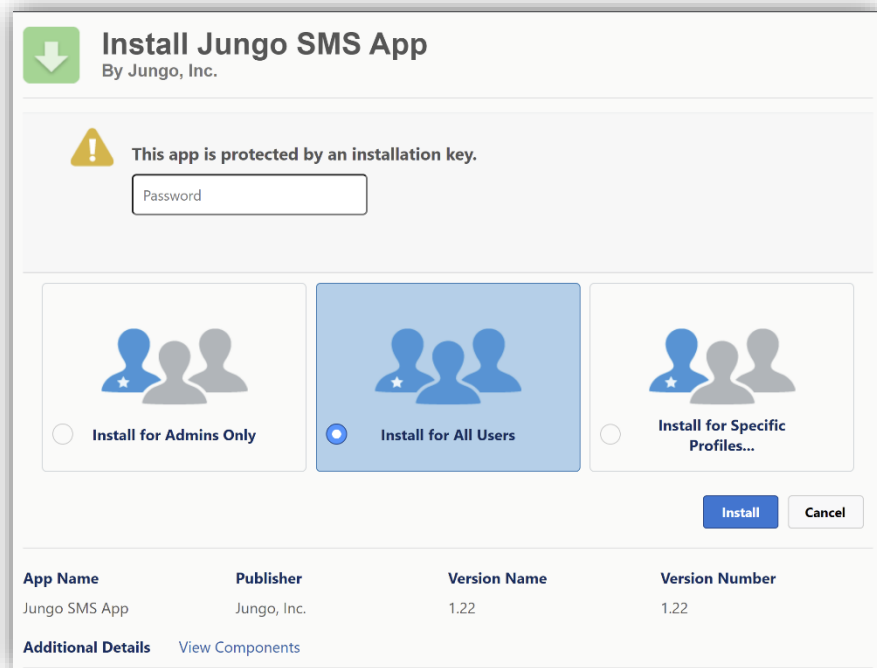


Jungo SMS App Setup Guide

***Note:** This application requires a Twilio account to send and receive SMS/MMS. If you do not have a Twilio account yet, you can sign up here: <https://www.twilio.com/try-twilio>

Configuring your SMS App:

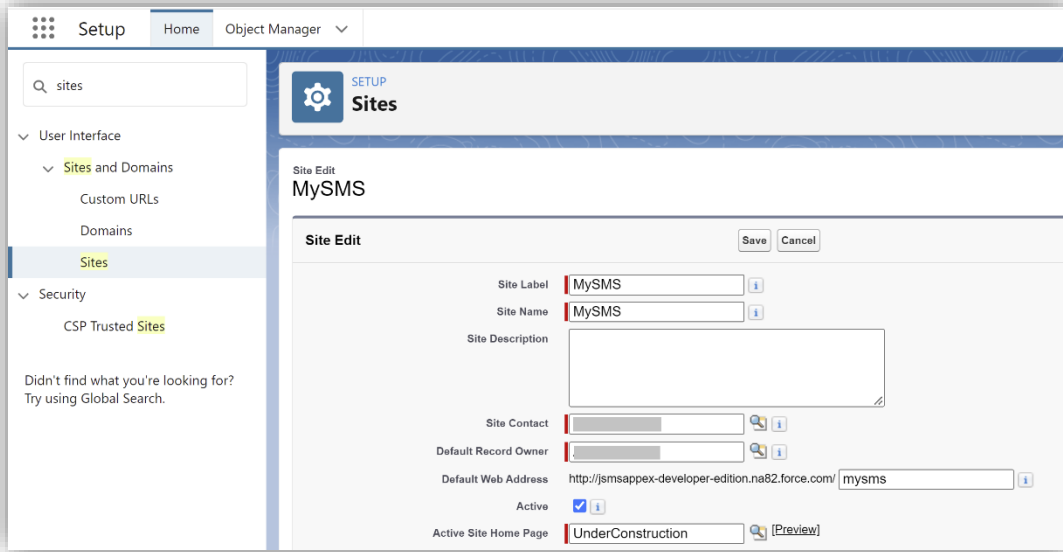
1. Install the SMS App package in your Salesforce Org (select which Users you wish to install for and Approve Third-Party Access for api.twilio.com)



