# Giriksms GIRIKSMS APP

# Installation and SMS Manual Guide (2023)

(Lightning Version)





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# 1) <u>Bots</u>

#### a) Create Bot

- Introducing Chatbots: Revolutionizing Sales, Marketing, and Support.
- In the rapidly evolving world of customer service and communication, businesses are increasingly turning to AI-powered chatbots to enhance their operations. These intelligent virtual assistants, capable of handling various tasks, are transforming the way organizations interact with their customers. Let's explore some key aspects of chatbots and their impact on sales, marketing, and support.

1() 	Bots		IIGT WINDING PROTOTIKE			11 1 1	TIIIi	~ <u>\</u> [[[	
Π		*			2 New Import	Change	Owner	r	Printable View
item	• Sorte	d by Bot Name • Filtered by All bots • Updated a	few seconds ago		Q, Search this list	\$	•	G	/ 0 1
		Bot Name 🕈 🛛 🗸	Welcome Message V	Confuse Message		`	/ is	. ~	Start Date/Ti
1		Arab Health Exhibition	arab_health_exhibition_manual_is_li	Thank you for reaching	g out to us. For any other assistance feel free to c	all u	1		8/2/2023 12:0
2		Badge Registration	badge_registration_is_live	Thank you for reaching	g out to us. For any other assistance feel free to c	all u	1		8/2/2023 12:0
3		Bussiness	stand_design_template	Default options					7/6/2023 12:0
4		Girik Chat Bot PAUSED	bot_language	Thank you for reaching	g out to us. For any other assistance feel free to c	all u			
5		GirikBot Sales and Marketing	it_service_demo_bot_welcome_msg	Thank you for contacti	ng us. For any Other assistance, please feel free t	o re			7/19/2023 12:
6		GirikBot Support	choose_language	Thank you for reaching	g out to us. For any other assistance feel free to c	all u	1		7/20/2023 12:
7		GirikSMS	test_whatsapp_template_with_girik	I did not get what you	saying. Please type one of the following options	SMS			6/30/2023 12:
8		Informa Bot	arabic_test_2	I am not sure on what	you said. Please contact support team.				7/6/2023 12:0
9		It Support Bot	Test Template	Default Message with	menu One Two Three Four Other				7/6/2023 12:0

• Click on **Bots** Tab after that click on **New** button to create bots.



					* = Required Information
ormation					
			5	Owner	🔇 SMS Dev Team
*Bot Name		Test Bot			
isActive				* Bot Type	None 🔻
					✓None
*Confuse Message				End Date/Time	Sales and Marketing
			11		Support
Confuse Message Template	0	Search SMS Templates C	2		
* Welcome Message	0	Search SMS Templates C	2		
Start Date/Time		Date Time			
		i C	Ø		
Channel/Service Id					

- 1. Bot Name: Choose unique names that align with their brand and values. These names can range from friendly and approachable to professional and formal, depending on the business's target audience. It's mandatory to fill this.
- 2. IsActive: The "isActive" feature allows businesses to enable or disable the chatbot's functionalities based on their requirements. For instance, during maintenance or off-peak hours, the chatbot can be deactivated, and users will be informed about its unavailability.
- 3. Confuse Message: In case the chatbot encounters an issue or fails to understand a user's query, it will respond with a "Confuse Message." This auto-generated message will politely inform the user that it couldn't comprehend the input and encourage them to rephrase the question. It's mandatory to fill this.
- 4. Welcome Message: The Welcome Message sets the tone for the conversation and gives users their first impression of the chatbot. Businesses can choose from a variety of WhatsApp/SMS templates. In cases where the chatbot is integrated with WhatsApp, it's essential to adhere to WhatsApp's approved templates to maintain a smooth user experience...
- 5. Bot Type: AI chatbots can serve two primary purposes and It's mandatory to fill this.
  - a. **Sales and Marketing**: These chatbots are designed to assist in lead generation, customer engagement, and promoting products or services. They can provide product recommendations, answer FAQs, and even run personalized marketing campaigns.
  - b. **Support**: Support chatbots excel in addressing customer queries, troubleshooting issues, and providing timely assistance. They can reduce



response times, handle repetitive inquiries, and escalate complex problems to human agents when necessary.

- 6. Start Date/Time: Businesses can schedule the activation of their chatbots at specific Start Date/Time. This feature enables companies to plan their bot deployment strategically and align it with product launches or marketing campaigns.
- 7. End Date/Time: Similarly, the End Date/Time feature allows businesses to set a date and time when the chatbot's functionality will be deactivated. This can be useful for seasonal promotions or limited-time events.
- Channel/Service Id: The Channel/Service Id helps identify the specific communication channel or service where the chatbot operates. This could service Id from Twilio.

