

UpMessage Admin Guide

Assisted by



UPMESSAGE ADMIN GUIDE

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INTRODUCTION

In this guide, we will walk you through the steps to install and configure the UpMessage application.

Application description

UpMessage is a managed package application for Salesforce which allows users to communicate with clients using SMS messages directly in Salesforce. The key feature of the application is supporting several SMS providers. Currently, you can set it up for Twilio and ClickSend.

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 SETUP

1. Set up a domain
2. Install the application
3. Share permission sets

4. Set up the application:

- a. Register provider
- b. Add phone numbers
- c. Let users send SMS

5. Add widgets

6. Set up SMS Receiving

But for a more advanced setup, please follow all the steps in this guide.

MY DOMAIN SETUP

Important! For the correct working of the application, My Domain should be activated. If you have already set up a domain, skip the following steps.

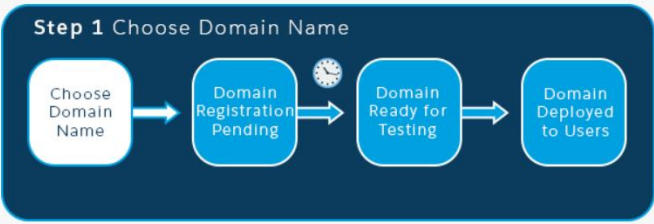
- Go to **Setup > My Domain**
- Enter the desired domain name
- Check availability
- Register an available domain name


My Domain

My Domain Step 1

Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on.

Step 1 Choose Domain Name



Choose Your Domain Name

Enter a domain name and check whether it's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's registered. Your domain name can be up to 34 characters. It can include letters, numbers, and hyphens; but it can't start or end with a hyphen.

← Enter

✓ Available
← Check

After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done.
 ← Register

- Check your email in a few minutes



SETUP

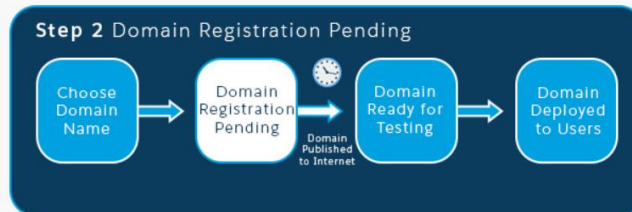
My Domain

My Domain

[Help for this Page](#)

My Domain Step 2

Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on.



Your domain name is **newregistereddomain-dev-ed.my.salesforce.com**

Registering your domain. You'll receive an email when it's ready for testing.

- Click on the link in the email or reload the My Domain page
- Your subdomain is registered. Log in with your domain URL to deploy your domain

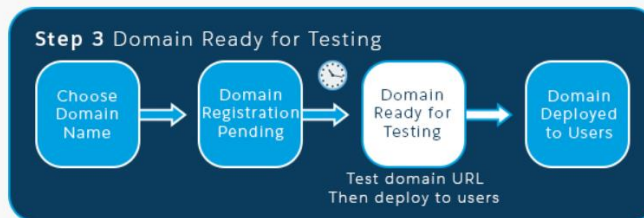


SETUP

My Domain

My Domain Step 3

Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on.



Your domain name is **newregistereddomain-dev-ed.my.salesforce.com**

Your domain name is ready. Log in to test it out. [Log in](#)

To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL.

Log in with your domain URL to deploy your domain.

[Deploy to Users](#) Roll out the new domain to your org.

- Now you can see your subdomain in a URL at the top of the browser.

INSTALLATION

- Follow the link, choose Install for Admins Only and click Install.



Install UpMessage

By Nix Solutions



☒ **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.

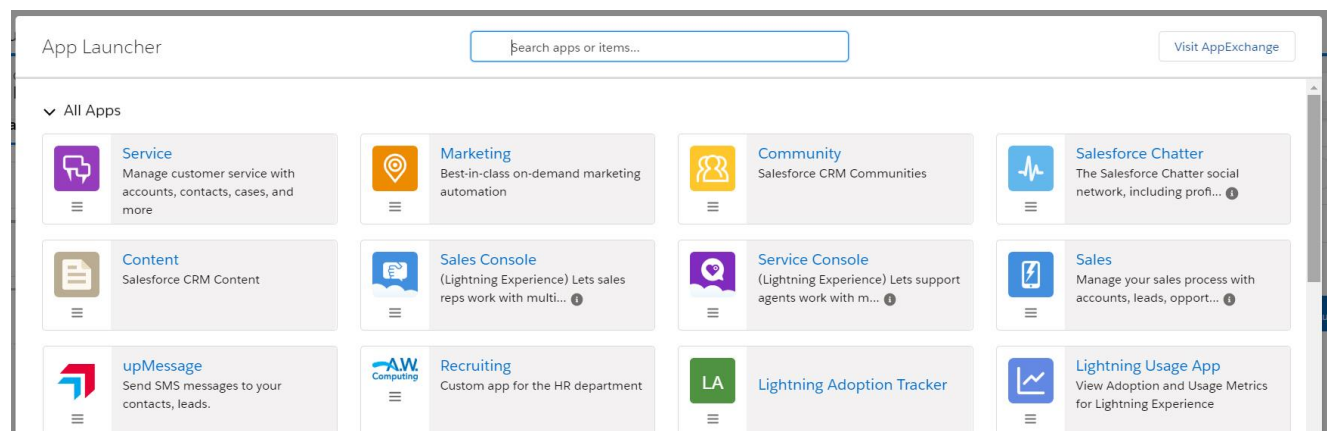
Install

Cancel

App Name	Publisher	Version Name	Version Number
UpMessage	Nix Solutions	0.3.2-beta	1.0 (Beta 1)

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

- You will see the installed application on the 'Installed Packages' page
- To open it, go to the App Launcher and select UpMessage



Please note: UpMessage should be installed for administrators only, and then the administrator should provide access to users by assigning permission sets.

