

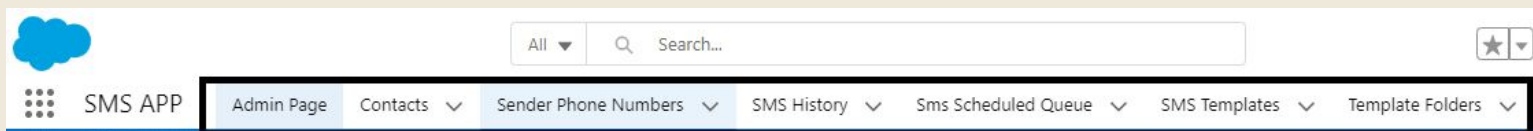


Ventas SMS & CPQ Solution User Guide

SMS APP

We have created an SMS application, we need to install the package from the app exchange. We have seven tabs for the application.

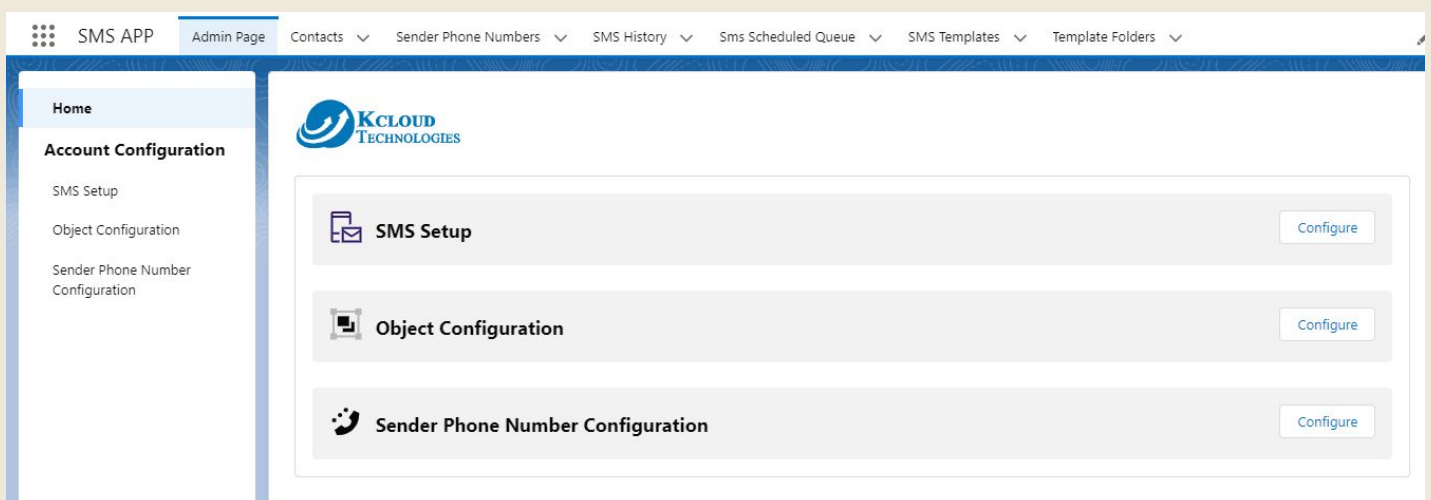
1. Admin Page.
2. Contacts.
3. Sender phone number.
4. SMS History.
5. SMS Schedule Queue.
6. SMS Template.
7. Template folder.



1. Admin Page:

On the admin page we setup the functionality and working process of the SMS application. We can setup SMS applications in two ways i.e: Trail Setup and Go Live. In Trail setup we give 30 days trial with 30 SMS already credited and in Go Live it sets up a live function that will be working for your production org. And it required an SMS delivery URL. For Go Live contact KCloud for Message limits and once it's done SMS message limits will get updated and setup is all completed. After this user has to do object configuration where an operator can decide and assign the sms functionality for objects. We have add new object and select the default phone number which operator wants to assign the sms function. After the SMS setup and object configuration is done the next step is Senders phone number configuration and we'll assign a number to application so that other user can contact on mentioned number. Number can be assigned to multiple roles, profile, users.

