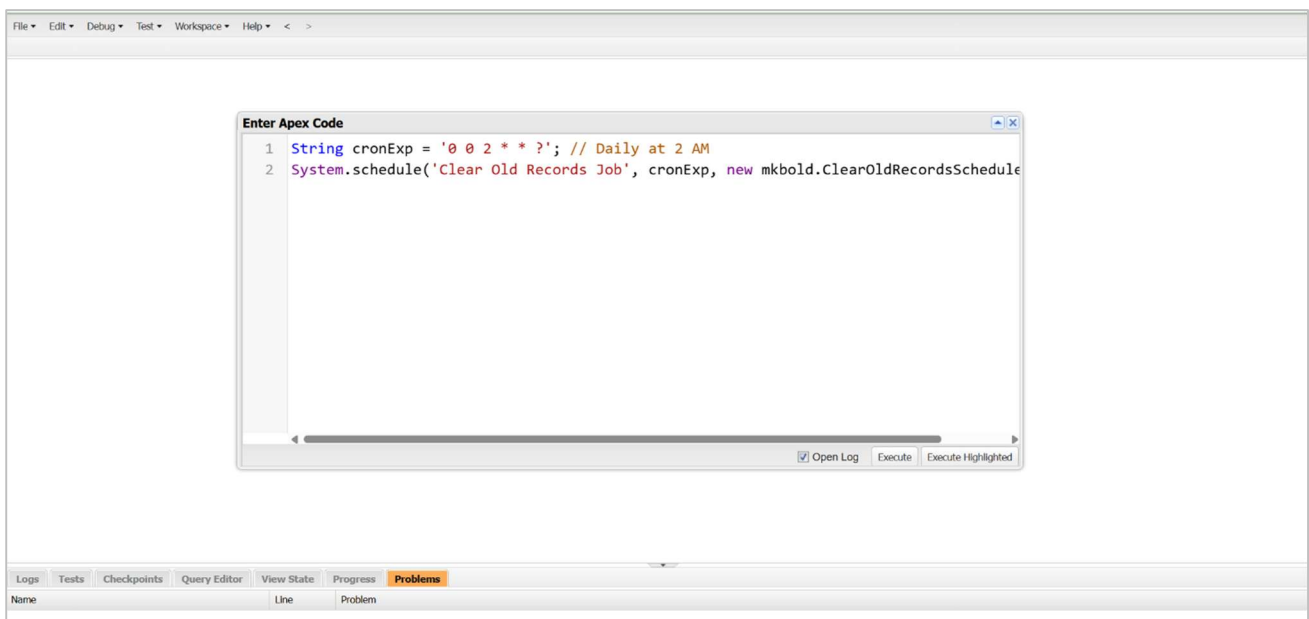
### 3.2 – Schedule clear old logs and reports

There is an option for Administrator users to schedule a task runs 2 AM daily to clear logs and reports that are more than 3 months.

Go to **Developer Console** in the menu at top right corner.



Select **Debug** and then **Open Execute Anonymous Window** in the menu.



Enter code below in the apex code dialog.

```
String cronExp = '0 0 2 * * ?'; // Daily at 2 AM
System.schedule('Clear Old Records Job', cronExp, new mkbold.ClearOldRecordsScheduler());
```



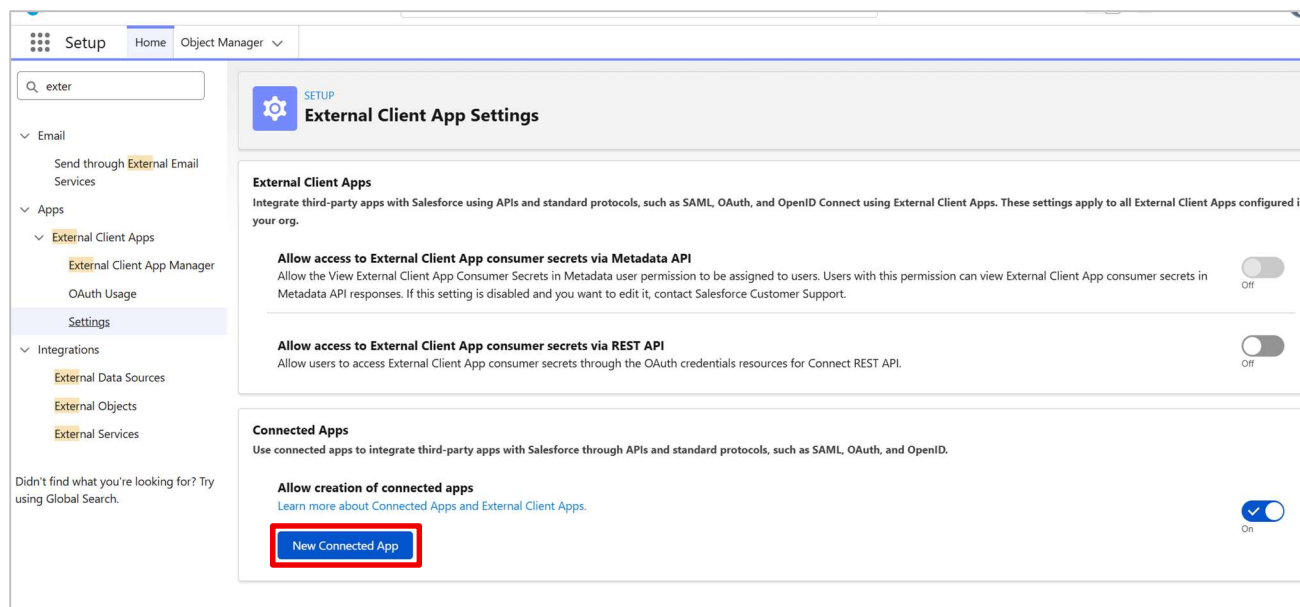
### 3.3 – Update Delivery Note (DN) and template status

To update the DN and template status, a user with BOLD Integration App Permission (see 3.1 – User permission) and consumer key are required.

Please note that SMS DN status update depends on the delivery carrier and may be delayed.

#### 3.3.1 – Create connected app

After the user and permission assignment has been done, go to **Setup** and search for **External Client App > Settings**, enable the option **Allow Creation of Connected App** and click the **New Connected App** button.



Enter “Bold Integration App” for **Connected App Name**. Check to **enable Use digital signatures in API (Enable OAuth Settings)** section.

Obtain and upload the certificate from MACROKIOSK Technical Support to authorize the API.

Select **Managed user data via APIs (api)** and **Perform requests at any time (refresh\_token, offline\_access)** from **Available OAuth Scopes**.