PERMISSION SETS

Now you need to provide access to everyone who will work with the application. 3 types of Permission Sets will be installed with the application:

- for administrators – permission set, which provides admins permissions to the user;
- for users – permission set, that gives users general permissions;
- for community guests – assign this permission set to a guest user who will manage inbound messages.

Please note: access to standard and other user objects can be additionally provided by the administrator. The following table shows access rights only to those objects that the UpMessage application has.

Permissions to access objects, events and settings such as tab availability:

UpMessage Admin	The admin gets access to: › read, create, edit, delete, view all, modify all: Messages, Bulk Messages, Schedules, Templates, Channel Assignments, Channels, Provider Configurations; › read, create: Messages Created (event); › the Settings tab is visible.
UpMessage User	The user gets access to: › read, create, edit, delete: Messages, Bulk Messages, Schedules, Templates; › read, create: Messages Created (event). Settings tab is visible.
UpMessage Receive Messages	The guest user gets access to read, create, edit, view all Messages. It's necessary if you set up a community.

Now you need to provide access to everyone who will work with the application. 3 types of Manage assignments for permission sets:

- Go to **Setup > Permission sets**
- Select any application's permission set of three presented and click on it
- Click **Manage Assignments > Add Assignments**

SETUP
Permission Sets

 Permission Set
UpMessage Admin

Permission Set Overview

Description	Permission set, which provides admins permissions to the user.
License	
Session Activation Required	☐

- Select appropriate users, click Assign and Done

After that, selected users should get access to the appropriate application tools.

APPLICATION SETUP

UpMessage setup consists of several actions, including adding and configuring widgets, basic settings and adding bulk message buttons.

Settings

Salesforce administrator can set and change UpMessage settings on this page.

General settings

- Enable Application – switches the application on and off. Disabled by default
- Use scheduled messages – if there is a need to schedule SMS sending this option on will add scheduling section to record page widgets. Disabled by default. When you activate Scheduled SMS, 4 Scheduled Jobs will be created and operate at intervals of 15 minutes
- SMS Configuration:
 - Maximum Characters in SMS – various SMS providers have different message length. If the maximum number of characters exceeded, single message will be split into two messages. The admin can restrict the maximum length of the message to avoid splitting

- Primary country – there is a list of Countries available for this point. This setting is responsible for phone number formatting. If any country is selected in picklist, the system will format receiver phone number based on selection

For example: Your business is directed to the USA market and most of your clients have USA phone numbers. If you have a Lead with phone number is (xxx) yy-yy-yyyy and USA is selected as a primary country, the system will add the USA country code while sending SMS to this Lead.

Please note: the USA is selected SMS Receiving Setup by default

- Public URL – allow Salesforce to receive SMS messages from the providers' side. Learn more about creating and setting up a community and site.

Providers and Numbers

For the application to work, you need an account with one of the supported SMS providers. Currently we support Twilio and Click Send. To register a provider, you will also need information such as API Username and API Secret. API Username and API Secret. This information is available in your provider's account settings. If you do not know this information, please contact your provider.

Register Provider

On this page the admin can manage the provider credentials which will be used for messaging.

- Click 'Register Provider' at the top right corner of the page

Settings Providers and Numbers Register Provider

Registered Providers

	Click Send			
Service:	ClickSend			
Api Username:	Click_Send			
Active:	☒			

	Twilio			
Service:	Twilio			
Api Username:	Twilio			
Active:	☒			

- Select the type of Provider
- Enter Provider Name
- Enter API Username and API Secret
- Click **Save**
- Your provider is displayed on the page and activated automatically
- To Edit, Delete provider and Assign Endpoints click the gear button next to the provider's name. You can deactivate a provider by unchecking the 'Active' checkbox.

Add phone numbers

When provider is created in Salesforce it is required to add phone numbers which will be later assigned to users for messaging with clients. Follow these steps to add phone numbers dedicated by your supplier:

- To Add, Edit or Delete registered numbers click on the panel with the provider's name

Settings
Providers and Numbers [Register Provider](#)

Registered Providers

Click Send

Service: ClickSend
Api Username: Click_Send
Active: ☒

Twilio

Service: Twilio
Api Username: Twilio
Active: ☒

Registered numbers for **Click Send**
1 item(s)

	USER FRIENDLY NAME	NUMBER	ACTIONS
1	Andre Garcia	+1(212) 348-2626	Edit Delete

[Add number](#)

- Click **Add number. Provider** is filled by selected provider by default
- Enter a User Friendly Name, Number and click **Save**.

When provider is created in Salesforce it is required to add phone numbers which will be later assigned to users for messaging with clients. Follow these steps to add phone numbers dedicated by your supplier:



There are no messages yet.