Once all the necessary fields are done then we have to give permission of page and classes in sites, after that we have to go in change data capture and enable the SMS History and enable the custom notification so whenever a messages come then a operator should get notified. Once all done the setup and configuration the application is ready to go.



2. Contacts:

Contacts creates a records of us to communicate with other end using SMS application. We need to assign the registered number we are using in SMS setup to contact. Before that we also need to add conversation view so operator can view the incom SMS". Send mass SMS will be used to send message to every records stored in ing messages. Also we will add button in page layout (contact layout) for "send SMS" and send "masscontacts. Our SMS function is a bidirectional functionality where both the operator and user can chat at the same time (supports inbound and outbond messages).

For single individual contacts we can see "Send_SMS" option available.

For mass records we can find "Send_Mass_SMS".

The screenshot displays a CRM interface. The top section, titled 'Contacts Recently Viewed', shows a list of two contacts. The 'Send Mass SMS' button in the top right corner is highlighted with a red box. Below this, the 'Contact himanshu Will' section is shown, featuring a '+ Follow' button and a 'Send_SMS' button. The contact details for himanshu Will are listed below.

	Name	Account Name	Account Site	Phone	Email	Contact Owner ...
1	☐ himanshu Will			(256) 634-6484	hemanshu@kcloudtechnologies.com	Tapp
2	☐ Andy Young	Dickenson plc		(785) 241-6200	a_young@dickenson.com	Tapp

Title	Account Name	Phone (2)	Email	Contact Owner
		(256) 634-6484	hemanshu@kcloudtechnologies.com	Test app



Notifications

[Mark all as read](#)



Incoming message

you received a text message

Dec 16, 2021, 2:02 PM •



Incoming message

you received a text message

Dec 16, 2021, 1:53 PM •



Incoming message

you received a text message

Dec 16, 2021, 1:52 PM •



Incoming message

you received a text message

Dec 16, 2021, 1:48 PM •



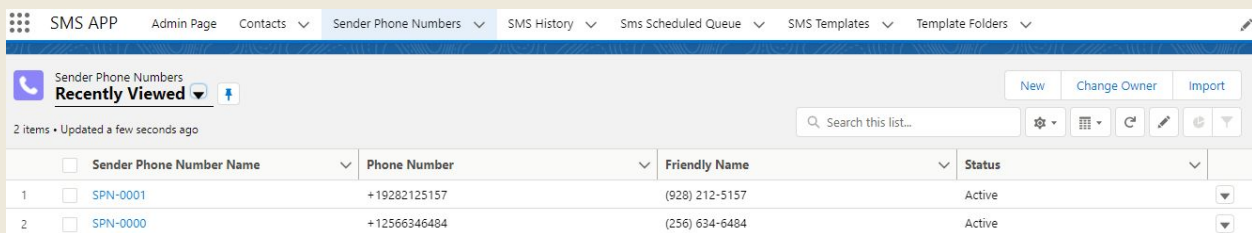
Incoming message

you received a text message

Dec 16, 2021, 1:48 PM •

3. Sender phone number:

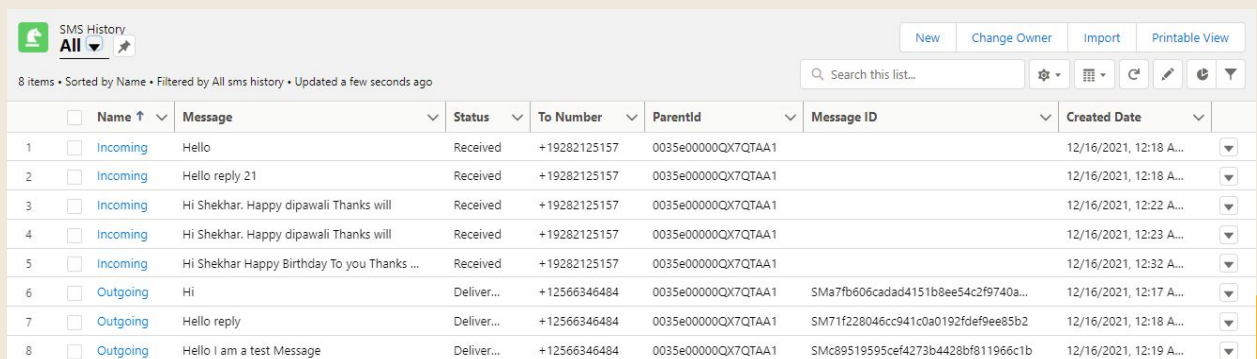
The sender's Phone number is list of all the phone number purchased and gives a record of number used for application to communicate other end. It makes a clear view for operators to know the number which is active and inactive.



