

SMS Functionality Flow

- Log in to your Salesforce Org.
- Go to the existing Contact record or create a new one.

| B | Q, Search | ★▼ 🖽 ? ‡ 🗟 |
|--|--|---|
| SMS and eFax Home Contacts V SMS Messages V eFAXs V SMS Te | mplates v SMS Bot Reports v Dashboards v SMS Registered #s v FAX Registered #s | ✓ SMS Number - User Mappings ✓ FAX Number - User Mappings ✓ |
| Contact Mr. Yeshwanth Test | NO WARD) MICHONERAL | New Credit Report Virtual Inspection Request Files Send Files 💌 |
| Title Account Name Phone (2) ♥ Email (281) 816-4156 pandetiyeshwanth@gmail.com | Contact Owner 😸 Himanshu Kappor 🖞 | |
| Related Details | | SMSTO +12818164156 v FROM +18022328674 v |
| Cartest Owner Content Owner Co | Power DB1) 816-4156 Power Poore Poor | |
| Lead Source | Asst.Phone | Enter Text here. |
| 55N / | | Powered By: Cloud Mever, Inc. rcp- |
| Run Credit Report | | TO Select an Option FROM +18022328674 Image: Control of the select and the selec |

- You can see SMS TO and SMS FROM fields are auto populated in the SMS screen.
- Enter your message and Click on the Send icon.

| SMS and eFax Home Contacts V SMS Messages V eFaxs V SMS Te | Q, Search | 😿 🖬 ? 🕸 🌲 🐻 |
|---|----------------------------|---|
| Contact Mr. Yeshwanth Test | | New Credit Report Virtual Inspection Request Files Send Files 💌 |
| Title Account Name Phone (2) ♥ Email (281) 816-4156 pandetlyeshwanth©gmail.com | Contact Owner | |
| Related Details | | SMSTO +12818164156 • FROM +18022328674 • |
| Contact Owner | Phone (201) 816-4156 | |
| Name Mr. Yeshwanth Test | Home Phone | |
| Account Name | Mobile / | |
| Tide // | Other Phone | |
| Department / | fax / | |
| Birthöste / | pandetiyeshwanth@gmail.com | |
| Keports 10 | Assister | × unstantiant |
| (1) (1) (1) (1) (1) (1) (1) (1) (1) (1) | ASS PROTE | Welcome to Cloud Maven, Inc |
| Run Credit Report | | Powered By: Cloud Marien, Inc. (2) |
| | | TO Select an Option V FROM +18022328674 V |
| ★ SMS Inbox | | |



• You can see **Green Tick** which means that the message has been delivered.

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| Contact Mr. Yeshwanth Test A | | New Credit Report Virtual Inspection Request Files Send Files 💌 |
| Title Account Name Phone (2) ♥ Email (281) 816–4156 pandetiyeshwanth@gmail.com | Contact Owner 👸 Himanshu Kapoor 🖉 | |
| Related Details | | SMS TO +12818164156 v FROM +18022328674 v |
| Contact Owner | Phone / | |
| Name Mr.Yeshwanth Test | Home Phone | |
| Account Name | Mobile / | |
| Tite / | Other Phone | |
| Department | Fax / | |
| Birthdate / | Email pandetiyeshwanth@gmail.com | Hey Yeshwanth, Welcome to Cloud Maven, Inc. |
| Reports To | Assistant | Himanshu Kapoor + 11/11/2021-11:37 |
| Lead Source | Asst. Phone | Enter Text here. |
| SSN / | | Provend By : Cloud Marver, Inc. 702 |
| Run Credit Report | | TO Select an Option FROM +18022328674 w |
| | | |

• "Thank you" message received from the customer.

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| Title Account Name Phone (2) ♥ Email (281) 816-4156 pandetiyeshwanth@gmail.com | Contact Quiner Himmanchu Kapoor <u>A</u> ' | |
| Related Details | | SMS TO +12818164156 ¥ FROM +18022328674 ¥ |
| Contact Owner E Statement Statement Statement Statement Statement Statement Text / Mr. Yeshmanth Text / | Prone (281) 816-8156 / | |
| Account Name | Vobile / | |
| Department | fac Z | Hey Yestwanth, Welcome to Cloud Maven, Inc. Himeshu Kapor + 11/1/2021-11:37 |
| Reports To | pandetiyeshwanth@gmail.com / Assistant / | Thank you IUTIORTITIE |
| Lead Source | Asst.Phone | ter Text here. |
| SSN / | | Powered By : Ooud Maven, Inc. ⊘ |
| Run Credit Report | | TO Select an Option FROM +18022328674 • |
| 4 SMS Inbox 4 Send SMS | | |



SMS Opt-Out Functionality

• If the customer sends "Stop" message, SMS Opt-Out Functionality will be enabled.

