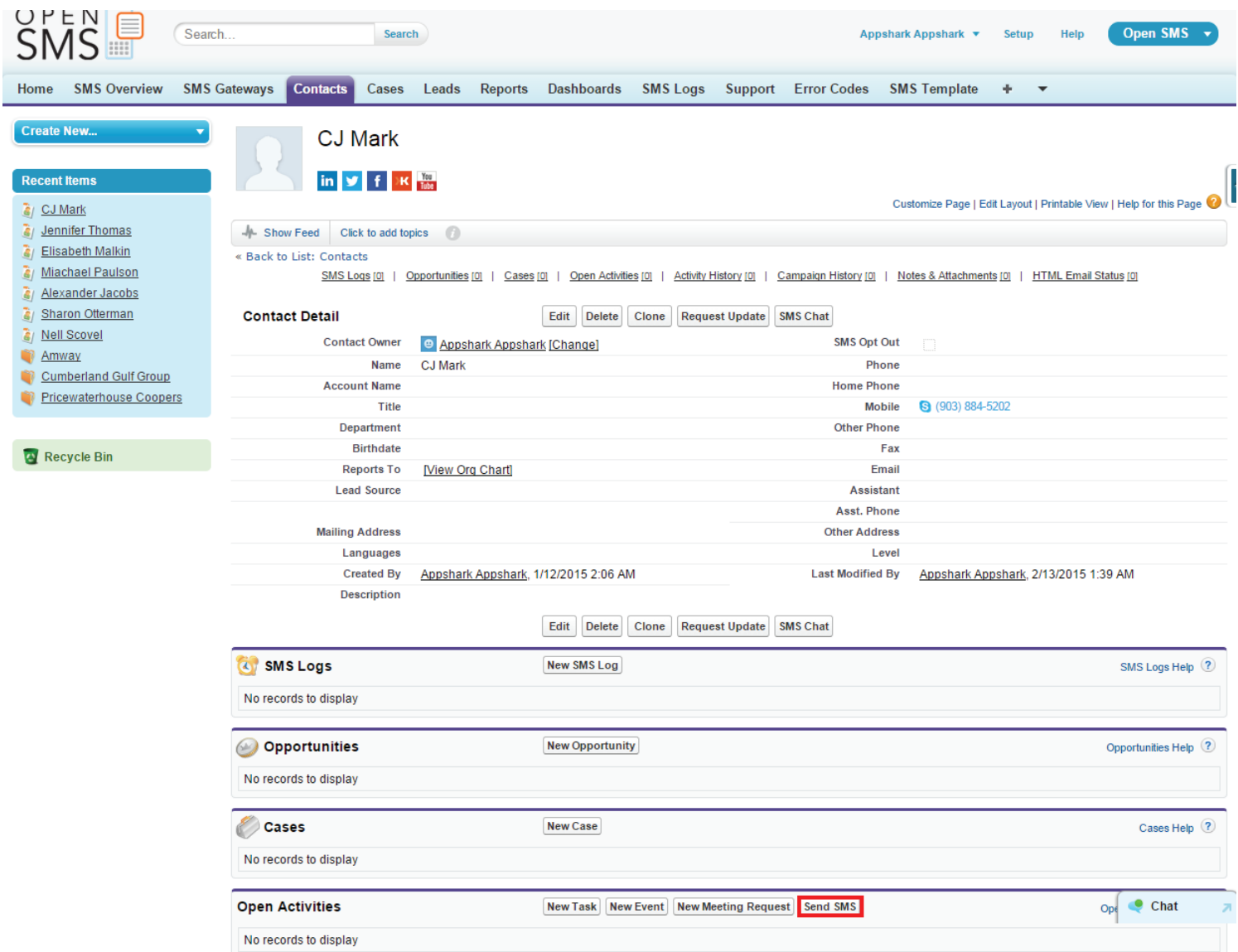


USER GUIDE FOR OPEN SMS

How to send a single SMS to Contacts

a) Select “Open SMS” application from the Salesforce application drop-down list. To test whether the Open SMS app is functioning properly, send a test message to a contact.

b) Click on the ‘Contacts’ tab where you can choose a single contact and message them using the ‘Send SMS’ button in the ‘Open Activities’ section.

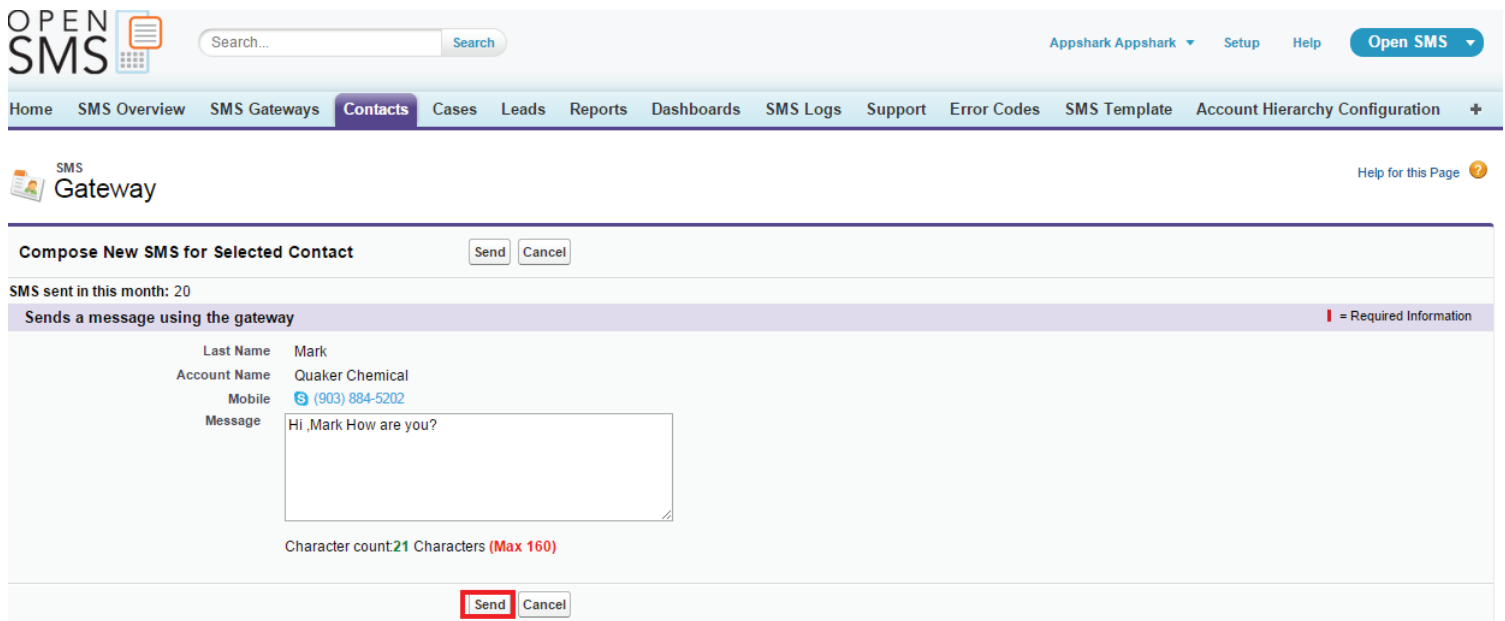


The screenshot displays the AppShark Open SMS application interface. At the top, there is a navigation bar with the AppShark logo, a search bar, and links for Setup, Help, and Open SMS. Below this is a main navigation menu with tabs for Home, SMS Overview, SMS Gateways, Contacts, Cases, Leads, Reports, Dashboards, SMS Logs, Support, Error Codes, and SMS Template. The 'Contacts' tab is currently selected.

On the left side, there is a 'Recent Items' list containing names like CJ Mark, Jennifer Thomas, Elisabeth Malkin, Michael Paulson, Alexander Jacobs, Sharon Otterman, Nell Scovel, Amway, Cumberland Gulf Group, and Pricewaterhouse Coopers. Below this is a 'Recycle Bin' button.

The main content area shows the contact detail for 'CJ Mark'. It includes a profile picture, social media links (LinkedIn, Twitter, Facebook, YouTube), and a 'Show Feed' button. Below this is a 'Back to List: Contacts' link and a list of tabs for SMS Logs, Opportunities, Cases, Open Activities, Activity History, Campaign History, Notes & Attachments, and HTML Email Status. The 'Contact Detail' section includes fields for Contact Owner, Name, Account Name, Title, Department, Birthdate, Reports To, Lead Source, Mailing Address, Languages, Created By, Last Modified By, and Description. The 'Open Activities' section at the bottom has buttons for New Task, New Event, New Meeting Request, and Send SMS (highlighted with a red box). There is also a 'Chat' button in the bottom right corner.

c) Send a message to the selected contact and type in the message as shown below in the message box. Click on the “Send” button.



Compose New SMS for Selected Contact [Send] [Cancel]

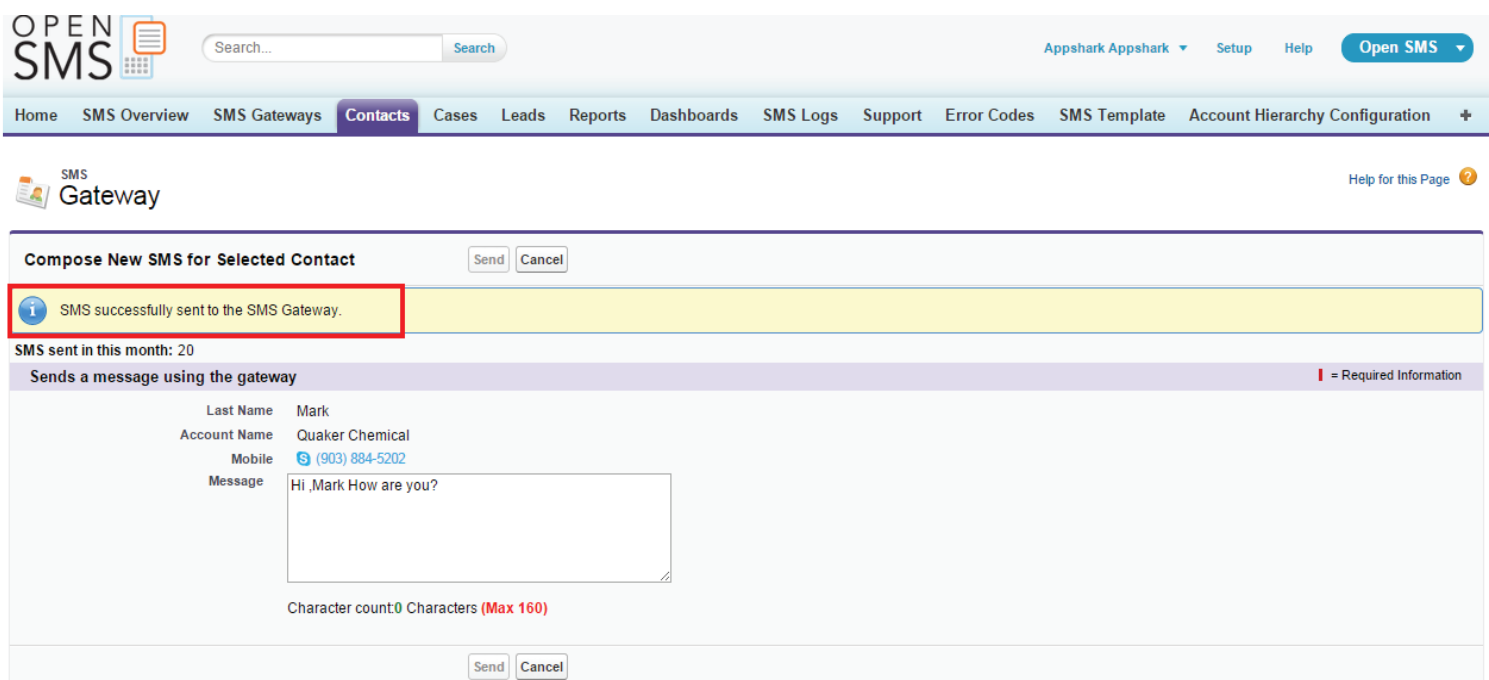
SMS sent in this month: 20

Sends a message using the gateway ! = Required Information

Last Name: Mark
 Account Name: Quaker Chemical
 Mobile: (903) 884-5202
 Message: Hi ,Mark How are you?
 Character count: 21 Characters (Max 160)

[Send] [Cancel]

d) If the test message gets delivered, you get a notification of “SMS successfully sent to the SMS Gateway”.



Compose New SMS for Selected Contact [Send] [Cancel]

1 SMS successfully sent to the SMS Gateway.

SMS sent in this month: 20

Sends a message using the gateway ! = Required Information

Last Name: Mark
 Account Name: Quaker Chemical
 Mobile: (903) 884-5202
 Message: Hi ,Mark How are you?
 Character count: 0 Characters (Max 160)

[Send] [Cancel]

e) Once the message is delivered, you can check the record history of the delivered message in “Activity History” which shows the contents of the message. ‘SMS Logs’ show records of the status of the message delivered and the contact number it was delivered to.

OPEN SMS

Search...

Search

Appshark Appshark Setup Help Open SMS

Home SMS Overview SMS Gateways **Contacts** Cases Leads Reports Dashboards SMS Logs Support Error Codes SMS Template

Create New...

Recent Items

CJ Mark
OST-32
Twilio
Jennifer Thomas
Elisabeth Malkin
Michael Paulson
Alexander Jacobs
Sharon Otterman
Neil Scovel
Amway

Recycle Bin

CJ Mark

in
f
K

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

Back to List: Contacts

Activity History [1] | Open Activities [0] | SMS Logs [1] | Opportunities [0] | Cases [0] | Campaign History [0] | Notes & Attachments [0] | HTML Email Status [0]

Contact Detail

Edit Delete Clone Request Update SMS Chat

Contact Owner	Appshark Appshark [Change]	SMS Opt Out	
Name	CJ Mark	Phone	
Account Name	Quaker Chemical	Home Phone	
Title		Mobile	(903) 884-5202
Department		Other Phone	
Birthdate		Fax	
Reports To	[View Org Chart]	Email	
Lead Source		Assistant	
		Asst. Phone	
Mailing Address		Other Address	
Languages		Level	
Created By	Appshark Appshark 1/12/2015 2:06 AM	Last Modified By	Appshark Appshark 2/13/2015 1:48 AM
Description			

Edit Delete Clone Request Update SMS Chat

Activity History

Log a Call Mail Merge Send an Email Request Update View All

Activity History Help

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Hi, Mark How are you?		✓		Appshark Appshark	2/13/2015 1:52 AM

Open Activities

New Task New Event New Meeting Request Send SMS

Open Activities Help

No records to display

SMS Logs

New SMS Log

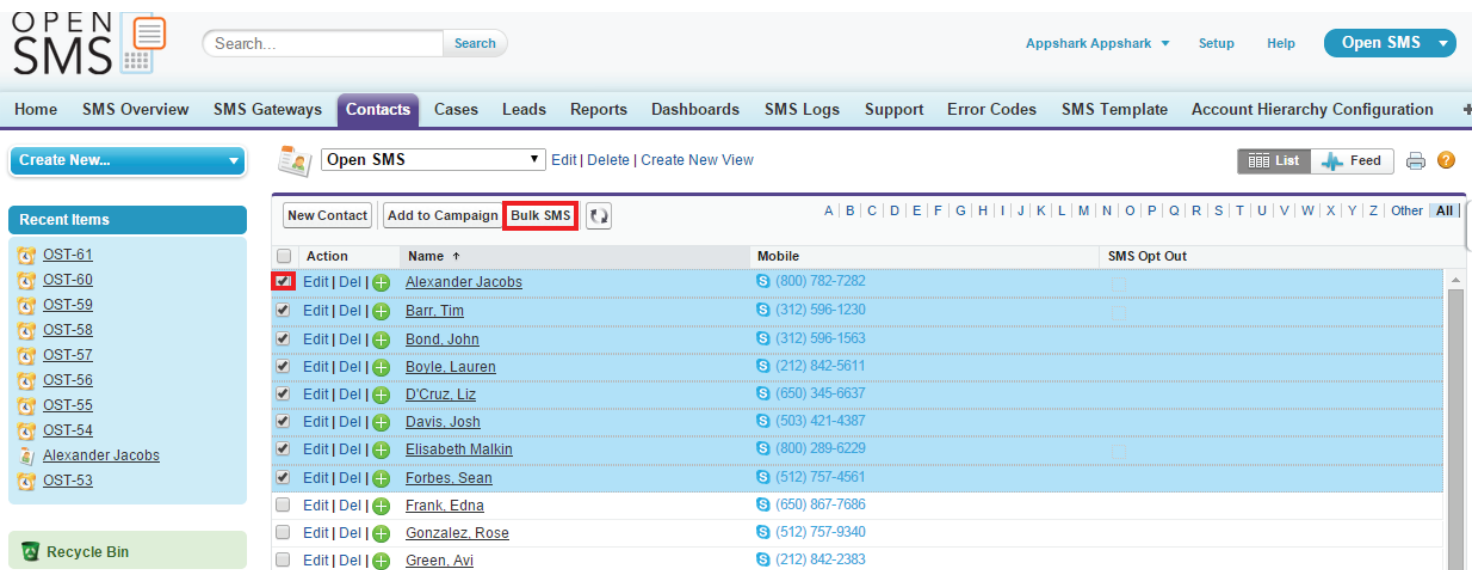
SMS Logs Help

Action	SMS Track#	Lead	SMS Sent To	Status
Edit Del	OST-32		(903) 884-5202	Success

