SMSupport User Guide

Prerequisites

In order to use SMSupport, you must have:

- Salesforce.com Enterprise, Unlimited, Performance, or Developer Edition
- An available Force.com Site site (used to receive incoming text messages)
- A Twilio Account (instructions on setting up a Twilio trial can be found below) with a Twilio number to send and receive text messages. In this setup guide, we will show how to test using a trial Twilio account, but you will need a paid account for correct operation of SMSupport. See Twilio's pricing page for details for your country and phone number selection.

Installing and Configuring SMSupport

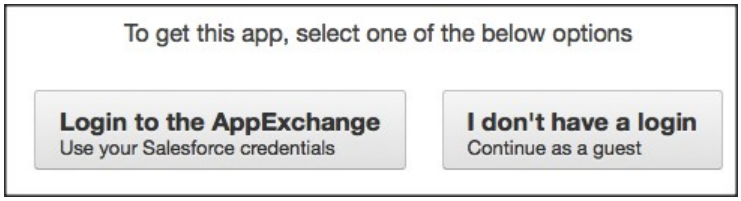
Before you can start using SMSupport, you will need to install the app to your Salesforce.com organization, configure a Site.com for receiving text messages, and add your Twilio credentials. You should expect for this to take about 15-20 minutes.

Installing SMSupport in Salesforce.com

The first thing you need to do is install SMSupport in your Salesforce.com enviroment.

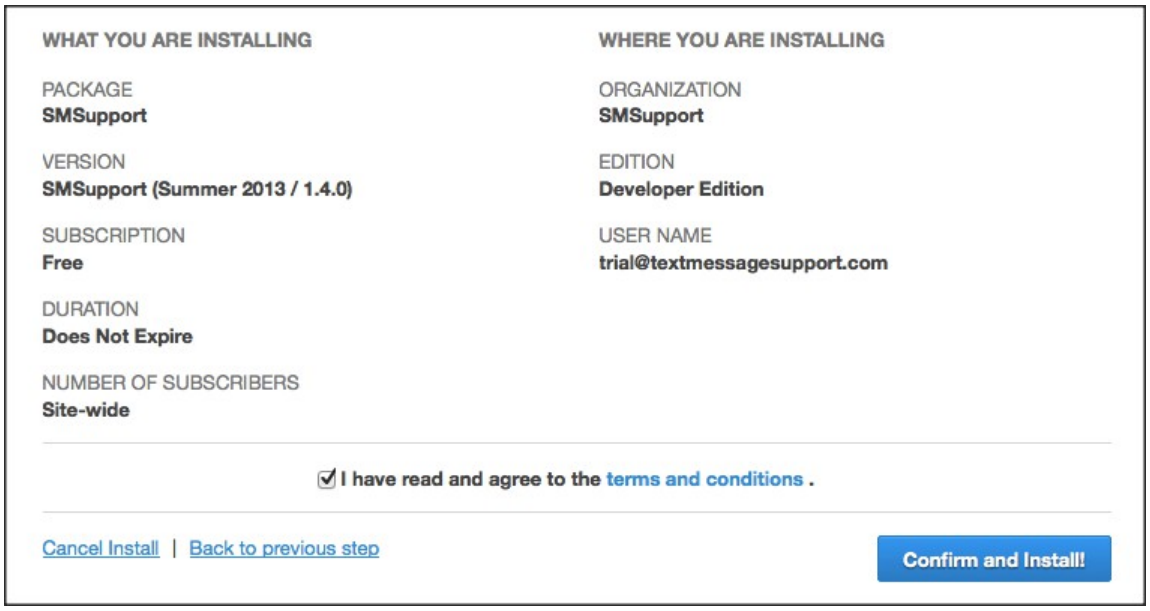
1. Using your browser, go to the SMSupport AppExchange listing. Click on the "Get It Now" button on the right side.