App Name	Publisher	Version Name	Version Number
Jungo SMS App	Jungo, Inc.	1.22	1.22

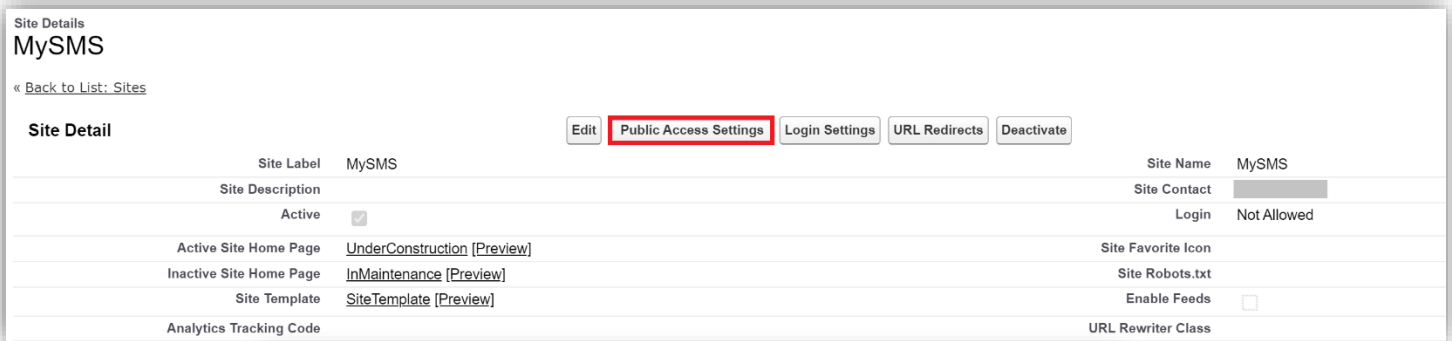
[Additional Details](#) [View Components](#)

2. Navigate back to the Setup in your Salesforce Org once the installation is complete and search for "Sites" in the Quick Find. Click Sites under Sites and Domains (if you do not have a force.com domain yet you will need to create and register one)
 - a. Click the New button to create a new Site
 - b. For the Site Label type "MySMS", let the Site Name autopopulate
 - c. In the Default Web Address section, type mysms at the end of the URL (an example of this might look something like <http://exampleorg-for-smsapp.force.com/mysms>)
 - d. Check the box for "Active"
 - e. In the Active Site Home Page section type "Under Construction" (this site will only be accessed by Twilio API requests)
 - f. Leave everything else as it is and click Save



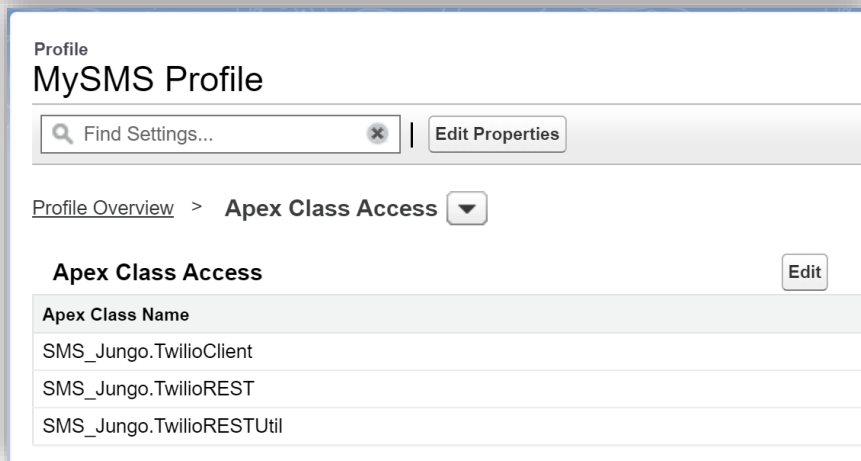
The screenshot shows the 'Setup Sites' page in the Jungo application. The left sidebar contains a search bar and a navigation menu with categories: User Interface, Sites and Domains, Security, and a search bar. The 'Sites and Domains' category is expanded, showing 'Custom URLs', 'Domains', and 'Sites'. The 'Sites' category is selected. The main content area is titled 'Site Edit MySMS'. It contains a 'Site Edit' form with fields for Site Label, Site Name, Site Description, Site Contact, Default Record Owner, Default Web Address, Active, and Active Site Home Page. The 'Active' checkbox is checked. The 'Active Site Home Page' is set to 'UnderConstruction'.