Chat

How to send Bulk SMS to Contacts

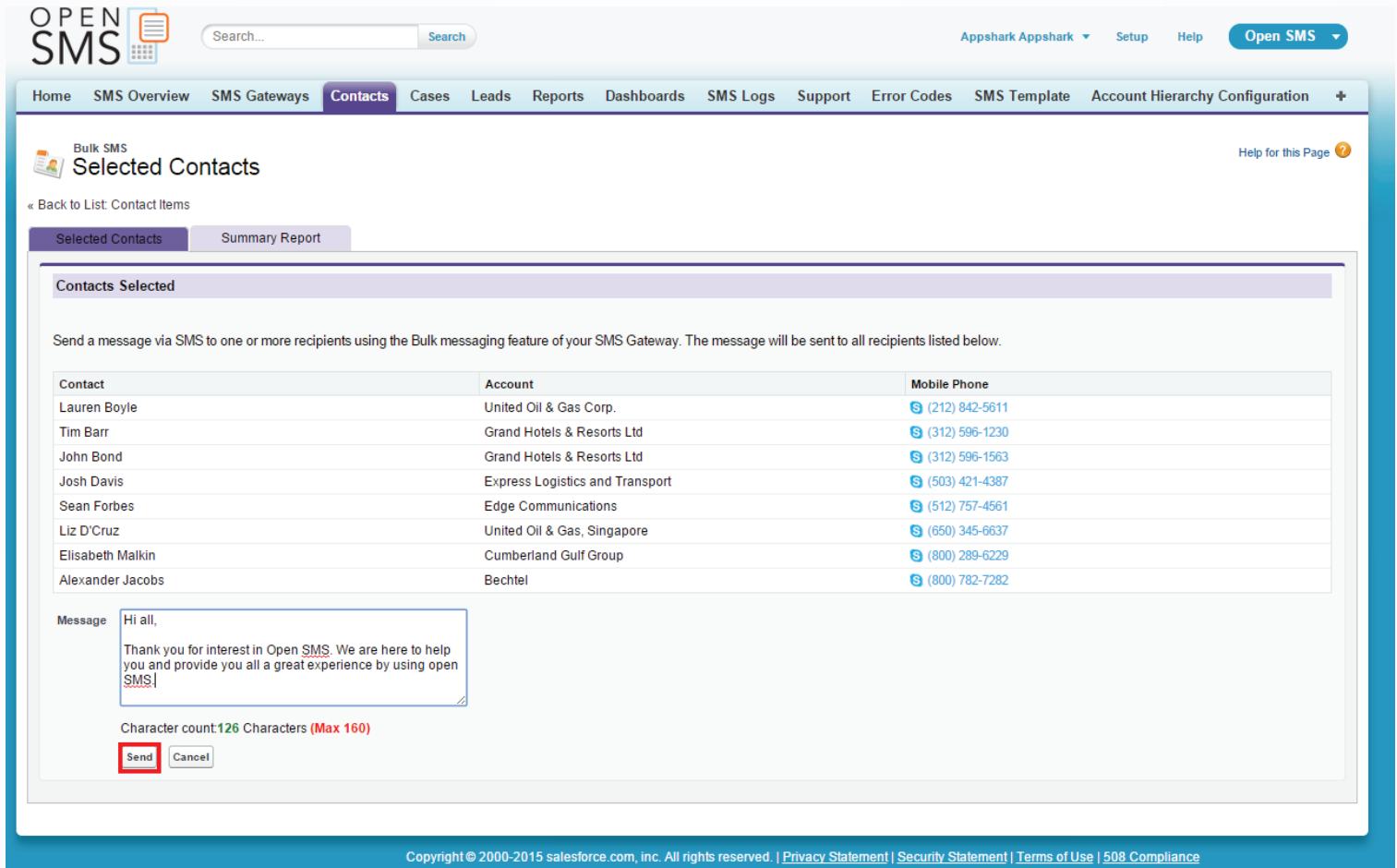
a) Go to the 'Contacts' tab and select the contacts you want to send the SMS to by checking the radio button. Click the button "Bulk SMS" to continue further.



The screenshot shows the AppShark Open SMS web application interface. The top navigation bar includes a search bar, a dropdown menu for 'Appshark Appshark', and links for 'Setup', 'Help', and 'Open SMS'. The main navigation bar contains tabs for 'Home', 'SMS Overview', 'SMS Gateways', 'Contacts' (selected), 'Cases', 'Leads', 'Reports', 'Dashboards', 'SMS Logs', 'Support', 'Error Codes', 'SMS Template', and 'Account Hierarchy Configuration'. Below the navigation bar, there is a 'Create New...' button and a dropdown menu for 'Open SMS'. The main content area displays a table of contacts with columns for 'Action', 'Name', 'Mobile', and 'SMS Opt Out'. The 'Bulk SMS' button is highlighted in the 'Add to Campaign' section. The table lists several contacts, including Alexander Jacobs, Barr, Tim, Bond, John, Boyle, Lauren, D'Cruz, Liz, Davis, Josh, Elisabeth Malkin, Forbes, Sean, Frank, Edna, Gonzalez, Rose, and Green, Avi.

Action	Name	Mobile	SMS Opt Out
☒ Edit Del +	Alexander Jacobs	(800) 782-7282	☐
☒ Edit Del +	Barr, Tim	(312) 596-1230	☐
☒ Edit Del +	Bond, John	(312) 596-1563	☐
☒ Edit Del +	Boyle, Lauren	(212) 842-5611	☐
☒ Edit Del +	D'Cruz, Liz	(650) 345-6637	☐
☒ Edit Del +	Davis, Josh	(503) 421-4387	☐
☒ Edit Del +	Elisabeth Malkin	(800) 289-6229	☐
☒ Edit Del +	Forbes, Sean	(512) 757-4561	☐
☐ Edit Del +	Frank, Edna	(650) 867-7686	☐
☐ Edit Del +	Gonzalez, Rose	(512) 757-9340	☐
☐ Edit Del +	Green, Avi	(212) 842-2383	☐

b) After selecting the contacts, the user is provided a preview of the selections made. The user can make edits by going back to the selected contacts page. The user can type in the message to be sent to the recipients in the message box and then click 'Send'.



The screenshot shows the 'Open SMS' web application interface. The top navigation bar includes links for Home, SMS Overview, SMS Gateways, **Contacts**, Cases, Leads, Reports, Dashboards, SMS Logs, Support, Error Codes, SMS Template, and Account Hierarchy Configuration. The 'Contacts' page is active, displaying a list of selected contacts for a bulk SMS campaign.

Selected Contacts

Send a message via SMS to one or more recipients using the Bulk messaging feature of your SMS Gateway. The message will be sent to all recipients listed below.

Contact	Account	Mobile Phone
Lauren Boyle	United Oil & Gas Corp.	(212) 842-5611
Tim Barr	Grand Hotels & Resorts Ltd	(312) 596-1230
John Bond	Grand Hotels & Resorts Ltd	(312) 596-1563
Josh Davis	Express Logistics and Transport	(503) 421-4387
Sean Forbes	Edge Communications	(512) 757-4561
Liz D'Cruz	United Oil & Gas, Singapore	(650) 345-6637
Elisabeth Malkin	Cumberland Gulf Group	(800) 289-6229
Alexander Jacobs	Bechtel	(800) 782-7282

Message

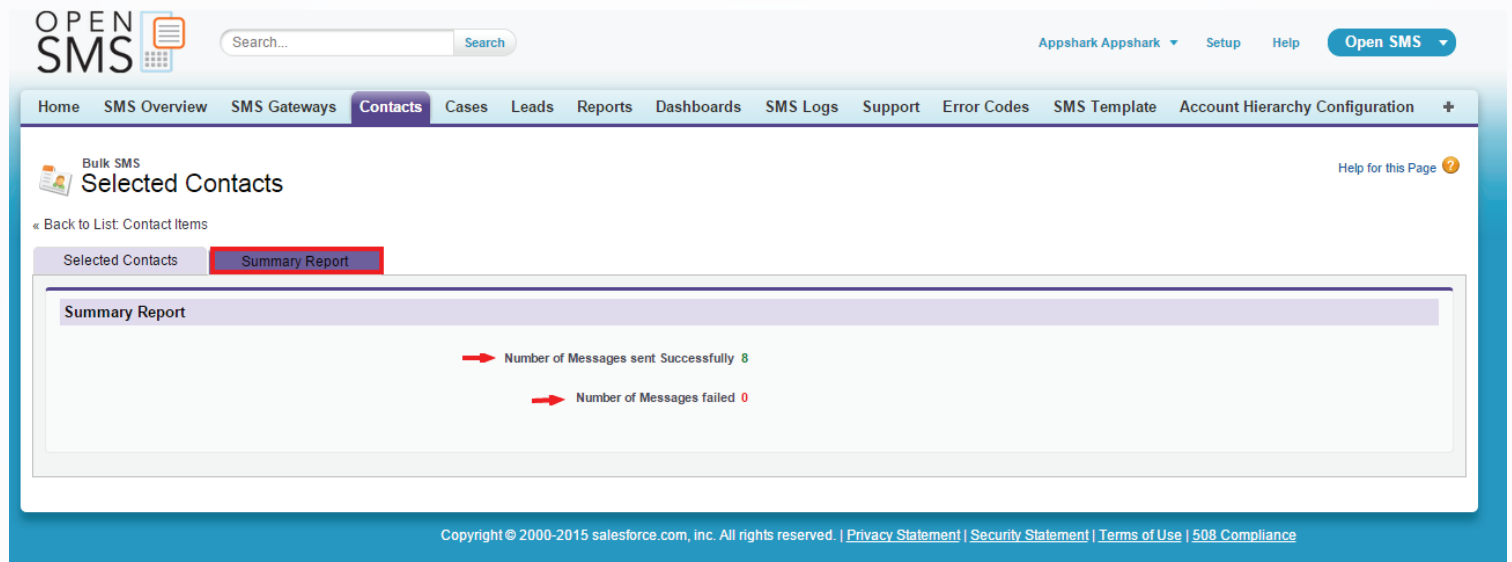
Hi all,
Thank you for interest in Open SMS. We are here to help you and provide you all a great experience by using open SMS.

Character count: 126 Characters (Max 160)

Send Cancel

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c) Once you click on 'Send', the user is directed to the delivery status screen which shows the number of messages sent or failed to deliver.



The screenshot shows the 'OPEN SMS' interface. The 'Contacts' tab is active, and the 'Summary Report' sub-tab is selected. The report displays the following data:

Summary Report	
→ Number of Messages sent Successfully	8
→ Number of Messages failed	0

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d) The user can check the 'Activity History' of the SMS sent. 'SMS logs' archives the delivery status and the phone number of the messages delivered.

OPEN SMS

Search...

Search

Appshark Appshark Setup Help

Open SMS

Home SMS Overview SMS Gateways **Contacts** Cases Leads Reports Dashboards SMS Logs Support Error Codes SMS Template

Create New...

Recent Items

Alexander Jacobs
OST-61
OST-60
OST-59
OST-58
OST-57
OST-56
OST-55
OST-54

Recycle Bin

Alexander Jacobs

in
Twitter
Facebook
K
YouTube

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

Back to List: Contacts
Activity History [1] | Open Activities [0] | SMS Logs [1] | Opportunities [0] | Cases [0] | Campaign History [0] | Notes & Attachments [0] | HTML Email Status [0]

Contact Detail

Edit Delete Clone Request Update SMS Chat

Contact Owner Appshark Appshark [Change]
Name Alexander Jacobs
Account Name Bechtel
Title
Department
Birthdate
Reports To [View Org Chart]
Lead Source
Mailing Address
Languages
Created By Appshark Appshark, 2/13/2015 1:37 AM
Description

SMS Opt Out
Phone
Home Phone
Mobile (800) 782-7282
Other Phone
Fax
Email
Assistant
Asst. Phone
Other Address
Level
Last Modified By Appshark Appshark, 2/13/2015 1:37 AM

Edit Delete Clone Request Update SMS Chat

Activity History

Log a Call Mail Merge Send an Email Request Update View All

Activity History Help

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Hi all, Thank you for interest in Open SMS. We are here to help you and provide you all a great experience by using open SMS.		✓		Appshark Appshark	2/13/2015 2:09 AM

Open Activities

New Task New Event New Meeting Request Send SMS

Open Activities Help

No records to display

SMS Logs

New SMS Log

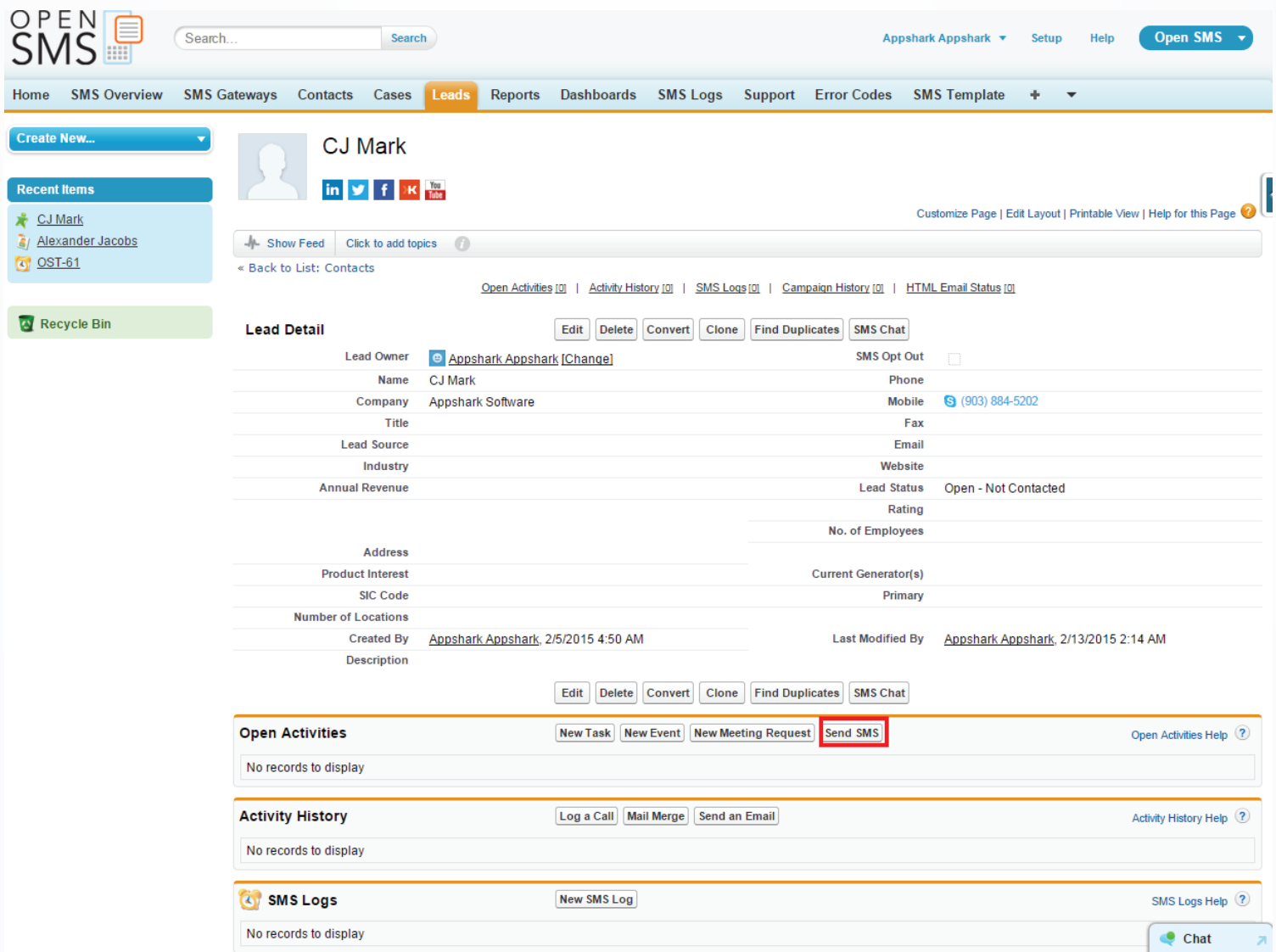
SMS Logs Help

Action	SMS Track#	Lead	SMS Sent To	Status
Edit Del	OST-54		(800) 782-7282	Success