2. Click on the "Login to the AppExchange" button.

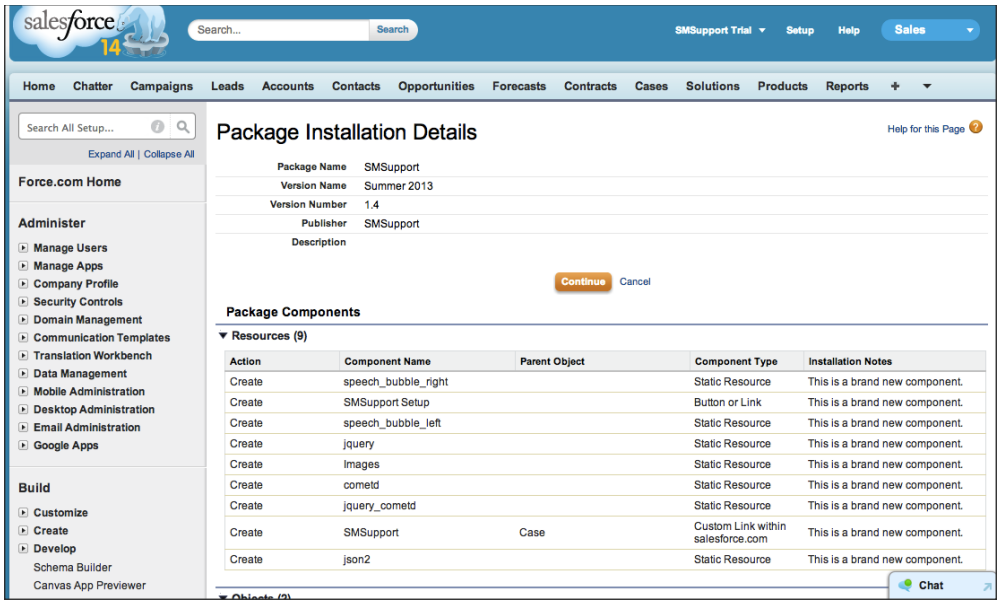


3. Login to Salesforce.com using your credentials. Once you have logged in successfully, you must choose whether to install SMSupport in production (your live Salesforce.com environment) or sandbox (for testing only.)

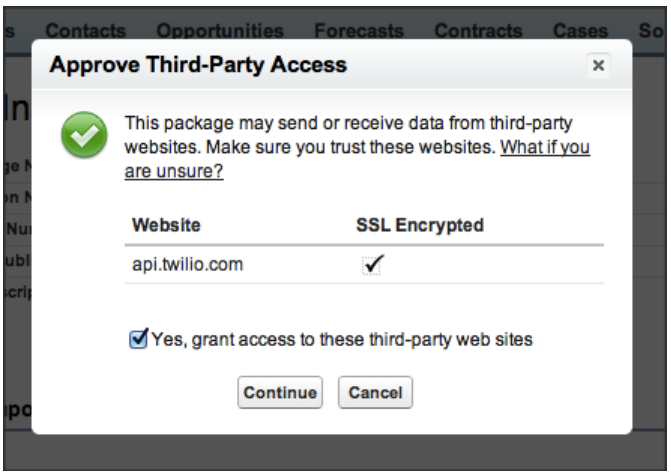
4. On the next screen, click off the checkbox beside “I have read and agree to the terms and conditions” once you have read them. Click the “Confirm and Install” button to continue.



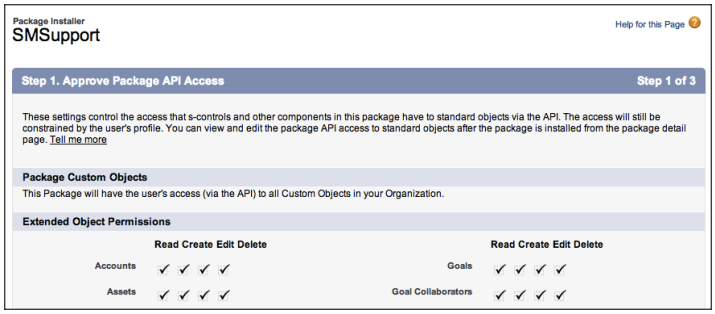
5. You may need to log in again. You should now see the Package Installation Details screen. Click the Continue button.



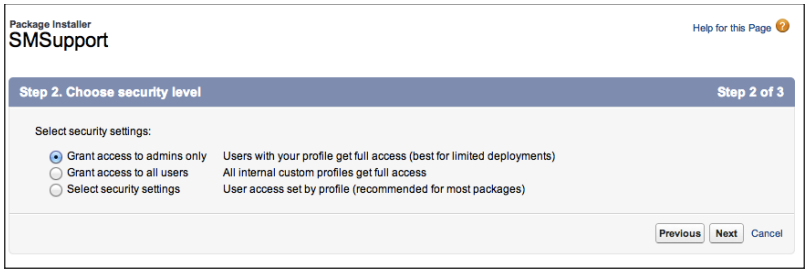
6. You will then see a pop-up indicating that SMSupport requires access to a third-party site, api.twilio.com. This is required for SMSupport to send text messages through Twilio. Click the checkbox beside, “Yes, grant access to these third-party web sites” and click the “Continue” button.