SMS APP				
Admin Page Contacts Sender Phone Numbers SMS History Sms Scheduled Queue SMS Templates Template Folders				
Sender Phone Numbers Recently Viewed				
2 items • Updated a few seconds ago				
Search this list...				
☐	Sender Phone Number Name	Phone Number	Friendly Name	Status
1	☐ SPN-0001	+19282125157	(928) 212-5157	Active
2	☐ SPN-0000	+12566346484	(256) 634-6484	Active

4. SMS History:

We created SMS history to record and track the status of SMS. It helps the operator to know the status and engagement with customers. It tells message status whether its delivered, sent or received.

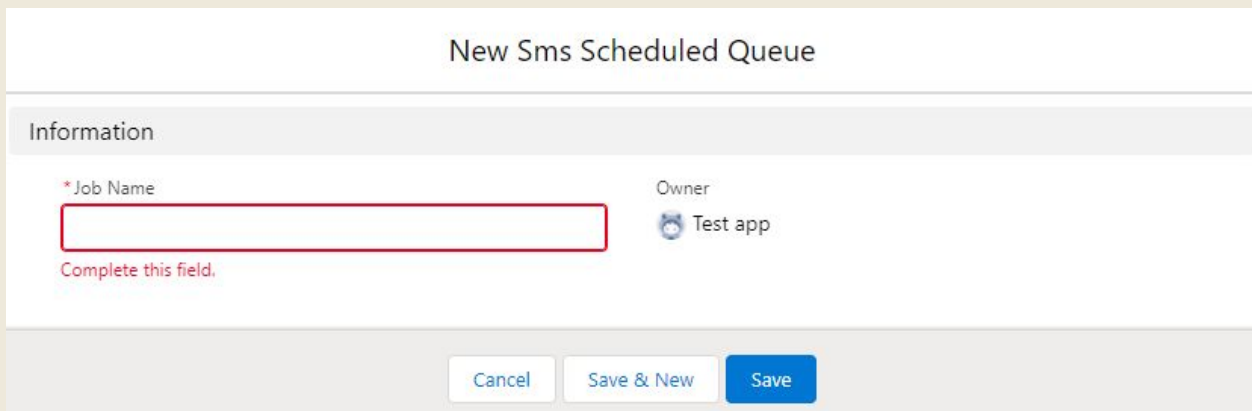


SMS History						
All						
8 items • Sorted by Name • Filtered by All sms history • Updated a few seconds ago						
Search this list...						
☐	Name	Message	Status	To Number	ParentId	Created Date
1	☐ Incoming	Hello	Received	+19282125157	0035e00000QX7QTAA1	12/16/2021, 12:18 A...
2	☐ Incoming	Hello reply 21	Received	+19282125157	0035e00000QX7QTAA1	12/16/2021, 12:18 A...
3	☐ Incoming	Hi Shekhar. Happy dipawali Thanks will	Received	+19282125157	0035e00000QX7QTAA1	12/16/2021, 12:22 A...
4	☐ Incoming	Hi Shekhar. Happy dipawali Thanks will	Received	+19282125157	0035e00000QX7QTAA1	12/16/2021, 12:23 A...
5	☐ Incoming	Hi Shekhar Happy Birthday To you Thanks ...	Received	+19282125157	0035e00000QX7QTAA1	12/16/2021, 12:32 A...
6	☐ Outgoing	Hi	Deliver...	+12566346484	0035e00000QX7QTAA1	12/16/2021, 12:17 A...
7	☐ Outgoing	Hello reply	Deliver...	+12566346484	0035e00000QX7QTAA1	12/16/2021, 12:18 A...
8	☐ Outgoing	Hello I am a test Message	Deliver...	+12566346484	0035e00000QX7QTAA1	12/16/2021, 12:19 A...