Chat

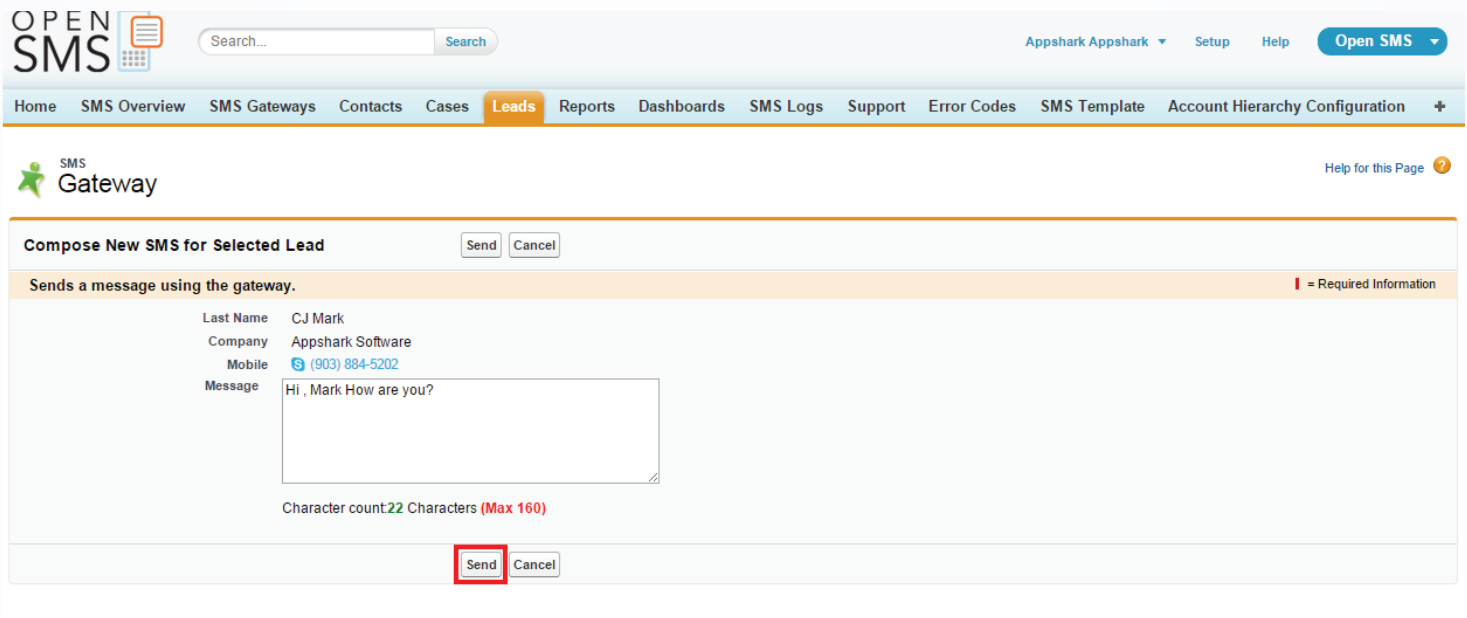
How to send Single SMS to Leads

- Select "Open SMS" application from the Salesforce application drop-down list.
- Click on the 'Leads' tab where you can choose a single lead and then send a message by clicking on the 'Send SMS' button in the 'Open Activities' section.



The screenshot displays the AppShark Open SMS application interface. At the top, there is a search bar and navigation links for Home, SMS Overview, SMS Gateways, Contacts, Cases, Leads, Reports, Dashboards, SMS Logs, Support, Error Codes, SMS Template, and a dropdown menu. The 'Leads' tab is selected, showing a lead profile for 'CJ Mark'. The profile includes fields for Name, Company, Title, Lead Source, Industry, Annual Revenue, Address, Product Interest, SIC Code, Number of Locations, Created By, and Description. Below the profile, there are buttons for Edit, Delete, Convert, Clone, Find Duplicates, and SMS Chat. The 'Open Activities' section is visible, showing a list of activities with a 'Send SMS' button highlighted. The 'Activity History' and 'SMS Logs' sections are also visible, both showing 'No records to display'.

c) Send a message to the selected lead and type in the message as shown below in the message box. Press the 'send' button.



OPEN SMS Gateway

Search... Search

Appshark Appshark Setup Help **Open SMS**

Home SMS Overview SMS Gateways Contacts Cases **Leads** Reports Dashboards SMS Logs Support Error Codes SMS Template Account Hierarchy Configuration +

Compose New SMS for Selected Lead Send Cancel

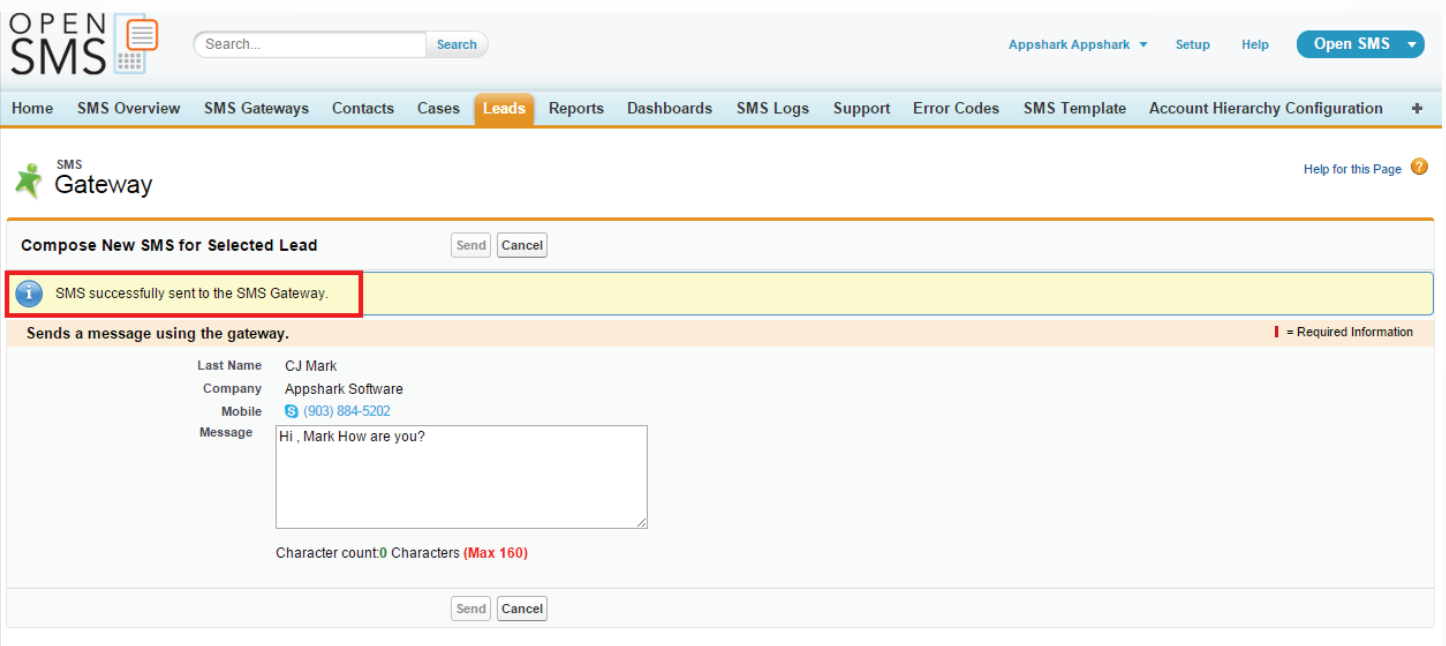
Sends a message using the gateway. ⓘ = Required Information

Last Name CJ Mark
Company Appshark Software
Mobile (903) 884-5202
Message Hi, Mark How are you?

Character count: 22 Characters (Max 160)

Send Cancel

d) If the message is delivered, you get a notification of 'SMS successfully sent to the SMS Gateway'.



OPEN SMS Gateway

Search... Search

Appshark Appshark Setup Help **Open SMS**

Home SMS Overview SMS Gateways Contacts Cases **Leads** Reports Dashboards SMS Logs Support Error Codes SMS Template Account Hierarchy Configuration +

Compose New SMS for Selected Lead Send Cancel

ⓘ SMS successfully sent to the SMS Gateway.

Sends a message using the gateway. ⓘ = Required Information

Last Name CJ Mark
Company Appshark Software
Mobile (903) 884-5202
Message Hi, Mark How are you?

Character count: 0 Characters (Max 160)

Send Cancel

e) Once the message is delivered, you can check the history of the delivered message in “Activity History” which shows the content of the message. ‘SMS Logs’ show records of the status of the message delivered and the phone number it was delivered to.

OPEN SMS

Search...

Search

Appshark Appshark Setup Help Open SMS

Home SMS Overview SMS Gateways Contacts Cases Leads Reports Dashboards SMS Logs Support Error Codes SMS Template

Create New...

Recent Items

- CJ Mark
- OST-62
- Alexander Jacobs

Recycle Bin

CJ Mark

in
f
K
YouTube

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Click to add topics

Back to List: Contacts

Open Activities

Activity History

SMS Logs

Campaign History

HTML Email Status

Lead Detail

Edit
Delete
Convert
Clone
Find Duplicates
SMS Chat

Lead Owner	Appshark Appshark	SMS Opt Out	
Name	CJ Mark	Phone	
Company	Appshark Software	Mobile	(903) 884-5202
Title		Fax	
Lead Source		Email	
Industry		Website	
Annual Revenue		Lead Status	Open - Not Contacted
		Rating	
		No. of Employees	
Address			
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	Appshark Appshark, 2/5/2015 4:50 AM	Last Modified By	Appshark Appshark, 2/13/2015 2:14 AM
Description			

Edit
Delete
Convert
Clone
Find Duplicates
SMS Chat

Open Activities

New Task
New Event
New Meeting Request
Send SMS

Open Activities Help

Activity History

Log a Call
Mail Merge
Send an Email
View All

Activity History Help

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Hi, Mark How are you?	✓		Appshark Appshark	2/13/2015 2:20 AM

SMS Logs

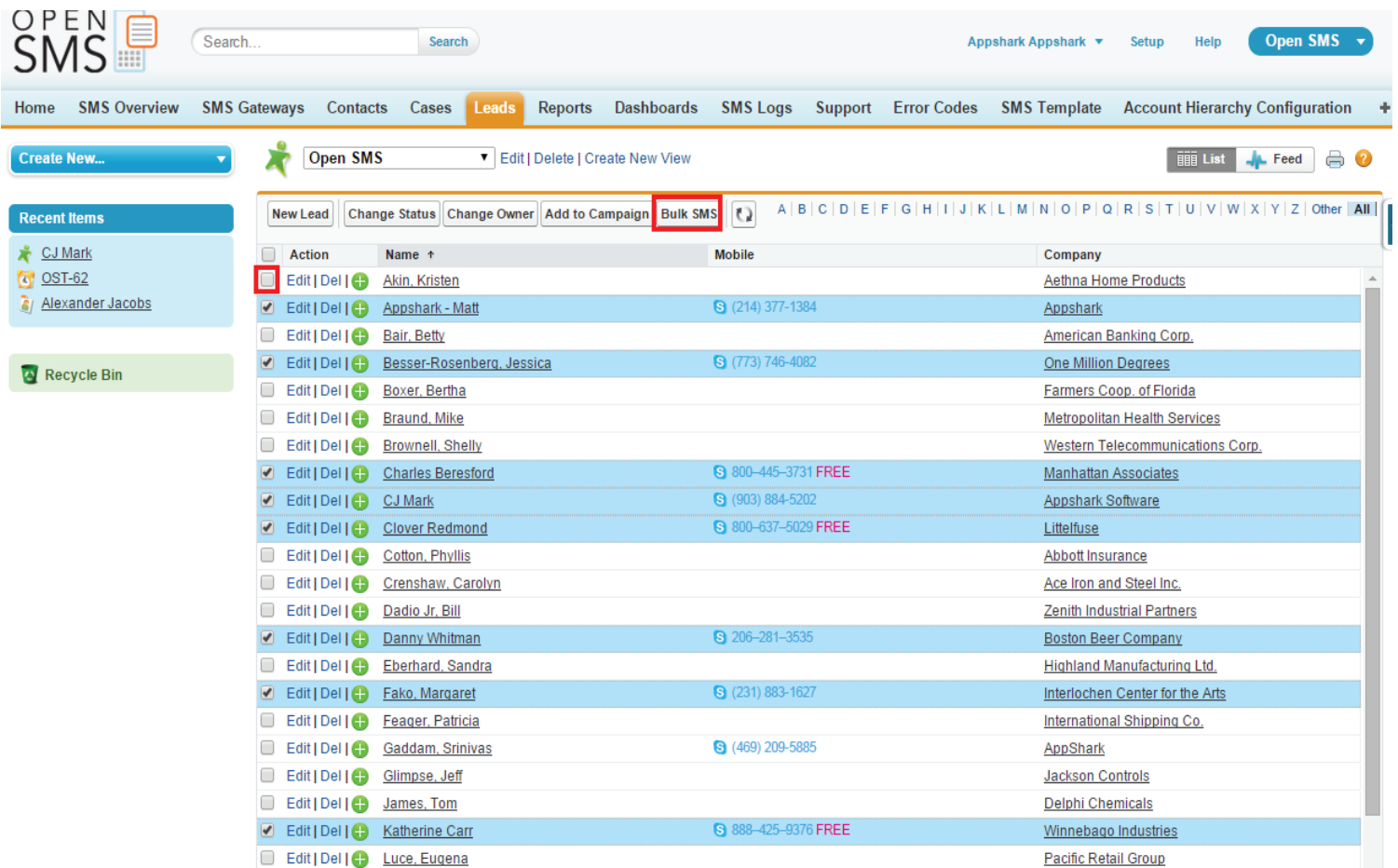
New SMS Log

Chat

Action	SMS Track#	Contact	SMS Sent To	Status
Edit Del	OST-62		(903) 884-5202	Success

How to send Bulk SMS to Leads

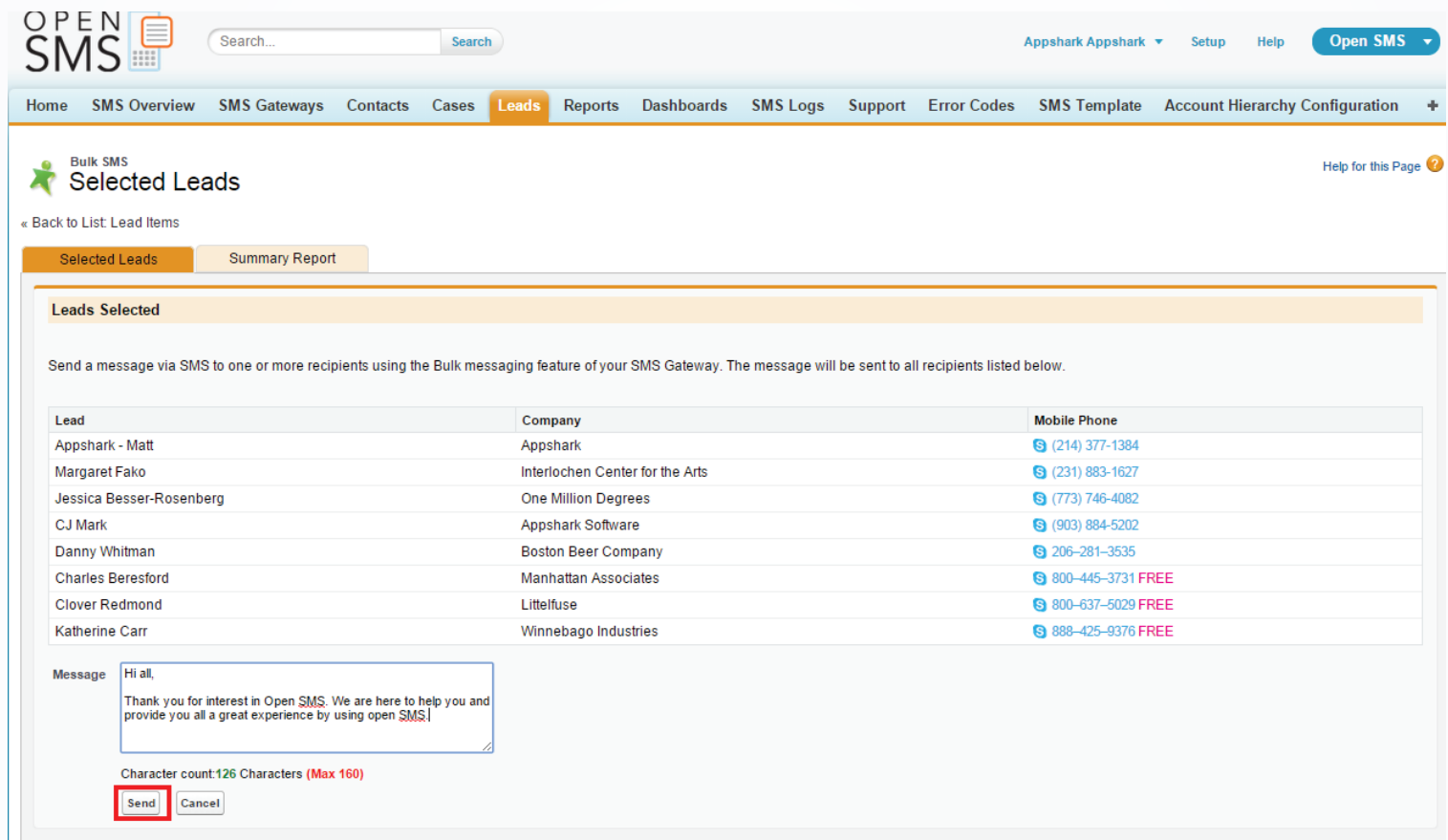
a) Go to the 'Leads' tab and select all the leads to whom the SMS is to be sent. Click the button "Bulk SMS" to continue further.