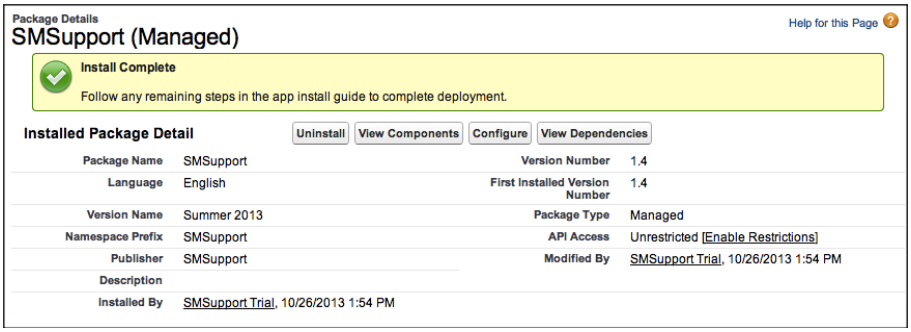
7. On the “Approve Package API Access”, click the “Next” button at the bottom of the page.



8. The next screen allows you to choose who will have access to SMSupport. Choose your preferred setting (we recommend “Grant access to all users”) and click the “Next” button.



9. On the next screen, click “Install” to install SMSupport. This might take a few minutes. If SMSupport installs properly, you should see the Package Details screen (below.)



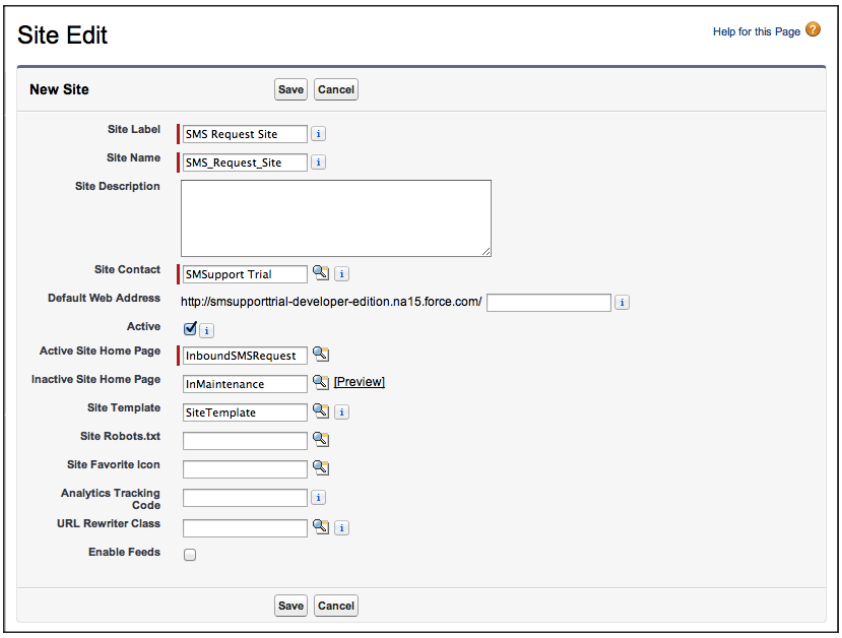
You have now successfully installed SMSupport in your Salesforce.com environment. Next, you will create a Force.com Site.

Creating a Force.com Site

In order for SMSupport to receive text messages, Twilio needs to post a response to a URL. In Salesforce, this can be accomplished using a Force.com Site.

10. You should now be on the Setup page after installing your app (if you're not, click "Setup" in the top right-hand corner.) In the left-side menu, go to Build > Develop > Sites.
11. On the Site setup screen, enter a name for your site. It doesn't really matter what this URL looks like as only the Twilio API will ever visit this site. Click the "Check Availability" button to ensure that it is available. Ensure that the checkbox at the bottom is checked off, and click the "Register My Force.com Domain" button.

12. Now that you have created a site, click the “New” button, enter a label for your site (we used “SMS Request Site”). **Make sure to check the “Active” checkbox here or your site will not be available.** For the Active Site Home Page, click the icon beside it and choose “InboundSMSRequest”. Click the “Save Button.”



13. On the next page under the “Custom URLs” heading, write down the URL directly under “Domain Name” for later. In the example below, it is “smsupporttrial-developer-edition.na15.force.com”.

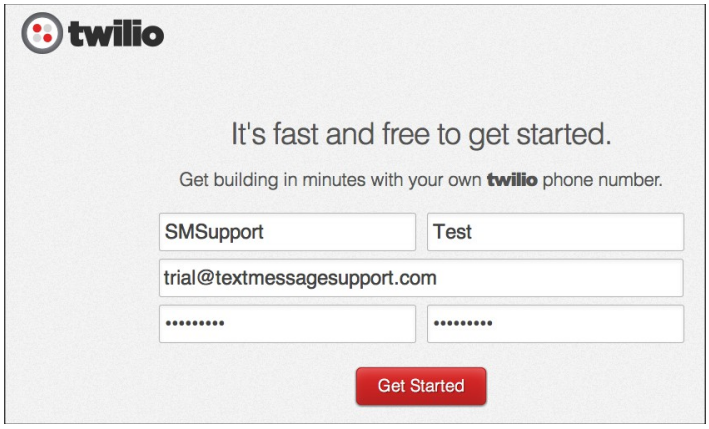
You have successfully set up your Force.com Site. Next, you will set up our Twilio credentials.