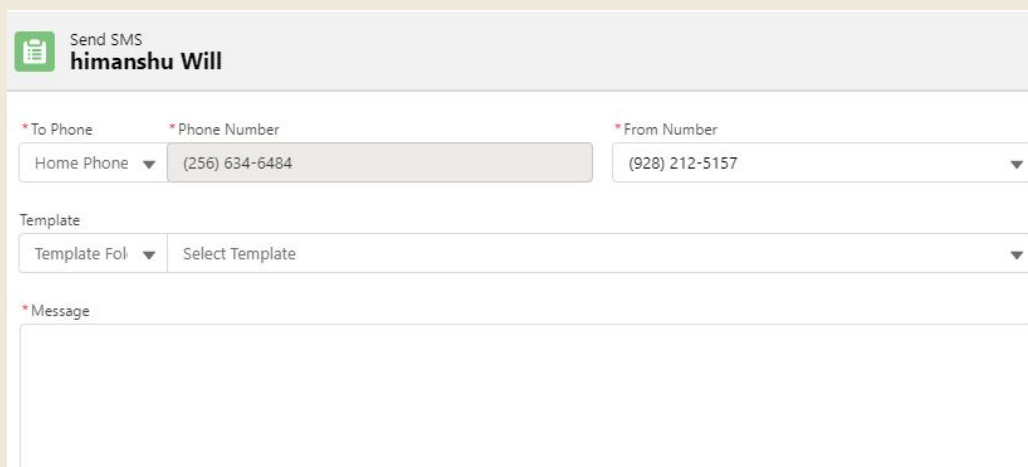
5. SMS Schedule Queue:

Whenever a operator wants to send a message in particular date or time and he physically is absent in that time he can use SMS schedule which helps to send message in required date and time given by

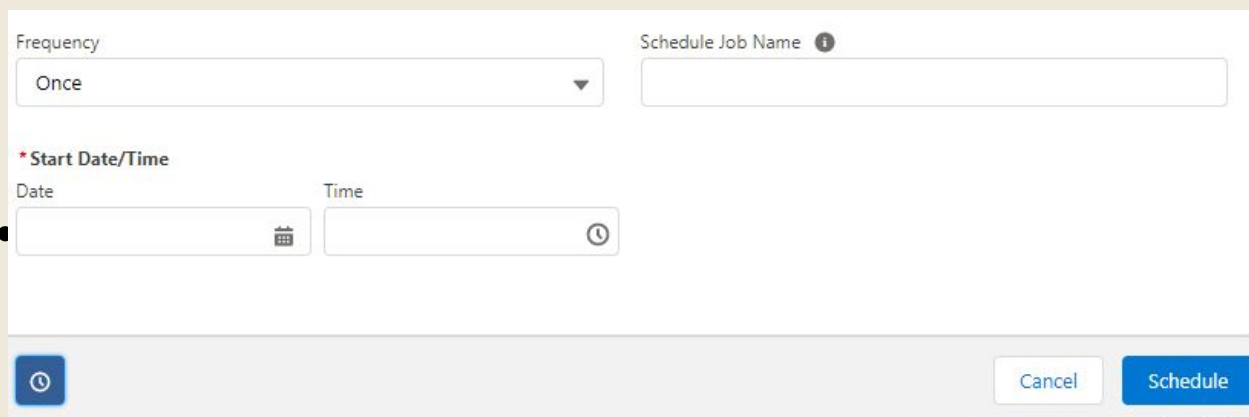
- operator. SMS schedule also gives flexibility to operators to manage
- the top priority first doesn't matter what pattern its designed for it will always give priority to top records which needs to be addressed first. (Priority is decided by time, i.e: in two messages one needs to be send on 12:30 AM and another at 12:23 AM so automatically it will first work for 12:23 one we have designed a class for it to automate this thing). We can also manage the schedule frequency of message by which we can decide when and at what time intervals messages will be delivered to other end also we can abort the message which we don't want to get delivered.



On Below screen we can see a clock type icon in left bottom that option is used for scheduling the message.



We've designed in such a way that message with high priority will be delivered first.

