

# UpMessage User Guide

Assisted by



## UPMESSAGE USER GUIDE

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## Introduction

The guide describes UpMessage and its components, the rules for working with them. Here you will find detailed instructions for using the UpMessage application.

## Application description

UpMessage is an application for Salesforce which allows you to communicate with clients using SMS messages in Salesforce directly.

**Please note:** UpMessage is available only in Lightning Experience.

## Features

- View inbox and live chat
- Create, send (save), edit, delete messages
- Create, save, edit, delete templates with the needed object's fields which will be added to message box
- Instant or schedule SMS messages sending
- Select the sender (one of the registered user numbers) and recipient numbers
- Easily check of inbox and message history
- Search by message text in all available widgets
- Protection against sending empty messages
- Cancel sending
- Remove failed messages from the system and widget

## Quick start

The application includes 3 main components that must be pre-configured by a Salesforce administrator. If you don't have any of the basic described functions, ask your Salesforce administrator to give access to your user.

## Widgets

You can use two UpMessage widgets:

- SMS Widget
- SMS Inbox

Let's analyze each of them in more detail.

## SMS WIDGET

### Description

Chat with Rose Gonzalez

SearchReset

+12075678956

Hi Rose,  
We have received your message. Thanks for the invitation!  
12 Aug, 11:38

+12075678956

Best regards.  
12 Aug, 11:39

+15127576000

Hi Andre,  
Thanks for your reply. I hope you can come.  
Regards.  
12 Aug, 11:44

From: Andre Garcia (+12123482626) To: Mobile Phone ((512) 757-9340)

Select template: --None-- Apply

Message: Enter your message...

Send Message

**SMS Widget** allows you to view and send SMS. The message box is updated in real time. That is, if you receive a message, he will see it immediately. Sending works the same way: the sent message will be delivered as soon as you click the **Send Message** button.

## Structure

The screenshot displays the 'Chat with Rose Gonzalez' interface. At the top, a search bar (1) with a magnifying glass icon and 'Search' and 'Reset' buttons is present. The chat history shows three messages: an outbound message (2) in blue, an inbound message (3) in grey, and a scheduled outbound message (4) in grey with an orange clock icon. A message (5) is highlighted with a red border. The composition area at the bottom includes a 'From' dropdown (6) set to 'Andre Garcia (+12123482626)', a 'To' dropdown (7) set to 'Mobile Phone ((512) 757-9340)', a 'Select template' dropdown (8) set to '--None--' with an 'Apply' button, a 'Send later' toggle (9) which is turned on, a date field set to '01-Sep-2019', a time field set to '16:19', a large text input field (10) with the placeholder 'Enter your message...', and a 'Send Message' button (11).

1. Search box allows you to look for the messages which meet the entered text.
2. Outbound messages are highlighted in blue and contain all the needed SMS information like the Phone number from which SMS was sent, SMS text, date and time sent.
3. Inbound messages are highlighted in grey and contain all the needed SMS information like Phone number from which SMS was received, SMS text, date and time received.
4. You have an ability to schedule sending. Scheduled messages are highlighted in grey and have an orange clock icon. By hovering over the clock icon, the information about scheduled time will appear. You can cancel sending by clicking on 'x' icon at the top right corner of the message box.

5. Messages which failed to be sent, for any reason, have a red frame and white background. You are available to remove this message from the system and widget by clicking on 'x' icon at the top right corner of the message box.
6. In 'From' field you can find all the Phone numbers which were assigned to the Salesforce User and select the one from which the message should be sent.
7. 'To' drop down list contains all the fields from the record with Phone and Text types which were selected for usage in application setup. You can select fields of 'Phone' and 'Text' types which were previously added to available fields by administrator while application setup.
8. Template section allows you to select a template which will be populated to the Message box by clicking on 'Apply' button.
9. You can schedule SMS messages sending. If there is a need to postpone sending 'Send later' toggle should be switched on. Date and time fields will appear to set the dispatch time.
10. 'Message' box has a limited number of symbols which can be changed in the application setup.
11. 'Send Message' button is disabled by default and becomes active when at least one symbol is entered to the Message box. The button is responsible for SMS sending and scheduling.

## SMS INBOX

### Description

SMS Inbox

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**From** Arthur Song:

12/08, 11:56



Sorry for troubling.

**From** Arthur Song:

12/08, 11:55



Hello. I want to remind you that I am still waiting for your response on the project.