Bot Name	GirikBot Support	1	Owner	SMS Dev Team	
isActive	<ul> <li>Image: A start of the start of</li></ul>	/	Object Or Report Name	Case	
Confuse Message	Thank you for reaching out to us. For any other assistance feel free to call us at XXXXXXXXX. Call to action, Site link	/	Template Type	Object	
Confuse Message 🛛 🚯 Template	confusion_template	/	Bot Type	Support	1
Welcome Message 🔳	choose_language	1	End Date/Time	7/30/2025 12:00 PM	1
Start Date/Time	7/20/2023 12:00 PM	1			
Channel/Service Id	N	1			
Created By	SMS Dev Team, 7/20/2023 6:35 PM		Last Modified By	Mukesh Gupta, 7/31/2023 8:58 PM	

#### b) Bot Intent

• Click on New button to create Bot Intent.





MS			Q Search		
GirikSMS App	Home APP Admin Bots V Schedule	Msg.	Msg. From Report SM	IS Survey Survey List 🗸 All Conversation	Msg. H
Bot	2 AMART 1988-11 COMPENNEL	11:11 N	Mar Hassil		S-111-2
GirikBot Sup	port				
A CONTRACTOR OF		$\frown$	Ne Il Mari	Month of the second	M/50
Bot Name	GirikBot Support	1	Owner	SMS Dev Team	
isActive	<b>v</b>	/	Object Or Report Name	Case	
Confuse Message	Thank you for reaching out to us. For any other assistance feel free to call us at XXXXXXXXXXX Call to action, Site link	1	Template Type	Object	
Confuse Message Template	confusion_template	/	Bot Type	Support	/
Welcome Message 🚯	choose_language	1	End Date/Time	7/30/2025 12:00 PM	/
Start Date/Time	7/20/2023 12:00 PM	1			
Channel/Service Id		1			
Created By	③ SMS Dev Team, 7/20/2023 6:35 PM		Last Modified By	Mukesh Gupta, 7/31/2023 8:58 PM	
Bot Intents (6+)					New
				Action	
Intent	Message Template	FIG	eld Api Name	Action	_
lcome message	choose_language				•
ase Select Event	follow_up_response_1	gk	m_smsEvent_Namec	Create Record	-

	$\rightarrow$	New Bo	ot Intent		
Information					
* Bot Intent	Welcome back	5	Owner Object Or Report Name	SMS Dev Team	
Bot Bot Response	T It Support Bot	×	Action	None	•
Message Template	Search SMS Templates	Q			
System Information	1				
Created By			Last Modified By		
	(	Cancel Save	e & New Save		

• Bot Intent: Give the name of bot intent to access the into while we selecting next intent.



- Bot: Here you will get selected Bot which is initially created and this is related to this intent.
- Bot Response: On choosing this Bot Intent user will show this message on response.
- Message Template: Here you have to search SMS/WhatsApp template to in order to response back to user while they will select this Bot Intent.
- Fire Action: The "Fire Action" feature allows the chatbot to execute the appropriate action (create/update) whenever it receives a response from the customer related to the specific intent. For instance, if the user confirms the information for record creation or provides updated details for a record update, the chatbot will trigger the corresponding action.
- Action: The chatbot will support two primary types of actions based on user queries.
  - **Create Record:** Whenever a user requests the creation of a record, the chatbot will gather relevant information from the user, validate it, and then initiate the creation process in the backend system.
  - **Update Record:** If a user asks to update an existing record, the chatbot will prompt the user to provide the necessary details for the update. It will then execute the update action once it receives valid input from the user.
  - After completing this Bot Intent fields Click on **Save** button.

Bot Intent Welcome me	essage				
✓ Information				11 Illo II.	
Bot Intent	Welcome message	/ Owne	r SMS [	Dev Team	
Bot	GirikBot Support	Objec	t Or Report Name Case		
Bot Response		Action	1		1
Message Template	choose_language	/ Fire A	ction 🕕		/

#### c) Bot Training Data Set

 Now create the Bot Training Data Set to show user intent values for user end.



