

TATA COMMUNICATIONS
CONNECT SMS
FOR SALESFORCE
VERSION – 1.0 USER GUIDE



Revision History

[illegible]

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1. INTRODUCTION

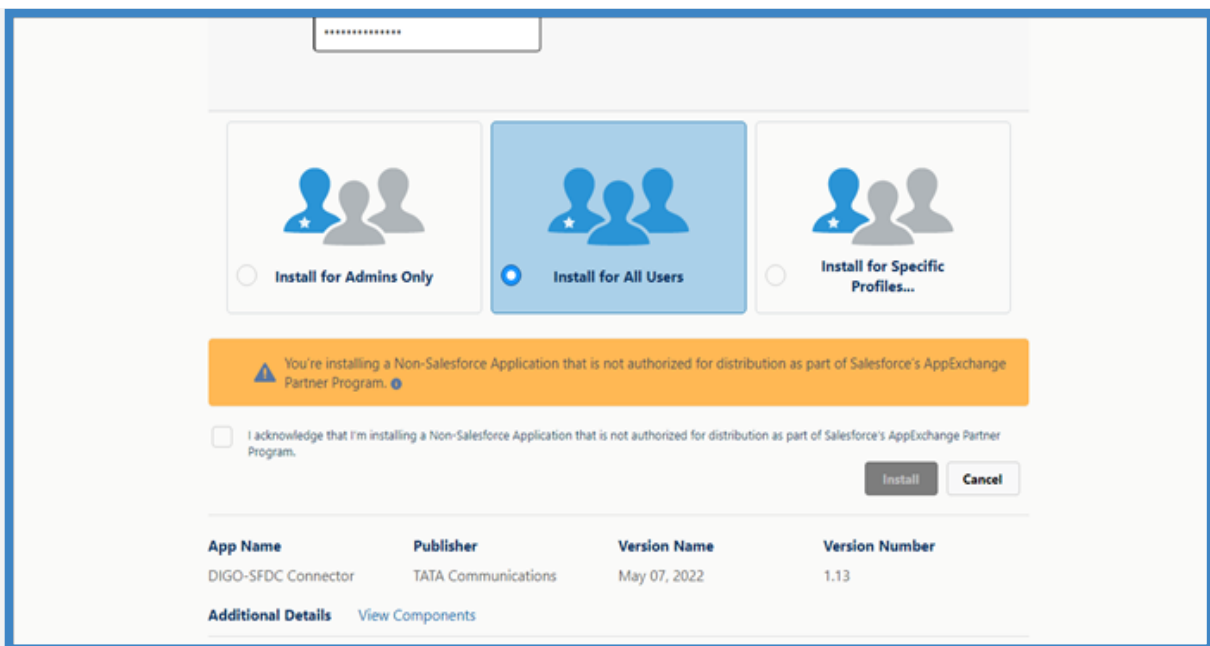
Tata Communications Connect SMS for Salesforce is part of a larger initiative “SaaS Connectors” within Cloud Communications to integrate Tata Communications SMS messaging with popular CRMs and collaboration tools to extend Tata Communications reach and drive incremental volume where there otherwise may be none. Tata Communications Connect SMS for Salesforce is used to allow enterprises to manage inbound and outbound communications within their Salesforce app.

With Tata Communications Connect SMS, enterprise can send and receive messages hassle free.

2. INSTALLATION

NOTE: Before you begin installation, please note that enterprise must have an active account of Salesforce and a subscription account with Tata Communications to use Tata Communications Connect SMS services.

- Search for the application named “Tata Communications Connect SMS for Salesforce ” in Salesforce AppExchange Marketplace by visiting the link: <https://appexchange.salesforce.com/> and Click Install. You can install the Tata Communications Connect SMS for Salesforce app for all users in your organization or for specific users as per your requirement. Type the password: Connector@1234 if prompted.

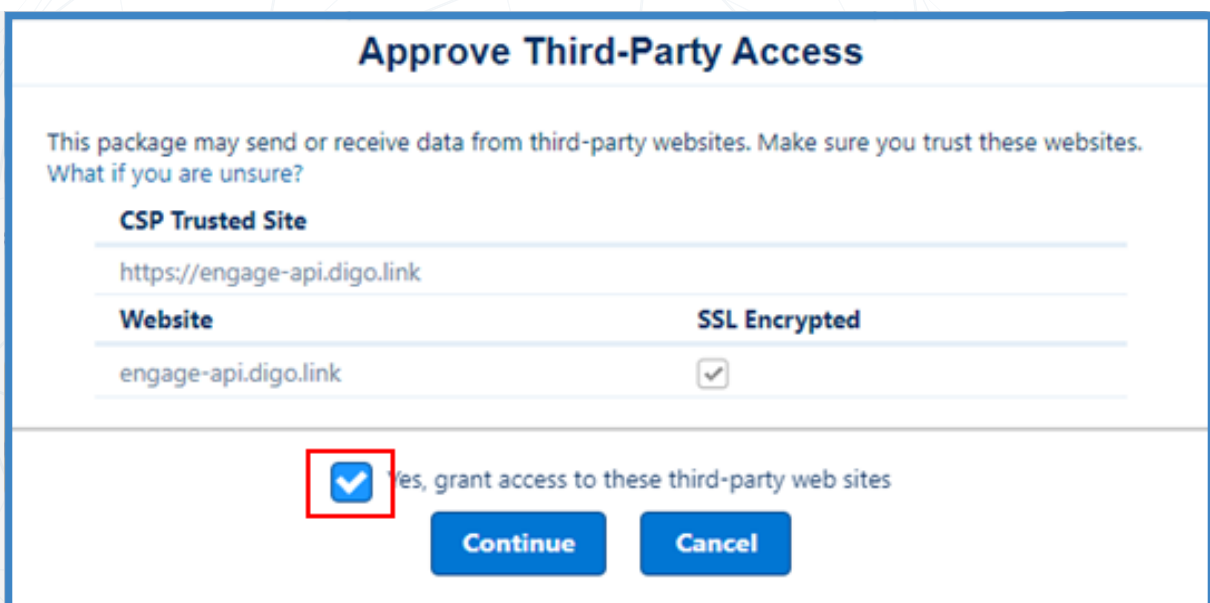


The screenshot shows the installation interface for the "DIGO-SFDC Connector" app. At the top, there is a password field with a masked password. Below it, three installation options are presented: "Install for Admins Only", "Install for All Users" (which is selected with a blue radio button), and "Install for Specific Profiles...". A warning banner states: "You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program." Below the banner, a checkbox is labeled "I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program." At the bottom right of the banner are "Install" and "Cancel" buttons. Below the banner, a table provides details about the app:

App Name	Publisher	Version Name	Version Number
DIGO-SFDC Connector	TATA Communications	May 07, 2022	1.13

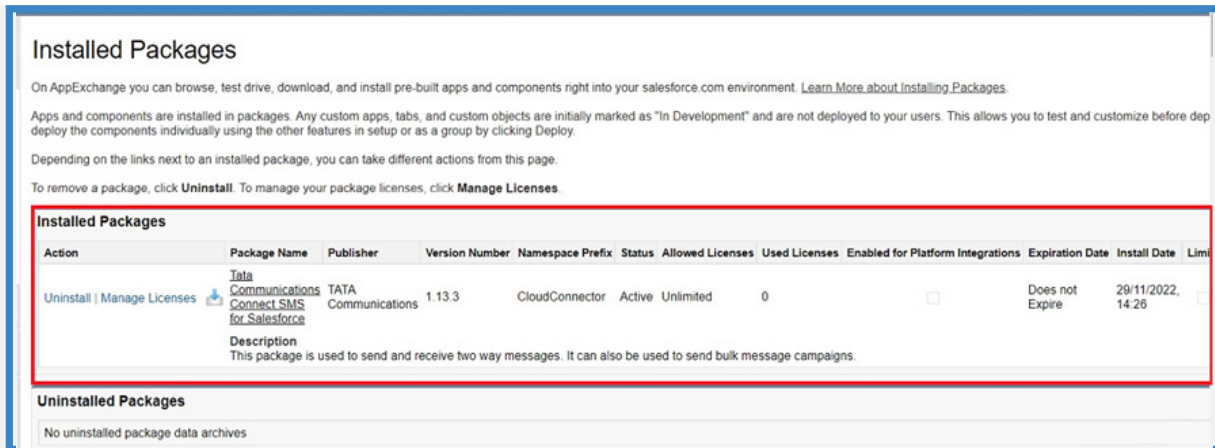
Below the table, there are links for "Additional Details" and "View Components".