Selected OAuth Scopes

Available OAuth Scopes

- Access Analytics REST API Charts Geodata resources (eclair\_api)
- Access Analytics REST API resources (wave\_api)
- Access Connect REST API resources (chatter\_api)
- Access Einstein GPT services (einstein\_gpt\_api)
- Access Headless Forgot Password API (forgot\_password)
- Access Headless Passwordless Login API (pwdless\_login\_api)
- Access Headless Registration API (user\_registration\_api)
- Access Interaction API resources (interaction\_api)
- Access Lightning applications (lightning)
- Access Salesforce hosted MCP servers (mcp\_api)

Add

Remove

Selected OAuth Scopes

- Manage user data via APIs (api)
- Perform requests at any time (refresh\_token, offline\_access)

Click **Save** button to complete.

Next, go to **Setup** and search for **App Manager**. Look for the connected app “Bold Integration App”. Click the arrow to show the context menu and select **Manage**.

Setup Home Object Manager

app man

Apps

App Manager

External Client Apps

External Client App Manager

Lightning Out 2.0 Apps

Lightning Out 2.0 App Manager

30 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

|    | App Name ↑           | Developer Name       | Description                                                                                          | Last Modified ...   | App Type            | Visi... |        |
|----|----------------------|----------------------|------------------------------------------------------------------------------------------------------|---------------------|---------------------|---------|--------|
| 1  | Agentforce Studio    | AgentforceStudio     | Agentforce Studio                                                                                    | 10/27/2025, 1:39 PM | Lightning           | ✓       |        |
| 2  | All Tabs             | AllTabSet            |                                                                                                      | 10/27/2025, 1:31 PM | Classic             |         |        |
| 3  | Analytics Studio     | Insights             | Build CRM Analytics dashboards and apps                                                              | 10/27/2025, 1:31 PM | Classic             | ✓       |        |
| 4  | App Launcher         | AppLauncher          | App Launcher tabs                                                                                    | 10/27/2025, 1:31 PM | Classic             | ✓       |        |
| 5  | Approvals            | Approvals            | Manage approvals and approval flows                                                                  | 10/27/2025, 1:31 PM | Lightning           | ✓       |        |
| 6  | Automation           | FlowsApp             | Automate business processes and repetitive tasks.                                                    | 10/27/2025, 1:38 PM | Lightning           | ✓       |        |
| 7  | Bold Integration App | Bold_Integration_App |                                                                                                      | 4/13/2026, 2:51 PM  | Connected           |         |        |
| 8  | BOLD4F               | MACROKIOSK           | Messaging application that enables users to send WhatsApp and SMS messages directly from Salesforce. | 4/10/2026, 4:22 PM  | Lightning (Managed) |         | View   |
| 9  | Bolt Solutions       | LightningBolt        | Discover and manage business solutions designed for your industry.                                   | 10/27/2025, 1:31 PM | Lightning           |         | Edit   |
| 10 | Community            | Community            | Salesforce CRM Communities                                                                           | 10/27/2025, 1:31 PM | Classic             |         | Manage |

Click **Edit Policies** button.

Setup Home Object Manager

app man

Apps

App Manager

External Client Apps

External Client App Manager

Lightning Out 2.0 Apps

Lightning Out 2.0 App Manager

Connected App

Bold Integration App

Connected App Detail

Edit Policies

Version 1

Description

System Info

Installed By

Last Modified By

Installed Date 4/13/2026, 2:51 PM

Last Modified Date 4/13/2026, 2:51 PM

Basic Information

Info URL

Start URL

Mobile Start URL

In the **OAuth Policies** section, change **Permitted Users** to “Admin approved users are pre-authorized”, **IP Relaxation** to “Enforce IP restrictions”, and **Refresh Token Policy** to “Immediately expire refresh token”.

Return to the list of custom Apps or go to **Setup** and search for **App Manager**. Look for the application that was created earlier, click the arrow to show the context menu and select **Manage**.

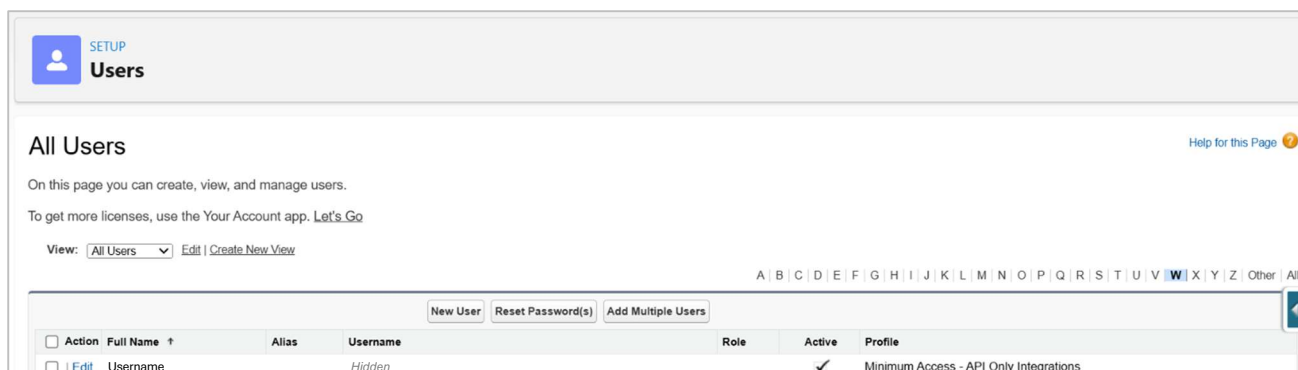
In the section **OAuth Policies**, select **Admin approved users are pre-authorized** for **Permitted Users**.

### 3.3.2 – Assign permission set for the connected app

Select the existing user or create a user which has minimum permissions. Click **New user** button to create new user.

Change **User License** to “Salesforce Integration” and **Profile** to “Minimum Access – API Only Integrations”.

Click the integration user to assign permission set.