From: To:

Message:

Assign Endpoints

To setup receiving SMS in UpMessage app administrator must assign endpoints to each phone number which should be used for receiving SMS messages.

- On the Settings tab go to Providers and Numbers section
- Click on the 'cogwheel' button near the provider name and select 'Assign Endpoint'
- Select the phone numbers which are allowed to receive SMS and click on 'Assign' button

Registered numbers for Twilio
3 item(s)

Assign Endpoints

☐	Number
☐	+16292192330
☒	+126600000000
☒	+126611111111

This action creates a rule on Provider's side which reassigns inbound messages to Salesforce.

User management

To let users send an SMS using the UpMessage app, the administrator should assign phone numbers to them. On Manage Assignments tab user can find 'Add Assignments' button which is a starting point to link Phone numbers with Users.

- Click 'Add Assignments' button.
- Select Provider from the list.
- Select Number (all the User-Friendly Names for the provider selected above will be populated).
- Click 'Next'. On the opened window you can select to assign Phone number to User or Profile.
- Select the users/profiles which should be assigned to the appropriate phone number and Save the changes.
- The list of assignments is available on the Manage Assignments page. To unassign a phone number of a user/profile check the needed rows and click 'Remove Assignments' button.

Please note: it is possible to assign several phone numbers to the same user/profile.

Objects

To let users send an SMS using the UpMessage app, the administrator should assign phone numbers to them. On Manage Assignments tab user can find 'Add Assignments' button which is a starting point to link Phone numbers with Users.

Let's add a new object to UpMessage. Follow the next steps:

- Click the 'Select Object' dropdown list and select the object you'd like to use for messaging
- Select the object's fields in which phone numbers are stored. Move the needed fields from 'Object Fields' to the 'Selected Phone Fields' section:
-

Register Object Fields

Select Object

Account

Select Phone Fields ⓘ

Object Fields

Shipping State/Provi...

Shipping Zip/Postal ...

Shipping Country

Account Fax

Account Number

SIC Code

Ticker Symbol

Selected Phone Fields

Account Phone

Cancel

Save

- Click **Save**.

If you want to leave only the default objects and remove all others from the list, click the **Reset Defaults** button. If you want to delete a specific object, select it in the 'Select Object' dropdown list and move all fields from 'Selected Phone Fields' to the 'Object Fields' section.

Widgets

You can add and use two UpMessage widgets: SMS Widget and SMS Inbox.

SMS Widget

Chat with Rose Gonzalez

Search Reset

+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 users

to view and send SMS.

The message box is updated in real time. That is, if the user receives a message, he will see it immediately.

Sending works the same way: the sent message will be delivered as soon as the user clicks the **Send Message** button.

Based on this, it is best to install **SMS Widget** on a record detail page in a place where users can easily read new messages and send timely replies.

SMS Inbox

SMS Inbox

Search Reset

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.

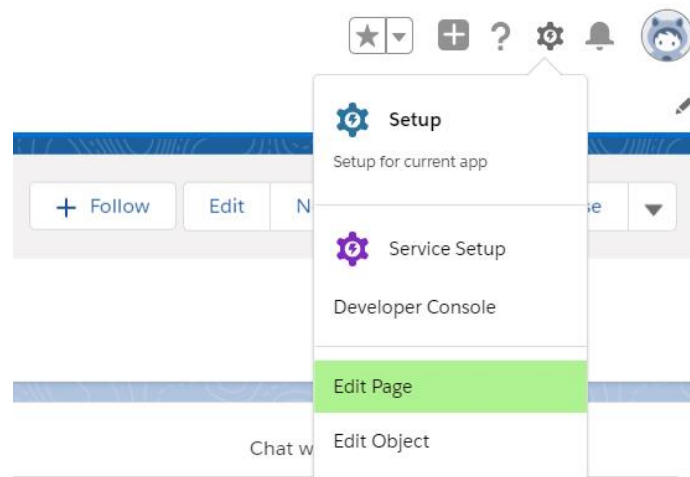
SMS Inbox displays all inbound messages received by current user. It includes messages from all senders and are sorted by date received. Such a widget can be added to the home page so that users can immediately see all inbound messages.

Please note: SMS Widget shows phone numbers in the format +1XXXXXXXXXX. Even if the object's or provider's phone number has a different format in the chat window it will always be displayed as +CXXXXXXXXXX, where C is a country code.

[Learn more about automatically adding a country code based on your settings.](#)

Adding a widget to the record detail page

1. Open any record you'd like to add SMS widgets to (Lead, Contact, other system or custom object)
2. At the top right corner of the page, click on the cogwheel button and select 'Edit page'



3. At the left side of the page in Lightning Components section type 'SMS' in the search box. You will find:
 - SMSWidget
 - SMSInbox
4. Drag-n-drop the needed widget to any appropriate place of the page.
5. To change the widget properties, click on the newly added widget.

Lightning App Builder | Pages | Contact Record Page | Back | Help

Desktop | Shrink To View | Refresh | Save | Activation...

Lightning Components

Standard (0) | Custom (0) | Custom - Managed (3)

SMSHistory | SMSInbox | SMSWidget

Page > SMSWidget

Chat Height: 300

Number of displayed SMS: 5

Set Component Visibility

Chat with Mila Rose

There are no messages yet.