3. Now click the Public Access Settings button and find the Apex Class Access section. Enable these three classes:
 - a. SMS_Jungo.TwilioClient
 - b. SMS_Jungo.TwilioREST
 - c. SMS_Jungo.TwilioRESTUtil



The screenshot shows the 'Site Details' page for 'MySMS'. It includes a 'Back to List: Sites' link and a 'Site Detail' section. The 'Site Detail' section has a table with the following data:

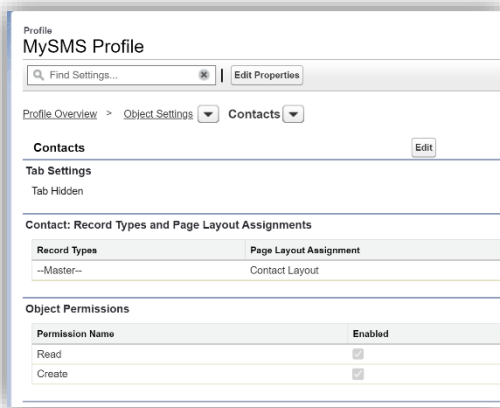
Site Label	MySMS	Site Name	MySMS
Site Description		Site Contact	
Active	☒	Login	Not Allowed
Active Site Home Page	UnderConstruction [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	☐
Analytics Tracking Code		URL Rewriter Class	



The screenshot shows the 'MySMS Profile' page. It includes a search bar and an 'Edit Properties' button. The 'Profile Overview' section is expanded, showing the 'Apex Class Access' section. The 'Apex Class Access' section has a table with the following data:

Apex Class Name
SMS_Jungo.TwilioClient
SMS_Jungo.TwilioREST
SMS_Jungo.TwilioRESTUtil

4. Next, we will be updating the Object permissions for the MySMS site guest user profile
 - a. Give Read and Create access for the Contact & Lead standard objects



Profile: MySMS Profile

Find Settings... | Edit Properties

Profile Overview > Object Settings > Contacts

Contacts [Edit]

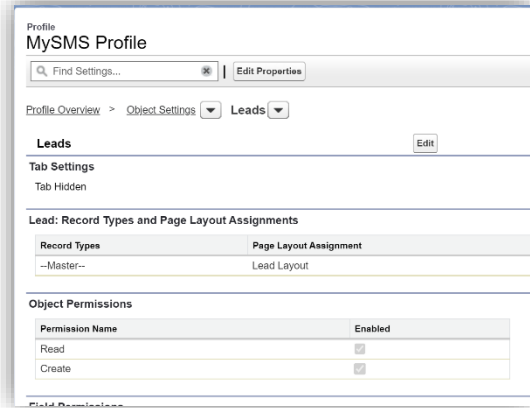
Tab Settings
Tab Hidden

Contact: Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Contact Layout

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒



Profile: MySMS Profile

Find Settings... | Edit Properties

Profile Overview > Object Settings > Leads

Leads [Edit]