Bot Intent Welcome m	essage				-Partie	at all	New Opportunity	Edit New Case
Information						Bot Trainin	g Data Set (Bot Intent) (2)	
ot Intent	Welcome message	/	Owner	3 SMS Dev Team		English Match key:	100%	New
ot	GirikBot Support	1	Object Or Report Name	Case		Next Intent: Created Date:	Please Select Event 7/22/2023 6:29 PM	
ot Response		1	Action		1	Arabic	1/22/2023 0.29 PM	
essage Template	choose_language		Fire Action			Match key: Next Intent: Created Date:	100% Please Select Event 7/22/2023 6:30 PM	
elected Field		/					View All	
System Informa	ition							
reated By	(3) SMS Dev Team, 7/22/2023 5:30 PM	И	Last Modified By	(3) SMS Dev Team, 7/25/2023 10:30 PM				

• Now click on New button to create sets.

nformation					
		5	Owner	🔇 SMS Dev Team	
* Title	English		Do you want to switch bot?	0	
Bot Intent	Welcome message	×	switch bot?		
Match key	100%				
* Next Intent	Search Bot Intents	Q			
ls Training Data 🛛 🚯					
ystem Information					
Created By			Last Modified By		

- i. Title: Give the Title for Bot Training Data Set. It's mandatory to fill this field.
- ii. Bot Intent: This show Bot Intent which is earlier created and its shows depends on previously created Intend value.
- iii. Match Key: It should be 100% for match the keywords while user gives the input.
- iv. Next Intent: If user select this Bot Training Data Set value then user get the next Bot Intent according to the flow of chat.

- v. Is Training Data Required? Its basically depends upon user input, if user keyword is like Email then this should be unchecked and if user have different keywords like e.g. English then user can train this sets in Training Datas.
- vi. Do you want to switch Bot? This is for Chat Transfer between Agent.
- After completing this Bot Training Data Set Click on **Save** button.

(3) SMS Dev Team	English		(
0	7	View All	
	-		
	0	•	•

#### d) Training Datas

• This is for if user have different keywords like e.g. English then user can train this sets in **Training Datas**. Click on New button On Training Datas Action toggle.

Bot Training Data : English	Set					New Opportuni	ty Edit New Case
✓ Information			17 - 77 × 17647	Children Children Children		Training Datas (1)	
Title	English	1	Owner	3 SMS Dev Team		English	New
Bot Intent	Welcome message	1	Do you want to switch	0	1	View All	
Match key	100%	1	bot?				
Next Intent	Please Select Event	1					
ls Training Data Required?	•						
<ul> <li>System Informat</li> </ul>					_		



5	
×	
	<del>ک</del> ×

- i. Training Data Name: Give the value in Training Data Name to match the keyword which is used in Bot Training Data set. It's mandatory to fill this field.
- ii. Bot Training Data Set: Its Selected value came from Bot Training Data Set.
- Now Bot is ready to use if you want to test this bot then check Bot Simulator to test before Go Live.

## 2) Bot Simulator

Chat started by <b>Giriko</b>	n Chat Bot	Start Simulator	
Please select your preferred language English Arabic			
Girikon Chat Bot +08:03 PM			

• Start Simulator: For test this Start the simulator every time after refresh the tab.



Chat started by Girikon Chat Bot	Start Simulator
Please select your preferred language English Arabic	Î
Girikon Chat Bot +08:03 PM	English Kndroid +08:12 PM
Please Select Event Arab Event USA Event	
Girikon Chat Bot •08:12 PM	
	USA Event
Ask Anything here	

• Select Intent Keyword: Click on the button which is given on the above simulator e.g. If You select **English** then next Intent is show and so far, now your Bot is ready to use in Live environment.



#### 3) Introduction

GirikSMS App allows the owner or the super admin to send individual or bulk SMS to the object records (e.g. Account, Leads, Contacts, etc.) from the Salesforce admin panel. In this app, the super admin can create multiple users and assign them permission to send SMS (bulk & individual). After installing GirikSMS App, the super admin can create new users if there are no users. The super admin can assign GirikSMS APP User permission set to its users who can access app features like-

- Bulk SMS/WhatsApp
- Schedule Msg
- SMS Survey
- Msg History
- Msg From Report
- Chat Bot (Sales, Marketing, Services)
- Actionable Chat Bot
- WhatsApp Bot
- Drip Campaigns
- OptOuts Numbers
- SMSApp Debugs

The SmartSMS APP Admin User can view the above-mentioned tabs along with two additional tabs- SMS Admin & Schedule SMS.





# 4) Installation

- You have to visit (AppExchange Product URL) for downloading and installing the app.
- Click on Get It Now button, login into your Salesforce Account, select between Sandbox or Production for the app installation and then the click on Confirm and Install.
- While installing, this will ask you to choose for:
  - Install for admins only
  - Install for all users
  - ✤ Install for specific profile.
- Choose the option as per your requirement.
- Wait for the application to get installed and then click done.
- After the app installation, you can see the components of the app under Installed Packages.