**From** Rose Gonzalez:

12/08, 11:44

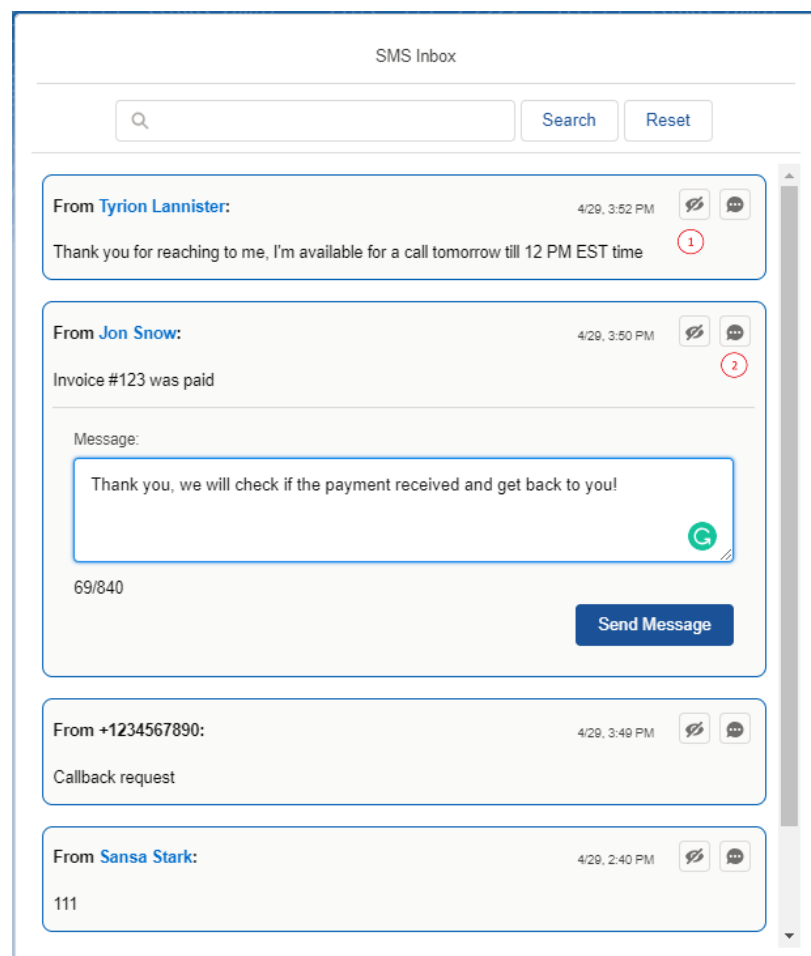


Hi Andre,  
Thanks for your reply. I hope you can come.  
Regards.

**SMS Inbox** displays all inbound messages received by you. It includes messages from all senders and are sorted by the date received.

## Structure

The SMS Inbox widget displays all the messages to which you didn't reply yet. There are several buttons related to each message:



1. 'Mark as read'. Clicking on this button you change a status for SMS from 'Unread' to 'Read' and removes the message from widget. The message will still be available in a record page widget for appropriate record.
2. The 'Reply' button opens a text box which allows you to reply the incoming SMS from home page directly.

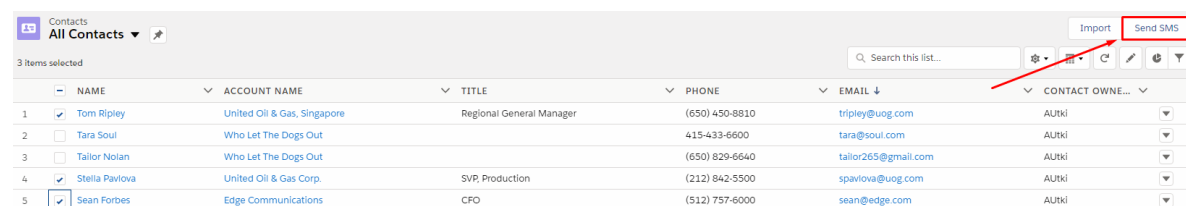
By clicking on the sender name you will be redirected to sender record detail page.

Search feature is available at the top of the widget and allows to search by message text.

## BULK SMS

To send SMS in bulk follow the following steps:

- On the appropriate List View, select the recipients and click on the 'Send SMS' button:



**Please note:** the 'Send SMS' button should be added to the appropriate List view by the administrator.

The Bulk SMS page is opened. The page is divided into 2 sections. At the left side of the page you can see a widget similar to Record page widget (1). At the right side of the page, there is a table with a list of recipients selected (2). Phone column is populated by phone numbers selected in 'Phone Field' of the left widget (3):

**Bulk SMS**  
 Send mass SMS messages to a list of recipients

You have selected 3 record(s) to send SMS messages.