Tab Settings
Tab Hidden

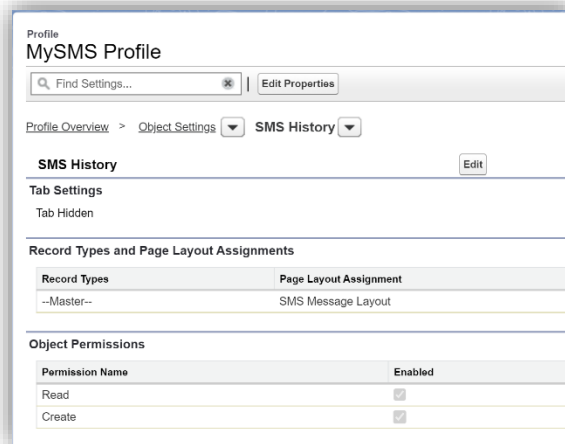
Lead: Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Lead Layout

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒

- b. Give Read and Create access for the SMS History custom object



Profile: MySMS Profile

Find Settings... | Edit Properties

Profile Overview > Object Settings > SMS History

SMS History [Edit]

Tab Settings
Tab Hidden

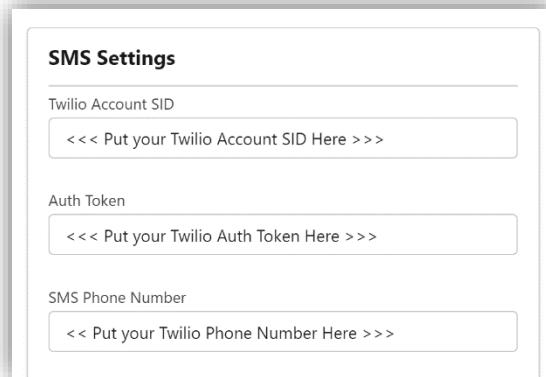
Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	SMS Message Layout

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒

5. Once the Site and Site User have been set up it is time to connect your Twilio account
 - a. Open the SMS Settings tab in the Jungo SMS App in Salesforce
 - b. Open your Twilio dashboard in a separate window
 - c. Copy your Twilio Account SID and Twilio Auth Token into Salesforce
 - d. Find the Twilio phone number that you wish to connect to your user account in the Jungo SMS app and click it to open its detail page. Copy the phone number in the Properties section and paste it into the corresponding input in the SMS Settings tab (*it will look like "+11112228888"*).



SMS Settings

Twilio Account SID

<<< Put your Twilio Account SID Here >>>

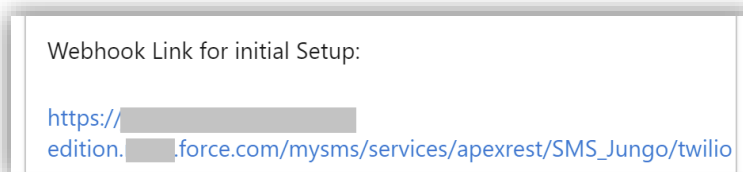
Auth Token

<<< Put your Twilio Auth Token Here >>>

SMS Phone Number

<< Put your Twilio Phone Number Here >>>

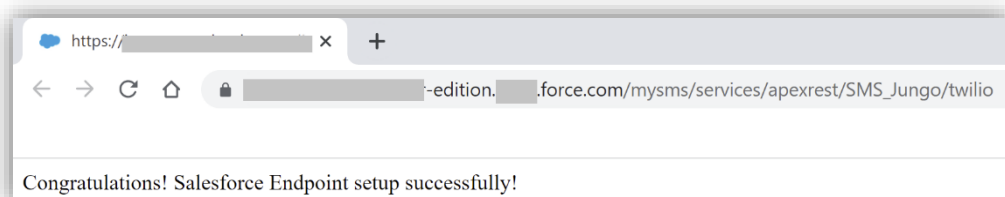
- e. Next find the Messaging section on the Twilio Number detail page
- For the Configure With input select “Webhooks, TwiML Bins, Functions, Studio, or Proxy” with the drop-down
 - For the A Message Comes In input select “Webhook” with the drop-down. For the text input go to the SMS Settings tab and copy paste the url below “Webhook Link for initial Setup:”. For the final drop down select “HTTP POST”