Note: If a user has a basic permission set assigned to him and he can only view the records of a specific object and if the super admin wants to assign him SmartSMS APP Admin User permission then the admin has to first make that user Admin. The super admin can do this by editing SmartSMS APP Admin User permission and clicking System Permissions. Now enable API Enabled and Modify All Data permission names and then that simple user can be SmartSMS APP Admin and create SMS Configuration and SMS Schedule.

#### 5) Activating GirikSMS App

 Click App Launcher and then you will come across GirikSMS App under All Apps section. Click the app to see its other components.



App Launcher	Q	Search apps	; or items		Visit AppE	xchange
Service Manage customer service with	I	0	Marketing Best-in-class on-demand	<u>8</u>	Community Salesforce CRM Communities	
Salesforce Chatter The Salesforce Chatter social		Đ	Content Salesforce CRM Content		Sales Manage your sales process with	**
Lightning Usage App View Adoption and Usage Metrics	:	Girik Sĭ⊠íS	GirikSMS App GirikSMS App support services like	 8	webchat	**

 Now, click APP Admin tab and then you will come to the Dashboard. In the One Time Setup section, tap the Activate button to activate the app.

Smart SMS App	Home SMS.Admin Schedule SMS SMS From Report SMS Survey Survey List 🗸 SMS History 🗸	N-2111-7777-5311117-NSWA JURTZ-
Setup Assistant Account Settings SMS Settings Whatsapp Settings Setup Auto Response	One Time Setup     Activate your SMS application account here, set the From Number and Incoming SMS url and other settings.     Demo Account     Activation     Incoming SMS Setting     Choose From Number     SMS/MMS Usage(Tr     Finish	Eager to hear from you use left
Map From Number Configuration Add New View All Workflow Whatsapp Templates	Click on Activation button to activate demo account In DEMO account, we will provide 100 SMS free to user. DEMO account gets deleted on usages of 100 SMS OR in 7 days whichever is earlier.	Feedback Give us your valuable feedback

## 6) My Domain Setup

- Now, go to setup, search My Domain in the quick find box and then select **My Domain**.
- Register your domain by entering a name for your domain, check its availability and then click Register Domain button. Now login in your registered domain.
- My Domain setup is important as Salesforce Lightning Experience works on the registered My Domain only.



#### 7) Site Setup

- If you haven't created any site in your org, then first you need to register your domain by entering a name for your domain, check its availability and then click Register Domain button.
- Now, go to setup, search Site in the quick find box and then select **Sites**.
- Enter details like Site Label, Site Name, Site Contact and for Active Site Home Page click on lookup icon and select HomeSmartSMS page (this page is included in the package) and save it.
- You also have to check Require Secure Connections (HTTPS), Upgrade all requests to HTTPS checkbox.

SETUP			
Sites			
New Site	- A \	Save Cancel	
Site Label	smart sms	i	
Site Name	smart_sms	i	
Site Description			
		1	
Site Contact	Md Rafiqkn	<b>Q</b> i	
Default Record Owner	Md Rafiqkn	<b>Q</b> i	
Default Web Address	https://	ev-ed.develop.my.salesforce-sites.com/	i
Active	<b>i</b>		
Active Site Home Page	HomeSmartSMS	(Preview)	
Inactive Site Home Page	InMaintenance	(Preview)	
Site Template	SiteTemplate	<b>S</b> 1	

• Now, click on **Public Access Setting** button on the site detail page.



Sites			SWANN
Site Details			
smart sms			
« Back to List: Sites			
Site Detail	Edit Public Access Settings	Login Settings URL Redirects Deactivate	
Site Label	smart sms	Site Name	smart sms
Site Description		Site Contact	Md Rafigkn
Active	8	Login	Not Allowed
Active Site Home Page	gkn_sms.HomeSmartSMS [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	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Lightning Features for Guest Users	✓ <u>i</u>
Enable Content Sniffing Protection	✓ 1	Enable Browser Cross Site Scripting Protection	✓ <u>i</u>
Referrer URL Protection	✓ i	Allow only required cookies for this site	More Details
Guest Access to the Payments API		Guest Access to the Support API	<b>i</b>
Default Record Owner	Md Rafigkn 🚺	Redirect to custom domain	✓ i

• After clicking Public Access Setting button, click on View Users button.