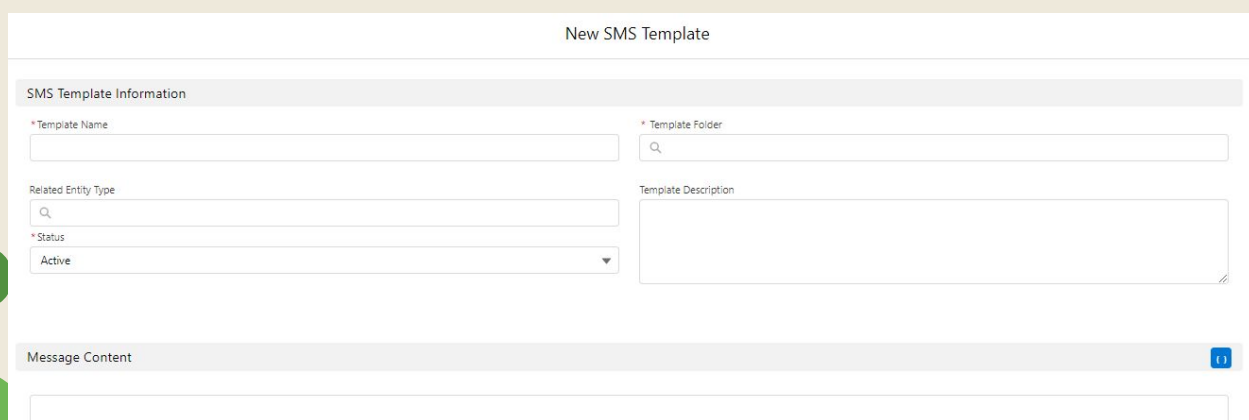


A screenshot of a scheduling interface. At the top, there is a 'Frequency' dropdown menu set to 'Once' and a 'Schedule Job Name' text input field. Below these, a section titled '* Start Date/Time' contains two input fields: 'Date' with a calendar icon and 'Time' with a clock icon. At the bottom of the form, there is a blue button with a clock icon, a 'Cancel' button, and a 'Schedule' button.

6. SMS Template:

We also have SMS Template which is used to send all the records same format of message and also reduces the pressure of operator to individually send every records a single message. We can use template for an event and can also schedule it to particularly event date, this also helps in customer interaction and automatically operates on the scheduled date. Once the template is done we also get an option to select entity type object we want to perform the action. This helps to make dynamic emails for records which makes it more personal with customer. If we want to forward this message to other end then again we have to go back to contact and in SMS conversation view and at time of sending SMS we get an option of selecting template and select the required template. We can do it for both single SMS send and mass SMS send.

Below we can see we can design a static and dynamic SMS for multiple contact at same time.