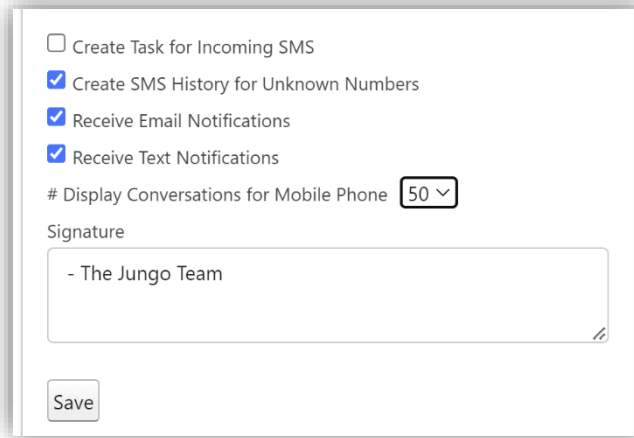
Webhook Link for initial Setup:

[https://\[redacted\]
edition.\[redacted\].force.com/mysms/services/apexrest/SMS_Jungo/twilio](https://[redacted]-edition.[redacted].force.com/mysms/services/apexrest/SMS_Jungo/twilio)

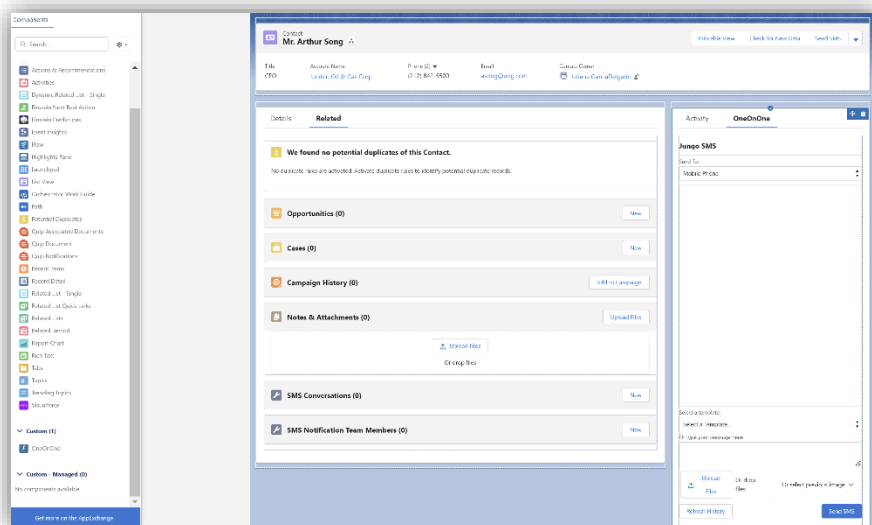
- f. Back in the SMS Settings tab click the URL which you pasted into the webhook section from the previous step. You should be brought to a webpage which displays only the text “Congratulations! Salesforce Endpoint setup successfully”



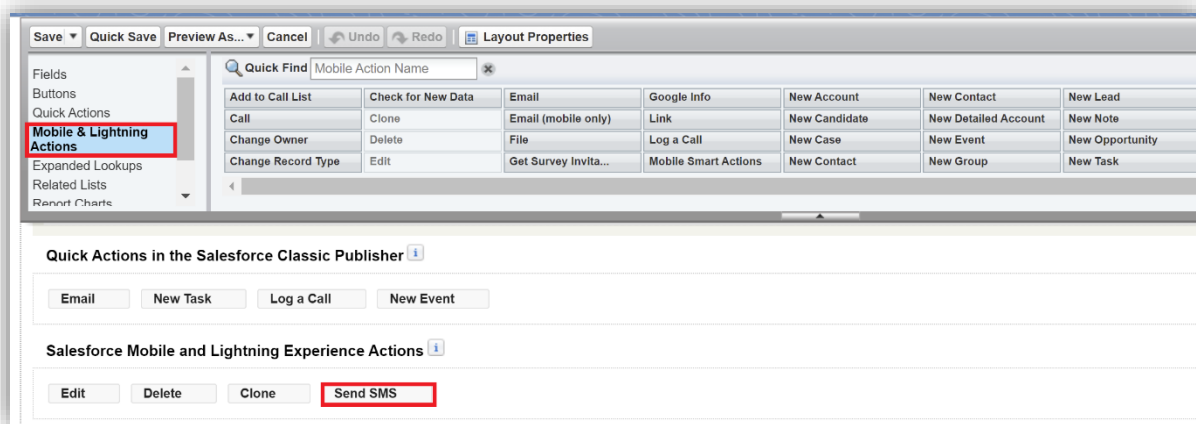
- g. For the checkbox inputs select whichever you wish to be activated. Activating “Create SMS History for Unknown Numbers” is recommended since otherwise you will not be able to receive SMS/MMS from numbers not already associated with Contacts or Leads in your Salesforce Org
- h. Provide whichever signature you wish to be associated with your outbound text messages
- i. Save your SMS Settings. These will be unique to your User record and step 5/f (*listed above*) must be done for every User you wish to connect. Make sure the SMS Setting records are owned by the User they belong to and that there are not multiple settings belonging to the same User