**SETUP Users**

**All Users** [Help for this Page](#)

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

To get more licenses, use the Your Account app. [Let's Go](#)

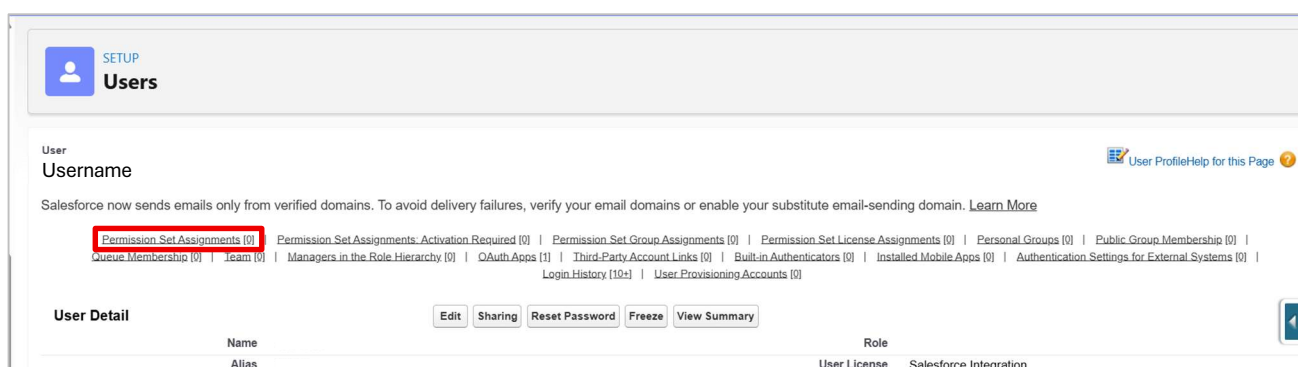
View: **All Users** [Edit](#) [Create New View](#)

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

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

| Action                   | Full Name            | Alias    | Username | Role | Active | Profile                                |
|--------------------------|----------------------|----------|----------|------|--------|----------------------------------------|
| <input type="checkbox"/> | <a href="#">Edit</a> | Username | Hidden   |      | ✓      | Minimum Access - API Only Integrations |

Click **Permission Set Assignments**.



**SETUP Users**

**User** [User Profile Help for this Page](#)

**Username**

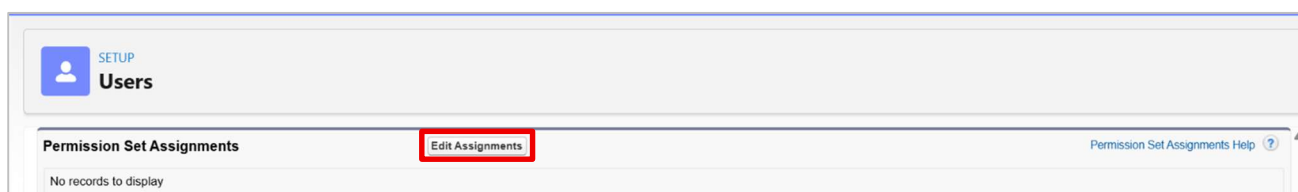
Salesforce now sends emails only from verified domains. To avoid delivery failures, verify your email domains or enable your substitute email-sending domain. [Learn More](#)

**Permission Set Assignments** (0) [Permission Set Assignments: Activation Required](#) (0) [Permission Set Group Assignments](#) (0) [Permission Set License Assignments](#) (0) [Personal Groups](#) (0) [Public Group Membership](#) (0) [Queue Membership](#) (0) [Team](#) (0) [Managers in the Role Hierarchy](#) (0) [OAuth Apps](#) (1) [Third-Party Account Links](#) (0) [Built-in Authenticators](#) (0) [Installed Mobile Apps](#) (0) [Authentication Settings for External Systems](#) (0) [Login History](#) (10+) [User Provisioning Accounts](#) (0)

**User Detail** [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

| Name  | Role                                |
|-------|-------------------------------------|
| Alias | User License Salesforce Integration |

Click the button **Edit Assignments**.

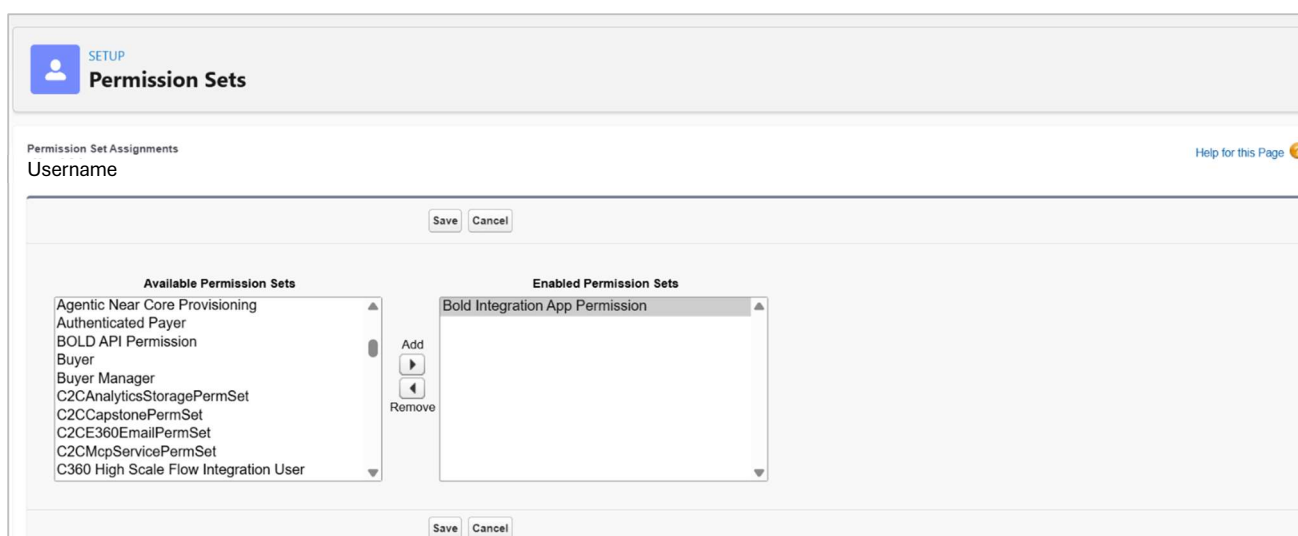


**SETUP Users**

**Permission Set Assignments** [Edit Assignments](#) [Permission Set Assignments Help](#)

No records to display

Enable the permission set "BOLD Integration App Permission" and then click the **Save** button.