Adding your Twilio Credentials

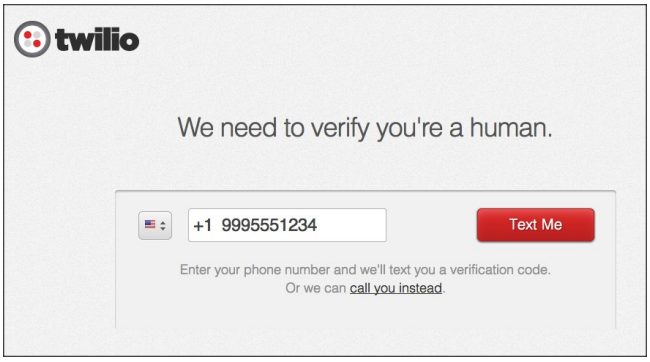
In order for SMSupport to send and receive text messages, you will need a Twilio account. You will first sign up for a Twilio account then add the Twilio API credentials to SMSupport. If you already have a Twilio account and Twilio number set up, you can skip ahead to step 19.

14. Go to Twilio.com and click on the “Sign up for free” button.

15. Fill out the sign-up screen and click “Get Started.”



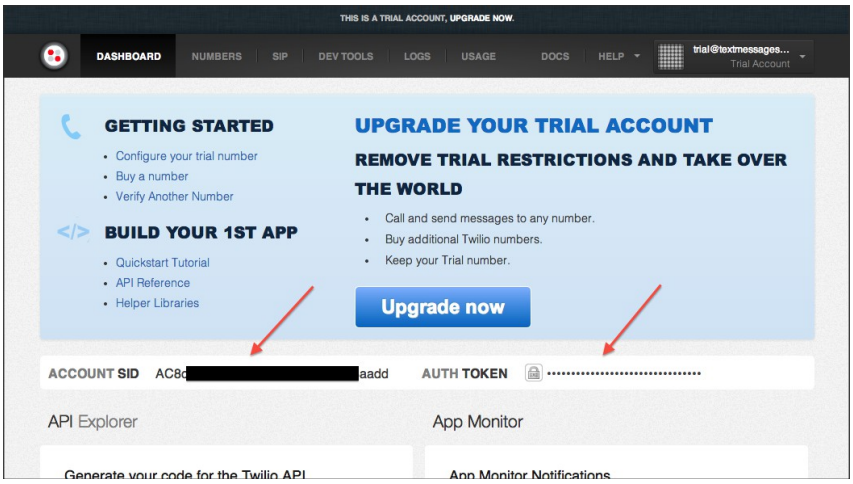
16. You will now need to verify your Twilio account by entering a phone number for Twilio to either text or call to verify that you're a human. Follow the instructions and verify your account.



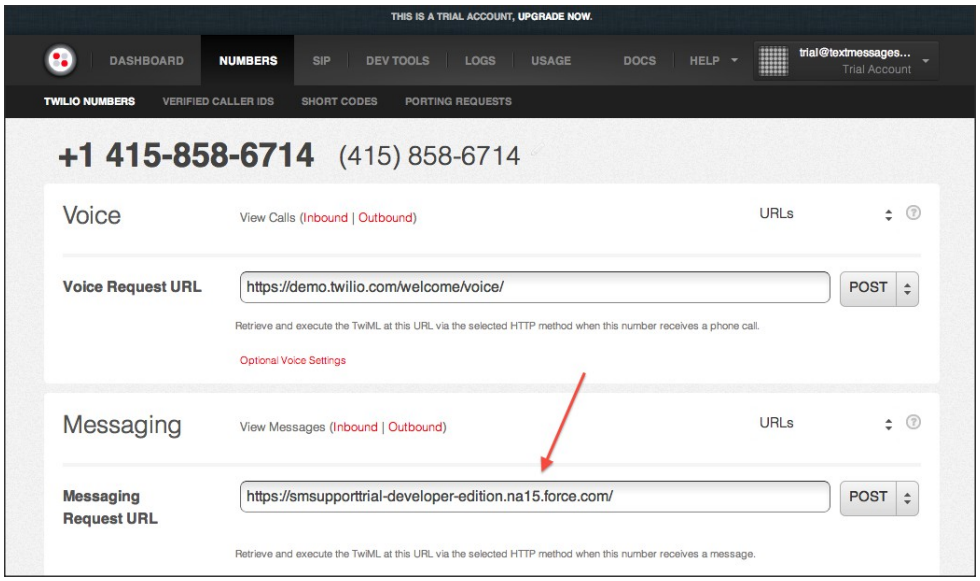
17. You will now be able to create a Twilio phone number. This will be the number that you will display on your web site for users to send text messages to in order to get support. Ensure that you choose a number in the country where you will be doing most of your support (SMSupport currently only supports a single number and country) because customers texting outside of that country may have to pay additional costs for sending international SMS message (short codes are also available from Twilio for an additional cost.)