6. Set **Chat Height** and **Number of displayed SMS** as needed.

- The **Chat Height** field must contain a value that determines the height of the chat window. If there are a lot of messages, a scroll will appear on the right side of the window
- The **Number of displayed SMS** value determines how many messages will be displayed immediately. Other messages will be hidden, but you always can open them with, 'Show more'

Chat with Rose Gonzalez

Search | Search | Reset

Show more

+12075678956

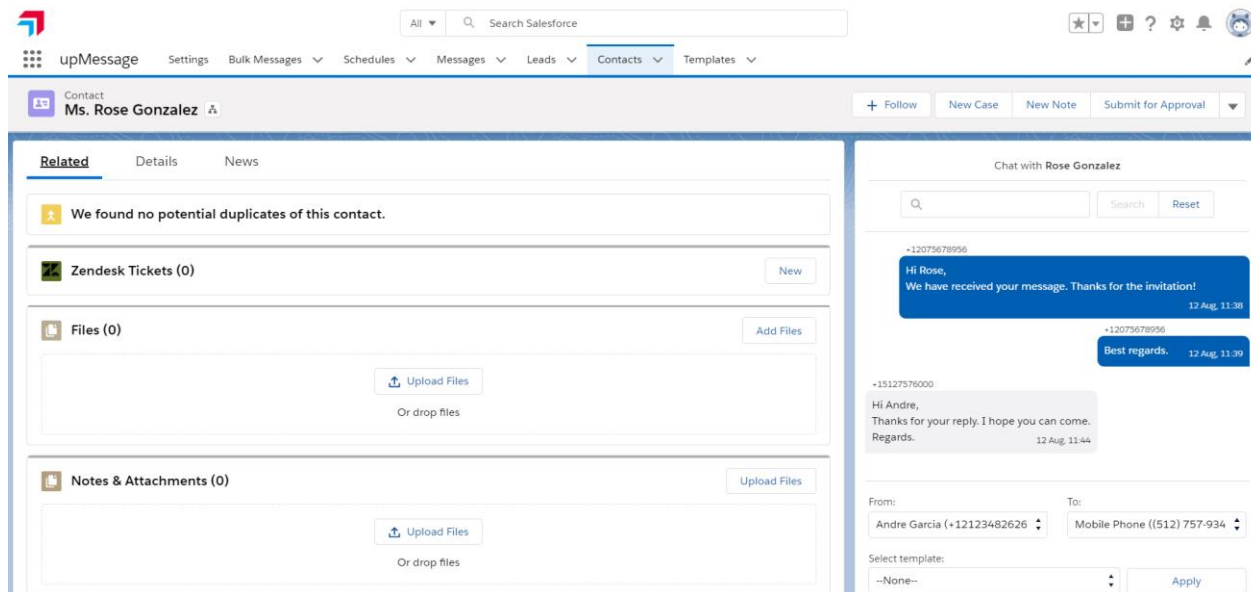
Best regards. 12 Aug. 11:39

+15127576000

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

7. Save the layout.

The result is such a page:



Adding widget to the home page

1. From **Setup**, enter **App Builder** in the Quick Find box, then select **Lightning App Builder**
2. Create new Home Page or customize your current Home Page if you already use a custom one.
3. At the left side of the page in **Lightning Components** section type 'SMS' in the search box.
4. Drag-n-drop the needed widget to any appropriate place of the page.
5. To change widget properties, click on the newly added widget.
6. Set **Chat Height** and **Show messages received last hours ago** as needed.

The screenshot shows the UpMessage Lightning App Builder interface. On the left, the 'Lightning Components' panel is visible with a search bar containing 'sms' and a list of components: Standard (0), Custom (0), and Custom - Managed (3). The main area displays a dashboard for 'Creating Vans' with various charts and tables. A green circle with the number '3' highlights the 'SMSHistory' component in the left panel. Another green circle with the number '5' highlights the 'SMS Inbox' component in the main dashboard area. A third green circle with the number '6' highlights the 'Page' configuration panel on the right, which includes fields for Label, Developer Name, Page Type, Template, and Description.

7. Save the layout.

The result is this type of page:

The screenshot shows the final 'Creating Vans' dashboard page. The top navigation bar includes the UpMessage logo and various menu items: Settings, Bulk Messages, Schedules, Messages, Leads, Contacts, Templates, and Home. The dashboard itself features several components: a 'Total quantity of supply types' card showing 15, a 'Total Cost' card showing \$21,415, a 'Supplies' card with a pie chart, a 'Quantity of supply types' chart, a 'Unit Cost' table, and an 'Employees' card showing 50. The 'Unit Cost' table lists items and their prices:

Vans: Vans Name	Supply: Supply ...	Unit...
Vans branch 1	Material (meters)	\$40...
Vans branch 1	Rack	\$10...
Vans branch 1	Sole	\$20...
Vans branch 1	Shoelaces	\$2.00
Vans branch 2	Rack	\$11...
Vans branch 2	Sole	\$15...
Vans branch 2	Shoelaces	\$2.50

On the right, the 'SMS Inbox' component displays a list of messages:

- 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.

Manage Bulk Message buttons

The same message can be sent to a list of recipients at once. The 'Send SMS' button is available on object list views (except 'Recently Viewed' list) for objects which are registered for use in the application settings.