SETUP Profiles		
Profile smart sms Profile		Help for this Page 🤣
Users with this profile have the perm	issions and page layouts list	below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Typ	es, use the Edit links in the F	cord Type Settings section below to make one or more record types available to users with this profile.
		e Page Access (12)   Enabled External Data Source Access (0)   Enabled Named Credential Access (0)   Enabled External Credential Principal Access (0) (0)   Enabled Custom Setting Definitions Access (0)   Enabled Flow Access (0)   Enabled Custom Permissions (0)
Profile Detail	E	View Users
Name	smart sms Profile	
User License	Guest User License	Custom Profile 🗸
Description		

• In the next page, click on Site Guest User ,smart sms.

smart sms Profile									ł	Help fo	r this F	Page 🃢
On this page you can create, view, and manage user	rs.											
In addition, download SalesforceA to view and edit u	ser details, re	set passwords, and perform other administrative tasks from your mobile device	s: <u>iOS</u>	And	Iroid							
×		A   B   C   D   E   F   G   H   I   J   K	LM	N	P		ST	UV	W 3	<   Y	z o	ther 🗾
Actin Full Name +	Alias	Username		Role		Active	e F	rofile				- 6
Edit Site Guest User, smart sms	guest	smart_sms@00d2w00000kspggea3 org force.com				~	5	mart s	ms Pr	ofile		

• Next setup page will open, scroll down to Permission Set Assignments Section and click on **Edit Assignments.** 



	GTANNONNA DAUTATATATA NIN
Edit Assignments	Permission Set Assignments Help
	Edit Assignments

 Then, in the next page move IncomingSMS Guest User from Available Permission Sets to Enabled Permission Sets and Save.

Permission Sets			
mission Set Assignments nart sms Site Guest User			Help for this P
	Save Cancel		
Available Permission Sets	Enabled Per	nission Sets	
Mechanoliser Order Management Agent Order Management Operations Manager	Add		
Order Management Shopper Order Management Store Associate	Remove		
Queue Manager Sales Cloud User Sales Engagement Basic User			

#### 8) Manage Incoming SMS

• Now select site as Smart SMS App click on Save selected site button.





# 9) Manage From Number

- The From Number is the number using which you will send and receive SMS/MMS.
- Click on Setup button, then the From Number setup page will open.
- Here, you can add your From Number bought from Twilio to send SMS/MMS.
- Select the **Country** and search the **Number** using area code, prefix, or character in your phone number. You can also have and use more than one From Number, but only one at a time.
- Then a list of number will be displayed, select the required number.





iirik MS		Q S	earch				*• 🖬 🏟	? 🏚 🏚 🌘
GirikSMS App Home	APP Admin Bo	its ∨ Sc	hedule Msg.	Msg. From Report	SMS Survey Surve	ey List 🗸 All Conversation	Msg. History 🗸	Leads 🗸 More
	Message Bird	(****			+1	02/08/2021 Edit		
Whatsapp Templates	Vonage				+1	11/27/2020 Edit		CTI Comming Soon
Add New	Test SMS Service	1		ddce	+1	10/12/2018 Edit		
View All	Twilio Org1 first N	um (			+1	05/01/2017 Edit		•
SMS Templates								
Add New	* Country		Nu	umber				Contact Us
View All	United States			Search by digits or phra		Search Number	Email:	sales@girikon.com
Other Links				arch by area code, prefix, ur phone number.	or characters you want in	n	Phone:	appsupport@girikon.c +1-480-432-1110 +1-602-456-5582
Feedback	# Numbe	r	Region	Locality	Capabilities	Select		Contact Now
Workflow	· · ·		GA	Hephzibah	SMS, MMS, Voice	Select		
Setup Auto Response	(762) 24	9-5847	GA	Hephzibah	SMS, MMS, Voice	Select		Supported Cour
								Australia

• Select any one number and set the site URL and number friendly name.

Confirmation	
* Country Code	
+1	
Country Code i.e., +1 for USA, +44 for UK, +61 for Australia. For more info Click Here	
Phone Number	
+	
* Friendly Name of Number kndroid	
* Site URL	
https://e-dev-ed.develop.my.salesforce-sites.com	
Do you realy want to use above selected number?	
	Cancel

#### 10) Manage SmartSMS App User Permissions

• The App user permission can be controlled from here, click on Setup button.

Setup Assistant	Complete all the steps below to use the SMS App	54% Complete
Account Settings		
SMS Settings	<b>O</b>	
Whatsapp Settings	Setup "My Domain" Enable your Domain to use SMS App Lightening Experience and send SMS/MMS.	6 Manage SmartSMS App User Permissions * Manage Permission (access) of user on the SMS App. Separate
Setup Auto Response	important setup for sending SMS/ABMS.	permission for SMS Admin and User

• Then, the User Permission setting page will open.