**SETUP Permission Sets**

**Permission Set Assignments** [Help for this Page](#)

**Username**

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

**Available Permission Sets**

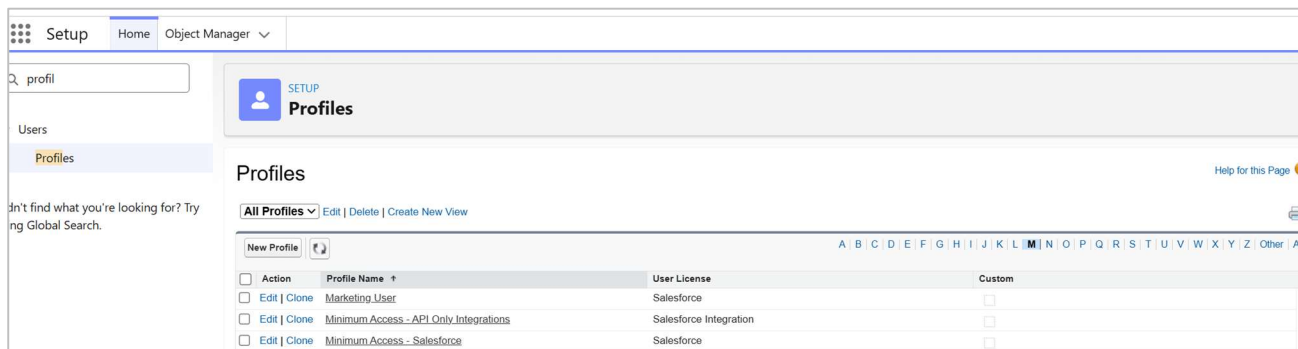
**Enabled Permission Sets**

[Add](#) [Remove](#)

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

### 3.3.3 – Enable profiles to connected app

Go to **Setup** and search for **Profiles**. Select the profile of integration user and click **Edit**.



Setup Home Object Manager

Search: profil

Users

Profiles

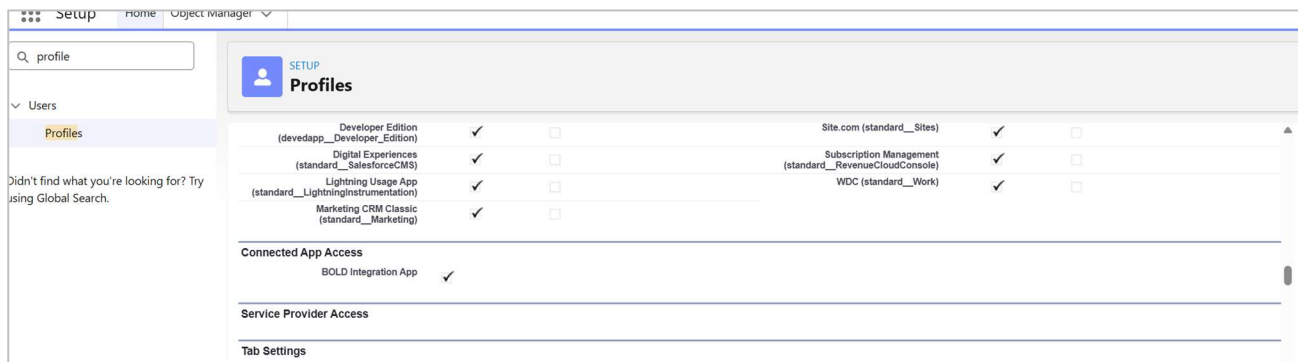
Profiles

All Profiles Edit Delete Create New View

New Profile

| Action                                | Profile Name                           | User License           | Custom                   |
|---------------------------------------|----------------------------------------|------------------------|--------------------------|
| <input type="checkbox"/> Edit   Clone | Marketing User                         | Salesforce             | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | Minimum Access - API Only Integrations | Salesforce Integration | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | Minimum Access - Salesforce            | Salesforce             | <input type="checkbox"/> |

Check to enable BOLD Integration App under **Connected App Access** section.