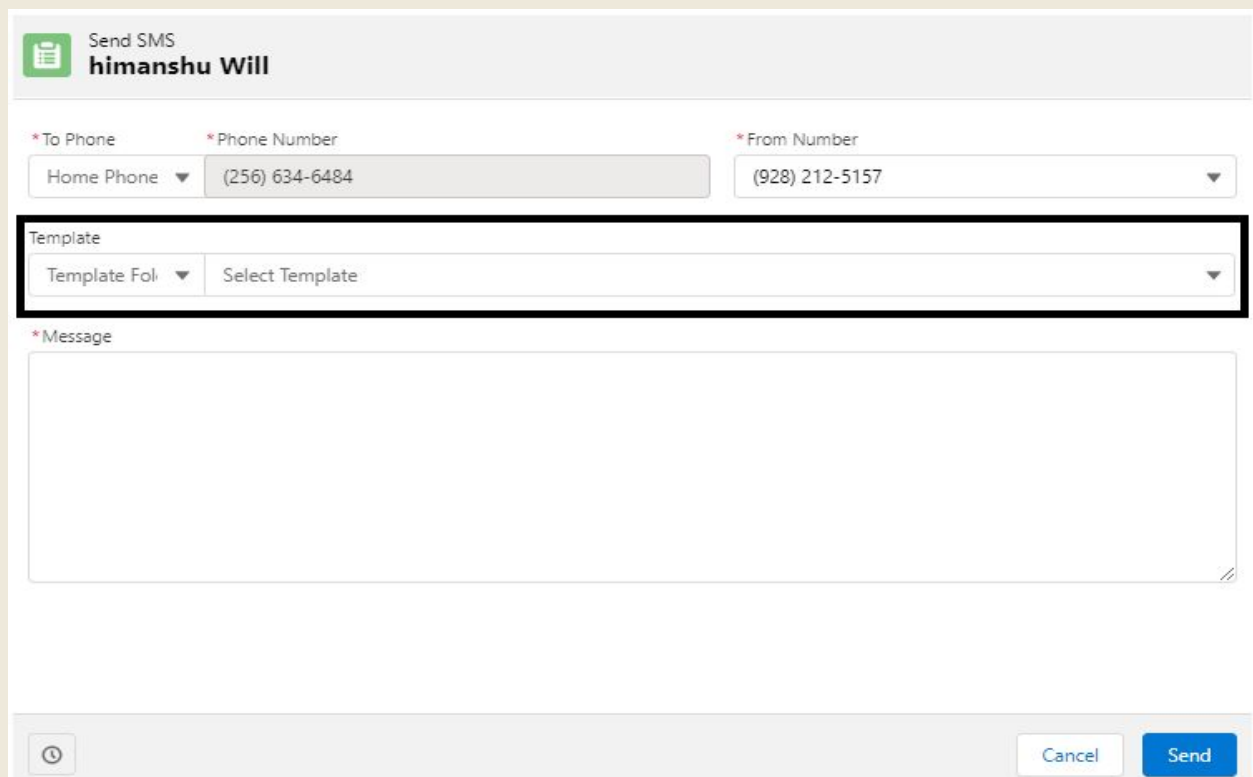


A screenshot of the 'New SMS Template' form. The form is titled 'New SMS Template' and is divided into two main sections: 'SMS Template Information' and 'Message Content'. The 'SMS Template Information' section contains four fields: '* Template Name' (text input), '* Template Folder' (text input with a search icon), 'Related Entity Type' (text input with a search icon), and '* Status' (dropdown menu set to 'Active'). The 'Message Content' section is at the bottom and contains a large text area for the message content. There is a blue button with a clock icon in the bottom right corner of the form.

7. Template folder:

- Template folder is nothing but just a tab which stores all the new and previous template made for all events. It stores every template so whenever operator wants to send message he can simply select the template from contact send SMS either for single record or multiple records.

We can select folder from contact which will be used to send to all contacts.



The screenshot shows a web-based interface for sending SMS. At the top, there's a header with a green icon and the text 'Send SMS himanshu Will'. Below this, there are three input fields: '* To Phone' with a dropdown menu showing 'Home Phone', '* Phone Number' with the value '(256) 634-6484', and '* From Number' with the value '(928) 212-5157'. A red box highlights the 'Template' section, which includes a dropdown menu labeled 'Template Fol' and a button labeled 'Select Template'. Below this is a large text area labeled '* Message'. At the bottom right, there are 'Cancel' and 'Send' buttons. A small icon is visible in the bottom left corner.

In CPQ, for every product, we have a Setup CPQ button where we can do the configuration of Products and add Pricing Methods. In the Quote, we have an EditLines button where we can add the Subscription and non-subscription Products to Quote. Calculations are done automatically on the change of any field values. We can apply a Discount Schedule for any Product.

In the Discount Schedule, we have a button EditTiers button where we can add Discount Tiers for the Discount Schedule. In the Quote, we have a checkbox Order, if it is true order will be generated with OrderItems for the added QuoteLineItems. In the Order we have a checkbox Contracted, If it is true and OrderItem has any Subscription Product, a Contract will be generated with the Subscription Product. In the Contract, we have an Ammend button where we can Amend the Contract and add or edit the Products.

Click on the CPQ button we can see the pricing method this. We can select any of the pricing methods. A quantity-based where we can define the quantity. We will select here the percent of portfolio category as software and we will define a default quantity as one and editable and saved.

The screenshot shows the 'Setup CPQ' configuration window. At the top, there are three sections: 'Pricing Method' with a dropdown set to 'PriceBook Price', 'Pricing Method Editable' with an unchecked checkbox, and 'Price Editable' with a checked checkbox. Below these is 'Default Quantity' set to '1.00' and 'Quantity Editable' with a checked checkbox. A section titled 'CPQ Price Configuration' contains 'Select Pricebooks' with 'Available' and 'Selected' lists. The 'Selected' list contains 'Standard Price Book' and 'Standard'. To the right, there are two input fields: '*Standard Price Book Price' and '*Standard Price', both set to '\$5,000.00'. At the bottom right are 'Cancel', 'Quick Save', and 'Save and Next' buttons. The footer shows 'Last Modified By'.