6. Click the Active Mass SMS button
7. Add the OneOnOne component to the Contact or Lead Lightning Record Page if you want to be able to text through the record page (*Optional*)

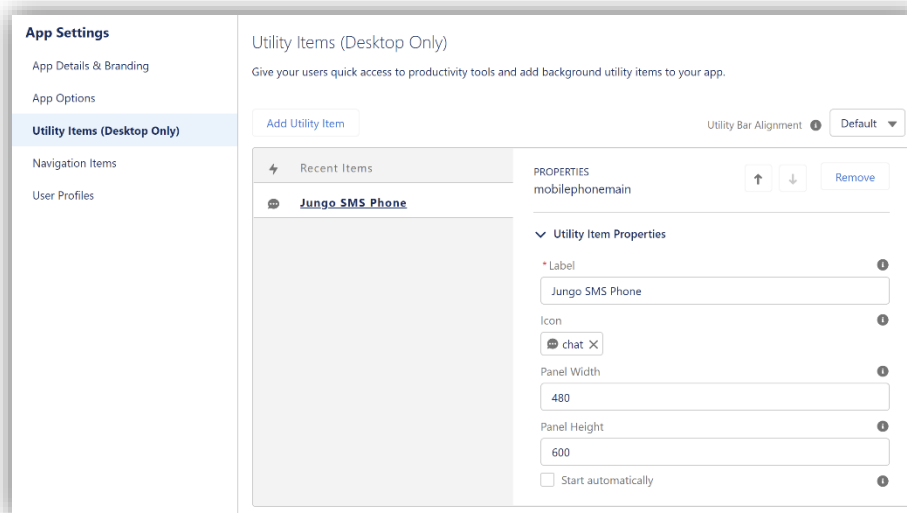


8. Add the "SMS Opt Out" field, "Send SMS" mobile action, and the "SMS History" related list to the relevant Contact & Lead page layouts where you would like to display this information (*Optional*)
9. Add the "Send SMS" button to the Contact page to make the OneOnOne component available through a quick action in mobile (*Optional*)

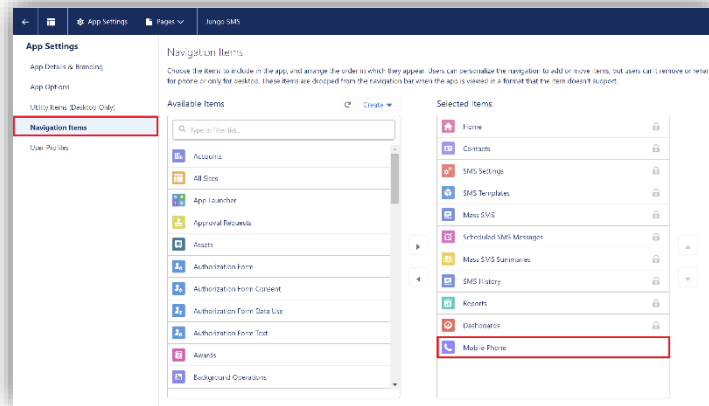


10. Add the "Send Mass SMS" button to the Contact list views you wish to see it on (*Optional*)
11. Add "mobilephonemain" to the Utility bar of the Apps you wish to use it in and update the following items (*Optional, Recommended*):