    Once you are done creating the number of your choice, click the “Go to your account” button.

18. You will now be on the “My Account” page. This is the same page you get to when you log in to your Twilio account. On this page, there are two values that you will need, the Account SID and Auth Token. Your Auth Token is hidden by default. Click on the key icon beside “Auth Token” to reveal your token. Copy down the Account SID and Auth Token (shown with arrows below) for later.

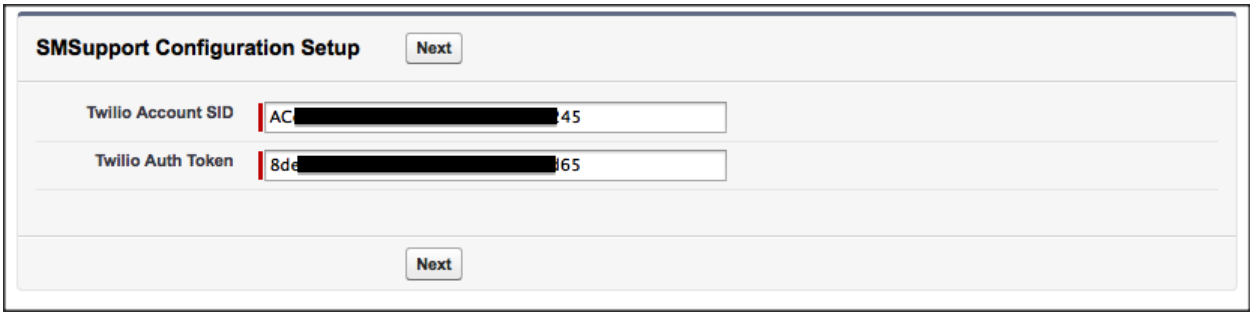


19. Click on the “Numbers” menu item and click on the number you want to use as your text message support number.
20. Under “Messaging Request URL”, enter the URL you wrote down in step 13. In this example, we will enter “https://smsupporttrial-developer-edition.na15.force.com/”. Note that we have included an “https://” prefix (to ensure information is sent over a secure connection) and a trailing slash (“/”.)

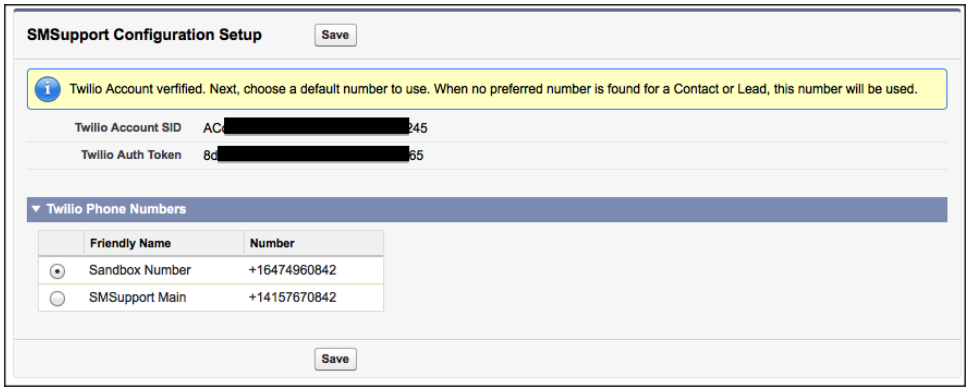


21. Go back to Salesforce.com and in the Setup screen, go to Build > Installed Packages.
22. Click on the “Configure” link beside “SMSupport.”
23. On the next screen, enter your Account SID and Auth Token from step 18 and click

"Next".



24. Choose the default number you want to use (if you have multiple Twilio numbers – see the section "Using Multiple Twilio Numbers" for more information) and click "Save".



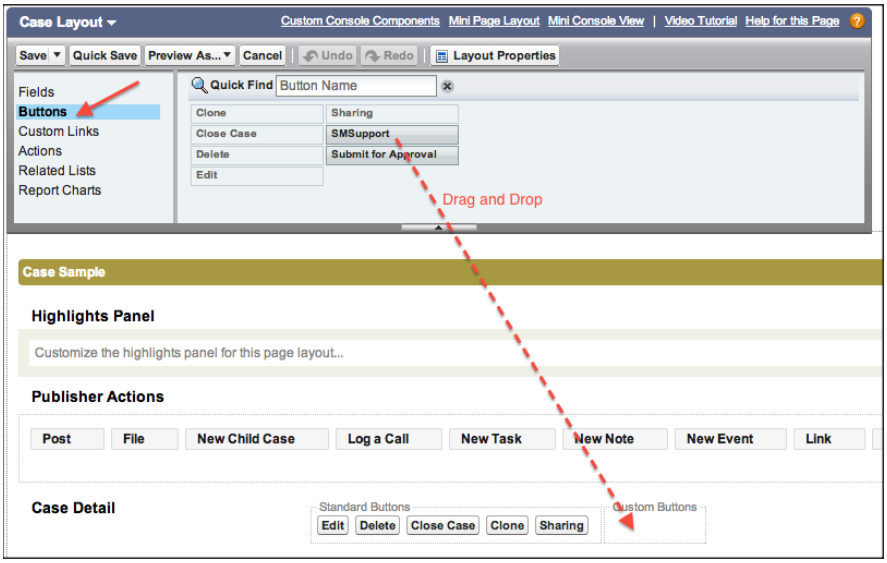
25. Click the "Save" button to verify and save your configuration.