- Check CSP trusted sites and websites and then accept the terms and conditions and in the pop-up window that appears:



The screenshot shows a dialog box titled "Approve Third-Party Access". The text inside reads: "This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?". Below this, there is a section for "CSP Trusted Site" with a text input field containing "https://engage-api.digo.link". Underneath, there is a table with two columns: "Website" and "SSL Encrypted". The "Website" column contains "engage-api.digo.link" and the "SSL Encrypted" column contains a checked checkbox. At the bottom, there is a checkbox labeled "Yes, grant access to these third-party web sites" which is checked and highlighted with a red box. Below this are "Continue" and "Cancel" buttons.

- Ensure that the package is installed successfully by going to Installed Packages section (Setup Installed Packages):



Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#).

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

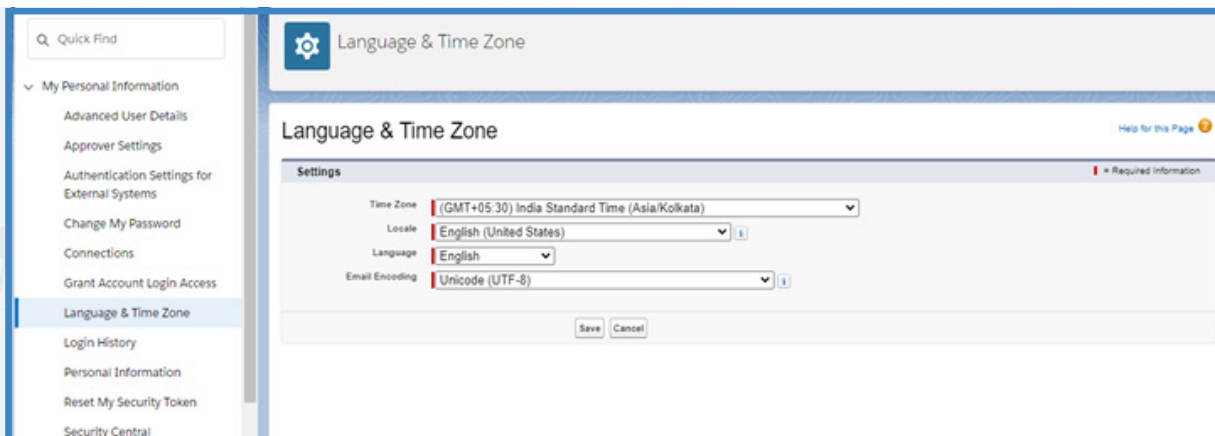
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limit
Uninstall Manage Licenses	Tata Communications Connect SMS for Salesforce	TATA Communications	1.13.3	CloudConnector	Active	Unlimited	0	☐	Does not Expire	29/11/2022, 14:26	

Description
This package is used to send and receive two way messages. It can also be used to send bulk message campaigns.

Uninstalled Packages
No uninstalled package data archives

- Change the Salesforce Org timezone to your local timezone by going to Settings near your avatar

NOTE: This step is mandatory to maintain the timezone synchronization



Language & Time Zone

Settings

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

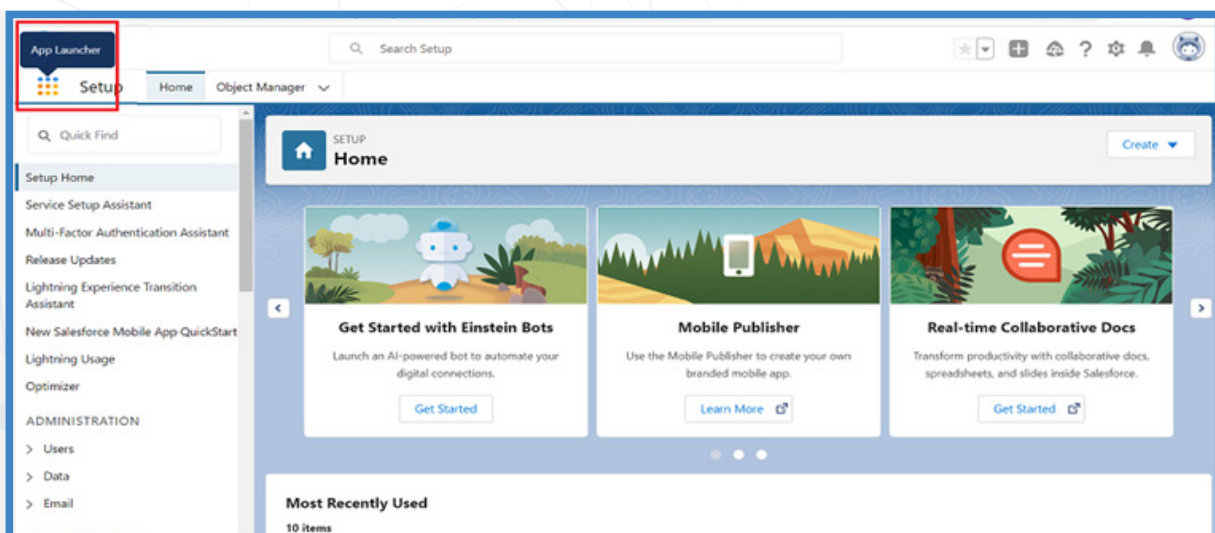
Locale: English (United States)

Language: English

Email Encoding: Unicode (UTF-8)

Save Cancel

- Search for "SMS Configuration" in the App Launcher and go to the tab:



App Launcher

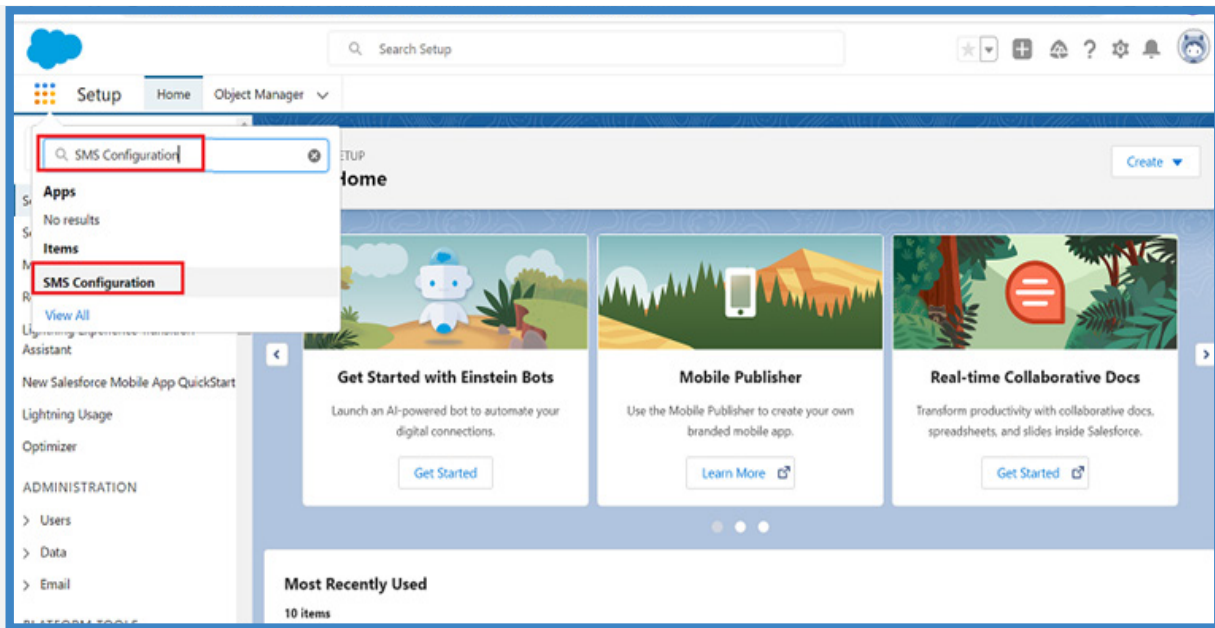
Setup Home

Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
[Get Started](#)

Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
[Learn More](#)

Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
[Get Started](#)

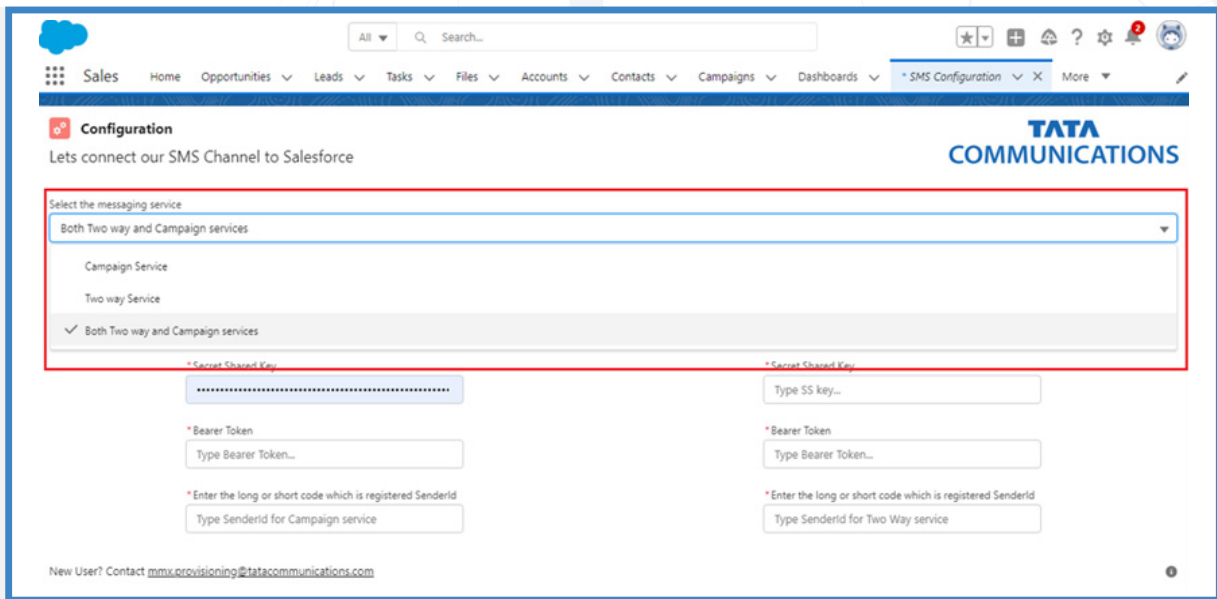
Most Recently Used
10 items



3. ACTIVATION

Select the service from dropdown as shown in below screen shot:

- a. Campaign service: *for sending campaign to multiple users at a time.*
- b. Two- way service: *for receiving and sending message to a particular contact.*
- c. Both: *for using both the above-mentioned services*



- Enterprise is required to contact Tata Communications team at [“mmx.provisioning@tatacommunications.com”](mailto:mmx.provisioning@tatacommunications.com) and shall purchase Numbers (Long Code, etc.) to send and receive SMS messages.
- The purchased Numbers (Long Code, etc.) will be mapped with enterprise account id of Connect SMS for Salesforce.
- Enterprise is required to contact Tata Communications team at [“mmx.provisioning@tatacommunications.com”](mailto:mmx.provisioning@tatacommunications.com) and [“cpaas-product-help@tatacommunications.com”](mailto:cpaas-product-help@tatacommunications.com) mentioning “Service Activation and Provisioning - Tata Communications SMS Connect for Salesforce” in subject line and request credentials such as: “appid”, “sskey”, “bearer token”, registered SenderID for campaign service, and registered long code for Two-way messaging service from Tata Communications team.
- Enterprise account will be provisioned and activated once all the commercial process is completed.
- Click on “Validate” to get started.

3.1 Two-Way SMS Messaging:

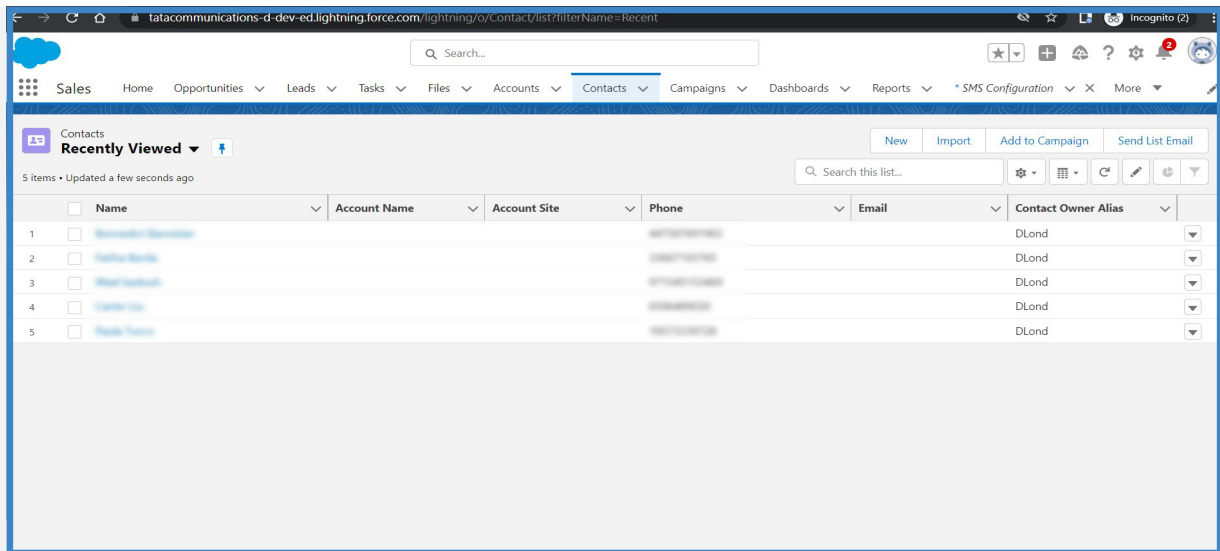
The screenshot shows the TATA Communications portal interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', and 'SMS Configuration'. The 'Contacts' dropdown menu is open, showing 'Contacts' as the selected item. The configuration page for 'Two Way service' is displayed, featuring the following fields:

- * AppId**: tcl-postmntstyupbgywkslutfrcn
- * Secret Shared Key**:
- * Bearer Token**: Type Bearer Token...
- * Enter the long or short code which is registered SenderId**: Type SenderId for Campaign service

On the right side, there are additional fields for the 'Two Way service':

- * AppId**: Type AppId...
- * Secret Shared Key**: Type SS key...
- * Bearer Token**: Type Bearer Token...
- * Enter the long or short code which is registered SenderId**: Type SenderId for Two Way service

- Click on New to create a new contact.