First of all, to set up bulk messaging:

- Go to the tab of any object that is available for sending SMS, click the **gear icon > Edit Object**. You can also open object's settings via **Setup > Object Manager > Object**
- Go to **Buttons, Links, and Actions** > click **New Button or Link**
 - Name it (e. g. 'Send SMS')
 - Display Type – List Button
 - Display Checkboxes (for Multi-Record Selection) – selected
 - Content Source – Visualforce Page
 - Content – BulkSmsContact [texter_BulkSmsContact] – for Contact
 - Content – BulkSmsLead [texter_BulkSmsLead] – for Lead
 - If you work with another object, create and use in 'Content' Visualforce Page with the code below (replace **<object_api_name>** with API Name of your object):

```
<apex:page standardController="<object_api_name>"
recordSetVar="records" extensions="upmessage.BulkSmsExt"
action="{!init}" standardStylesheets="false">
    <apex:pageMessages />
    <apex:includeLightning />

    <div id="lightning" />

    <script>
        var recordIdsJson = '{! JSENCODE(recordIdsJson) }';
        var sObjectName = "<object_api_name>";
        $Lightning.use("upmessage:BulkSmsApp", function() {
            $Lightning.createComponent(
                "upmessage:BulkSmsPage",
                {
                    "recordIdsJson" : recordIdsJson,
                    "sObjectName" : sObjectName
                },
                "lightning"
            );
        });
    </script>
</apex:page>
```

SETUP > OBJECT MANAGER

Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Edit Contact Custom Button or Link

Send SMS

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label **Send SMS**

Name **Send_SMS**

Description

Display Type

☐ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☒ List Button [View example](#)
☒ Display Checkboxes (for Multi-Record Selection)

Behavior **Display in existing window with sidebar** [View Behavior Options](#)

Content Source **Visualforce Page**

Content **BulkSmsContact [texter__BulkSmsContact]**

Save Quick Save Preview Cancel

- Click **Save**.

Add this button to the list view:

- Go to **Search Layouts** > edit **List View**

Search Layouts
7 Items, Sorted by Layout

Quick Find

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	Send SMS
Lookup Dialogs	Name, Account Name, Account Site	N/A
Lookup Filter Fields	N/A	N/A
Lookup Phone Dialogs	Name, Account Name, Account Site, Phone, Mobile, Home Phone, Other Phone, Asst. Phone	N/A
Search Filter Fields	N/A	N/A
Search Results	Name, Salutation, Phone, Email	N/A
Tab	Name	N/A

In the 'Custom Buttons' section, move this button from 'Available Buttons' to 'Selected Buttons'.

Custom Buttons

Available Buttons

--None--

Selected Buttons

Send SMS

Add

Remove

Up

Down

- Click **Save**.

Now you can see the 'Send SMS' button on the appropriate list view (except 'Recently Viewed'):

Contacts						
All Contacts						
50+ Items • Sorted by Email • Filtered by all contacts • Updated a few seconds ago						
	NAME	ACCOUNT NAME	TITLE	PHONE	EMAIL	CONTACT OW...
1	☐ Tom Ripley	United Oil & Gas, Singapore	Regional General Manager	(650) 450-8810	triple@uog.com	AUTki
2	☐ Tara Soul	Who Let The Dogs Out		415-433-6600	tara@soul.com	AUTki
3	☐ Tailor Nolan	Who Let The Dogs Out		+1(650) 829-6640	tailor265@gmail.com	AUTki

Templates setup

UpMessage has an option to send predefined messages to recipients and supports merge fields. The template is private by default, and each template, regardless of this status, is available only to the owner.


Template Create

* Template Name:

Congratulation

Select object and fields to insert in template body:

Object: Contact Field: First Name

Insert Field: {!Contact.FirstName}

* Message text:

Dear {!Contact.FirstName}, please accept our sincere congratulations on the contract signing. We look forward to a fruitful cooperation!

☒ Public

136

Cancel Save

To make the template available to other users, follow the steps:

- Go to **Setup > Sharing Settings**
- Make sure **Template** is private

Teacher	Public Read/Write	Public Read/Write
Template	Private	Private
Trello Participant	Public Read/Write	Private

- For 'Manage sharing settings for' select 'Template'

Sharing Settings

This page displays your organization's sharing settings. These settings are used to control sharing permissions for objects in your organization. These settings are used to control sharing permissions for objects in your organization. These settings are used to control sharing permissions for objects in your organization.

Manage sharing settings for: All Objects

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults

Object	
Lead	
Account and Contract	
Contact	
Order	
Asset	
Opportunity	

Location
Location Resources
Message
Planned sales
Position
Provider Configuration
Resource
Review
Schedule
Sector
Settings
Student
Supply
Teacher
Template
Trello Participant
Trello Task
Vans
Zendesk Agent Details
Zendesk Bulk Sync Response

- In the Template Sharing Rules section select **New**
 - Fill Label and Rule Name fields
 - Rule Type – Based on criteria
 - Criteria – Public equals True
 - Share with the right users
 - Set the Access Level

SETUP
Sharing Settings

Label: TemplateSharingRule
 Rule Name: TemplateSharingRule ⓘ
 Description:

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☒ Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	
	Public	equals	True	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

[Add Filter Logic...](#)