The screenshot shows the AppShark Open SMS interface. The 'Leads' tab is selected in the top navigation bar. The 'Bulk SMS' button is highlighted with a red box. The table below lists the leads available for selection.

Action	Name	Mobile	Company
☐ Edit Del +	Akin, Kristen		Aethna Home Products
☒ Edit Del +	Appshark - Matt	S (214) 377-1384	Appshark
☐ Edit Del +	Bair, Betty		American Banking Corp.
☒ Edit Del +	Besser-Rosenberg, Jessica	S (773) 746-4082	One Million Degrees
☐ Edit Del +	Boxer, Bertha		Farmers Coop. of Florida
☐ Edit Del +	Braund, Mike		Metropolitan Health Services
☐ Edit Del +	Brownell, Shelly		Western Telecommunications Corp.
☒ Edit Del +	Charles Beresford	S 800-445-3731 FREE	Manhattan Associates
☒ Edit Del +	CJ Mark	S (903) 884-5202	Appshark Software
☒ Edit Del +	Clover Redmond	S 800-637-5029 FREE	Littelfuse
☐ Edit Del +	Cotton, Phyllis		Abbott Insurance
☐ Edit Del +	Crenshaw, Carolyn		Ace Iron and Steel Inc.
☐ Edit Del +	Dadio Jr, Bill		Zenith Industrial Partners
☒ Edit Del +	Danny Whitman	S 206-281-3535	Boston Beer Company
☐ Edit Del +	Eberhard, Sandra		Highland Manufacturing Ltd.
☒ Edit Del +	Fako, Margaret	S (231) 883-1627	Interlochen Center for the Arts
☐ Edit Del +	Feager, Patricia		International Shipping Co.
☐ Edit Del +	Gaddam, Srinivas	S (469) 209-5885	AppShark
☐ Edit Del +	Glimpse, Jeff		Jackson Controls
☐ Edit Del +	James, Tom		Delphi Chemicals
☒ Edit Del +	Katherine Carr	S 888-425-9376 FREE	Winnebago Industries
☐ Edit Del +	Luce, Eugena		Pacific Retail Group

b) After selecting the leads, the user is provided a preview of the selections made. The user can make edits by going back to the selected leads page. The user can type in the message to be sent to the recipients in the message box and then click 'Send'.



The screenshot shows the 'Open SMS' web application interface. The top navigation bar includes a search bar, 'Appshark Appshark' dropdown, 'Setup', 'Help', and an 'Open SMS' button. The main menu includes 'Home', 'SMS Overview', 'SMS Gateways', 'Contacts', 'Cases', 'Leads' (highlighted), 'Reports', 'Dashboards', 'SMS Logs', 'Support', 'Error Codes', 'SMS Template', and 'Account Hierarchy Configuration'.

The 'Bulk SMS' section is active, showing 'Selected Leads'. A 'Back to List Lead Items' link is available. The 'Selected Leads' tab is active, displaying a table of leads.

Lead	Company	Mobile Phone
Appshark - Matt	Appshark	☎ (214) 377-1384
Margaret Fako	Interlochen Center for the Arts	☎ (231) 883-1627
Jessica Besser-Rosenberg	One Million Degrees	☎ (773) 746-4082
CJ Mark	Appshark Software	☎ (903) 884-5202
Danny Whitman	Boston Beer Company	☎ 206-281-3535
Charles Beresford	Manhattan Associates	☎ 800-445-3731 FREE
Clover Redmond	Littelfuse	☎ 800-637-5029 FREE
Katherine Carr	Winnebago Industries	☎ 888-425-9376 FREE

Below the table, there is a 'Message' input field with the text: 'Hi all, Thank you for interest in Open SMS. We are here to help you and provide you all a great experience by using open SMS.' The character count is 126 Characters (Max 160). A 'Send' button is highlighted with a red box.

c) Once you click on 'Send', the user is directed to the delivery status screen which shows the number of messages sent or failed to deliver. In cases where messages could not be delivered, you will see a notification "SMS delivery failed to the following list of leads".

OPEN SMS

Appshark Appshark
Setup
Help
Open SMS

Home
SMS Overview
SMS Gateways
Contacts
Cases
Leads
Reports
Dashboards
SMS Logs
Support
Error Codes
SMS Template
Account Hierarchy Configuration

Bulk SMS
Selected Leads
Help for this Page

« Back to List Lead Items

Selected Leads

Summary Report

Summary Report

➔ Number of Messages sent Successfully 4

➔ Number of Messages failed 4

SMS delivery failed to the following list of Leads.

Lead	Company	Mobile Phone
Danny Whitman	Boston Beer Company	206-281-3535
Charles Beresford	Manhattan Associates	800-445-3731 FREE
Clover Redmond	Littelfuse	800-637-5029 FREE
Katherine Carr	Winnebago Industries	888-425-9376 FREE

d) Once the message is delivered, you can check the history of the delivered message in “Activity History” which shows the content of the message. ‘SMS Logs’ show records of the status of the message delivered and the phone number it was delivered to.

OPEN SMS

Search...

Search

Appshark Appshark Setup Help

Open SMS

[Home](#)
[SMS Overview](#)
[SMS Gateways](#)
[Contacts](#)
[Cases](#)
[Leads](#)
[Reports](#)
[Dashboards](#)
[SMS Logs](#)
[Support](#)
[Error Codes](#)
[SMS Template](#)

Create New...

Recent Items

- CJ Mark
- OST-70
- OST-69
- OST-68
- OST-67
- OST-66
- OST-65
- OST-64
- OST-63

Recycle Bin

CJ Mark

[in](#)
[t](#)
[f](#)
[K](#)
[v](#)

[Show Feed](#)
[Click to add topics](#)

[Back to List: Leads](#)
[Open Activities \[0\]](#)
[Activity History \[1\]](#)
[SMS Logs \[1\]](#)
[Campaign History \[0\]](#)
[HTML Email Status \[0\]](#)

Lead Detail

[Edit](#)
[Delete](#)
[Convert](#)
[Clone](#)
[Find Duplicates](#)
[SMS Chat](#)

Lead Owner	Appshark Appshark [Change]	SMS Opt Out	☐
Name	CJ Mark	Phone	
Company	Appshark Software	Mobile	(903) 884-5202
Title		Fax	
Lead Source		Email	
Industry		Website	
Annual Revenue		Lead Status	Open - Not Contacted
		Rating	
		No. of Employees	
Address			
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	Appshark Appshark, 2/5/2015 4:50 AM	Last Modified By	Appshark Appshark, 2/13/2015 2:14 AM
Description			

[Edit](#)
[Delete](#)
[Convert](#)
[Clone](#)
[Find Duplicates](#)
[SMS Chat](#)

Open Activities

[New Task](#)
[New Event](#)
[New Meeting Request](#)
[Send SMS](#)

Open Activities Help

No records to display

Activity History

[Log a Call](#)
[Mail Merge](#)
[Send an Email](#)
[View All](#)

Activity History Help

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Hi all, Thank you for interest in Open SMS. We are here to help you and provide you all a great experience by using open SMS.	✓		Appshark Appshark	2/13/2015 2:38 AM

SMS Logs

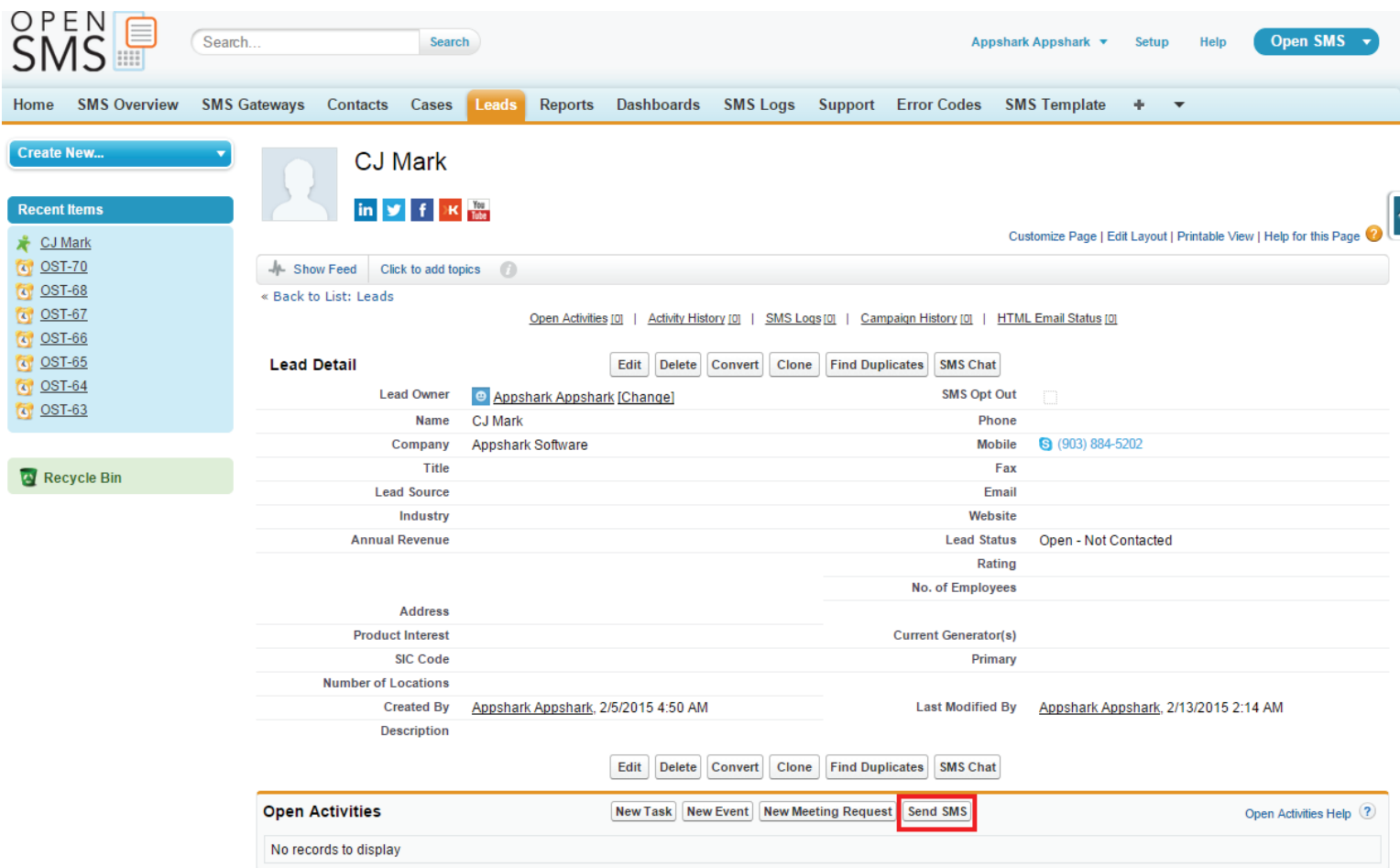
New SMS Log

Chat

Action	SMS Track#	Contact	SMS Sent To	Status
Edit Del	OST-69		(903) 884-5202	Success

How to use TwoWay SMS on Leads

- a) Click 'Leads' on the Open SMS application, select the lead to whom the message is to be sent and click on the 'Send SMS' button.



The screenshot shows the 'Open SMS' application interface. The top navigation bar includes 'Home', 'SMS Overview', 'SMS Gateways', 'Contacts', 'Cases', 'Leads' (highlighted), 'Reports', 'Dashboards', 'SMS Logs', 'Support', 'Error Codes', 'SMS Template', and a '+'. The 'Leads' section is active, displaying a lead profile for 'CJ Mark'. The profile includes a 'Show Feed' button and a 'Click to add topics' link. Below the profile, there are tabs for 'Open Activities', 'Activity History', 'SMS Logs', 'Campaign History', and 'HTML Email Status'. The 'Lead Detail' section shows various fields for the lead, including 'Lead Owner', 'Name', 'Company', 'Title', 'Lead Source', 'Industry', 'Annual Revenue', 'Address', 'Product Interest', 'SIC Code', 'Number of Locations', 'Created By', and 'Description'. The 'Send SMS' button is highlighted in the 'Open Activities' section.

Open SMS

Search... Search

Appshark Appshark Setup Help Open SMS

Home SMS Overview SMS Gateways Contacts Cases **Leads** Reports Dashboards SMS Logs Support Error Codes SMS Template +

Create New...

Recent Items

- CJ Mark
- OST-70
- OST-68
- OST-67
- OST-66
- OST-65
- OST-64
- OST-63

Recycle Bin

CJ Mark

in Twitter Facebook YouTube

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

Back to List: Leads

Open Activities | Activity History | SMS Logs | Campaign History | HTML Email Status

Lead Detail

Edit Delete Convert Clone Find Duplicates SMS Chat

Lead Owner Appshark Appshark [Change]

Name CJ Mark

Company Appshark Software

Title

Lead Source

Industry

Annual Revenue

Address

Product Interest

SIC Code

Number of Locations

Created By Appshark Appshark 2/5/2015 4:50 AM

Description

SMS Opt Out

Phone

Mobile (903) 884-5202

Fax

Email

Website

Lead Status Open - Not Contacted

Rating

No. of Employees

Current Generator(s)

Primary

Last Modified By Appshark Appshark 2/13/2015 2:14 AM

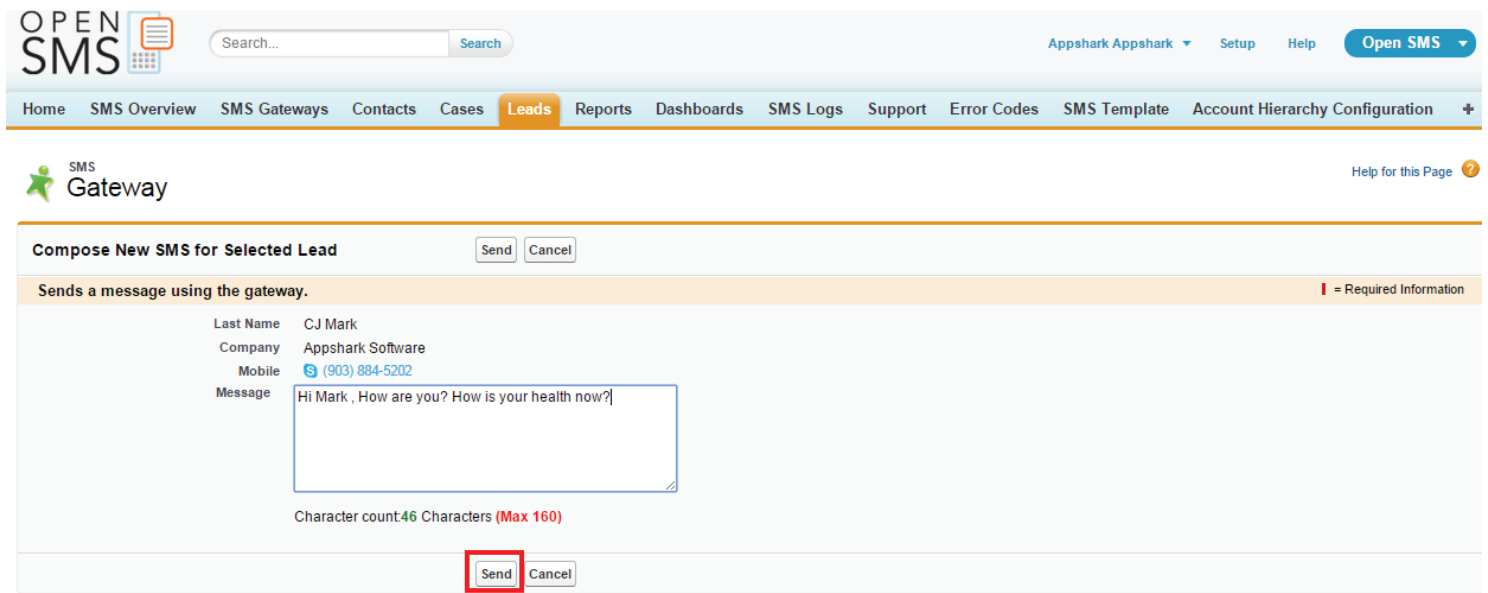
Edit Delete Convert Clone Find Duplicates SMS Chat