- Ensure to fill the Phone number field with the country code. For example, prepend the phone number with "91" if it belongs to India.

New Contact

Contact Information

Contact Owner
 **DLond**

*** Name**

Salutation
 --None--

First Name

*** Last Name**

Account Name

Title

Phone

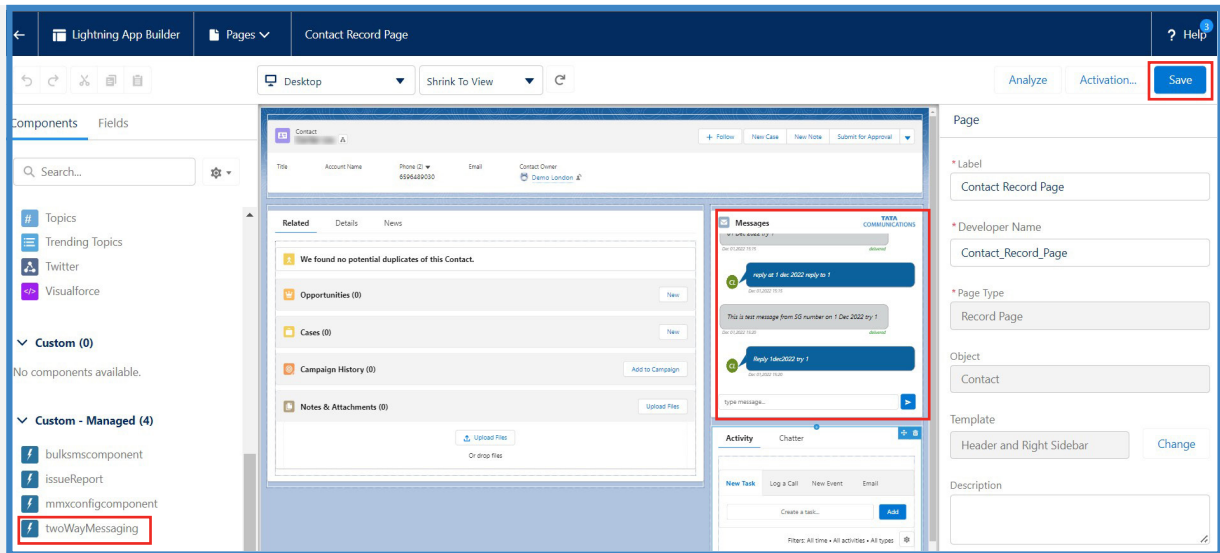
Home Phone

Mobile

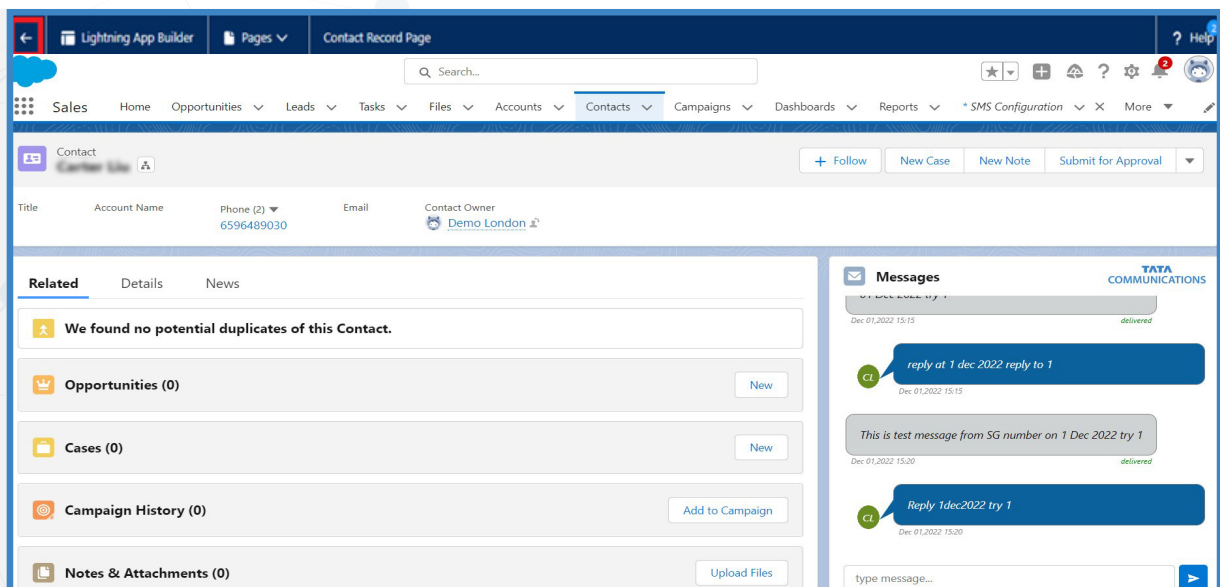
Other Phone

Department

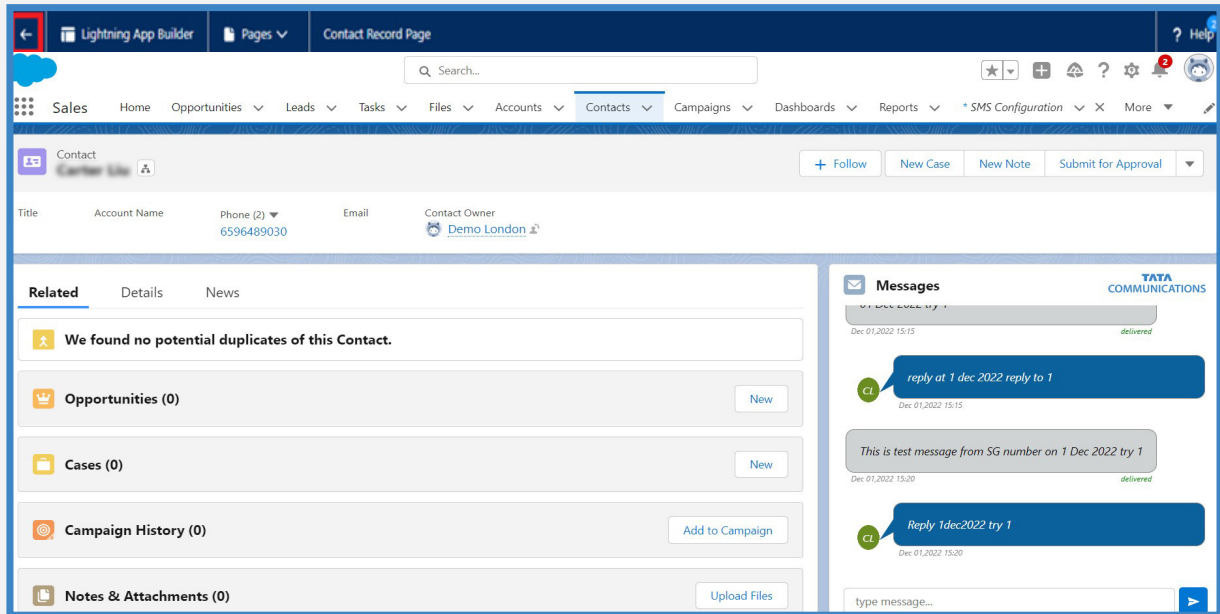
- Go to any of your Contacts and click on Edit Page. Find the “**twoWayMessaging**” in the Custom Managed package section as shown in below screen shot drag and drop the component to the main page in the centre.
- Activate the service and save the changes as shown below:



- Click on the back button to reach the contact page as shown below.