Now that you have set up Twilio and configured SMSupport to use your Twilio account, the last thing we need to do is add the SMSupport button to Cases.

Adding the SMSupport Button on Cases & Contacts

To access the SMSupport console to receive and reply to text messages in real time, your support agents must click a button on the Case that gets automatically created when a customer sends a text message to your text message support number.

26. In Saleforce.com's setup, go to Build > Customize > Cases > Page Layouts. Click on the "Edit" link beside the Layout that your support agents that you want to give access to SMSupport use.
27. Click on "Buttons" in the top left (see red arrow below) and then drag and drop "SMSupport" down to the area underneath "Custom Buttons" (see dashed arrow below.) Click the "Save" button.



28. Repeat steps 25 and 26 for any other Case Page Layouts that you want to add the SMSupport button to.
29. Repeat steps 26-28 on the Contact record to add the button to the Contact Page Layout.

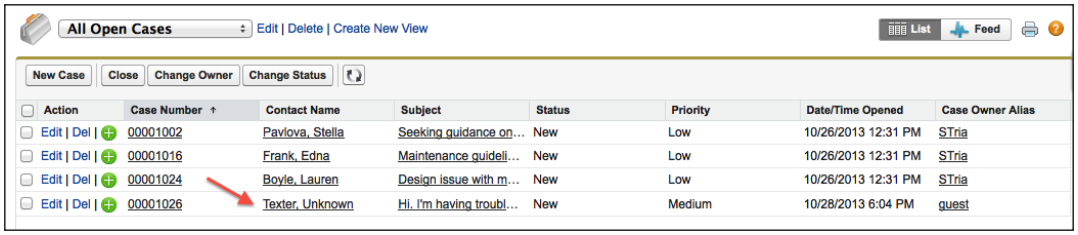
You have now added the SMSupport button to the Case and Contact Page Layouts. Finally, you will test the setup to ensure everything is working properly.

Testing the Setup

Now you will send a text message to your Twilio number and reply to it in the SMSupport console.

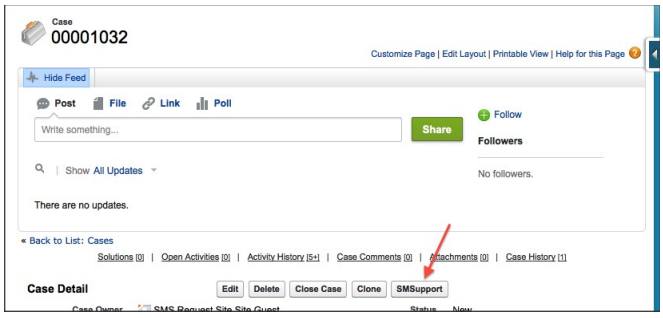
30. Send a text message to your Twilio number that you set up on step 17 using your mobile phone.

31. Go in to Salesforce and click on the “Cases” tab. In the “View” drop down, select “All Open Cases” and click the “Go!” button.
32. You should now be in the “All Open Cases” view and should see a Case record with the Contact Name, “Texter, Unknown.” Each new inbound text message (where there is no open Case for that Contact or closed Case with an activity since the day before) will result in a new Case being created. When a new text message comes in, if an existing contact record is not found with a matching Phone number or Mobile Phone number, a new Contact is created with the name “Unknown Texter.” The text message you sent in the previous step has created this new Contact and opened a new Case for you.



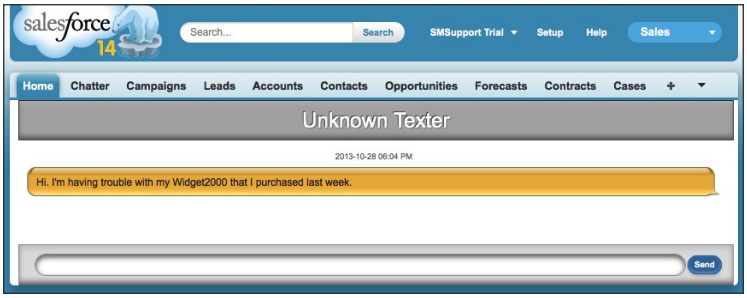
33. Click on the Case number associated with “Texter, Unknown” (in this case, “00001026”.) Here you should see a button, “SMSupport”. If you do not see this button, click the “Edit Layout” link or icon and follow step 26.