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|---|---|---|
| Contact Mr. Yeshwanth Test 👗 | NY | New Credit Report Virtual Inspection Request Files Send Files V |
| Title Account Name Phone (2) ♥ Email (281) 816-4156 pandetiyeshwanth@gmail.com | Contact Owner | |
| | | SMS Opt-out enabled × |
| Related Details | | SMS TO +12818164156 ¥ FROM +18022328674 ¥ |
| Contact Owner | Phone (281) 816-4156 | / |
| Name Mr. Yeshwanth Test | Home Phone | 2 |
| Account Name | Mobile | - |
| Tite | Other Phone | Hey Yeshwanth, |
| Department | Fax | Himanani Kapoor - 11/11/2021-11:37 |
| Birthdate / | Email pandetiyeshwanth@gmail.com | Thank you |
| Reports To | Assistant | Stop |
| Lead Source | Asst. Phone | |
| 55N | | |
| Run Credit Report | | Powered By: Cloud Maven, Inc. 🖒 |
| L Child Tokyov & Canad State | | TO Select an Onlinn |

• The SMS Opt-out option is enabled as you can see at top of the SMS screen.

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| Contact Mr. Yeshwanth Test | E E E E E E E E E E E E E E E E E E E | New Credit Report Virtual Inspection Request Files Send Files V |
| Tite Account Name Phone (2) ♥ Email (281) 816-4155 pandetiyeshwanth@gmail.com | Contact Owner S Himanshu Kapoor A | |
| | | SMS Opt-out enabled × |
| Related Details | | SMS TO +12818164156 - FROM +18022328674 - |
| Const Chrise C Hand to Kapoor Parel M. Kahnash Test Account Name Const Name | Doos // 2011 816-4156 // // Rone Pone // // // // // // // // // // // // // | Hey Nutwardt Welcome to Claud Monro, pro wearwink Users - 10/1021/1127 @ 10/10221-1126 5000 11/11222-1142 |
| 55N / | <u>×</u> | Enter Text here. |
| Run Cresit Report + SMS Inbox + Send SMS | | TO Salect an Online FROM +180023238/7g + |



- When **SMS Opt-Out Functionality** is enabled, the message sent by the user will not be delivered.
- If the customer sends "Start" message, SMS Opt-Out Functionality will be disabled.

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| Contact Mr. Yeshwanth Test A | | New Credit Report Virtual Inspection Request Files Send Files 💌 |
| Title Account Name Phone (2) ♥ Email (281) 816-4156 pandetiyeshwanth@gmail.com | Contact Owner 😽 Himanshu Kapoor 🖉 | |
| Related Details | | SMSTO +12818164156 v FROM +18022328674 v |
| Contact Owner Chimanshu Kapoor | Phone (281) 816-4156 | |
| Name Mr. Yeshwanth Test | Home Phone | Hey Yeshwanth, |
| Account Name | Mobile | Welcome to Cloud Maven, Inc Himanshu Kapoor • 11/11/2021-11:37 🥥 |
| Tide | Other Phone | Thank you |
| Department | Fax / | 1/11/2021-1140 Stop |
| Birthdate | Email | 11/11/2021-11-62 |
| Reports To | Assistant | Start 17/1-025-11544 |
| Lead Source | Asst Phone | Enter Text here. |
| 55N / | ^ | Powered By : Cloud Maren. Inc. 💫 |
| Run Credit Report | | TO Select an Option FROM +18022328674 w |
| SMS inbox Send SMS | | |

• Click on the Related Tab of the Record, you will be able to see the SMS Messages.

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| SMS and eFax Home Contac | ts 🗸 SMS Messages 🗸 eFAXs 🗸 SM | IS Templates 🗸 SMS Bot Reports 🗸 I | Dashboards 🗸 SMS Registered #s 🗸 | FAX Registered # | s 🗸 SMS Number - User Mappings 🤍 FAX Number - User Mappings 🗸 💉 |
| Contact Mr. Yeshwanth Test | Contact New Credit Report Votaul Impaction Request Files Send Files V | | | | |
| 🥅 eFAXs (0) | | | | New | Activity Email |
| SMS Messages (4) | | | | New | Write an email |
| Message Number | Text Message | Record Type | Created Date | | |
| A-0000483 | Hey Yeshwanth, Welcome to Cloud Maven, Inc | Outbound Message | 11/11/2021, 11:37 AM | ¥ | Pitters: All time * All activities * All types 44 |
| A-0000484 | Thank you | Inbound Message | 11/11/2021, 11:40 AM | ¥ | ненези • сървно ни • чем ни |
| A-0000485 | Stop | Inbound Message | 11/11/2021, 11:42 AM | ۳ | ✓ Upcoming & Overdue |
| <u>A-0000486</u> | Start | Inbound Message View All | 11/11/2021, 11:44 AM | ¥ | No next steps. To get things moving, add a task or set up a meeting. |
| | | | | | No past activity. Past meetings and tasks marked as done show up here. |
| Criminal Reports (0) | | | | New | |
| Eviction Reports (0) | | | | New | |
| Secure EmailMessages (1) | | | | New | |
| Secure Email | FromAddress | Reply-to | Email Status | | |
| E-0000000019 | himanshu@cloudmaveninc.com | himanshu@cloudmaveninc.com | Delivered | | |
| 4 SMS Inbox 4 Send SMS | | | | | |

Please reach out to us at <u>solutions@cloudmaveninc.com</u> in case of any queries or concerns.