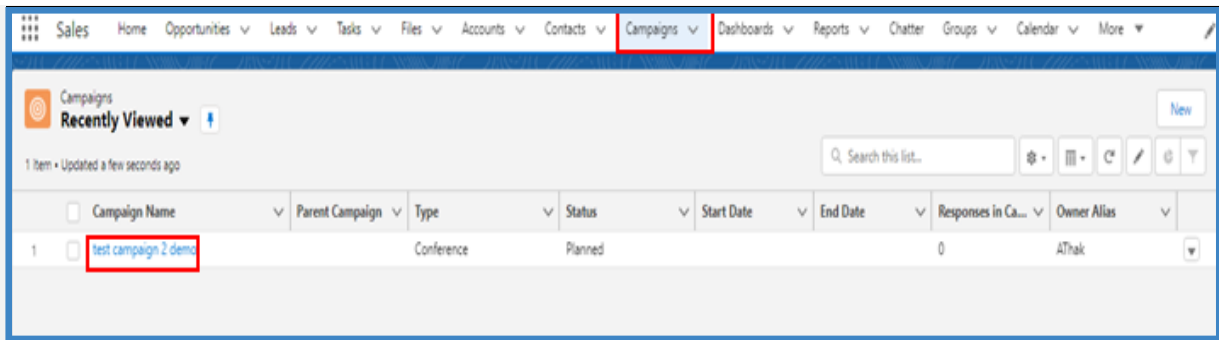
- Start typing your message and click on the Send button to send the message. You will notice the timestamp of the message just below your chat.



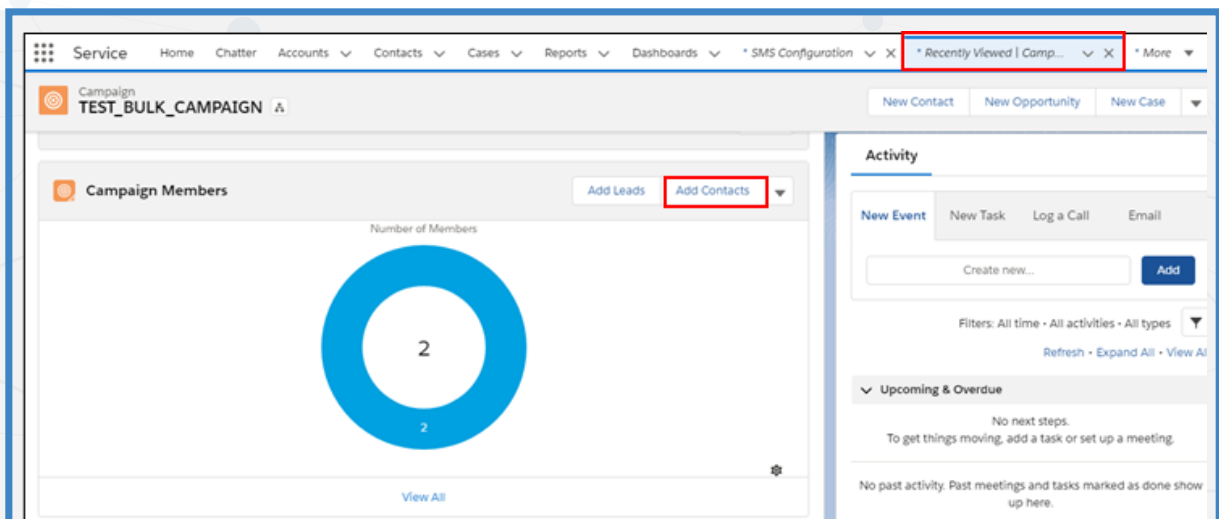
- You can also see the live delivery status of your message below your chat. Refer to appendix- section 5.1 for more details about delivery status
- You can see the chat history by scrolling up within the chat box which includes delivery status, time of message creation and the chat.

3.2 Campaign Messaging:

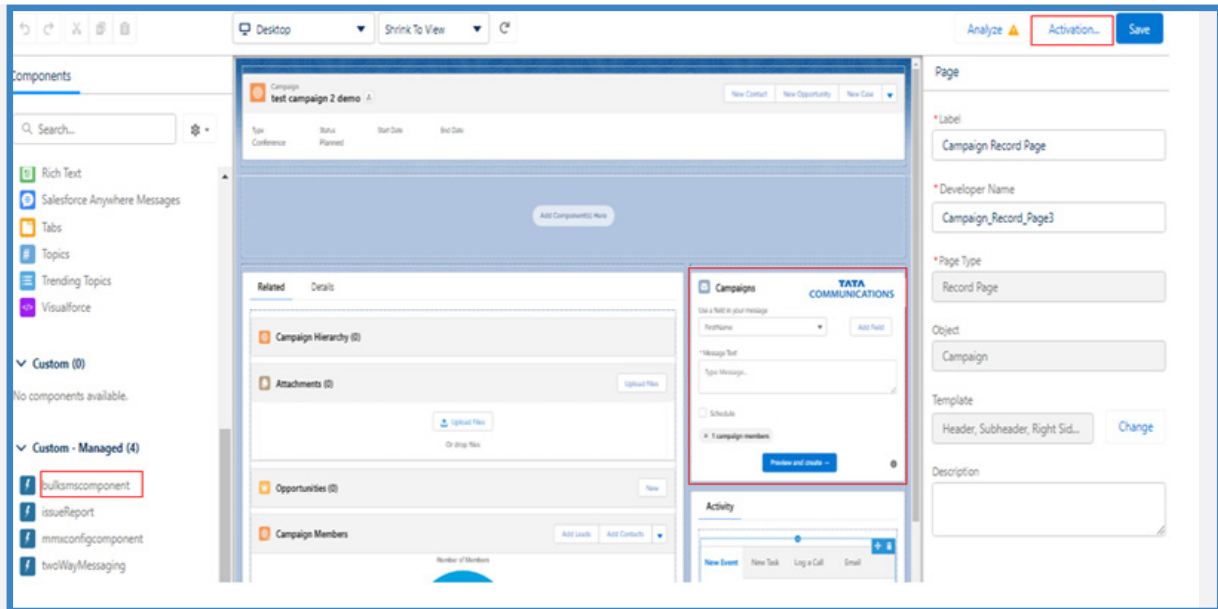
You can start sending campaigns by creating the Campaign in the Campaigns Record Tab:



- Go to the created campaign/Recently viewed campaign and add the campaign members by choosing Add Contacts. Also ensure that the contact has the phone number prepended with the country code. For example, prepend the phone number with “91” if it belongs to India



- Now click on Settings near your avatar and go to Edit Page and find the “bulksmscomponent” in the Custom Managed package section and drag and drop the component to the main page in the centre:

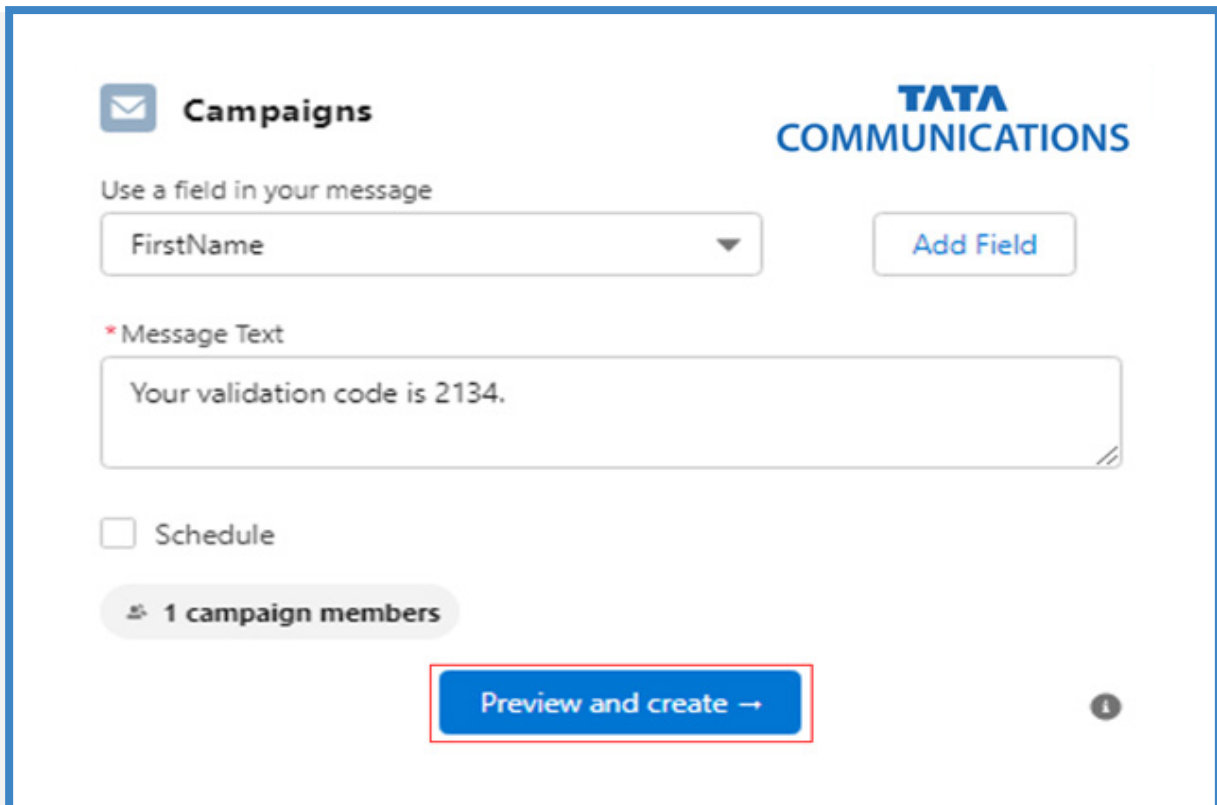


- Activate the service, save, and return to Records page.
- Type the message in the text box. You can also insert the preset fields in the message. The various preset fields enabled are:

- Phone
- Name
- FirstName
- LastName
- Email

Note: All the above fields belong to the Contact record.

- You can also schedule your campaigns by the choosing the future date, time, and the preferred frequency. Currently, we have enabled 2 types of frequencies:
 - Schedule Once
 - Schedule Daily
- You can also uncheck the Schedule option to create campaigns instantly.
- Click on Preview and create button and ensure that the message is correct. You will also see that pre-set fields are converted into the actual values. These values belong to the first campaign member.



Campaigns

Use a field in your message

FirstName ▼

Add Field

* Message Text

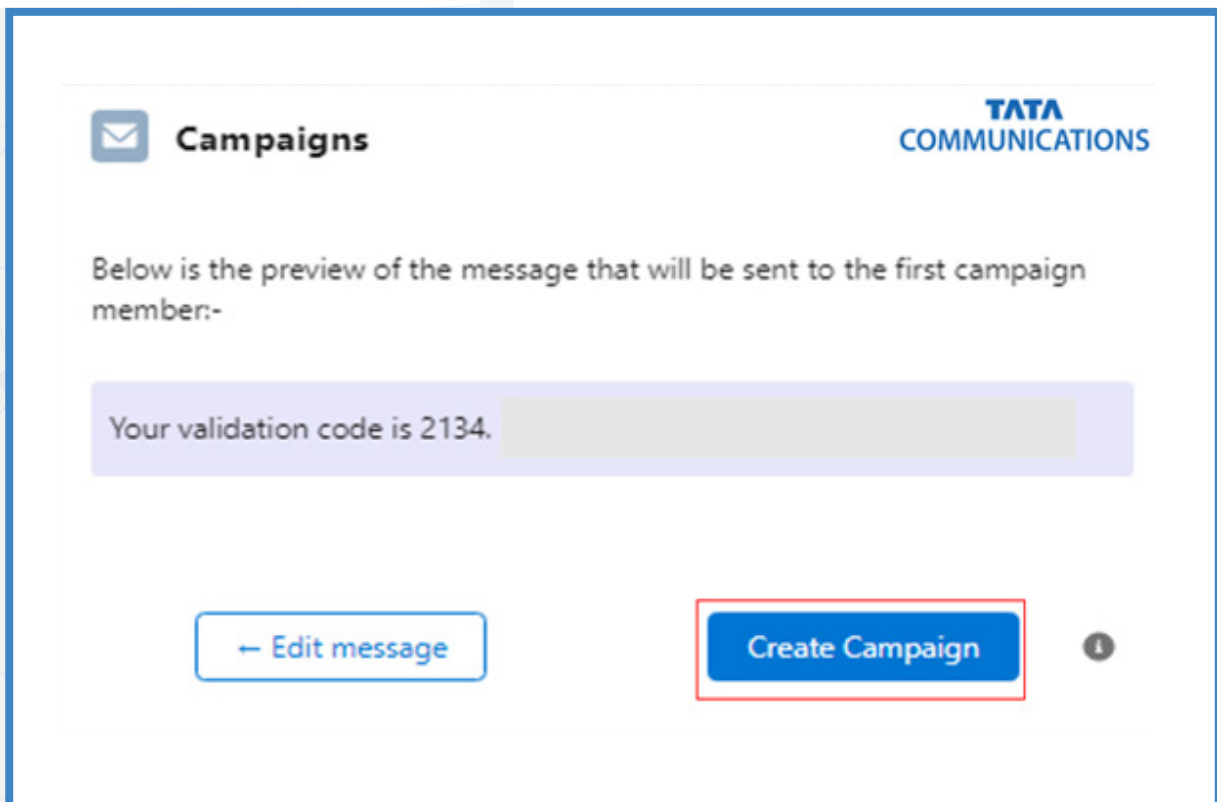
Your validation code is 2134.

☐ Schedule

1 campaign members

Preview and create →

- Click on Create Campaign:



Campaigns

Below is the preview of the message that will be sent to the first campaign member:-

Your validation code is 2134. [Greyed out field]