Setup Home Object Manager

Search: profile

Users

Profiles

Profiles

Developer Edition (devedapp\_Developer\_Edition) ✓ ☐

Digital Experiences (standard\_\_SalesforceCMS) ✓ ☐

Lightning Usage App (standard\_\_LightningInstrumentation) ✓ ☐

Marketing CRM Classic (standard\_\_Marketing) ✓ ☐

Site.com (standard\_\_Sites) ✓ ☐

Subscription Management (standard\_\_RevenueCloudConsole) ✓ ☐

WDC (standard\_\_Work) ✓ ☐

Connected App Access

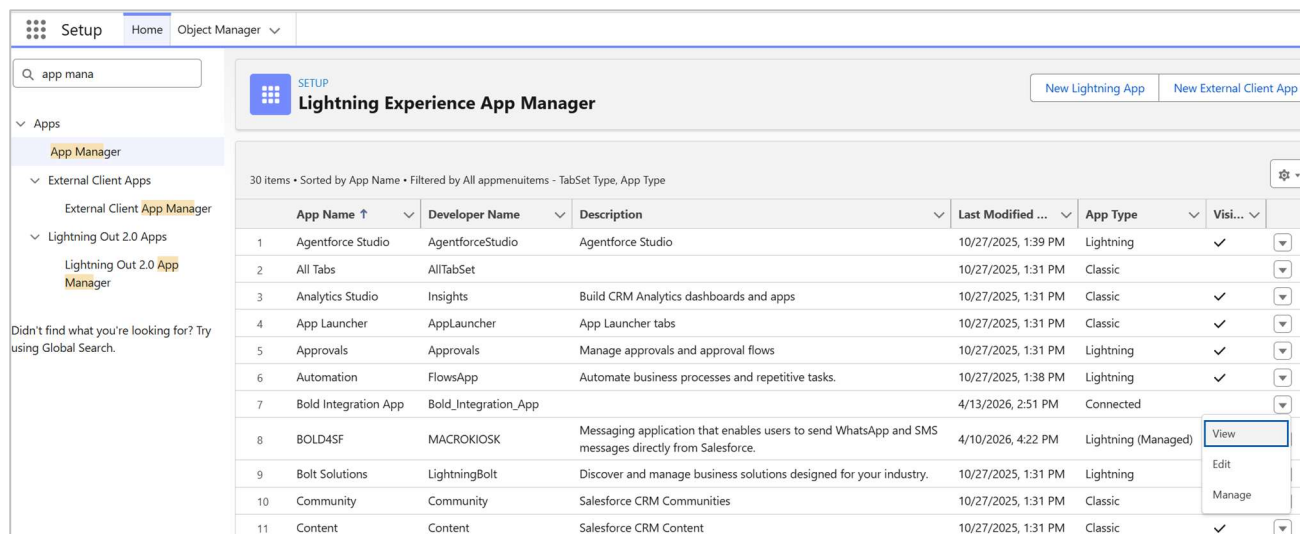
BOLD Integration App ✓

Service Provider Access

Tab Settings

### 3.3.4 – Share the consumer key

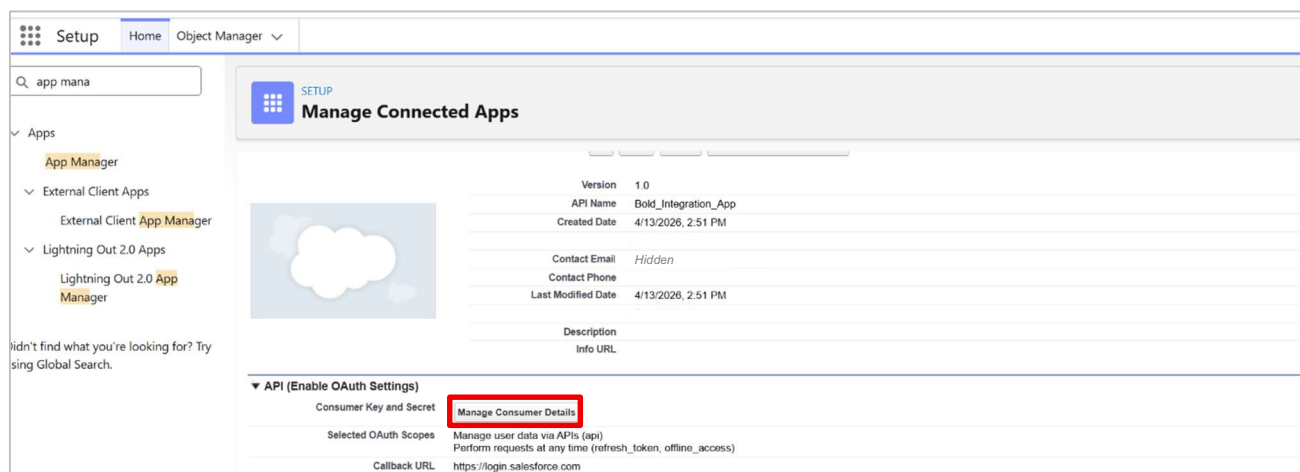
Go to **Setup** and search for **App Manager**. Looking for the connected app “Bold Integration App”. Click the arrow to show the context menu and select **View**.



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'app mana' and a list of navigation items: Apps, App Manager, External Client Apps, External Client App Manager, Lightning Out 2.0 Apps, and Lightning Out 2.0 App Manager. The main content area is titled 'Lightning Experience App Manager' and displays a table of 30 items. The table columns are App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The 'Bold Integration App' is listed with the description 'Messaging application that enables users to send WhatsApp and SMS messages directly from Salesforce.' A context menu is open for this app, showing options: View, Edit, and Manage. The 'View' option is highlighted.

| App Name               | Developer Name       | Description                                                                                          | Last Modified       | App Type            | Visi... |
|------------------------|----------------------|------------------------------------------------------------------------------------------------------|---------------------|---------------------|---------|
| 1 Agentforce Studio    | AgentforceStudio     | Agentforce Studio                                                                                    | 10/27/2025, 1:39 PM | Lightning           | ✓       |
| 2 All Tabs             | AllTabSet            |                                                                                                      | 10/27/2025, 1:31 PM | Classic             | ✓       |
| 3 Analytics Studio     | Insights             | Build CRM Analytics dashboards and apps                                                              | 10/27/2025, 1:31 PM | Classic             | ✓       |
| 4 App Launcher         | AppLauncher          | App Launcher tabs                                                                                    | 10/27/2025, 1:31 PM | Classic             | ✓       |
| 5 Approvals            | Approvals            | Manage approvals and approval flows                                                                  | 10/27/2025, 1:31 PM | Lightning           | ✓       |
| 6 Automation           | FlowsApp             | Automate business processes and repetitive tasks.                                                    | 10/27/2025, 1:38 PM | Lightning           | ✓       |
| 7 Bold Integration App | Bold_Integration_App |                                                                                                      | 4/13/2026, 2:51 PM  | Connected           | ✓       |
| 8 BOLD4SF              | MACROKIOSK           | Messaging application that enables users to send WhatsApp and SMS messages directly from Salesforce. | 4/10/2026, 4:22 PM  | Lightning (Managed) | ✓       |
| 9 Bolt Solutions       | LightningBolt        | Discover and manage business solutions designed for your industry.                                   | 10/27/2025, 1:31 PM | Lightning           | ✓       |
| 10 Community           | Community            | Salesforce CRM Communities                                                                           | 10/27/2025, 1:31 PM | Classic             | ✓       |
| 11 Content             | Content              | Salesforce CRM Content                                                                               | 10/27/2025, 1:31 PM | Classic             | ✓       |

Click **Manage Consumer Details** button.



The screenshot shows the Salesforce Setup interface for the 'Manage Connected Apps' page. The left sidebar is the same as the previous screenshot. The main content area is titled 'Manage Connected Apps' and displays details for the 'Bold Integration App'. The details include Version (1.0), API Name (Bold\_Integration\_App), Created Date (4/13/2026, 2:51 PM), Contact Email (Hidden), Contact Phone, Last Modified Date (4/13/2026, 2:51 PM), and Description (Info URL). Below the details is a section titled 'API (Enable OAuth Settings)' which contains a 'Consumer Key and Secret' section. The 'Manage Consumer Details' button is highlighted in red in this section.

| Version            | 1.0                  |
|--------------------|----------------------|
| API Name           | Bold_Integration_App |
| Created Date       | 4/13/2026, 2:51 PM   |
| Contact Email      | Hidden               |
| Contact Phone      |                      |
| Last Modified Date | 4/13/2026, 2:51 PM   |
| Description        | Info URL             |

**API (Enable OAuth Settings)**

| Consumer Key and Secret | Manage Consumer Details                                                                         |
|-------------------------|-------------------------------------------------------------------------------------------------|
| Selected OAuth Scopes   | Manage user data via APIs (api)<br>Perform requests at any time (refresh_token, offline_access) |
| Callback URL            | https://login.salesforce.com                                                                    |

When identity verification is required for accessing the connected application, enter the verification code sent to the profile's registered email address.

### Verify Your Identity

You're trying to **access a connected app**. To make sure your Salesforce account is secure, we have to verify your identity.

Enter the verification code we emailed to **le\*\*\*\*\*@\*\*\*il.com**.

Verification Code

[Resend Code](#)

[Back](#) [Verify](#)

Copy and share the consumer key and the connected app's username (see 3.3.2 – *Assign permission set for the connected app*) with MACROKIOSK Technical Support to establish secure connections for DN and template status update.