Open Activities

New Task New Event New Meeting Request **Send SMS** Open Activities Help

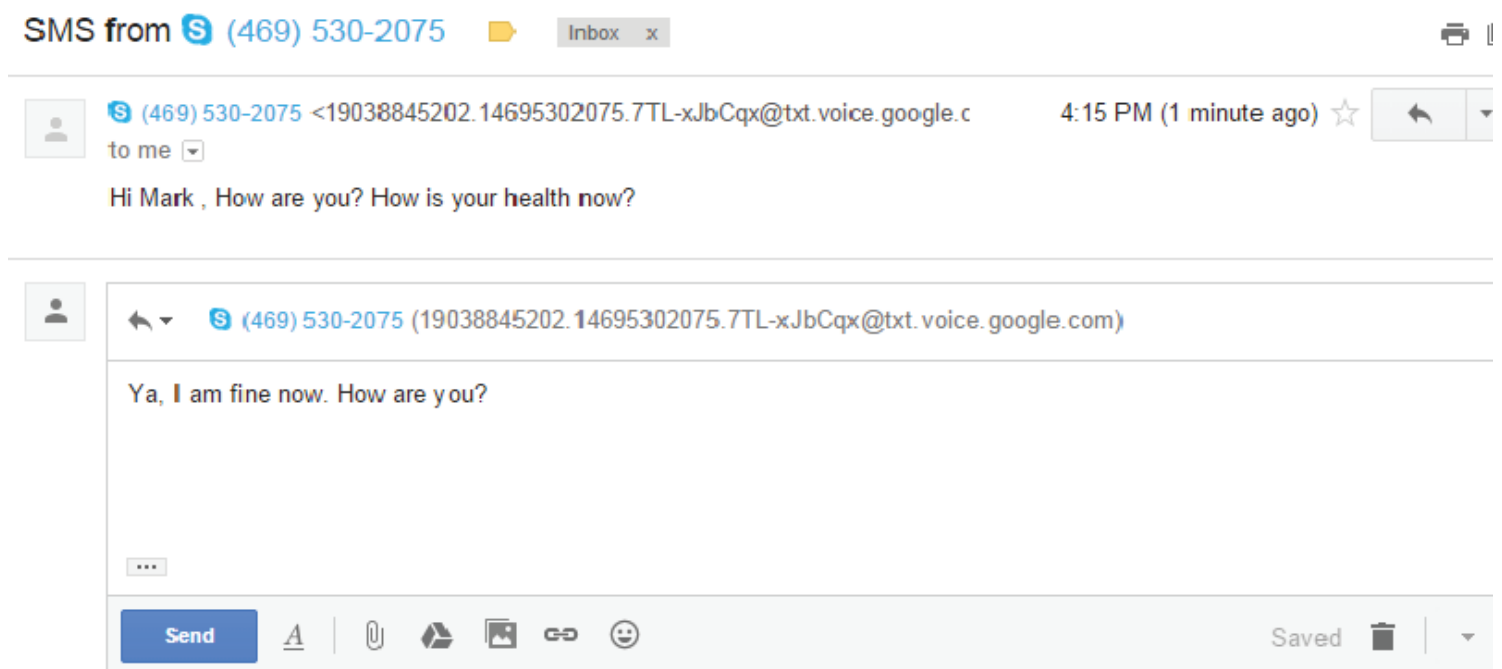
No records to display

b) When you click on 'Send SMS', you are directed to a page where you can type the message in the box as shown below. Please note that the message should be limited to a maximum of 160 characters.



The screenshot shows the 'Compose New SMS for Selected Lead' interface. At the top, there's a navigation bar with 'OPEN SMS' and a search bar. Below it, a menu bar includes 'Home', 'SMS Overview', 'SMS Gateways', 'Contacts', 'Cases', 'Leads' (highlighted), 'Reports', 'Dashboards', 'SMS Logs', 'Support', 'Error Codes', 'SMS Template', and 'Account Hierarchy Configuration'. The main content area is titled 'SMS Gateway' and contains a form for composing a new SMS. The form includes fields for 'Last Name' (CJ Mark), 'Company' (Appshark Software), and 'Mobile' ((903) 884-5202). A text area for the message contains 'Hi Mark , How are you? How is your health now?'. A character count at the bottom indicates '46 Characters (Max 160)'. There are 'Send' and 'Cancel' buttons at the top and bottom of the form. A red box highlights the 'Send' button at the bottom.

c) Here is a screen shot of how the two way sms interaction takes place:



The screenshot shows a two-way SMS interaction in a messaging app. The top part shows an incoming message from '(469) 530-2075' with the text 'Hi Mark , How are you? How is your health now?'. The bottom part shows an outgoing message to '(469) 530-2075' with the text 'Ya, I am fine now. How are you?'. The interface includes a header with the contact name and phone number, a status bar with 'Inbox x', and a bottom bar with a 'Send' button and various icons for text, attachments, and emojis.

d) Once you receive an incoming message, it is stored in the “Open Activities” along with the original message. Check ‘SMS Logs’ to know the delivery status of the message.

OPEN SMS

Search...

Search

Appshark Appshark Setup Help Open SMS

[Home](#)
[SMS Overview](#)
[SMS Gateways](#)
[Contacts](#)
[Cases](#)
[Leads](#)
[Reports](#)
[Dashboards](#)
[SMS Logs](#)
[Support](#)
[Error Codes](#)
[SMS Template](#)

Create New...

Recent Items

- CJ Mark
- OST-71
- OST-70
- OST-68
- OST-67
- OST-66
- OST-65
- OST-64

Recycle Bin

CJ Mark

[in](#)
[t](#)
[f](#)
[K](#)
[v](#)

[Customize Page](#)
[Edit Layout](#)
[Printable View](#)
[Help for this Page](#)

Show Feed Click to add topics

« Back to List: Leads

[Open Activities \[0\]](#)
[Activity History \[1\]](#)
[SMS Logs \[1\]](#)
[Campaign History \[0\]](#)
[HTML Email Status \[0\]](#)

Lead Detail

[Edit](#)
[Delete](#)
[Convert](#)
[Clone](#)
[Find Duplicates](#)
[SMS Chat](#)

Lead Owner	Appshark Appshark [Change]	SMS Opt Out	☐
Name	CJ Mark	Phone	
Company	Appshark Software	Mobile	(903) 884-5202
Title		Fax	
Lead Source		Email	
Industry		Website	
Annual Revenue		Lead Status	Open - Not Contacted
		Rating	
		No. of Employees	
Address			
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	Appshark Appshark, 2/5/2015 4:50 AM	Last Modified By	Appshark Appshark, 2/13/2015 2:14 AM
Description			

[Edit](#)
[Delete](#)
[Convert](#)
[Clone](#)
[Find Duplicates](#)
[SMS Chat](#)

Open Activities

[New Task](#)
[New Event](#)
[New Meeting Request](#)
[Send SMS](#)

Open Activities Help

No records to display

Activity History

[Log a Call](#)
[Mail Merge](#)
[Send an Email](#)
[View All](#)

Activity History Help

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Hi Mark , How are you? How is your health now?	✓		Appshark Appshark	2/13/2015 2:45 AM

SMS Logs

[New SMS Log](#)

SMS Chat

Action	SMS Track#	Contact	SMS Sent To	Status
Edit Del	OST-71		(903) 884-5202	Success

d) Once you receive an incoming message, it is stored in the “Open Activities” along with the original message. Check ‘SMS Logs’ to know the delivery status of the message.

OPEN SMS

Search...

Search

Appshark Appshark Setup Help Open SMS

[Home](#)
[SMS Overview](#)
[SMS Gateways](#)
[Contacts](#)
[Cases](#)
[Leads](#)
[Reports](#)
[Dashboards](#)
[SMS Logs](#)
[Support](#)
[Error Codes](#)
[SMS Template](#)

Create New...

Recent Items

- CJ Mark
- OST-71
- OST-70
- OST-68
- OST-67
- OST-66
- OST-65
- OST-64

Recycle Bin

CJ Mark

[in](#)
[t](#)
[f](#)
[K](#)
[v](#)

[Customize Page](#)
[Edit Layout](#)
[Printable View](#)
[Help for this Page](#)

Show Feed Click to add topics

« Back to List: Leads

[Open Activities \[0\]](#)
[Activity History \[1\]](#)
[SMS Logs \[1\]](#)
[Campaign History \[0\]](#)
[HTML Email Status \[0\]](#)

Lead Detail

[Edit](#)
[Delete](#)
[Convert](#)
[Clone](#)
[Find Duplicates](#)
[SMS Chat](#)

Lead Owner	Appshark Appshark [Change]	SMS Opt Out	☐
Name	CJ Mark	Phone	
Company	Appshark Software	Mobile	(903) 884-5202
Title		Fax	
Lead Source		Email	
Industry		Website	
Annual Revenue		Lead Status	Open - Not Contacted
		Rating	
		No. of Employees	
Address			
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	Appshark Appshark, 2/5/2015 4:50 AM	Last Modified By	Appshark Appshark, 2/13/2015 2:14 AM
Description			

[Edit](#)
[Delete](#)
[Convert](#)
[Clone](#)
[Find Duplicates](#)
[SMS Chat](#)

Open Activities

[New Task](#)
[New Event](#)
[New Meeting Request](#)
[Send SMS](#)

Open Activities Help

No records to display

Activity History

[Log a Call](#)
[Mail Merge](#)
[Send an Email](#)
[View All](#)

Activity History Help

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Hi Mark , How are you? How is your health now?	✓		Appshark Appshark	2/13/2015 2:45 AM

SMS Logs

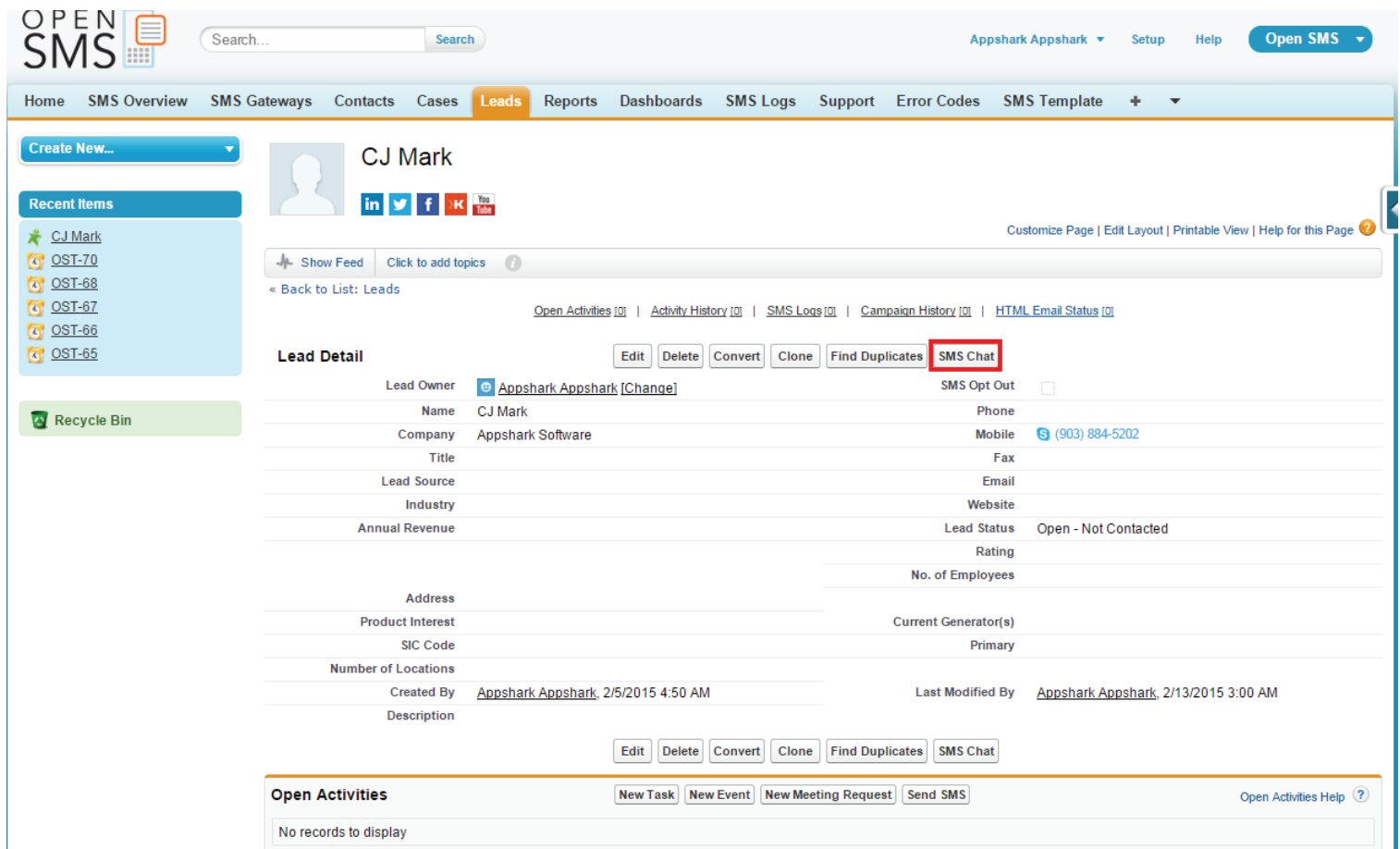
[New SMS Log](#)

SMS Chat

Action	SMS Track#	Contact	SMS Sent To	Status
Edit Del	OST-71		(903) 884-5202	Success

How to connect with leads using the SMS Chat feature

a) Click on the 'Leads' tab in Salesforce and choose any 'Lead' to view their details page. Press on the 'SMS Chat' button to initiate a conversation with the lead.



The screenshot shows the 'OPEN SMS' interface with the 'Leads' tab selected. The 'Lead Detail' page for 'CJ Mark' is displayed, showing various fields and a list of 'Open Activities'.

Lead Detail

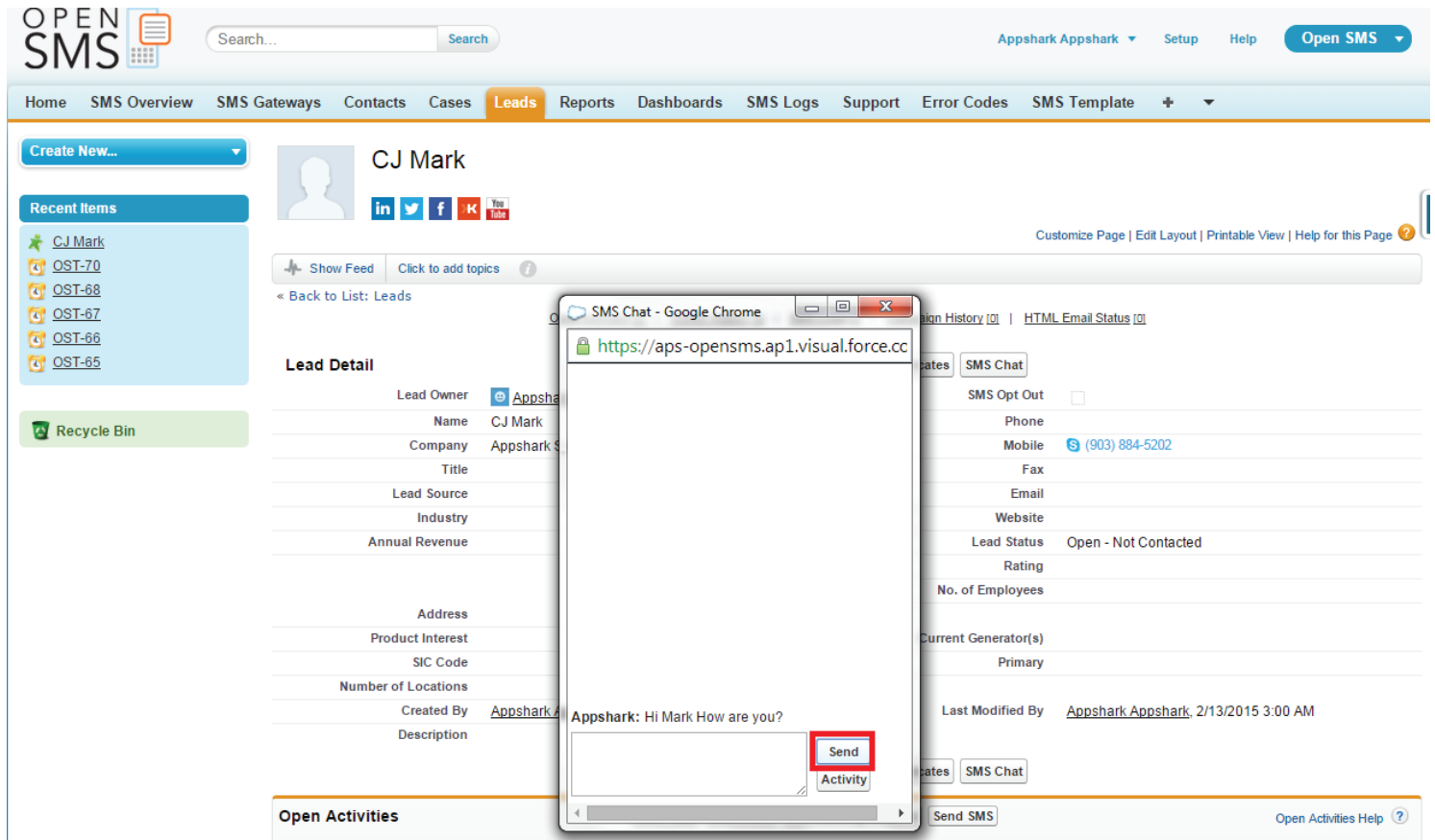
Lead Owner	Appshark Appshark [Change]	SMS Opt Out	☐
Name	CJ Mark	Phone	
Company	Appshark Software	Mobile	(903) 884-5202
Title		Fax	
Lead Source		Email	
Industry		Website	
Annual Revenue		Lead Status	Open - Not Contacted
		Rating	
		No. of Employees	
Address		Current Generator(s)	
Product Interest		Primary	
SIC Code			
Number of Locations			
Created By	Appshark Appshark, 2/5/2015 4:50 AM	Last Modified By	Appshark Appshark, 2/13/2015 3:00 AM
Description			

Open Activities

New Task	New Event	New Meeting Request	Send SMS
----------	-----------	---------------------	----------

No records to display

b) Once you click on 'SMS Chat', a pop up window opens up where you can begin typing.