- There are two type of user permission:
  - SmartSMS Admin User: Any user assigned this permission becomes the Admin and has access to every feature in the App and can manage the SMS App and control access permission of other users.
  - 2. SmartSMS User: Any user assigned this permission can access limited features as assigned by the Admin, the basic features of the SMS App excluding the control panel.
- To assign permission just move the User Name from Available Users to Selected Users box.

#### 11) Manage Send SMS Button

• This to set "Send SMS Button" on the objects both Standard and Custom from where you want to send SMS. Click on Setup button.





• Click on Object page layout edit then in the palette, once configured for an object, a button captioned "Send SMS" will be created and available for addition on all related page layouts.

#### 12) SMS Reply From Email

 Using this you reply to received SMS from your email. Click on Setup button in 10<sup>th</sup> box, you will land in the SMS Setting page. Enable this feature by clicking the button.





#### 13) Manage Messaging from WhatsApp

 Click on Setup button in 11<sup>th</sup> box, you will land in the WhatsApp Settings page



- Here if you want to send message to contacts on WhatsApp or even communicate through WhatsApp, then enable this setting. Enable this feature by clicking the button.
  - Important: You need to have WhatsApp Business account to send message through WhatsApp.

#### 14) Send Single SMS from Record Detail View Page

 After creating SMS configuration for objects, you can navigate to that particular object and view any of its record detail pages and select Start Conversation button on Activity Tab.

Contact Alok A	+ Follow Submit for Approval Delete Edit 💌
Title Account Name Phone (2) ▼ Email Contact Owner ISO(m) + Mukesh Gupta 2	
We found no potential duplicates of this Contact.     No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.	Activity Chatter
Details Related News No related lists to display	None Switch to WhatsApp
	Conversion not found Start Conversation





 Then Select From Number, Select ToNumber Fields after that select Template. If user need to add attachments like media then click on upload image button then click on Send SMS/MMS.

		_		>	×	2	
Home SMS Admin Schedule SMS	1012 D 1012 D 10				1000		
	* Select From Number	Note: You	can send only one media	file in	1.7 555500	STARS-TI	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1
A	kndroid (+	MMS		1	Follow	Enable Customer Use	r New Case
and the second se	* Select ToNumber Fields		Choose Existing Media	J	-		
unt Name Phone (2) 🛩	Business Phone		OR				
1d Hotels & Resorts Ltd (312) 596-	Business Fax		1 Upload Image				
	Mobile Phone		OR		10.000		
News Chat	* SMS will be send to all selected numbers (312) 596-1563		eference link to the file. E nat others can access.	nter a file	tivity	Chatter	
and the second se	* Select Template	Publicly A	ccessible URL				
otential duplicates of this Contact.	test contact					Filters:	All time • All act
	* SMS body which will be send						Refrest
0)	Hi John Bond , Thanks				Upcoming		
	Send SMS/MMS 🔿 OF	-			Get sta	No activitie rted by sending an ema	
	Send Whatsapp 🗩 Cancel				No past acti	vity. Past meetings and t	asks marked as (
• 00001014							
denerator consumes Subject: D.	elav in installation: spare parts						

#### 15) <u>SMS Notification</u>

 This is the Home page where you can see the Incoming SMS Notification. Here the incoming SMS will be displayed and you can reply here as well. Other features available here are Search SMS on basis of – From Number, User, Search received SMS, Set SMS Reminder and Filter SMS – All, Unread and Read.



- 1. Search SMS on basis of From Number by typing the number here.
- 2. Search SMS on basis of User by typing the name here.
- 3. Search received SMS by typing any keyword here.



- 4. Click the All checkbox to view all received SMS (both read and unread).
- 5. Use this toggle button to filter the SMS UnRead and Read for display.
- 6. check this checkbox and click dustbin button to delete, you can delete one or more at a time.

om I	Number		Select User		
0	* Subject				
Se	SMS Reply to Con	tact			Read
est	* Reminder Date Tim		Time		
i Te /21/	May 21, 2020	曲	2:57 AM	0	10
ost					-
epi /20/		Cance	Set Ren	ninder	Ø

- 7. This is to set **Reminder** on SMS to remind you for reply at a particular date and time. Once you set a reminder a task will be created and then at the designated time a notification will pop-up.
- This is the Reply option which you can use to reply instantly to the incoming SMS. On click a text box will open, just type your reply message and press enter button.
- 9. This is to navigate Previous and Next page.
- 10. This is **Refresh** button.
- 11. This is the **Dustbin** button, select one or more messages that you want to delete (check the checkbox) and click on this button.