    If you are using the regular Case view, the button should look something like this:

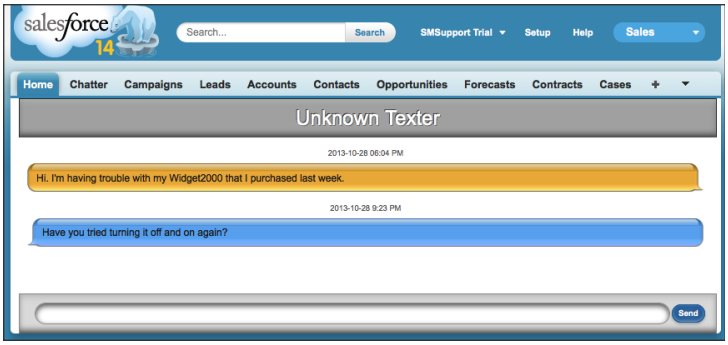


    If you are using the Case Feed layout, you should see a button similar to this:

34. You should now see the SMSupport console with the message that you send from your mobile phone.



35. Type a new message in the bottom of the screen and click the “Send” button.



36. You should now receive a text message on the mobile phone that you sent in step 28. Note that “Sent from your Twilio trial account” will not appear in your text messages once you have upgraded your Twilio account to a paid account.

You have successfully installed SMSupport. Congratulations, you are now ready to start supporting customers the way they want to be supported – via text message!

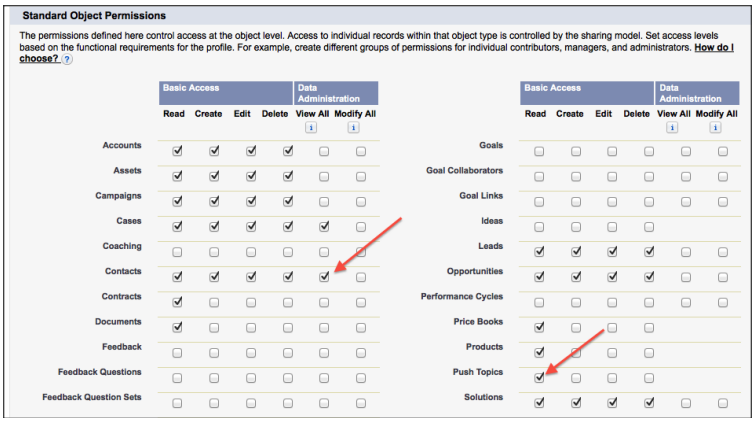
Giving Users Access to SMSupport

In order for support agents to use SMSupport, your System Administrator must set the correct permissions to give them access. If your support agents that you would like to give access to SMSupport use more than one profile, the following steps must be repeated for each profile. Note that giving these permissions can be done in a number of ways (e.g. Profiles, Permission Sets, Organization Wide Defaults, etc.) so the following steps are simply one suggested approach.

1. In Administer > Manage Users > Profiles, select the profile for your support agents. Scroll to the bottom of the page, to "Enabled Visualforce Page Access" and click the "Edit" button beside the title. Select "SMSupport.SMSupportMessageFeed" from the left hand side and click the add (right arrow) button to give support agents access to the SMSupport console. Click on "Save" and the section should look like this:

2. You are now back on the profile screen. Click the "Edit" button at the top of the screen and scroll down to "Standard User Profiles." Ensure that the profile has "Read" access to "Push Topics" to allow them to receive incoming text messages in real time on the SMSupport console.

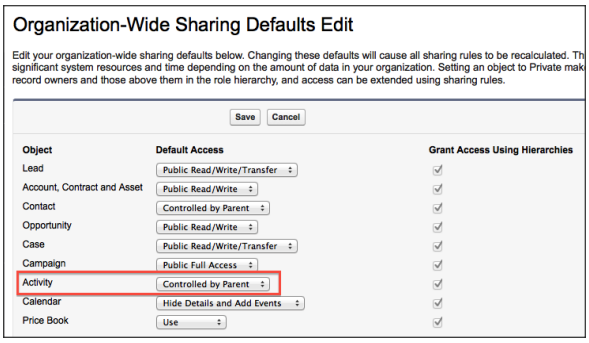
3. In order for support agents to send text messages to contacts, they must be able to see the Contact record (specifically, their First Name, Last Name, Phone and MobilePhone fields) associated with the Cases they are handling. In all likelihood, they already have access with your current settings. If they do not, ensure you give them the proper access to contacts or give them access to all Contacts by checking off "View All" beside "Contacts" while editing the Standard User Profiles, as shown in step 2.