The screenshot displays the AppShark Open SMS web application. The top navigation bar includes links for Home, SMS Overview, SMS Gateways, Contacts, Cases, Leads (highlighted), Reports, Dashboards, SMS Logs, Support, Error Codes, SMS Template, and an Open SMS button. The left sidebar shows a 'Create New...' dropdown and a 'Recent Items' list with entries like 'CJ Mark', 'OST-70', 'OST-68', 'OST-67', 'OST-66', and 'OST-65'. The main content area shows the lead detail for 'CJ Mark', including fields for Name, Company, Title, Lead Source, Industry, Annual Revenue, Address, Product Interest, SIC Code, Number of Locations, Created By, and Description. A 'Recycle Bin' button is also visible. Overlaid on the lead detail is an 'SMS Chat - Google Chrome' window. The chat window shows a message from 'Appshark: Hi Mark How are you?' and a 'Send' button highlighted with a red box. The background of the chat window is a URL: 'https://aps-opensms.ap1.visual.force.cc'. The bottom of the page shows an 'Open Activities' section with a 'Send SMS' button and an 'Open Activities Help' link.

c) The initiated chat message sent by the user and the reply received is shown below:

SMS from **S (469) 530-2075**  Inbox x  


S (469) 530-2075 <19038845202.14695302075.7TL-xJbCqx@txt.voice.google.c
 to me 
4:35 PM (1 minute ago)   

Appshark@Appshark:Hi Mark How are you?


 **S (469) 530-2075** (19038845202.14695302075.7TL-xJbCqx@txt.voice.google.com)

Ya I am fine. Hpw are you?

...

Send

Send (Ctrl-Enter)

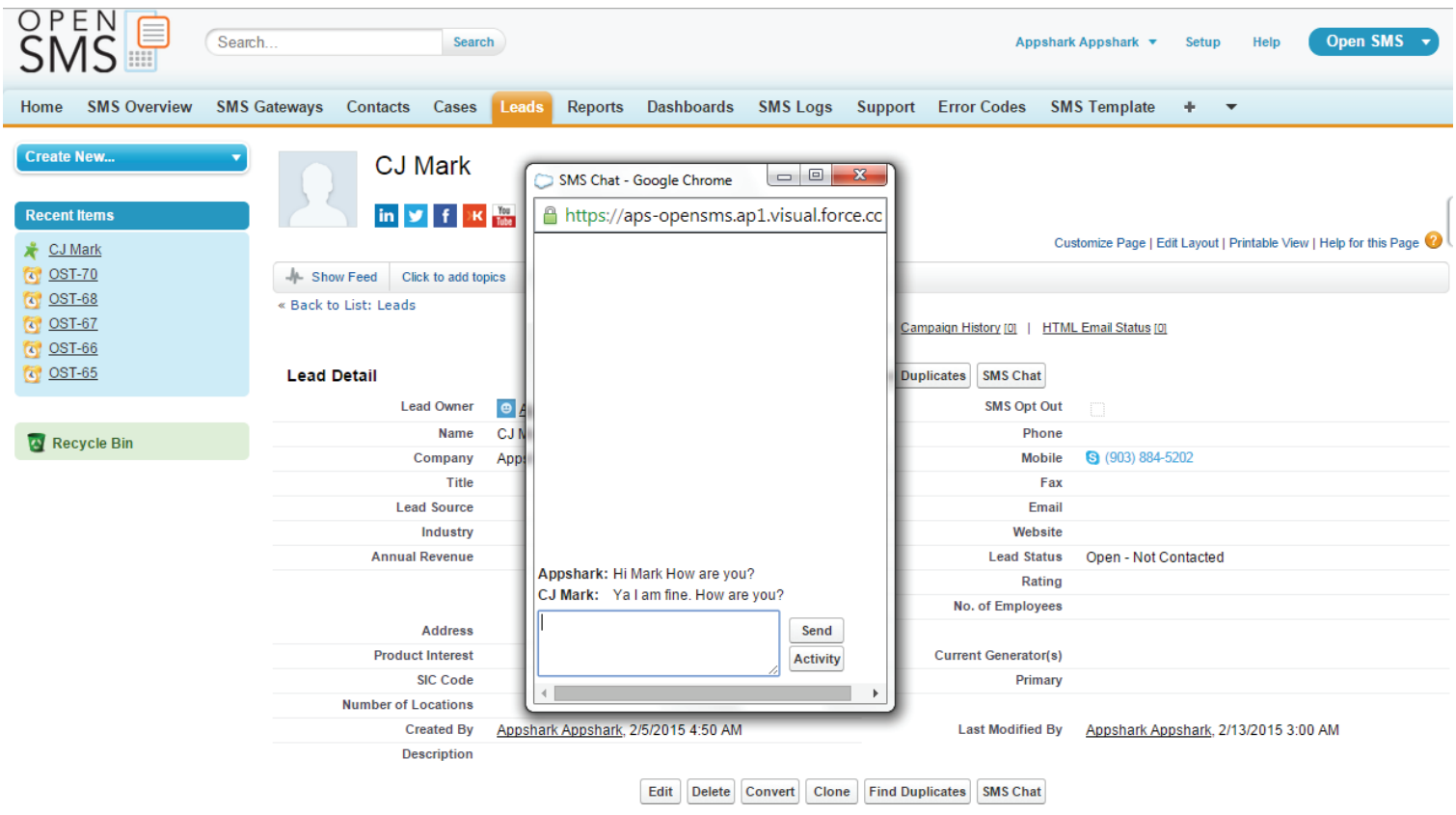







Saved  

d) Using the open chat window, the user can continue the conversation as show below:

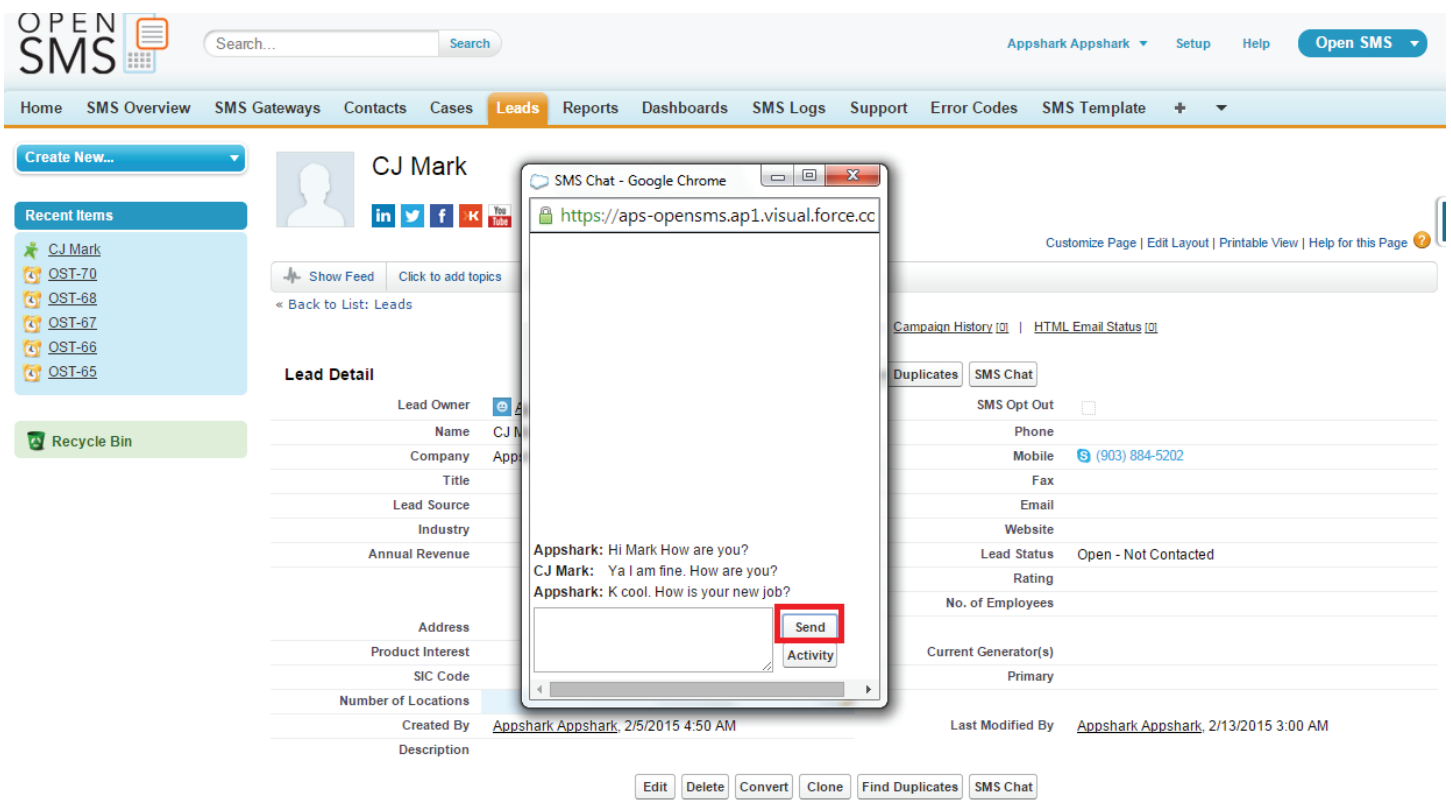


The screenshot displays the AppShark Open SMS web application. The top navigation bar includes links for Home, SMS Overview, SMS Gateways, Contacts, Cases, Leads (highlighted), Reports, Dashboards, SMS Logs, Support, Error Codes, SMS Template, and an Open SMS button. The left sidebar shows a 'Create New...' dropdown, 'Recent Items' (CJ Mark, OST-70, OST-68, OST-67, OST-66, OST-65), and a 'Recycle Bin'.

The main content area shows the 'Lead Detail' for 'CJ Mark'. The lead's information includes Name, Company, Title, Lead Source, Industry, Annual Revenue, Address, Product Interest, SIC Code, Number of Locations, Created By (Appshark Appshark, 2/5/2015 4:50 AM), and Description. The 'SMS Chat' window is open, showing a conversation with Appshark. The chat messages are:

- Appshark: Hi Mark How are you?
- CJ Mark: Ya I am fine. How are you?

The chat window has a 'Send' button and an 'Activity' button. The background shows the 'Lead Detail' form with fields for Name, Company, Title, Lead Source, Industry, Annual Revenue, Address, Product Interest, SIC Code, Number of Locations, Created By, and Description. The 'SMS Chat' window is overlaid on the 'Lead Detail' form.



This screenshot is identical to the one above, showing the AppShark Open SMS interface with the 'Lead Detail' for 'CJ Mark' and the 'SMS Chat' window. The 'Send' button in the chat window is highlighted with a red box, indicating the next step in the conversation.

e) The user can check the recorded chat conversation in 'Activity History' which is stored on the lead details page.



Appshark Appshark ▾
Setup
Help
 ▾

Home
SMS Overview
SMS Gateways
Contacts
Cases
Leads
Reports
Dashboards
SMS Logs
Support
Error Codes
SMS Template
+ ▾

Create New... ▾

Recent Items

- CJ Mark
- OST-70
- OST-68
- OST-67
- OST-66
- OST-65

 Recycle Bin



CJ Mark

in
twitter
f
K
YouTube

Customize Page | Edit Layout | Printable View | Help for this Page ?

Show Feed
Click to add topics ?

Back to List: Leads

[Open Activities \[1\]](#) | [Activity History \[1\]](#) | [SMS Logs \[0\]](#) | [Campaign History \[0\]](#) | [HTML Email Status \[0\]](#)

Lead Detail

Edit
Delete
Convert
Clone
Find Duplicates
SMS Chat

Lead Owner
Appshark Appshark [\[Change\]](#)

Name
CJ Mark

Company
Appshark Software

Title

Lead Source

Industry

Annual Revenue

Address

Product Interest

SIC Code

Number of Locations

Created By
Appshark Appshark, 2/5/2015 4:50 AM

Description

SMS Opt Out

Phone

Mobile
(903) 884-5202

Fax

Email

Website

Lead Status
Open - Not Contacted

Rating

No. of Employees

Current Generator(s)

Primary

Last Modified By
Appshark Appshark, 2/13/2015 3:00 AM

Edit
Delete
Convert
Clone
Find Duplicates
SMS Chat

Open Activities

New Task
New Event
New Meeting Request
Send SMS

Open Activities Help ?

Action	Subject	Task	Due Date	Status	Priority	Assigned To
☐ Edit Cls	New incoming SMS Alert from CJ Mark-(903) 884-5202	✓		In Progress	Normal	Appshark Appshark

Activity History

Log a Call
Mail Merge
Send an Email
View All

Activity History Help ?

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
☐ Edit Del	Chat Conversation with CJ Mark	✓		Appshark Appshark	2/13/2015 3:13 AM

f) Here’s how the chat conversation is stored in “Activity History” with other details:

OPEN SMS

Search... Search

Appshark Appshark Setup Help Open SMS

Home SMS Overview SMS Gateways Contacts Cases Leads Reports Dashboards SMS Logs Support Error Codes SMS Template Account Hierarchy Configuration

Create New...

Recent Items

- CJ Mark
- OST-70
- OST-68
- OST-67
- OST-66
- OST-65

Recycle Bin

Task Chat Conversation with CJ Mark

Click to add topics

1 7 31

Back to List: Leads

Attachments

Task Detail

Assigned To Appshark Appshark

Subject Chat Conversation with CJ Mark

Due Date

Phone

Priority Normal

IsSMSSent

Created By Appshark Appshark, 2/13/2015 3:13 AM

Comments

Replied

Status Completed

Name CJ Mark, Appshark Software

Related To

Email

Last Modified By Appshark Appshark, 2/13/2015 3:13 AM

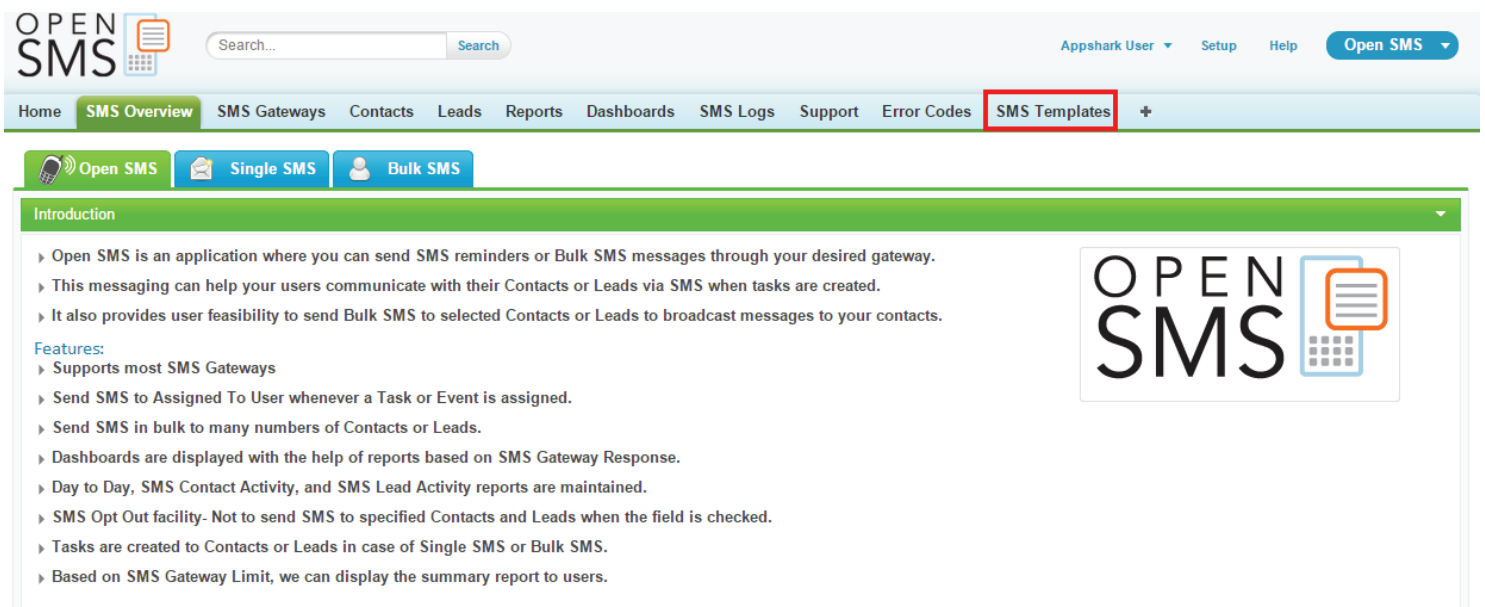
Reminder

Reminder

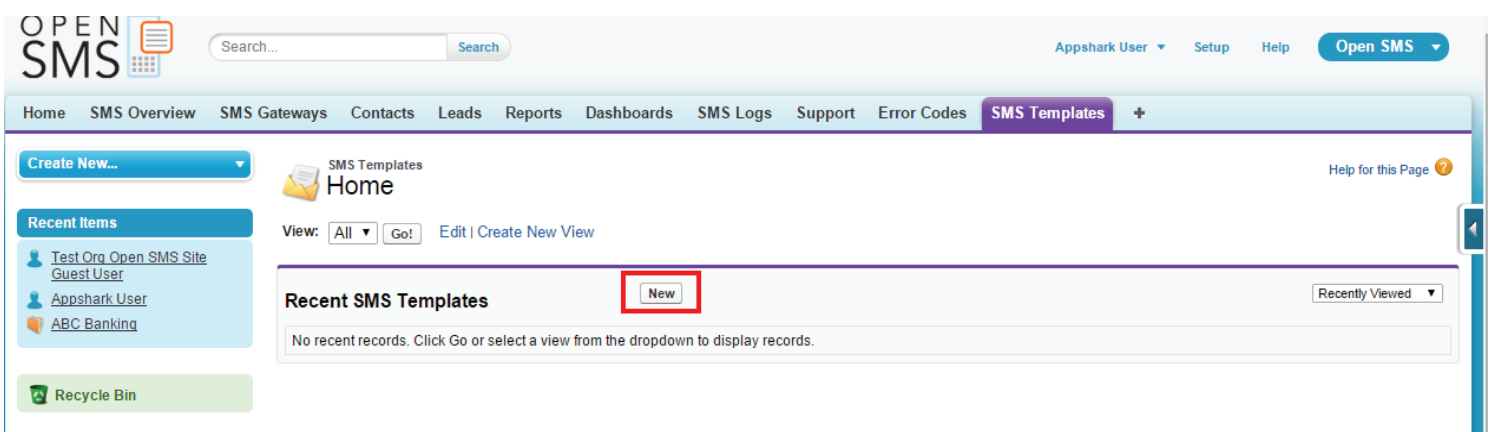
Edit Delete Create Follow-Up Task Create Follow-Up Event