#### 16) Schedule Msg

- This feature enables you to schedule SMS to the records of an object (standard and custom objects), for example, you can create a contact list view and then schedule a message (WhatsApp/SMS) to be sent to these contacts Daily, Weekly, Monthly or immediately i.e. Now and even choose the Time of the day. Automatically on the selected day and time SMS will be sent to the records of the chosen object.
- You can the frequency and time to send WhatsApp/SMS to any object. You can also select the day(s) on which the SMS will be sent to the records of an object.



Msg. Scheduler Msg. will be send to 1 record(s).			S. 1. 111 S	Scheduler List 11	2108-211 2	
Is WhatsApp?				NAME LAST RUN	NEXT RUN	ACTION
Inactive				Scheduler Test 1		◎ 12
* Scheduler Name		* From Number				
Contact Messages		Twilio Org1 first Num (+1	<b>▼</b> 2	demo		•
* Object Name		* To Number Field	-	Test		۲
Contact	×	Mobile Phone	- 4	TEST		0
* Contact Listview		Msg. Template				
All Contacts	*	None	<b>~</b> 6			
* Msg. Body						
Hi How Are you ?						
			11			
Frequency  Monthly Weekly Send N	low					
On Day      1     of every month OR C	Dn 🔿 The 1	st   Monday  of every month				
* Start Date		* End Date				
Aug 2, 2023	苗	Aug 2, 2023	首			
O <sup>Start Time</sup> HH ▼ MM ▼						

- Is WhatsApp: If you toggle this option then you can send Bulk SMS through the WhatsApp, then you get the From Number and Msg. Template fields.
- 1. Scheduler Name: You can set a name for your Schedule Msg, this is a mandatory field and must be always provided.
- 2. From Number: The number from which you want to send SMS, this is a mandatory field and must be always provided.
- 3. Object Name: You can choose the object (both standard and custom) to send SMS to the respective records. This is also a mandatory field and must be always provided and must be phone number.
- 4. To Number Field: This field is for the phone number field in the select object, this is a mandatory field and must be always provided. For example, if you have selected Contact object and there are 3 phone fields in Contact, you can choose any one field and SMS will be send to the respective numbers in that field.
- List View: This is a filter to select the respective object like All Contacts, My Contacts, Recently Viewed, etc. And, this is also a mandatory field and must be always provided.
- 6. Msg. Template: Here you can select any template that you have already saved and use it.
- 7. Msg. Body: This is the body of the SMS i.e. the text message will be displayed here that you will send. In case you have already selected a Msg. Template then this field will be auto-displayed with the text saved in the template, still you can edit the text here. If you have not selected any saved Msg. Template, then you can type your message here before sending SMS. This is a mandatory field and should not be left blank before sending SMS.
- 8. Frequency: You can set the frequency here
  - a. Monthly:
    - You can set monthly frequency to send SMS.

- In this mode you have option to choose day when to SMS will be sent.
   For example, On 1<sup>st</sup> Date of the Month or on 1<sup>st</sup> Monday of every month.
- You can also set the **Start Date** and **End Date**.
- And, the last option is you can set the exact time of the day to send SMS.

On Day   I  of every month OR On	The 1st V Monday of every month	
* Start Date	* End Date	
Aug 2, 2023	🛗 Aug 2, 2023	苗
* Start Time 00 🔹 00 💌		

#### b. Weekly

- Here you can set the Weekday/Weekdays when SMS will be sent.
- You can also set the **Start Date** and **End Date**.
- And, the last option is to set the exact time of the day to send SMS.

Frequency O Monthly 💽 Weekly O Send N	ow		
Weekdays ✓ Sunday 🗌 Monday 🗌 Tuesday 🗌 Wedne	esday	Thursday 🗌 Friday 🗌 Saturday	
* Start Date		* End Date	
Aug 2, 2023	苗	Aug 2, 2023	苗
* Start Time 00 💌 00 💌			
Schedule Msg. Cancel			

#### c. Now

 If you choose this option SMS will be send immediately after you click Send Now button.

Frequency 🔵	Monthly 🔵 Weekly 🧿 Send Now
Send Now	Cancel

- 9. Start Date: This is the date of the month, when scheduler will start sending SMS.
- 10. Start Time: The date when scheduler will stop sending SMS.
- **11. Scheduler List:** This list will display all your scheduled SMS names.
- **12. Action Button:** Using these buttons you can view details of the any scheduler in the list.