1 recipient(s) don't have value in their **MobilePhone**. SMS will not be sent to that records

Name (optional):

From:

Phone Field:

Select a template:

Send later ☐

Message:  

Kind reminder that interview of a new candidate starts today at 2 AM in the conference room.

93 / 840

| NAME             | PHONE FIELD TYPE | PHONE          |
|------------------|------------------|----------------|
| Cersei Lannister | Mobile Phone     | +36 55 623 643 |
| Jaime Lannister  | Mobile Phone     |                |
| Tyrion Lannister | Mobile Phone     | +380950000000  |

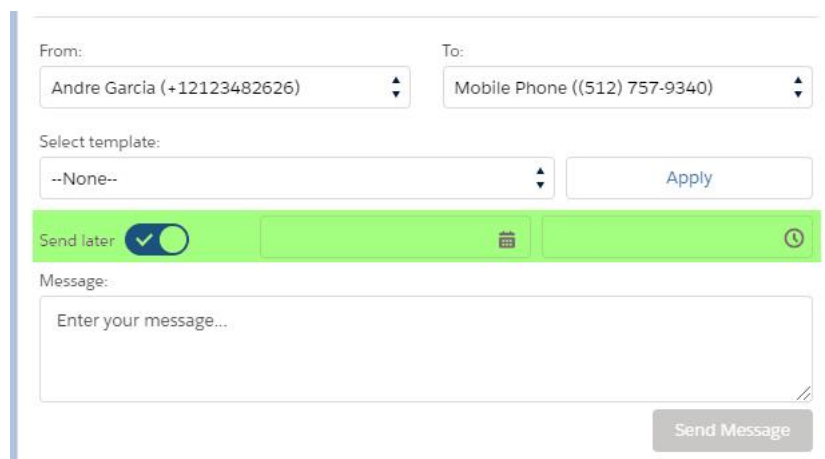
If at least one recipient doesn't have the Phone filled in, you will see a notification that SMS will not be sent to such recipients (4). Also, information message with a number of selected recipients, is displayed at the top of the page (5).

After clicking on the 'Send' button a group of messages will be sent to the selected records.

## Scheduling

You can create schedules using the SMS Widget:

- Open a record of any object, to which the SMS Widget is accessible.
- If you want to schedule your message, click the Send later toggle and enter the desired date.
- If you can't find the Send later toggle, please contact your administrator.

The screenshot shows a web interface for sending SMS messages. At the top, there are two dropdown menus: 'From:' with the value 'Andre Garcia (+12123482626)' and 'To:' with the value 'Mobile Phone ((512) 757-9340)'. Below these is a 'Select template:' dropdown menu currently set to '--None--', with an 'Apply' button to its right. A prominent green horizontal bar contains the 'Send later' toggle, which is currently turned on (indicated by a blue circle with a white checkmark). To the right of the toggle are icons for a calendar and a clock. Below the green bar is a text area labeled 'Message:' with the placeholder text 'Enter your message...'. At the bottom right of the form is a grey button labeled 'Send Message'.

'Send later' toggle is also available on Bulk SMS Widget.