 **SETUP**

**Manage Connected Apps**

Connected App Name  
**BOLD Integration App**

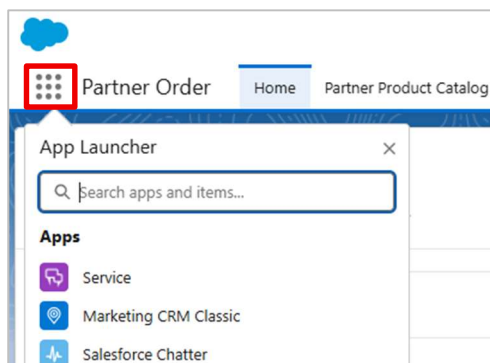
[« Back to Manage Connected Apps](#)

**Consumer Details**

|              |                      |
|--------------|----------------------|
| Consumer Key | Hidden               |
|              | <a href="#">Copy</a> |

### 3.4 – Connect to the account

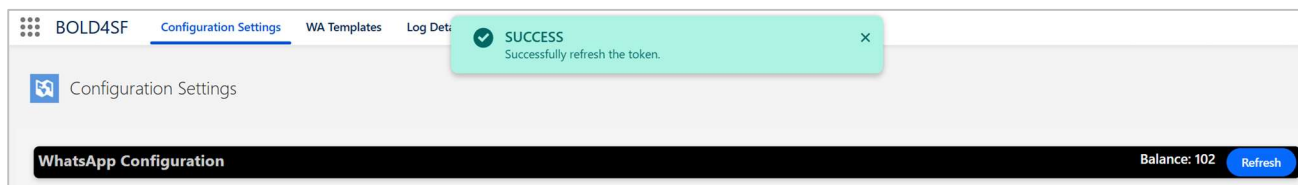
Click the icon and search for “BOLD4SF” in the **App Launcher** menu. Users assigned with BOLD API Permission will be able to access the application, if “BOLD4SF” not found, please check user permission (see 3.1 – User permission).



In the **Configuration Settings** section, enter **Username**, **Password**, and **Brand Name** (For WhatsApp Business only) to establish the connection with the account and brand name that was created by MACROKIOSK.

Click **Save** button to confirm the username and password. Confirmation message prompt if the connection has been established and balance will be displayed.

If the balance is not displayed, click the **Refresh** button next to the balance to generate the new access token which will be used for the process.



If there is any issue on the connection, contact MACROKIOSK Technical Support [techsupport@macrokiosk.com](mailto:techsupport@macrokiosk.com).



## 4.0 – WhatsApp template

Template must be approved from WhatsApp to send business-initiated messages. In **WA Templates** section, click **View Templates** button to view templates associated with the registered brand name and WhatsApp phone number.

| Brand Name | Phone  |
|------------|--------|
| MY PHONE   | Hidden |

If the registered brand name is not shown in this section, make sure that the brand name has been linked in **Configuration Settings** (see 3.4 – Connect to the account).

Click **Create New Template** button to create template.

| Template Title                           | Template Type | Date Created | Last Updated | Status  |
|------------------------------------------|---------------|--------------|--------------|---------|
| flash_sale_alert_exclusive_20_off_inside | Marketing     | May 18, 2026 | May 18, 2026 | Deleted |
| maxtemplate_0517                         | Marketing     | May 17, 2026 | May 17, 2026 | Pending |

Enter **Template Title** and select **Template Type**. Please note that template title supports lower case characters and underscores only.

Select **Language** and enter **Message** for the template. Click **Add Language** button for multiple languages.

Click **Save** button to confirm submission for approval.

WhatsApp Template

\* Template Title

Complete this field.

Template Type

Select an Option

Template

Language

Select an Option

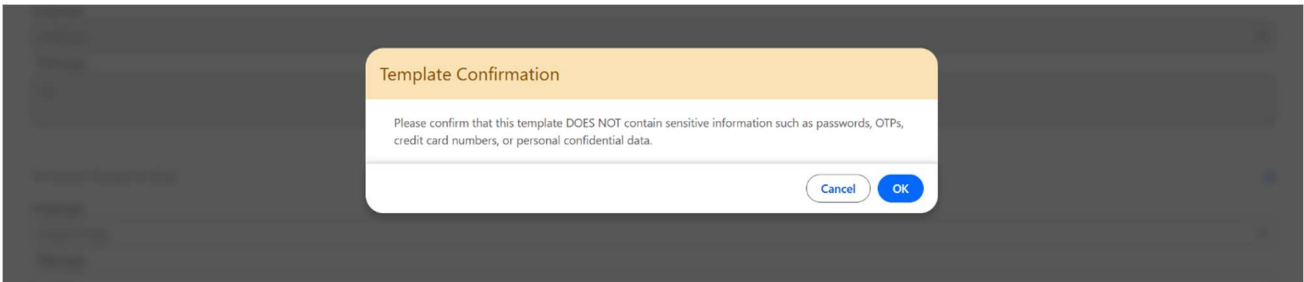
\* Message

Enter the template message here

Add Language

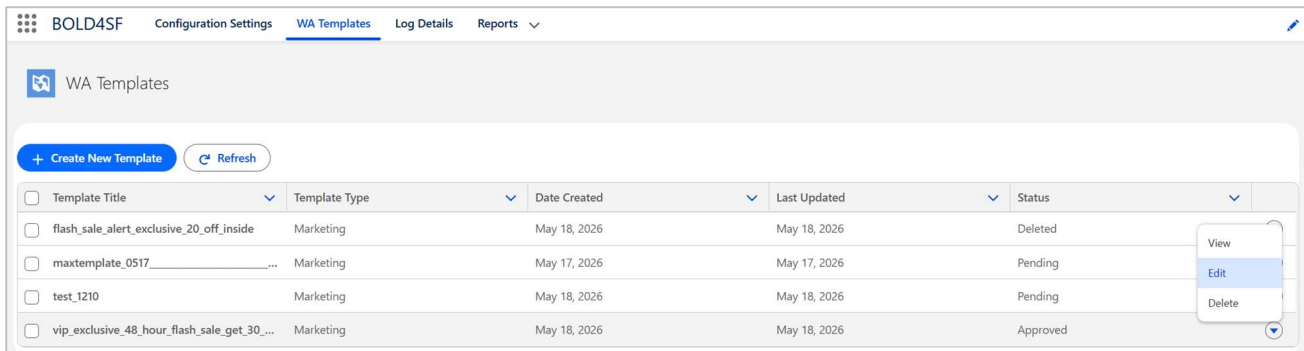
Cancel Save

Click **OK** button to confirm template submission.

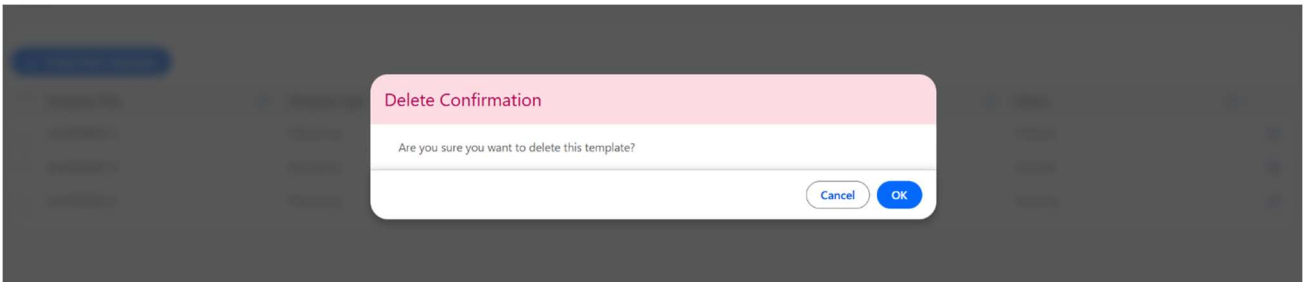


Never store sensitive personal information (PII) or credentials, such as identity card numbers, credit card details, passwords, or API keys in templates.