Step 4: Select the users to share with

Share with: Public Groups All Internal Users

Step 5: Select the level of access for the users

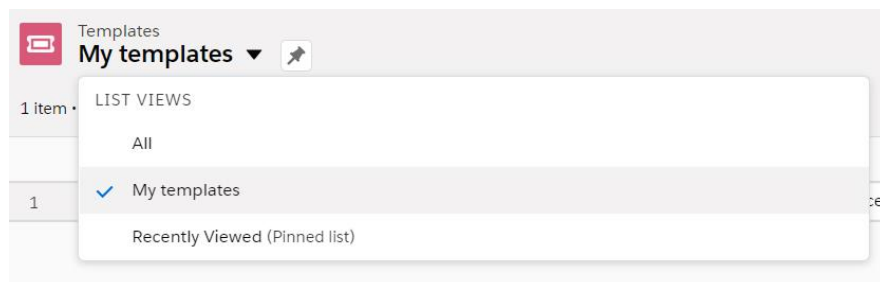
Access Level: Read Only

- Click **Save**.

Please note: in this case, the selected users will have access only to the public templates of other users. Private templates will remain available only to owners.

The Template object has 2 main List Views:

- All
- My templates



If you haven't configured Sharing Rules, the data in both lists will be the same. Otherwise, in 'All' all visible templates will be displayed, and in 'My templates' the user will see only those templates that belong to him.

SMS RECEIVING SETUP

Please note: the following steps allow Salesforce to receive SMS messages. A provider needs to identify site API. Salesforce uses for this community or site link. So to receive messages, you need to create any community or site and insert this link in the 'Public URL' field.

Community setup

Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. *Learn more.*

Enable communities

To get started with communities, you must first enable it and select a domain.

- From Setup, enter 'Communities Settings' in the Quick Find box, then click **Communities Settings**
- Enable communities
- Enter a domain name and check availability
- Click **Save**.

Save

Enable communities

Important:
Once you enable communities in your org, you must still create, configure, customize, and then activate a community before it's live and available to users.

After you enable communities, you can assign the View Global Header permission to internal users who need access to the community. The global header allows they're a member of. [Learn more.](#)

☒ Enable communities

Select a domain name

Important: The domain name will be used in all of your communities and can't be changed after you save it

Sample Domain Name
MyCompany.force.com

Sample Community URLs
MyCompany.force.com/customers
MyCompany.force.com/developers
MyCompany.force.com/partners

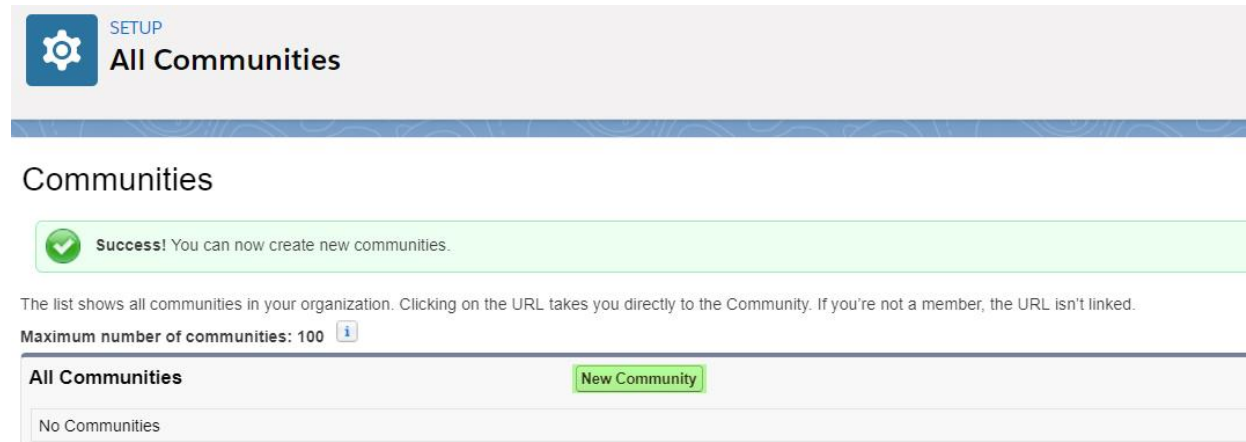
Domain name -developer-edition.eu16.force.com

☒ **Success!** Domain name available

Save

Create a community

- From Setup, enter 'All Communities' in the Quick Find box, then choose **All Communities**
- Click **New Community**



- Choose the Experience You Love
- Click **Get Started**
- Enter Name and URL (optional)
- Click **Create**.

You can customize the community as you like.

Access Community Workspaces

For convenience, you can also add workspaces next to the community name in **All Communities**:

- From Setup, enter 'Communities Settings' in the Quick Find box, then click **Communities Settings**
- Enable Community Workspaces
- Click **Save**.


Communities Settings

Community Settings

General Settings
Save Cancel

Domain Name

The default domain name for Communities in your organization is `montgomeri15-developer-edition.eu12.force.com` 

Sample Domain Name
MyCompany.force.com

Sample Community URLs
MyCompany.force.com/customers
MyCompany.force.com/developers
MyCompany.force.com/partners

Community Management Settings

Enable Community Workspaces ☒ 

Enable ExperienceBundle Metadata API ☐ 

- From Setup, enter 'All Communities' in the Quick Find box, then click **All Communities**.
To access a community's workspace area, click Workspaces next to its name.