← Edit message

Create Campaign

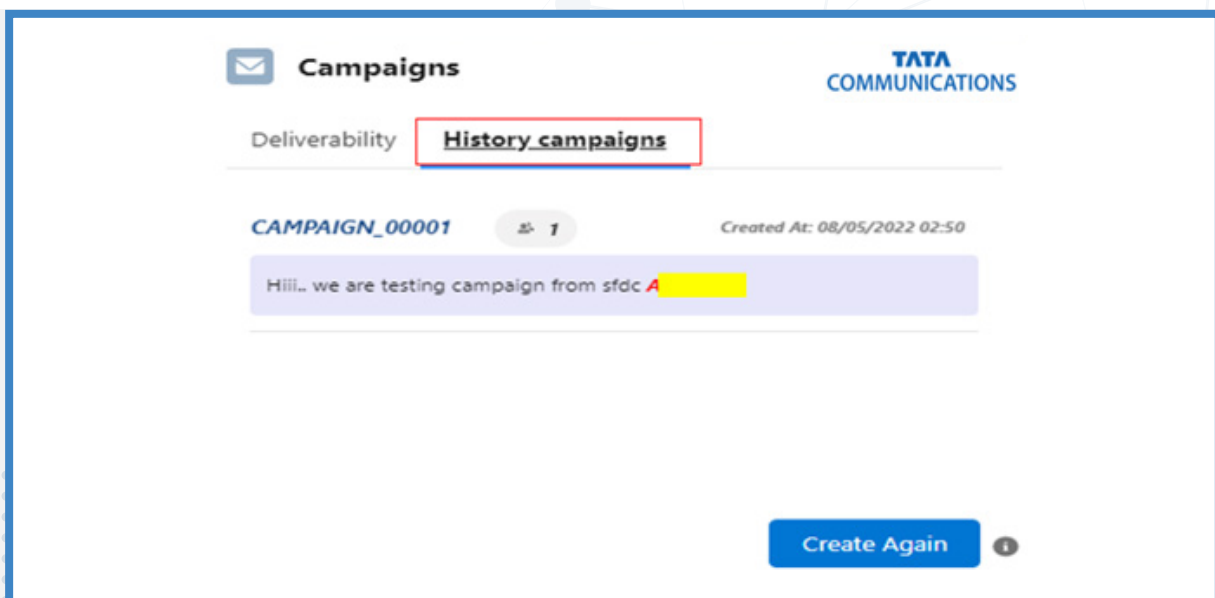
- Now you can see the list of scheduled campaigns by clicking on the Scheduled Campaigns button:



- You can see the History Campaigns details by clicking on the View History button.
- There are two tabs inside View History:

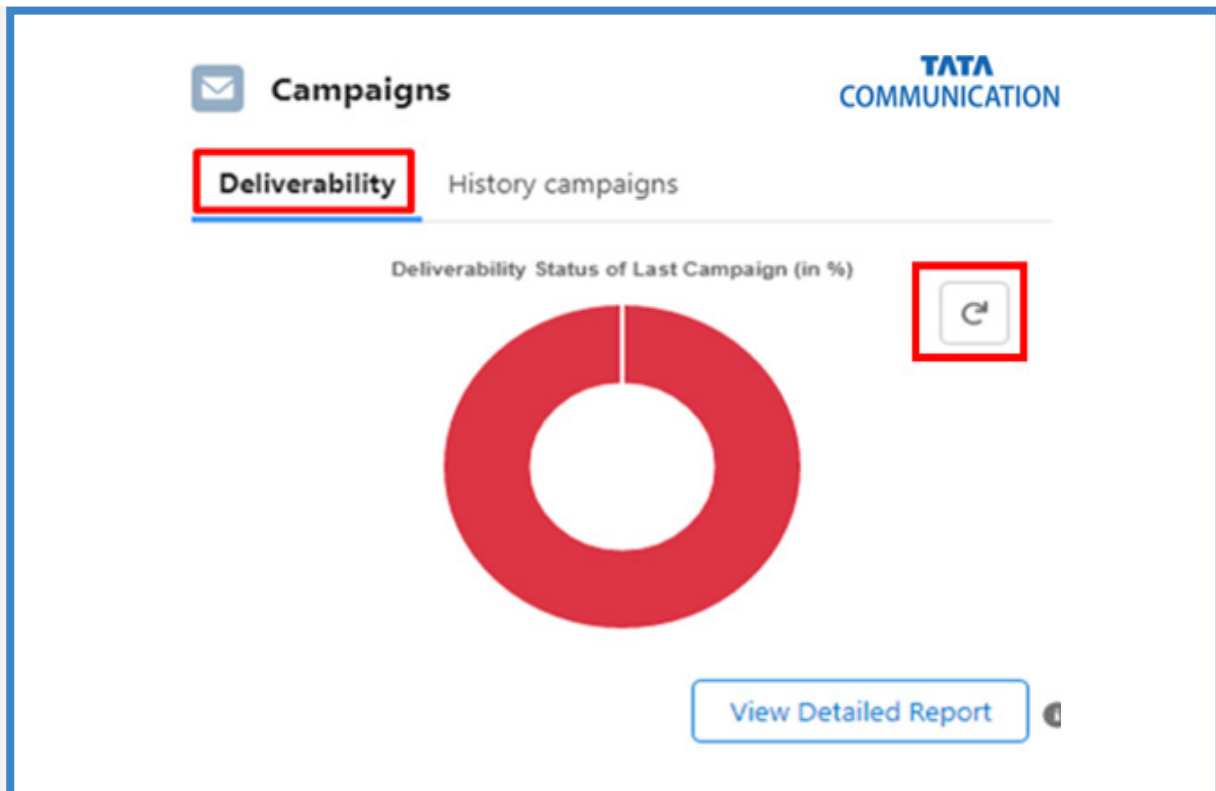
1. History campaigns

- This tab shows all the History campaigns with time of creation, total campaign members, campaign name and message content.

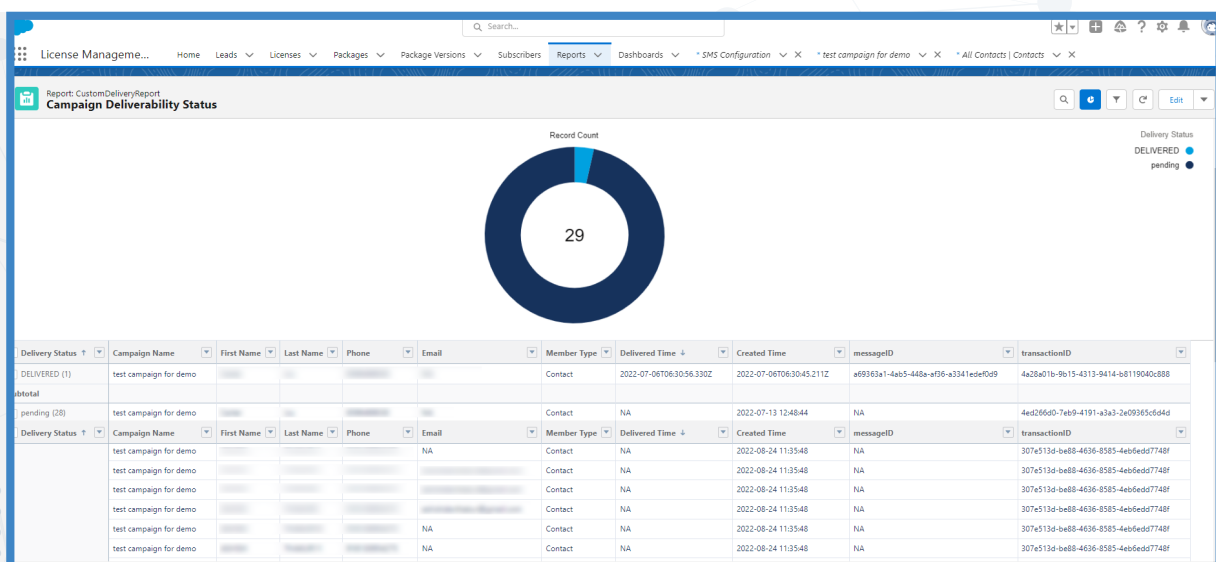


2. Deliverability

- This tab shows the recent campaign delivery status in the form of a pie chart. Refer appendix 5.1 for more details about delivery status.