We can add a new options category from here we can name a category as software and save it and add an option from here an optional product we can also add an option from here a button is there where we can just go and add any of the options and click on Save and finish.

Setup CPQ

Software [Edit] [Delete]

	Product Name	Product Code	Product Description	Bundled	
1	GenWatt Propane 100kW	GC3020		☐	[Edit] [Delete]
Add Option					

Other Options

	Product Name	Product Code	Product Description	Bundled	
1	GenWatt Diesel 200kW	GC1040		☐	[Edit] [Delete]
Add Option					

← Previous New Option Category New Option Finish

Now we need to go to port and edit lines and select the price book as the standard price book and save and add a product to it.

SMS APP Admin Page Contacts Sender Phone Numbers SMS History Sms Scheduled Queue SMS Templates Template Folders App Tests More

Test Schedule [Cancel] [Save]

	Name	Lower Bound	Upper Bound	Discount(%)/Amount	
1	Tier 1	10	20	5	[Edit] [Delete]

SMS APP Admin Page Contacts Sender Phone Numbers SMS History Sms Scheduled Queue SMS Templates Template Folders App Tests More

Edit Tiers Test Schedule

Name	Lower Bound	Upper Bound	Discount(%) / Amount
1 Tier 1	10	20	5

Cancel Save

Select the software category product and Save we can see the bundled product with it need to edit and make it ordered and primary and save and go to the order and activate it and make it contracted and click Save

Edit GenWatt Diesel 10kW

* Product Name GenWatt Diesel 10kW

Product Code GC1020

Pricing Method PriceBook Price

Percent of Total(%) 10.00

Pricing Method Editable ☐

Default Quantity 1.00

Quantity Editable ☒

Active ☒

Product Family Software

Price Editable ☒

Discount Schedule

Search Discount Schedules...

- Test Schedule
- Test Amount
- + New Discount Schedule

Subscription Term

Cancel Save & New Save

We can see the contract just go on it and down below we can see the subscription go back to the code which we want to generate. From here we can create a PDF.

00000001
Edit Quote
Add Products Quick Save Cancel Save

Quote Information :

Start Date
End Date
Additional Disc(%)
Subscription Term
28

#	Product Code	Product Name	Quantity	List Unit Price	Additional Disc. (%)	Net Unit Price	Net Total
1	GC1060	GenWatt Diesel 1000...	10	\$1,000.00		\$6,650.00	\$66,500.00
2	GC1020	GenWatt Diesel 10kW	1	\$5,000.00		\$5,000.00	\$5,000.00
3	GC3020	GenWatt Propane 10...	10	\$15,000.00		\$14,250.00	\$142,500.00

We will get a preview of the PDF here and send it to code save to code details we can see a link URL for the PDF

SMS APP
Admin Page
Contacts
Sender Phone Numbers
SMS History
Sms Scheduled Queue
SMS Templates
Template Folders
App Tests
00000107
More

Order
00000107
Edit Change Owner Clone

Account Name
Test Acc 1
Contract Number
Order Start Date
7/5/2022
Status
Activated
Order Amount
\$720,000.00

Activated
Mark Status as Complete

Related
Details

Order Owner
Narendhar Reddy
Order Number
00000107
Account Name
Test Acc 1
Order Start Date
7/5/2022
Billing Address
Activated By
Narendhar Reddy
Quote
Quote for Test Opp 1
Order Amount
\$720,000.00
Order Type
Quote
Contracted
Contracting Method
By Subscription End Date
Shipping Address
Activated Date
7/5/2022, 3:51 AM

Activity
Filters: All time • All activities • All types
Refresh Expand All View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.

Now go back to contact if we select Send SMS and template folder and template we can see the URL here and click on send now the user will be receiving a URL, a link for the quote and we can see that success.



Thanks !!

contact@kcloudtechnologies.com

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