SMS Template

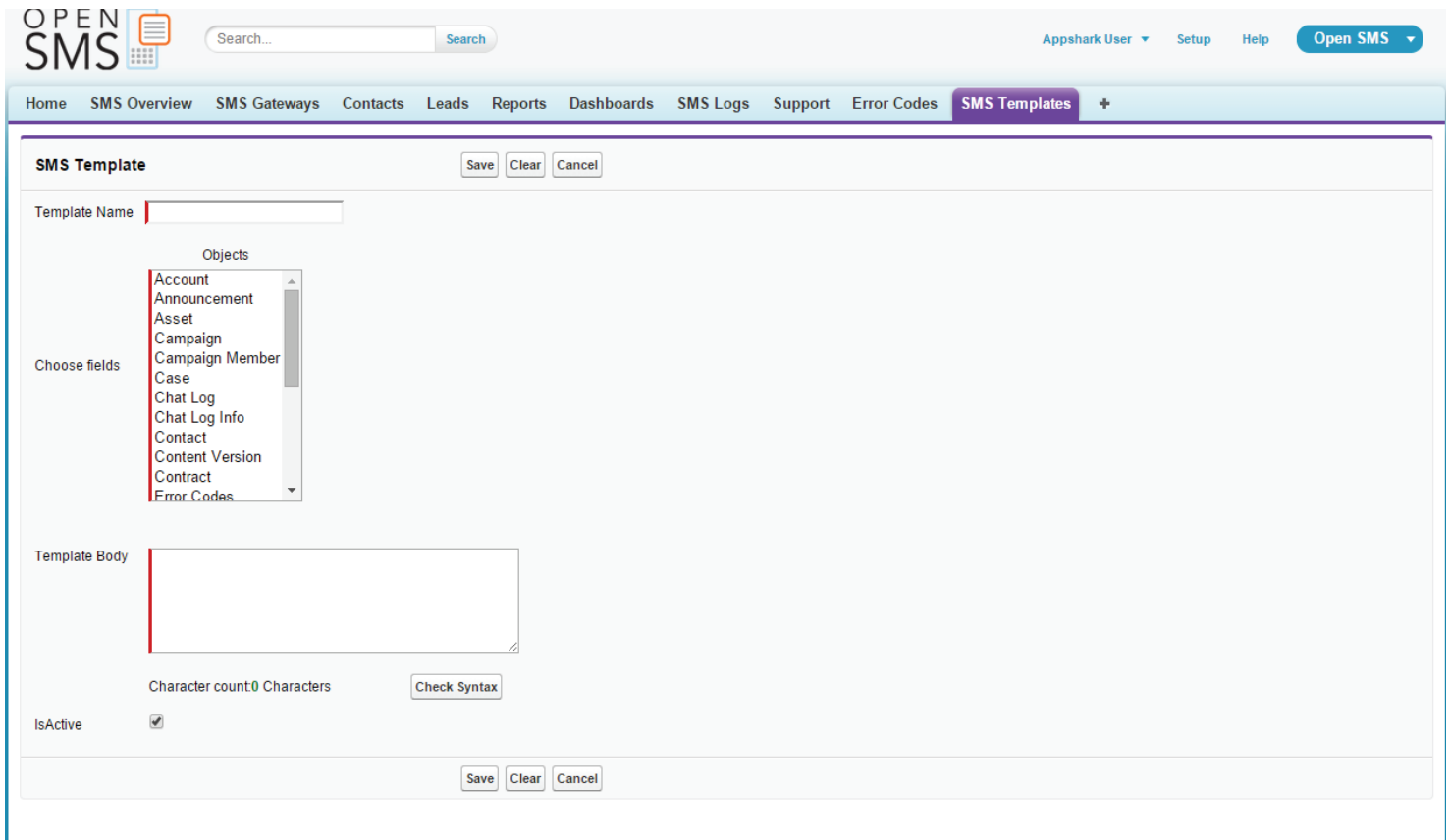
STEP 1: After installing Open SMS, you will notice that the SMS template tab is added as well. Click on the tab to create a new message template.



STEP 2: After clicking on the SMS template tab, the user is directed to a new page. On this page click on the “New” button to create SMS Templates.

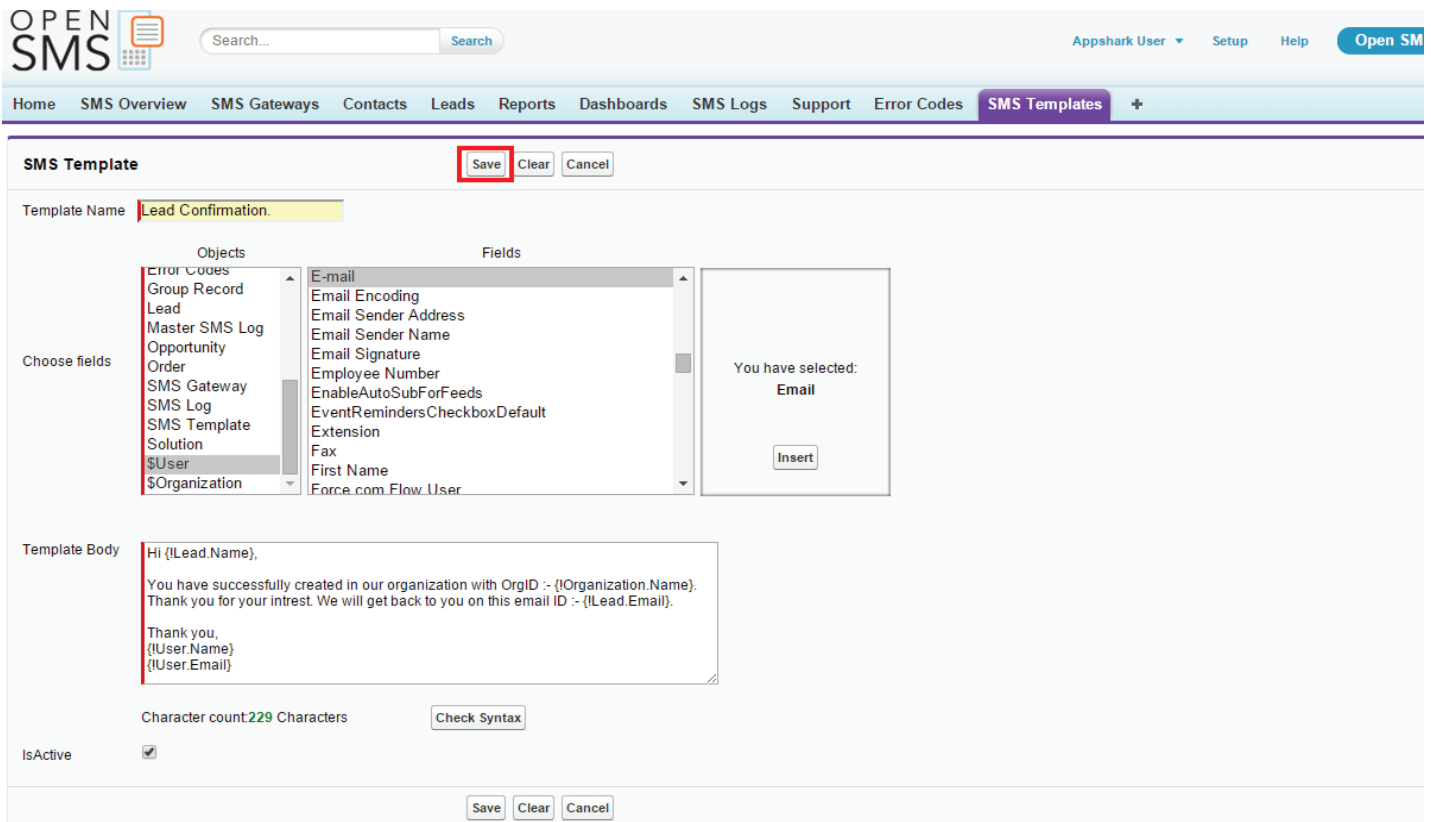


STEP 3: After clicking on the “New” button, the user is directed to the page to begin creating the message template. On this page, the user can select any one object at a time including Organization and User in the same template. Multiple objects cannot be added to the Template body.



The screenshot shows the 'Open SMS' web application interface. The top navigation bar includes a search bar, user profile ('Appshark User'), and links for 'Setup' and 'Help'. A secondary navigation bar contains various menu items: 'Home', 'SMS Overview', 'SMS Gateways', 'Contacts', 'Leads', 'Reports', 'Dashboards', 'SMS Logs', 'Support', 'Error Codes', and 'SMS Templates' (which is highlighted). Below this, the 'SMS Template' form is displayed. It features a 'Template Name' input field, a 'Choose fields' section with a dropdown menu listing objects like 'Account', 'Announcement', 'Asset', 'Campaign', 'Campaign Member', 'Case', 'Chat Log', 'Chat Log Info', 'Contact', 'Content Version', 'Contract', and 'Error Codes', a 'Template Body' text area, a 'Character count' display, a 'Check Syntax' button, and an 'IsActive' checkbox. The form is framed by 'Save', 'Clear', and 'Cancel' buttons at the top and bottom.

STEP 4: As shown in the screen shot below, The user has to enter all the required fields and click on the “Save” button to create a message template.



OPEN SMS Search... Search Appshark User Setup Help Open SMS

Home SMS Overview SMS Gateways Contacts Leads Reports Dashboards SMS Logs Support Error Codes **SMS Templates** +

SMS Template Save Clear Cancel

Template Name **Lead Confirmation.**

Choose fields

Objects	Fields
Error Codes	E-mail
Group Record	Email Encoding
Lead	Email Sender Address
Master SMS Log	Email Sender Name
Opportunity	Email Signature
Order	Employee Number
SMS Gateway	EnableAutoSubForFeeds
SMS Log	EventRemindersCheckboxDefault
SMS Template	Extension
Solution	Fax
\$User	First Name
\$Organization	Force.com.Flow.User

You have selected:
Email
Insert

Template Body

Hi {Lead.Name},
You have successfully created in our organization with OrgID :- {Organization.Name}.
Thank you for your interest. We will get back to you on this email ID :- {Lead.Email}.

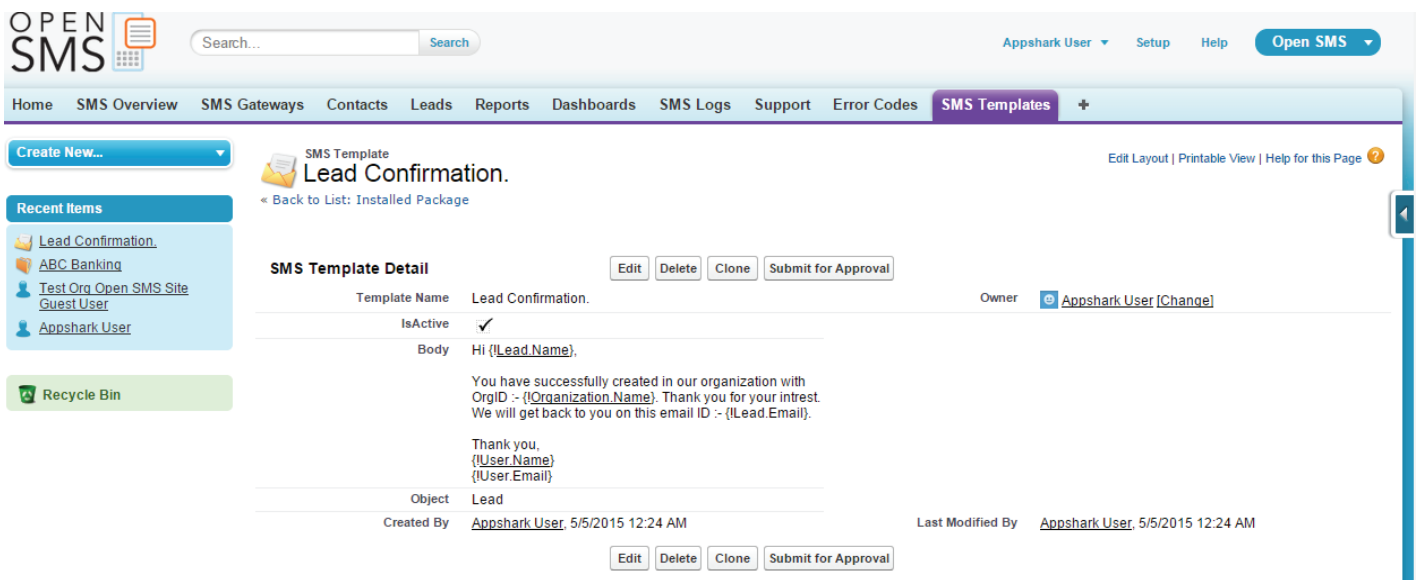
Thank you,
{User.Name}
{User.Email}

Character count: 229 Characters Check Syntax

IsActive ☒

Save Clear Cancel

STEP 5: After clicking on the “Save” button on the detail page of this message template, we find the Object Type here. Based on the object Type field value, the template appears for the specific object. As shown in the screen shot below.



OPEN SMS Search... Search Appshark User Setup Help Open SMS

Home SMS Overview SMS Gateways Contacts Leads Reports Dashboards SMS Logs Support Error Codes **SMS Templates** +

Create New...

Recent Items

- Lead Confirmation.
- ABC Banking
- Test Org Open SMS Site Guest User
- Appshark User

Recycle Bin

SMS Template Lead Confirmation. Edit Layout | Printable View | Help for this Page ?