- Label = Jungo SMS Phone
- Icon = chat
- Panel Width = 480
- Panel Height = 600

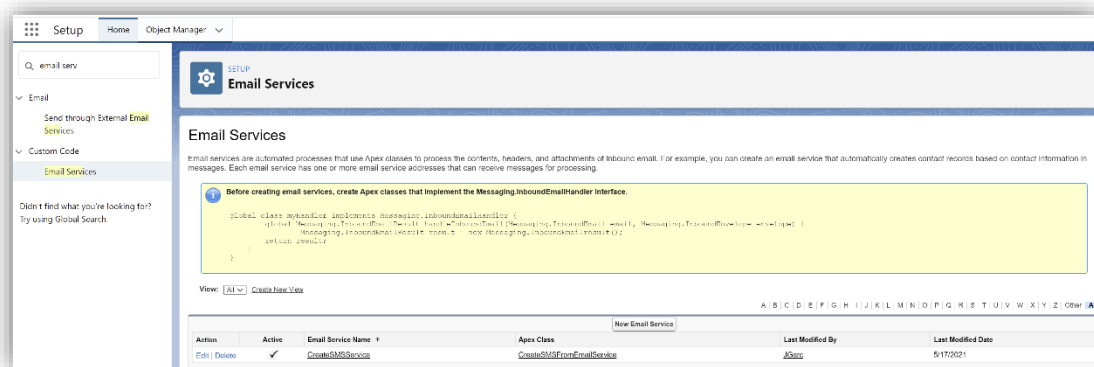


12. Add "Mobile Phone" (the Jungo SMS Phone) to the Mobile Navigation menu of the Apps you wish to use it in (Optional, Recommended)

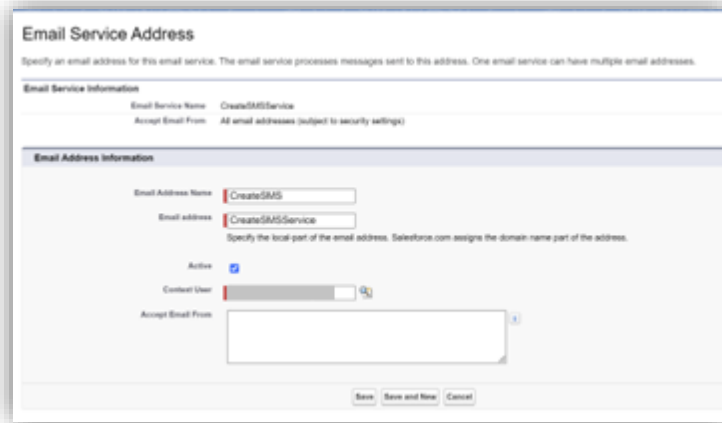


13. Now we will set up the Send SMS Reply from Email functionality

- In Setup search for "Email Services" and select it
- Find the Email Service named "CreateSMSService" and edit it to be Activated if it is not already.



- Next open the CreateSMSService detail and click the "New Email Address" button. For the Email Address Name provide "CreateSMS" and make sure to leave the Accept Email From section blank then click save



Email Service Address
Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.

Email Service Information

Email Service Name: CreateSMSService
Accept Email From: All email addresses (subject to security settings)

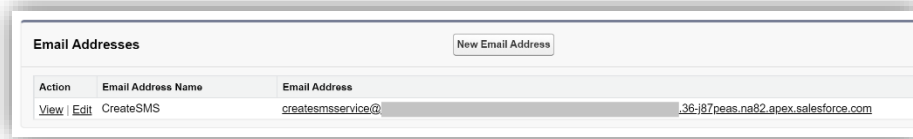
Email Address Information

Email Address Name: CreateSMS
Email address: CreateSMSService
Specify the local part of the email address. Salesforce.com assigns the domain name part of the address.