4. Incoming text messages are saved as Tasks in Salesforce. These new Task records are

assigned the same owner that was set up as a guest user in the “Creating a Force.com Site” section. To see that user's permissions, go to App Setup > Develop > Site, click on your Site name, and click the “Public Access Settings” button. This user should have Read access to Contacts, Cases, Leads, and Tasks, if they don't already, as well as Create access on Cases, Contacts, and Tasks.

5. In order for a support agent to see the text messages that other agents have sent, as well as incoming text messages, they need to see others' Task records. To give them access, go to Administration Setup > Security Controls > Sharing Settings, click “Edit” beside “Organization-Wide Defaults” and change “Activity” to “Controlled by Parent” and click “Save.” If the user can see the Case, they can now see the text messages for that Case.



6. Finally, ensure that the SMSupport button has been added to each of the Page Layouts that our support agents use by following the instructions in the “Adding the SMSupport Button on Cases” section.

User Permissions Reference

User	Minimum Access Needed
Support agent	• Read access on Contacts, Cases, and Tasks • Read access to Push Topics
Site guest user	• Read access to Contacts, Cases, Leads, and Tasks • Create access on Cases, Contacts, and Tasks

Using Multiple Twilio Numbers

When you do the initial setup of SMSupport (by going to Setup > Build > Installed Packages and clicking “Configure” next to SMSupport) you are asked to select a default Twilio number. When you are sending a text message with SMSupport to a new Contact or Lead, this will be the number that SMSupport uses by default.

Every Contact and Lead has a custom field called “Default Outbound Twilio Number” (you can add this to the page layout by going to Setup > Build > Customize > Contact or Lead >

Page Layout). If no number is found on the record, the default Twilio number is used. If a Twilio number is found here, this is the Twilio number that will be used to send the text message to this Lead or Contact. This field uses the E.164 phone number standard format. For instance, if your Twilio number is (415) 767-0842, then you will enter "+14157670842" here.

For example, let's look at a scenario where you have a US-based Twilio number and a UK-based Twilio number and the US number has been set as the default number. If you send a text message to a new Contact, the US number will be used. If the Default Outbound Twilio Number is set to the UK number for a Contact, when you send them a text message, the text message will be sent from the UK Twilio number.

When a text message is received from the Contact or Lead, the Default Outbound Twilio Number for the Lead or Contact is updated to the Twilio number that they sent the text message to. By doing this, SMSupport ensures that the Lead or Contact is being contacted from the number that they prefer to interact with.

If you want to ensure that a subset of Leads and Contacts interact with a specific number (e.g. one that is local to them) it is recommended that you update the Default Outbound Twilio Number for all existing Leads or Contacts to the appropriate number and that you set up workflows to use the correct number based on whatever criteria you would like for new and updated records. For instance, if you have US and Canada Twilio numbers you can set up the US number as your default Twilio number and set up workflows on the Lead and Contact records to update the Default Outbound Twilio number field to the Canadian Twilio number if the Billing Country is "Canada" or "CA".

Debugging Issues with Incoming Text Messages

Unlike other error messages with SMSupport, if an error has occurred while SMSupport was accepting a new inbound text message from Twilio, you will not be able to see an error message and it will fail silently. Force.com Sites do not produce error messages to avoid exposing any information that hackers might use to jeopardize your Force.com Sites.

It is recommended that you turn on Twilio's App Monitoring feature (see https://www.twilio.com/help/faq/twilio-basics/my-app-isnt-working-how-do-i-troubleshoot-whats-going) to ensure that you do not lose any messages as a result of errors. You can use the Request Replay feature (https://www.twilio.com/blog/2014/04/introducing-request-replay-debug-twilio-apps-nt.html) to resend the message once you have fixed the issue.

Turning on Salesforce Error Debugging Filters

1. Go to Setup > App Setup > Develop > Apex Classes.
2. Click on the Log Filters tab.
3. Click the checkbox beside "Override Log Filters" to ensure it is checked.
4. For each category (Database, Workflow, Validation, etc.) click on the drop-down under "Level" and click "FINEST". Wait a couple of seconds between selecting each drop down.

Retrieving the Debug Logs:

1. Go to Setup > Monitor > Logs > Debug Logs
2. Beside Monitor Users, click "New"
3. Search for the Guest user (should be something like "Site Guest User, SMSupport").
4. Try sending a text message to your Twilio number.
5. Refresh the screen and you should see two new entries under the debug log, one will be for /apex/InboundSMSRequest. Look under the "Status" column to see the nature of the error and click the "View" link beside the error for deeper debugging.

If you are still unable to debug your issue, please text (415) 767-0842 or e-mail smsupport@textmessagesupport.com for help.