- Click on refresh button at the top right corner to get updated status.
- You can also click on the View Detailed Report button to view the detailed recent campaign reports. Click on the refresh button to update the report:

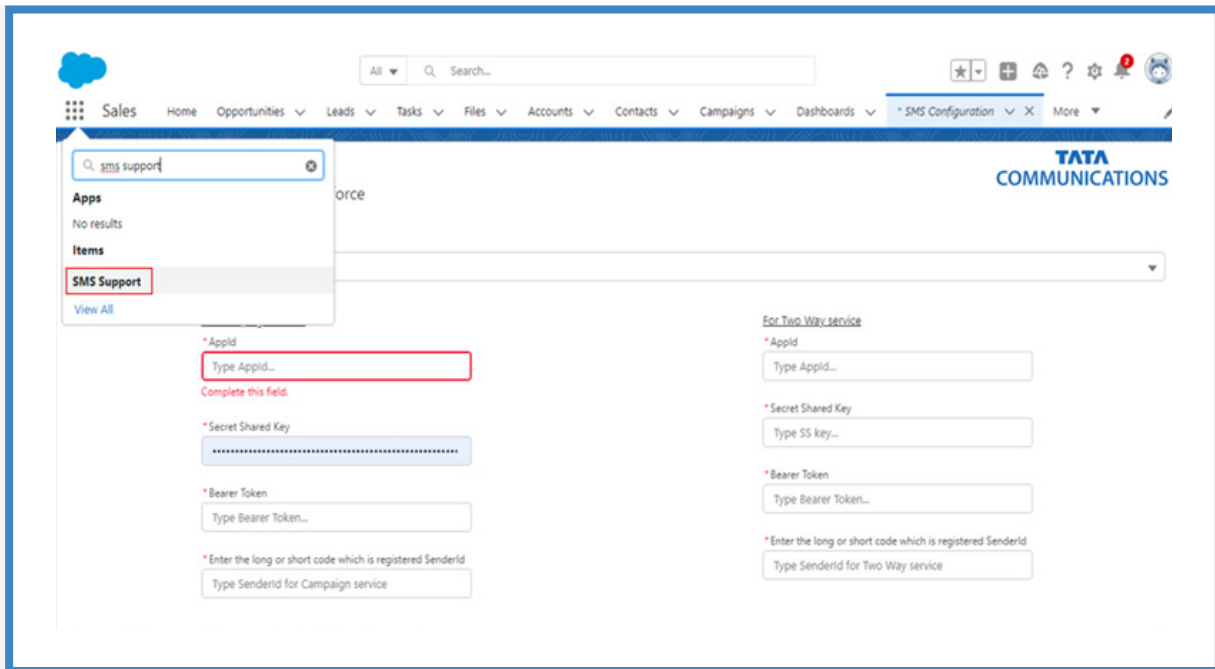


- The report table contains the following columns:
 - a) Delivery Status
 - b) Campaign Name
 - c) Member Type
 - d) First Name
 - e) Last Name
 - f) Email
 - g) Phone
 - h) Created Time (in GMT time zone)
 - i) Delivered Time (in GMT time zone)
 - j) messageID
 - k) TransactionID
- Refer to appendix- section 5.1 for more details about delivery status.



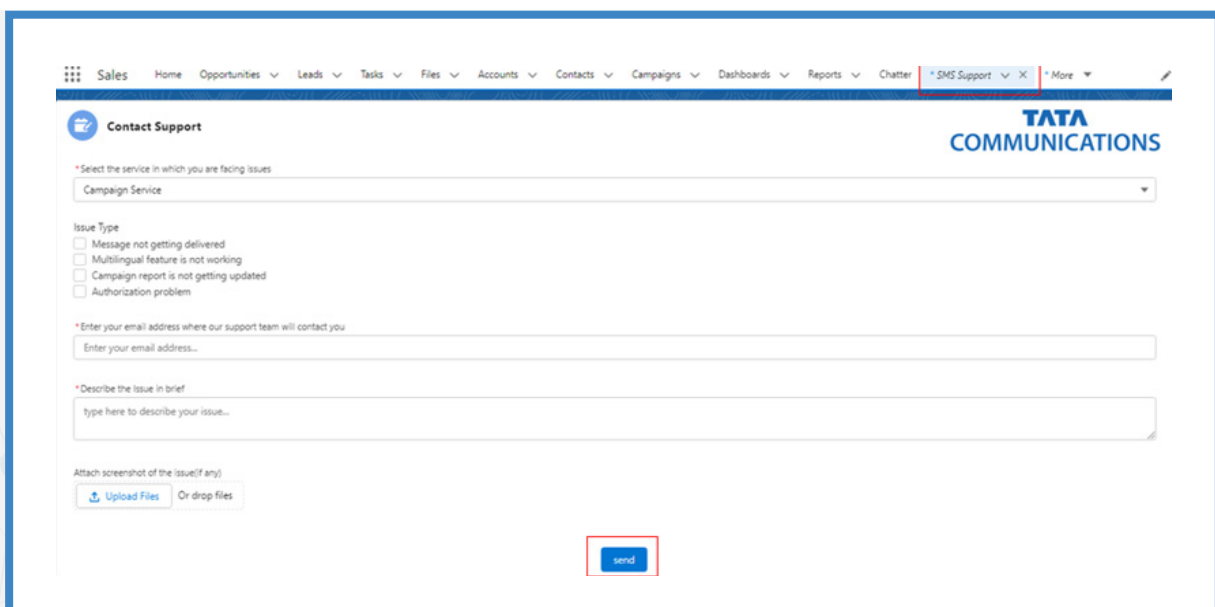
4. SUPPORT

- If you are facing any issues in using the application, for e.g., User interface is not loading up correctly, campaign messages not getting delivered, delivery status in campaign report not updating or any other technical difficulty, you can reach out to our Tata Communications support team by going to “SMS Support” tab.



The screenshot shows the Tata Communications application interface. The left sidebar has a search bar with 'sms support' entered. Below the search bar, the 'SMS Support' option is highlighted with a red box. The main content area displays a form for configuring SMS services. The form includes fields for 'AppID', 'Secret Shared Key', 'Bearer Token', and 'SenderID'. A red box highlights the 'AppID' field. The form also includes a section for 'For Two Way service' with fields for 'AppID', 'Secret Shared Key', 'Bearer Token', and 'SenderID'. A red box highlights the 'AppID' field in this section.

- Fill in the required details. You can also attach the screenshots of the issues.



The screenshot shows the Tata Communications application interface. The left sidebar has a search bar with 'sms support' entered. Below the search bar, the 'SMS Support' option is highlighted with a red box. The main content area displays a form for configuring SMS services. The form includes fields for 'AppID', 'Secret Shared Key', 'Bearer Token', and 'SenderID'. A red box highlights the 'AppID' field. The form also includes a section for 'For Two Way service' with fields for 'AppID', 'Secret Shared Key', 'Bearer Token', and 'SenderID'. A red box highlights the 'AppID' field in this section.

- You can also directly reach out to support team at mobilecustomer.service@tatacommunications.com for further follow ups.

5. APPENDIX

5.1 Delivery Status

Table 1: Delivery status

	Status	Description
1.	DELIVERED	Message successfully delivered to handset.
2.	PENDING	Message is either pending with the suppliers or message is not delivered yet or delivery report is not received.
3.	ENROUTE	The message may be in retry or dispatched to a mobile network for delivery to the mobile.
4.	EXPIRED	Message validity period has expired
5.	DELETED	The message has been cancelled or deleted from the MC. No further delivery attempts will take place
6.	UNKNOWN	The message state is unknown. This may be due to some internal problem which may be intermediate or permanent.
7.	REJECTED	The message has been rejected by a delivery interface. The reasons for this rejection are vendor and network specific. No further delivery attempts will be made
8.	UNDELIVERED	The message has encountered a delivery error and is deemed permanently undeliverable. No further delivery attempts will be made
9.	ACCEPTED	Message is in accepted state (i.e., has been manually read on behalf of the subscriber by customer service).



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