Communities

The list shows all communities in your organization. Clicking on the URL takes you directly to the Community. If you're not a member, the URL isn't linked.

Maximum number of communities: 100 

All Communities New Community			
Action	Community Name	Description	URL
Workspaces Builder	UpMsg		https://upmsg-developer-edition.eu16.force.com

Add to Public URL

- Go to **Setup > All Communities**
- Copy the community URL
- Go to **UpMessage** application and open the Settings tab
- In General settings, fill the 'Public URL' field with a copied community URL
- Click **Save**.

 Settings
General

Reset Defaults

Enable Application
This allows you to turn on/off the application.

☒ Enabled

Use Scheduled Messaging
This allows users to postpone message sends.

☐ Disabled

SMS Configuration

* Maximum Characters in SMS

840

Primary country

United States

Public URL

https://upmsg-developer-edition.eu16.force.com

Save

Please note: the URL must start with '**https://**'

After the Public URL is filled, please *assign endpoint* for the phone numbers which should be used for receiving SMS messages.

Site setup

Salesforce Sites enables you to create public websites and applications that are directly integrated with your Salesforce organization without requiring users to log in with a username and password. *Learn more.*

Create site

- Go to **Setup > Sites** and create a new public site


**SETUP
Sites**

New Site
Save Cancel

Site Label
i

Site Name
i

Site Description

Site Contact

i

Default Web Address
i

Active
☐
i

Active Site Home Page


Inactive Site Home Page

(Preview)

Site Template

i

Site Robots.txt


Site Favorite Icon


Analytics Tracking Code
i

URL Rewriter Class

i

Enable Feeds
☐

Clickjack Protection Level
i

Require Secure Connections (HTTPS)
☒
i

Lightning Features for Guest Users
☒
i

Upgrade all requests to HTTPS
☒
i

Enable Content Sniffing Protection
☒
i

Enable Browser Cross Site Scripting Protection
☒
i

Referrer URL Protection
☒
i

Guest Access to the Support API
☐
i

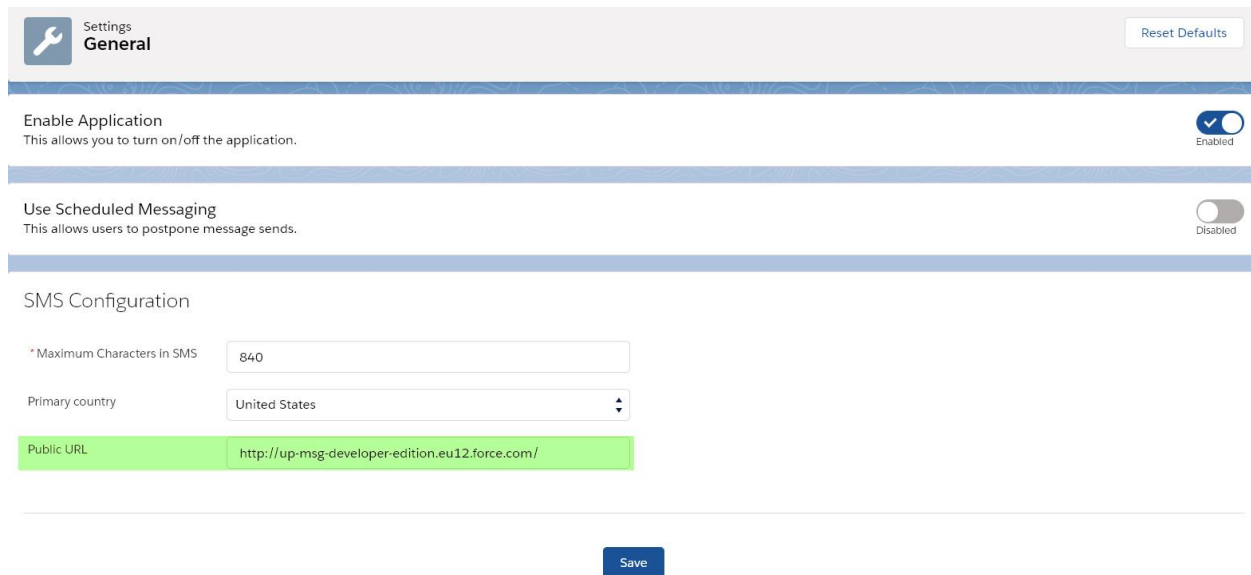
The site is created, and a Site URL is generated automatically:

Sites (up-msg-developer-edition.eu12.force.com)			New
Action	Site Label ↑	Site URL	
Edit Activate	UpMsg	http://up-msg-developer-edition.eu12.force.com/	

Add to Public URL

- Open the details of just created site
- Click on 'Public Access Settings' button

- In the 'Enabled Apex Class Access' add the following classes:
 - ReceiveMessages
 - ReceiveStatusCallback
- Copy the site URL
- Go to **UpMessage** application and open the Settings tab
- In General settings fill the 'Public URL' field with a copied site URL
- Click **Save**.



The screenshot shows the 'Settings - General' page for the UpMessage application. At the top, there's a header with a wrench icon, the text 'Settings General', and a 'Reset Defaults' button. Below this, there are two toggle switches: 'Enable Application' (checked, labeled 'Enabled') and 'Use Scheduled Messaging' (unchecked, labeled 'Disabled'). The 'SMS Configuration' section contains three fields: '* Maximum Characters in SMS' (text input with '840'), 'Primary country' (dropdown menu with 'United States'), and 'Public URL' (text input with 'http://up-msg-developer-edition.eu12.force.com/'). A 'Save' button is located at the bottom right of the form.