Active: ☒
Context User: [User Icon]
Accept Email From: [Text Box]

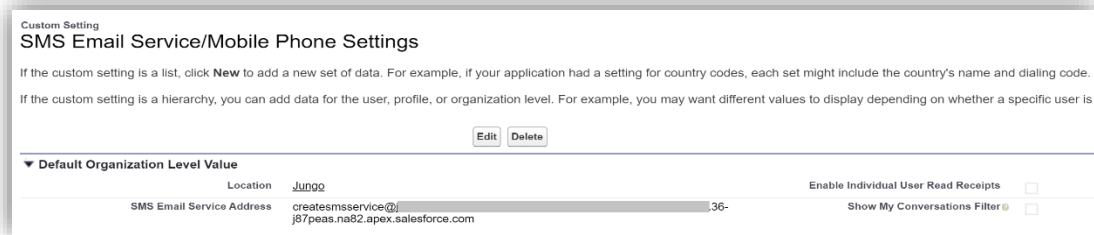
Save Save and New Cancel

- d. Copy the Email Address which was generated for the Email Address created in the previous step and navigate to your Org's Custom Settings.



Email Addresses			New Email Address
Action	Email Address Name	Email Address	
View Edit	CreateSMS	createsmsservice@_36-j87peas.na82.apex.salesforce.com	

- e. Click "Manage" next to the "SMS Email Service/Mobile Phone Settings" custom setting and click the topmost "New" button to create an Org Wide Default level custom setting record. Paste the Email Address you copied in the previous step in the "SMS Email Service Address" section and then click "Save"



Custom Setting
SMS Email Service/Mobile Phone Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is

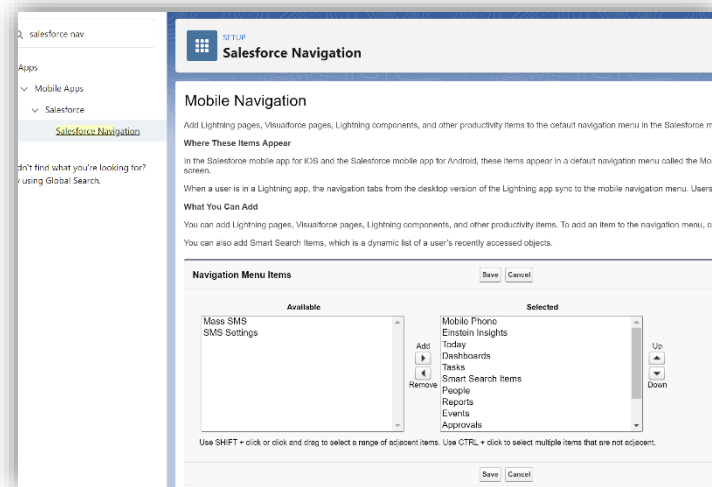
[Edit](#) [Delete](#)

▼ Default Organization Level Value

Location	Jungo	Enable Individual User Read Receipts	☐
SMS Email Service Address	createsmsservice@_36-j87peas.na82.apex.salesforce.com	Show My Conversations Filter	☐

14. Add the SMS Mobile Phone App to Salesforce Mobile (Optional)

- Search Mobile Apps in Setup and click "Salesforce Navigation"
- Add the "Mobile Phone" option to the Selected section and Save



15. Assign the Jungo SMS User permission set to everyone who will be using the SMS App

16. Create a Template for Business Texting Compliance (Acceptable Use Policy:

<https://www.twilio.com/legal/aup>, Messaging Policy: <https://www.twilio.com/legal/messaging-policy>)

- Go to the SMS Templates tab in the Jungo SMS App and create a new SMS Template record
- Give a name like "Introduction" for the template. You can choose what you believe is most appropriate for your Users
- For the Message provide something that lets the recipient know you are texting them from a business number and that they can choose to not receive future messages by replying STOP
- Move both Category options into the Chosen column and click save. This template can be used when you are initially texting a number for business purposes