Templates are allowed to add more languages after approved. In the templates listing, click the arrow to show the context menu and select **Edit**, or **Delete** if the template is no longer needed.



Click **OK** button to confirm delete the template.



Deleted template names can only be reused after 30 days.

## 5.0 – Logs and reports

Logs and reports are available in **Log Details** and **Reports** section. Select **Log Details** tab, choose either **App Error Logs** or **App Logs**.

| Name                   | Error Date                | Error Type | Error Message                                                                                                                                             |      |
|------------------------|---------------------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| 1 Err-20260520-0000002 | May 20, 2026, 09:53:01 AM | ERROR      | qnGvnu3msxH99fw5mLHa9ZTrDOeKWCPdGxR4ikhp7/7oI4+15x9F/XYXzgfgs4jq6iGEvMtI0RPEIjxHa8tzv7G MQbOACUZlp0TKU/UyPlvIOFEI4gk60j+UbnJy8A6J6w qdjOdWWJ+iiVx4434bw== | Copy |
| 2 Err-20260520-0000001 | May 20, 2026, 09:52:31 AM | ERROR      | L24dX7gWPSYOj4BwTICeoNSW7HO+LbSN+WKr/FE QIOld68H+q0KZZe/WdKNe5BDul2Ee2P6VWLG4R4Y Z8MQxy72v9O+csiq18vE0yr/IVgHAsvsAKys6lc1O+t WE9ZMokB18Bp2BLuKHZYERNOA==  | Copy |

| Name                 | Log Date                  | Log Type | Message                        |      |
|----------------------|---------------------------|----------|--------------------------------|------|
| 1 L-20260520-0000034 | May 20, 2026, 09:53:03 AM | LOG      | Response Saved                 | Copy |
| 2 L-20260520-0000033 | May 20, 2026, 09:53:01 AM | LOG      | updating response              | Copy |
| 3 L-20260520-0000032 | May 20, 2026, 09:53:01 AM | LOG      | Request sent for refresh token | Copy |

| Section     | Description                                                                                                                                                                                                                                                                                                                                                            |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Log Details | <ul style="list-style-type: none"> <li>App Error Logs - Errors captured upon app execution.</li> <li>App Logs - User activities capture for audit trail.</li> <li>Show the latest 200 records only.</li> <li>Sensitive information encrypted.</li> </ul>                                                                                                               |
| Reports     | <ul style="list-style-type: none"> <li>Transactions reports of WhatsApp and SMS traffic.</li> <li>SMS DN status update depends on the delivery carrier and may be delayed.</li> <li>Searchable with filter by date and more.</li> <li>Administrators need to share the report folder to the specific user/profile if the report is not visible to the user.</li> </ul> |

Click **Copy** button to get the log details and send it to MACROKIOSK Technical Support [techsupport@macrokiosk.com](mailto:techsupport@macrokiosk.com) for the verification of the issue.

| Name                 | Log Date                  | Log Type | Message        |      |
|----------------------|---------------------------|----------|----------------|------|
| 1 L-20260520-0000034 | May 20, 2026, 09:53:03 AM | LOG      | Response Saved | Copy |

Select **Reports** tab, choose **All Folders** and then select **Bold Report**.

BOLD4SF Configuration Settings WA Templates Log Details **Reports**

Reports

All Folders 8 items

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

| Name                                    | Created By        | Created On         | Last Modified By  | Last Modified Date |
|-----------------------------------------|-------------------|--------------------|-------------------|--------------------|
| <b>Bold Report</b>                      | Username          | 5/21/2026, 5:34 PM | Username          | 5/21/2026, 5:34 PM |
| Einstein Bot Reports                    | Automated Process | 3/14/2026, 7:14 AM | Automated Process | 3/14/2026, 7:14 AM |
| Einstein Bot Reports Spring '23         | Automated Process | 3/14/2026, 7:14 AM | Automated Process | 3/14/2026, 7:14 AM |
| Einstein Bot Reports Summer '23         | Automated Process | 3/14/2026, 7:14 AM | Automated Process | 3/14/2026, 7:14 AM |
| Einstein Bot Reports Summer '22         | Automated Process | 3/14/2026, 7:14 AM | Automated Process | 3/14/2026, 7:14 AM |
| Einstein Bot Reports Winter '23         | Automated Process | 3/14/2026, 7:14 AM | Automated Process | 3/14/2026, 7:14 AM |
| Enablement Dashboard Reports Spring '24 | Automated Process | 3/14/2026, 7:14 AM | Automated Process | 3/14/2026, 7:14 AM |
| Enablement Dashboard Reports Summer '24 | Automated Process | 3/14/2026, 7:14 AM | Automated Process | 3/14/2026, 7:14 AM |

Click to view WhatsApp and SMS transactions report.

BOLD4SF Configuration Settings WA Templates Log Details **Reports**

Report: WA Transaction Details

WA Transaction Details Report

Enable Field Editing

Total Records: 8

|   | Brand Name | WA Transaction Detail: Tran Id | Language Code | Message ID         | Delivered Date      | To Phone | Status      | Used Credit | Remaining Credit |
|---|------------|--------------------------------|---------------|--------------------|---------------------|----------|-------------|-------------|------------------|
| 1 | MY PHONE   | WTR-20260522-000000            | en            | 5,000,046,351,720  | 5/22/2026, 12:07 AM | ****069  | SUCCESS     | 53          | 97               |
| 2 | MY PHONE   | WTR-20260522-000001            | ko            | 6,000,044,016,757  | 5/22/2026, 12:07 AM | ****069  | SUCCESS     | 54          | 96               |
| 3 | MY PHONE   | WTR-20260522-000002            | en            | 6,000,044,018,241  | 5/22/2026, 1:09 AM  | ****069  | SUCCESS     | 55          | 95               |
| 4 | MY PHONE   | WTR-20260522-000003            | en_US         | 91,000,040,768,884 | 5/22/2026, 1:22 AM  | ****069  | SUCCESS     | 56          | 94               |
| 5 | MY PHONE   | WTR-20260525-000004            | en            | 90,000,043,471,271 | 5/24/2026, 5:57 PM  | ****069  | SUCCESS     | 57          | 93               |
| 6 | MY PHONE   | WTR-20260525-000005            | ko            | 4,000,044,847,616  | 5/24/2026, 6:01 PM  | ****069  | SUCCESS     | 58          | 92               |
| 7 | MY PHONE   | WTR-20260525-000006            | zh_CN         | 91,000,040,825,065 | 5/24/2026, 6:07 PM  | ****679  | SUCCESS     | 59          | 91               |
| 8 | MY PHONE   | WTR-20260525-000007            | ko            | 0                  | 5/24/2026, 6:31 PM  | ****ext  | UNDELIVERED | 59          | 91               |