Please note: the URL must start with '**https://**'

After the Public URL is filled, please *assign an endpoint* for the phone numbers which should be used for receiving SMS messages.

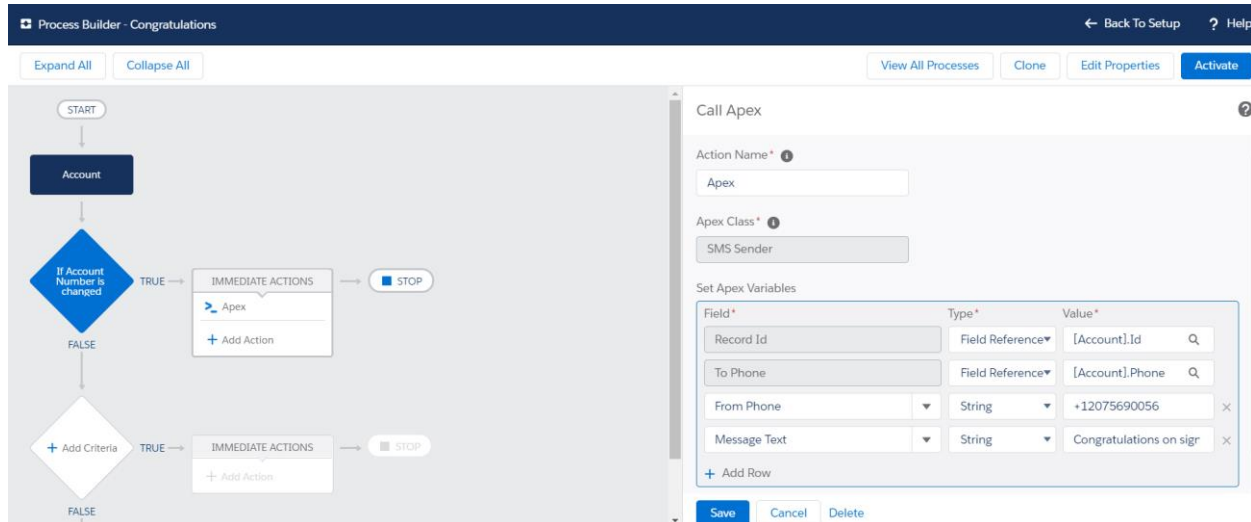
MESSAGES SENDING AUTOMATION

You can easily automate the messages sending based on certain events. Just use standard Salesforce tools like Process Builder and Flows.

Process Builder

- Go to **Setup > Process Builder**

- Click **New** to create a new process
- Fill the fields according to what the process should do and click **Save**
- Add Object
- Add 'SMS Sender' Apex Class in Immediate or Schedules actions



- You will see required fields **To Phone**, **Record Id** and **From Phone**. Use for them:
 - references to the Phone and ID of the selected object
 - a phone number from which the message will be sent (provider number)
- You can also add fields such as **Message Text** and **SMS Template Id**:
 - Message Text – just enter your message text in this field
 - SMS Template Id – fill it if you intend to use a readymade template

Flows

- Go to **Setup > Flows**
- Click **New Flow**
- Select the needed type
- On the left side choose **Action > Type > Apex Action**

New Action

Filter By

Type

Core Action

Apex Action

Apex Action (Legacy)

Email Alert

Search Apex actions...

SMS Sender
apex-upmessage__TriggeredSMSService



Lights, camera, action!
Select an Apex action to configure.

CancelDone

Edit "SMS Sender" Apex action

Set Input Values

Store Output Values

A_a *Record Id

{!New_Lead}.Id

A_a *To Phone

{!New_Lead}.Phone

A_a From Phone

+12153956210

☒ Include

A_a Message Text

☐ Don't Include

A_a SMS Template Id

a181r0000079hIIAAY

☒ Include

CancelDone

- You will see required fields **To Phone**, **Record Id** and **From Phone**. Use for them:
 - references to the Phone and ID of the selected object
 - a phone number from which the message will be sent (provider number)
- You can also add fields such as **Message Text** and **SMS Template Id** field:
 - Message Text – just enter your message text in this field
 - SMS Template Id – fill it if you intend to use a readymade template.

Please note: either **Message Text** or **SMS Template Id** should be filled. Otherwise, the message will not be sent. If both of the fields filled, SMS Template will be used to send a message.

PROVIDER SPECIFICS

ClickSend

- Cyrillic/chinese symbols are not supported by the provider
- Endpoint assignment
 - When the administrator reassigns endpoint (e.g. community URL is changed) new SMS Inbound rules on ClickSend side are created, but not updated. ClickSend administrator should remove rules related to old endpoint to ensure correct work of integration
 - To see delivery statuses in Salesforce, appropriate rules should be created in ClickSend manually. Follow the next steps to find endpoint URL for SMS Delivery Report action address:
 - Navigate to Settings tab of UpMessage application
 - Open General section
 - Click on a button near the 'Public URL' text box
 - 'Endpoint for SMS Message Status' link is available on the opened 'Detailed URL Info' pop-up window.