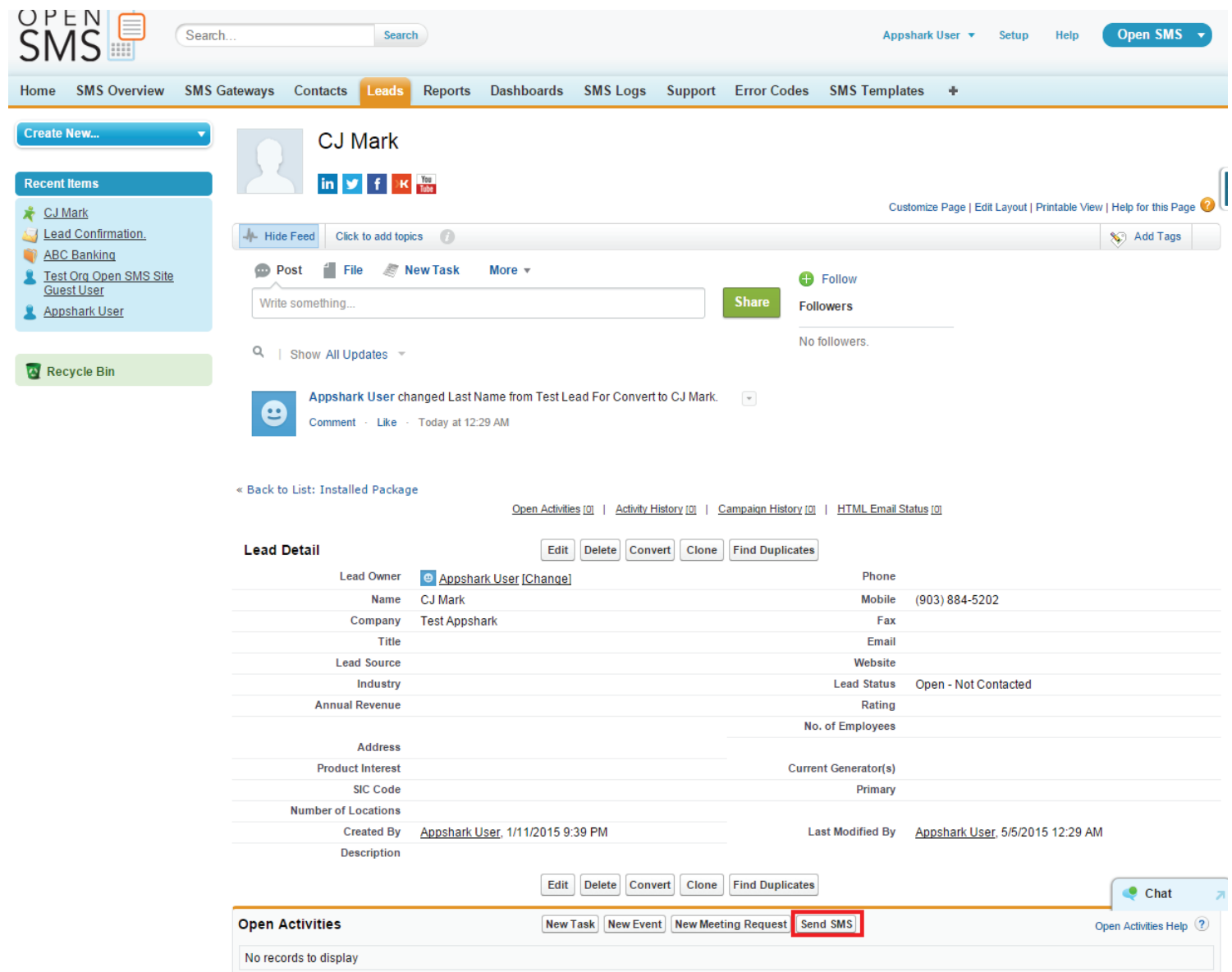
Back to List: Installed Package

SMS Template Detail Edit Delete Clone Submit for Approval

Template Name	Lead Confirmation.	Owner	Appshark User [Change]
IsActive	✓		
Body	Hi {Lead.Name}, You have successfully created in our organization with OrgID :- {Organization.Name}. Thank you for your interest. We will get back to you on this email ID :- {Lead.Email}. Thank you, {User.Name} {User.Email}		
Object	Lead		
Created By	Appshark User, 5/5/2015 12:24 AM	Last Modified By	Appshark User, 5/5/2015 12:24 AM

Edit Delete Clone Submit for Approval

STEP 6: After creating the message template, Go to Lead/Contact and click on the “Send SMS” button as shown in the screen shot below.



The screenshot displays the AppShark OPEN SMS web application interface. At the top, there is a navigation bar with a search bar and links for Appshark User, Setup, Help, and Open SMS. Below this is a main menu with options like Home, SMS Overview, SMS Gateways, Contacts, Leads (selected), Reports, Dashboards, SMS Logs, Support, Error Codes, and SMS Templates.

The central part of the interface shows the profile for 'CJ Mark', including social media links and a feed. A recent activity post from 'Appshark User' is visible, stating: 'Appshark User changed Last Name from Test Lead For Convert to CJ Mark.' Below the feed, there are links to 'Back to List: Installed Package' and various history tabs.

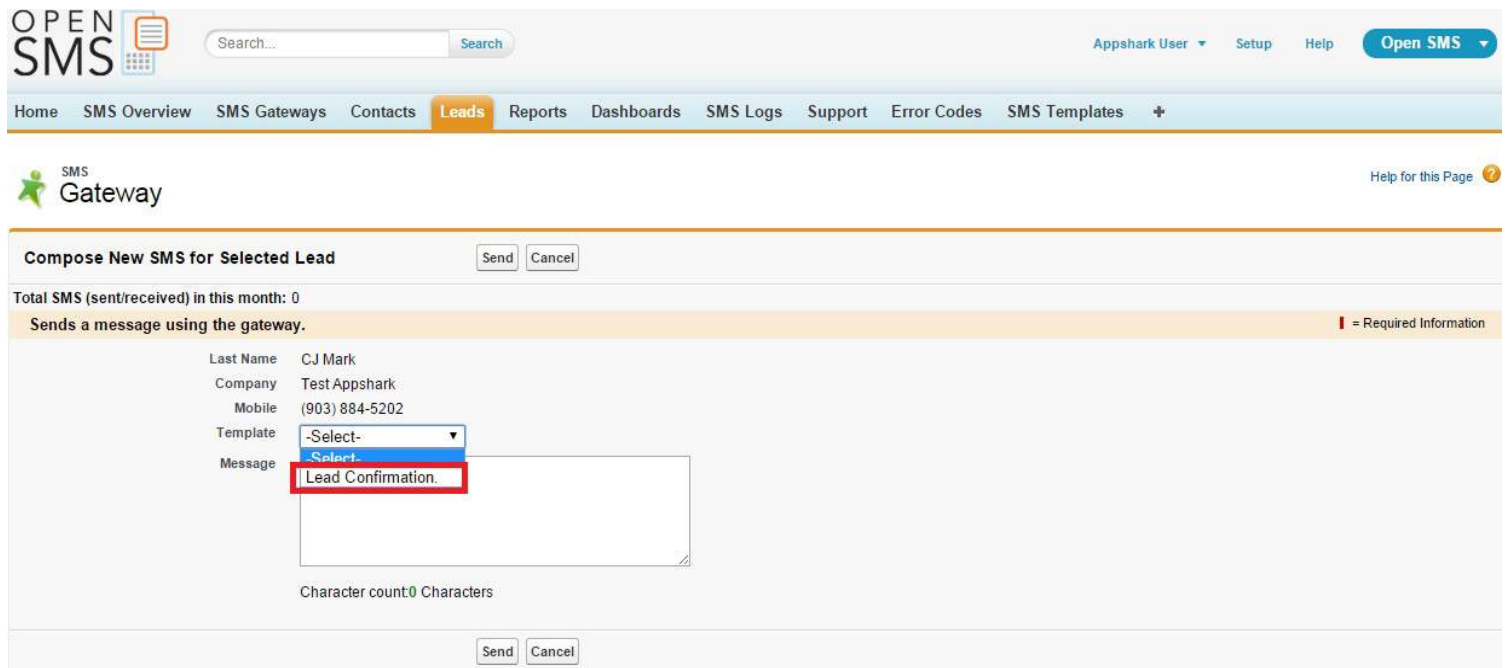
The 'Lead Detail' section for 'CJ Mark' is shown, with fields for Name, Company, Title, Lead Source, Industry, Annual Revenue, Address, Product Interest, SIC Code, Number of Locations, Phone, Mobile, Fax, Email, Website, Lead Status, Rating, No. of Employees, Current Generator(s), and Primary. The 'Send SMS' button in the 'Open Activities' section is highlighted with a red box.

Lead Detail	
Lead Owner	Appshark User [Change]
Name	CJ Mark
Company	Test Appshark
Title	
Lead Source	
Industry	
Annual Revenue	
Address	
Product Interest	
SIC Code	
Number of Locations	
Created By	Appshark User, 1/11/2015 9:39 PM
Description	
Phone	
Mobile	(903) 884-5202
Fax	
Email	
Website	
Lead Status	Open - Not Contacted
Rating	
No. of Employees	
Current Generator(s)	
Primary	
Last Modified By	Appshark User, 5/5/2015 12:29 AM

Open Activities

No records to display

STEP 7: As shown in the screen shot below, the message template is displayed on the message sending page. By selecting the message template we can send the message by clicking on the “Send” button.



OPEN SMS

Search... Search

Appshark User Setup Help Open SMS

Home SMS Overview SMS Gateways Contacts **Leads** Reports Dashboards SMS Logs Support Error Codes SMS Templates +

SMS Gateway Help for this Page

Compose New SMS for Selected Lead Send Cancel

Total SMS (sent/received) in this month: 0

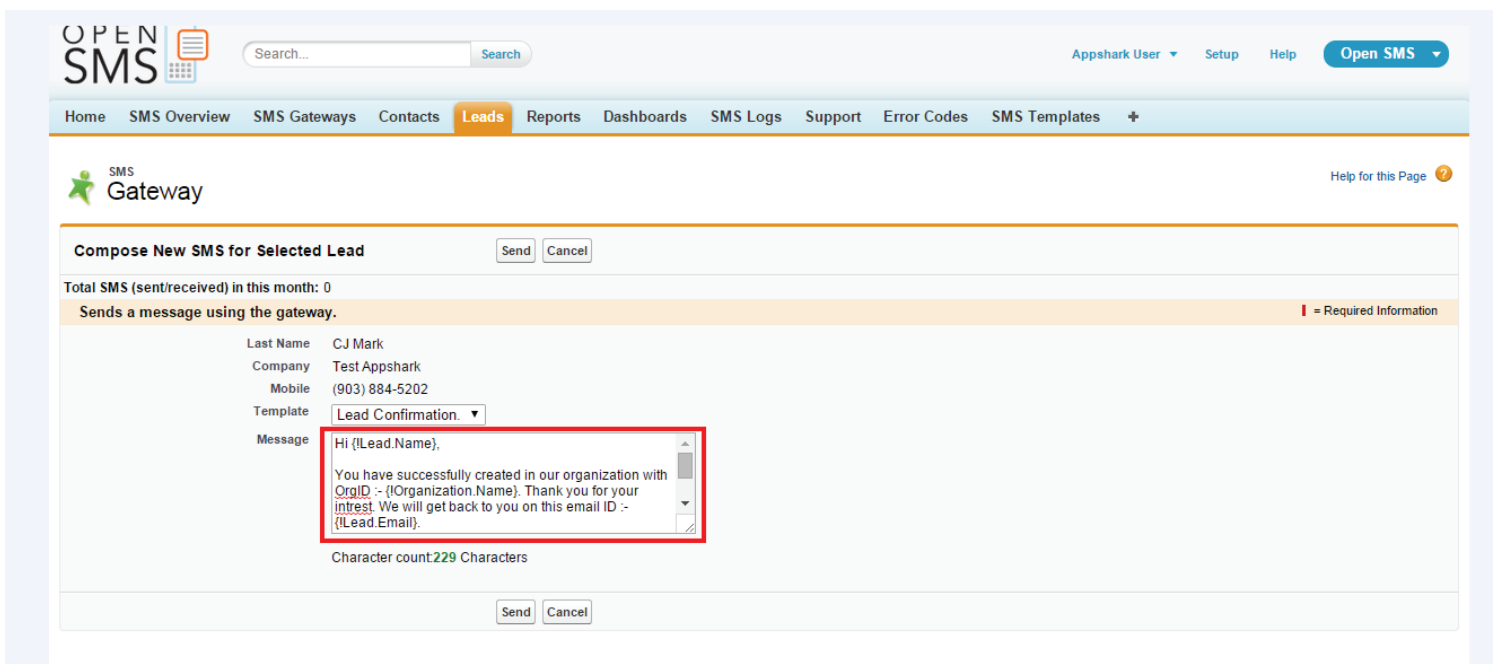
Sends a message using the gateway. ! = Required Information

Last Name CJ Mark
Company Test Appshark
Mobile (903) 884-5202
Template -Select-
Message **Lead Confirmation.**

Character count 0 Characters

Send Cancel

STEP 8: After selecting the template, the user can view all the data of the selected template in the template body. After reviewing the message the user can click on “Send” to send the message.



OPEN SMS

Search... Search

Appshark User Setup Help Open SMS

Home SMS Overview SMS Gateways Contacts **Leads** Reports Dashboards SMS Logs Support Error Codes SMS Templates +

SMS Gateway Help for this Page

Compose New SMS for Selected Lead Send Cancel

Total SMS (sent/received) in this month: 0

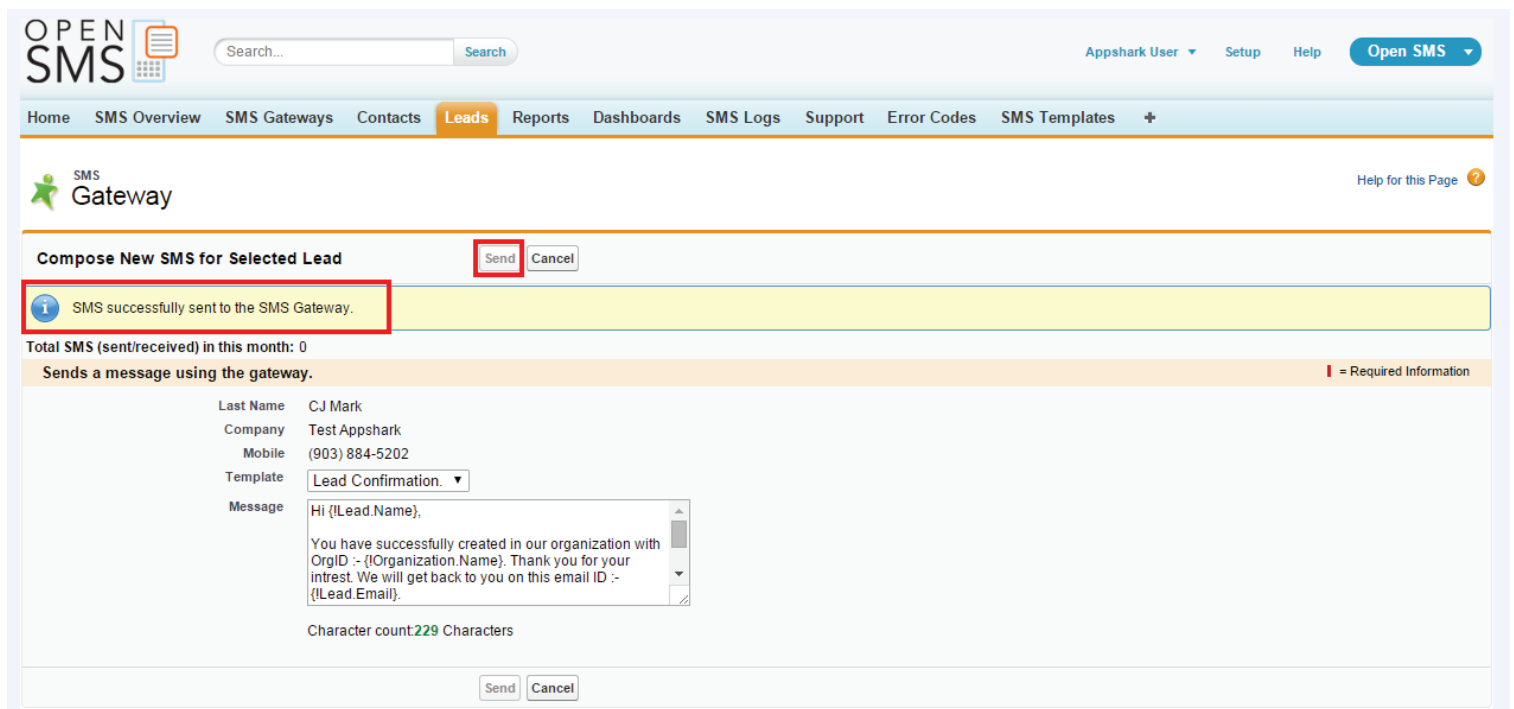
Sends a message using the gateway. ! = Required Information

Last Name CJ Mark
Company Test Appshark
Mobile (903) 884-5202
Template Lead Confirmation.
Message **Hi {Lead.Name},
You have successfully created in our organization with
OrgID :- {!Organization.Name}. Thank you for your
interest. We will get back to you on this email ID :-
{!Lead.Email}.**

Character count 229 Characters

Send Cancel

STEP 9: After clicking on the “Send” button, the user is notified with an alert message saying that the message has been sent successfully.



The screenshot displays the 'OPEN SMS Gateway' web application. The top navigation bar includes a search bar, user profile ('Appshark User'), and links for 'Setup' and 'Help'. A secondary navigation bar contains various menu items: 'Home', 'SMS Overview', 'SMS Gateways', 'Contacts', 'Leads' (highlighted), 'Reports', 'Dashboards', 'SMS Logs', 'Support', 'Error Codes', and 'SMS Templates'. The main content area is titled 'SMS Gateway' and features a 'Compose New SMS for Selected Lead' section. This section includes a 'Send' button (highlighted with a red box) and a 'Cancel' button. Below this, a yellow alert box with a blue information icon and a red border displays the message: 'SMS successfully sent to the SMS Gateway.' The interface also shows a summary of 'Total SMS (sent/received) in this month: 0' and a section for composing a message using a gateway. This section includes fields for 'Last Name' (CJ Mark), 'Company' (Test Appshark), 'Mobile' ((903) 884-5202), and a 'Template' dropdown set to 'Lead Confirmation.'. The message body contains a personalized text template with placeholders for lead information. A character count at the bottom indicates '229 Characters'. A second 'Send' button is located at the bottom of the form.