BOLD4SF Configuration Settings WA Templates Log Details **Reports**

Report: SMS Transaction Details

SMS Transaction Details Report

Enable Field Editing

Total Records: 13

|    | Message ID     | Message | SMS Transaction Detail: Tran Id | Phone Number | Send Date           | Delivered Date      | Status   | Used Credit | Remaining Credit |
|----|----------------|---------|---------------------------------|--------------|---------------------|---------------------|----------|-------------|------------------|
| 1  | -              | ****    | a05dL00001mDexx                 | ****ext      | 5/24/2026, 6:45 PM  | 5/24/2026, 6:45 PM  | FAILED   | 88          | 72               |
| 2  | 24.627.838.381 | ****    | ****069                         | ****069      | 5/24/2026, 5:25 PM  | 5/24/2026, 5:25 PM  | ACCEPTED | 88          | 72               |
| 3  | 24.627.616.773 | ****/   | ****069                         | ****069      | 5/23/2026, 11:46 PM | 5/23/2026, 11:46 PM | ACCEPTED | 87          | 73               |
| 4  | 38.561.071.845 | ****S   | ****069                         | ****069      | 5/23/2026, 11:40 PM | 5/23/2026, 11:40 PM | ACCEPTED | 86          | 74               |
| 5  | 22.644.088.318 | ****S   | ****069                         | ****069      | 5/23/2026, 11:38 PM | 5/23/2026, 11:38 PM | ACCEPTED | 84          | 76               |
| 6  | 37.583.632.168 | ****次不期 | ****069                         | ****069      | 5/23/2026, 11:33 PM | 5/23/2026, 11:34 PM | ACCEPTED | 83          | 77               |
| 7  | 38.561.069.556 | ****次不  | ****069                         | ****069      | 5/23/2026, 11:31 PM | 5/23/2026, 11:31 PM | ACCEPTED | 81          | 79               |
| 8  | -              | ****列左宁 | a05dL00001mCQqn                 | ****145      | 5/23/2026, 11:27 PM | 5/23/2026, 11:28 PM | FAILED   | 80          | 80               |
| 9  | 37.583.630.004 | ****列左宁 | ****145                         | ****145      | 5/23/2026, 11:23 PM | 5/23/2026, 11:23 PM | ACCEPTED | 80          | 80               |
| 10 | -              | ****est | a05dL00001mCHCD                 | ****069      | 5/23/2026, 8:41 PM  | 5/23/2026, 8:41 PM  | FAILED   | 64          | 96               |
| 11 | 24.627.537.946 | ****est | ****069                         | ****069      | 5/23/2026, 8:30 PM  | 5/23/2026, 8:30 PM  | ACCEPTED | 64          | 96               |
| 12 | 22.642.153.882 | ****QAP | ****069                         | ****069      | 5/22/2026, 12:06 AM | 5/22/2026, 12:06 AM | ACCEPTED | 56          | 104              |
| 13 | 37.581.704.666 | ****QAP | ****069                         | ****069      | 5/22/2026, 12:06 AM | 5/22/2026, 12:07 AM | ACCEPTED | 57          | 103              |

## 6.0 – Apex classes

Go to **Setup** and search for **Apex Classes**. Look for the classes with namespace prefix “mkbold”.

**Percent of Apex Used: 1.71%**  
You are currently using 170,692 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 10,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage [i](#)

Compile all classes [i](#)

View: [All](#) [Create New View](#)

<Previous Page | Next Page>

| Action                                                                | Name ↑                              | Namespace Prefix | Api Version | Status | Size Without Comments | Last Modified By               | Has Trace Flags          |
|-----------------------------------------------------------------------|-------------------------------------|------------------|-------------|--------|-----------------------|--------------------------------|--------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a> | <a href="#">AccessService</a>       | mkbold           | 65.0        | Active | 564                   | User User, 10/02/2026, 2:37 PM | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>                            | <a href="#">AccessServiceTest</a>   | mkbold           | 65.0        | Active | 568                   | User User, 10/02/2026, 2:37 PM | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a> | <a href="#">AccountTokens</a>       | mkbold           | 65.0        | Active | 100                   | User User, 10/02/2026, 2:37 PM | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Security</a>                       | <a href="#">APIEndpoints</a>        | mkbold           | 65.0        | Active | 957                   | User User, 10/02/2026, 2:37 PM | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Security</a>                       | <a href="#">APIResponseModel</a>    | mkbold           | 64.0        | Active | 371                   | User User, 10/02/2026, 2:37 PM | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a> | <a href="#">APIResponseSelector</a> | mkbold           | 65.0        | Active | 480                   | User User, 10/02/2026, 2:37 PM | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a> | <a href="#">APIResponseService</a>  | mkbold           | 65.0        | Active | 4,688                 | User User, 10/02/2026, 2:37 PM | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a> | <a href="#">BalanceService</a>      | mkbold           | 65.0        | Active | 3,866                 | User User, 10/02/2026, 2:37 PM | <input type="checkbox"/> |

To use BOLD. WhatsApp and SMS services, insert class name “WAService” and “SMSService” in apex code dialog (see [3.2 – Schedule clear old logs and reports](#)) or flow.

Sending WhatsApp messages:

```
Id responseID = mkbold.WAService.sendWA('60123456789','60123456789','template_title','en');
FileSystem.Debug('CHECK ==> ' + responseID);
```

The arguments for the function are as follows:

1. Sender's phone number with country code
2. Recipient's phone number with country code
3. Template title
4. Language code

Sending SMS:

```
Id responseID = mkbold.SMSService.sendSMS('SF','60123456789'+'This is SMS test message.');
```

```
FileSystem.Debug('CHECK ==> ' + responseID);
```

The arguments for the function are as follows:

1. Sender's name / ID
2. Recipient's mobile phone number with country code
3. Message

Use the testing tool available in Salesforce to run a test or debug by referring to the transaction ID.

Please note that currently the BOLD. WhatsApp and SMS service supports one-time messaging. Technical users are required to include the class into own function to send bulk messages.