## Templates

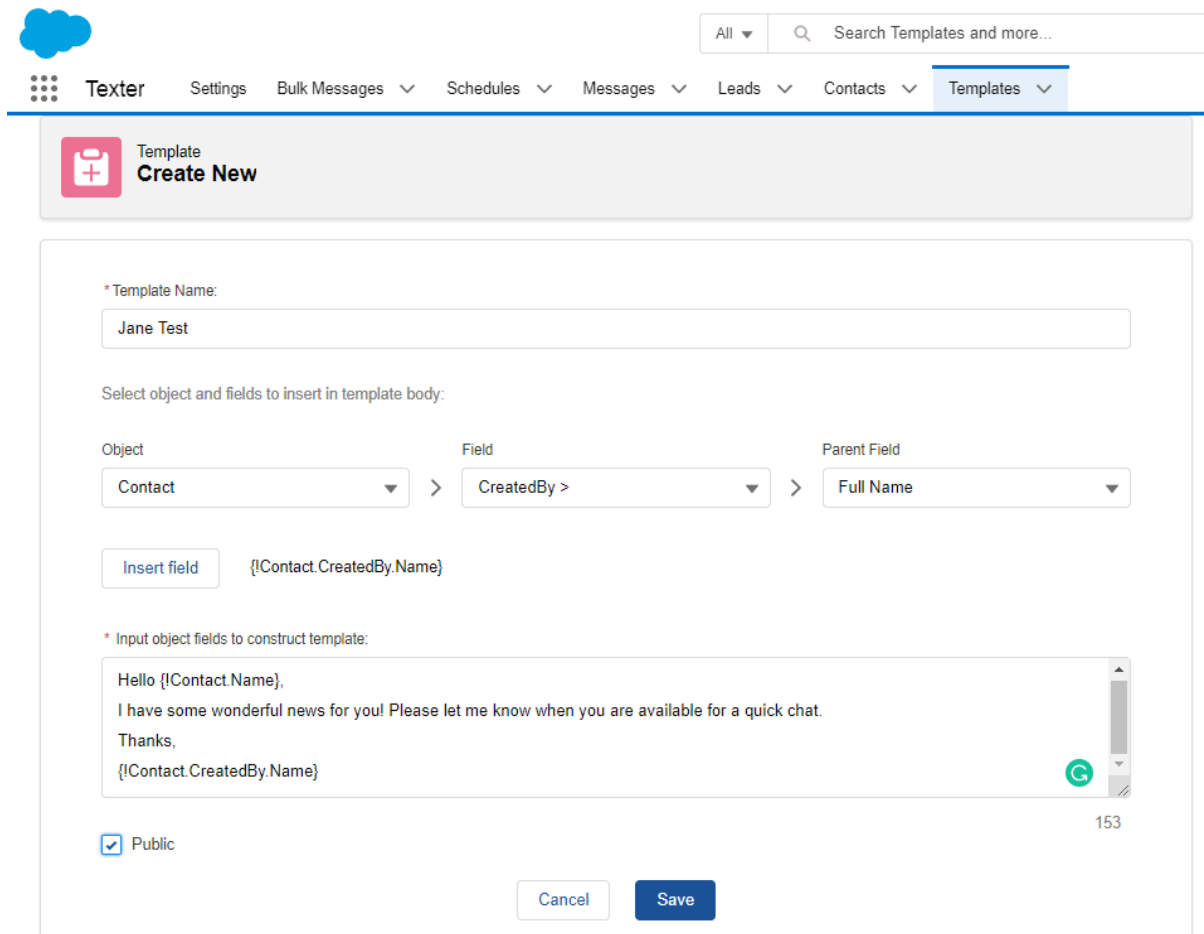
UpMessage has an option to send predefined messages to recipients and supports merge fields. To create a template you need to:

- Open a UpMessage app
- Navigate to Templates tab
- Click on 'New' button
- Enter a Template Name
- Type the message text in the text box at the bottom of the section.

If you want to insert merge fields:

- Select the appropriate object from the 'Object' dropdown list.
- Select the required field from the 'Field' dropdown list. The name of the merge field appears below the dropdown lists.
- Move the cursor to the appropriate place in the message text box and click 'Insert field' button. You can see that merge field name appeared in the message template.

The template is private by default, and each template, regardless of this status, is available only to the owner. If the template should be visible for other users with the appropriate access, 'Public' checkbox must be set to 'True'.



The screenshot shows the 'Create New' template form in the upMessage application. The interface includes a top navigation bar with a search bar and a menu with options like 'Texter', 'Settings', 'Bulk Messages', 'Schedules', 'Messages', 'Leads', 'Contacts', and 'Templates'. The 'Templates' menu is currently selected. Below the navigation bar, there is a 'Create New' button with a plus icon. The main form area contains the following fields and options:

- Template Name:** A text input field containing 'Jane Test'.
- Select object and fields to insert in template body:** A section with three dropdown menus: 'Object' (set to 'Contact'), 'Field' (set to 'CreatedBy >'), and 'Parent Field' (set to 'Full Name').
- Insert field:** A button that, when clicked, inserts the field code `{!Contact.CreatedBy.Name}` into the template body.
- Input object fields to construct template:** A text area containing the template text: 'Hello {!Contact.Name},  
I have some wonderful news for you! Please let me know when you are available for a quick chat.  
Thanks,  
{!Contact.CreatedBy.Name}'. A green circular icon with a 'G' is visible in the bottom right corner of the text area.
- Public:** A checkbox that is checked, indicating the template is public.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

The page number '153' is visible in the bottom right corner of the form area.

After the template is saved, it becomes available on a record page widget. Select the template and click 'Apply' button to see it in the 'Message' box.

**Record page widget** Chat with Tyrion Lannister



There are no messages yet.

From:

To:

Select a template:

Send later ☐

Message:  

Hello Tyrion Lannister,  
I have some wonderful news for you! Please let me know when you are available for a quick chat.  
Thanks,  
User User