		Scheduler List			
		NAME	last 🗙 N	NEXT RUN	ACTION
		Scheduler Details			-0
	2	scheduler Details			0
Job Name:	Scheduler Test 1	From:			
	MobilePhone	Object:			•
List View Name:	Quick Test	Template : arabic_temp_23			
Template Body:	مرحبا، كيف حالك؟				
Scheduling Type:	Weekly	Start Time:			
Start Date:	Jul 27, 2023	End Date : Jul 27, 2023			
			Close		

#### 17) Msg From Report

• Stop the tedious job of sending SMS one by one to your contacts. Just prepare a report save it and then send WhatsApp/SMS to all the contacts in the report in one go. Before using this, you must prepare a report and save it and then select the same report here.

Send Msg. From Report 1		eport Data (3) 3 lsg. Will be send to Numbers.					
Is WhatsApp? 2	S.N.	LEAD ID	FIRST NAME	LAST NAME	TITLE	MOBILE	
Note: In your selected report, there should be columns for Phone, Id, and all fields that	1	00Q6F00001kmAvj	Mukesh	Gupta		4	
are used in the Msg template, i.e., "reportname.columnsname".	2	00Q6F00001hnyUF	Alok	Anibha		+	
On which object you have created a report U Lead  X	3	00Q6F00001AWtzX	Avinash	Singh		+9 '	
—							
Search Report							
New Leads Whatsapp Report ×							
"ToNumber Column Name (the ToNumber column must be of the phone type and should not be grouped in the report)							
Mobile							
Select Lead ID							
Mobile							
Select From Number							
Twilio Org1 first Num (+							
Select Msg. Template							
test sms using report							
Msg. Body (All merge fields must be in the report)							
Hi (INew_Leads_Report_n7L.FIRST_NAME),							
This message is for test sms using report							

- Send SMS From Report: Select the object first, then you can select the related saved reports, To Number, Contact ID (ID field in object), From Number, SMS Template and click on Send SMS button. All fields are mandatory here. Though you have selected a pre-saved SMS Template, still you can edit the text before you send SMS.
- 2. Is WhatsApp: If you toggle this option then you can send report to the WhatsApp, then you get the Select From Number and Select Msg. Template fields.
- 3. Report Data: Here sample records associated with the report will be displayed.

At the bottom of the page you can see **Sent Msg. From Report**. This will display all details like Items Processed, Items Failed, Total Items and Sent Date. You can also filter and view report on basis of report name.

REPORT NAME	ITEMS PROCESSED	ITEMS FAILED	TOTAL ITEMS	SENT DATE
Test Contact Report-1589967629432	2	0	2	05/20/2020
Test Contact Report-1589961900714	2	0	2	05/20/2020

#### 18) <u>SMS Survey</u>

Girik SMIS	Q, Search					*• 🖩 🎕 ? 🌣 🖡 🌀
GirikSMS App Home APP Admin Bots 🗸	Schedule Msg. Msg. From Report SMS Survey Surv	ey List	<ul> <li>All Conversation</li> </ul>	Msg. History 🗸 Leads 🦴	🗸 Contacts 🗸 Cases 🗸	
Survey Scheduler Survey will be send to 7 record(s).			Scheduler L	ist		
Note: You will have to add "Instance URL" under "Remote Site Se *Scheduler Name	*From Number		NAME	LAST RUN	NEXT RUN	ACTION
1 SMS Survey	Select an Option	2				
	Select from number	_				
* Object Name	* ToNumber Field	_				
3 🔤 Lead 🛛 🗙	Mobile Phone	- 4				
*Lead Listview	* Survey List					
5 All Lead 👻	Survey Questions	• 6				
Select Template						
7 Select an Option						
*Survey Body Would you like to participate in survey? 8 (A) Yes (B) No		•				
9Frequency Monthly Weekly Send Now On Day 1 of every month OR On 1	The 1st V Monday V of every month					
* Start Date	*End Date					
10 Aug 2, 2023	Aug 2, 2023	â				
1 <sup>Start Time</sup> HH • MM •						
Schedule SMS Cancel						
GirikSMS						

- 1. Scheduler Name: You can set a name for your Schedule Msg, this is a mandatory field and must be always provided.
- 2. From Number: The number from which you want to send SMS, this is a mandatory field and must be always provided.
- **3. Object Name:** You can choose the object (both standard and custom) to send SMS to the respective records. This is also a mandatory field and must be always provided and must be phone number.
- 4. To Number Field: This field is for the phone number field in the select object, this is a mandatory field and must be always provided. For example, if you have selected Lead object and there are 3 phone fields in Lead, you can choose any one field and SMS will be send to the respective numbers in that field.

- List View: This is a filter to select the respective object like All Leads, My Leads, Recently Viewed, etc. And, this is also a mandatory field and must be always provided.
- 6. Survey List:
- 7. SMS Template: Here you can select any template that you have already saved and use it.
- 8. Survey Body: This is the body of the SMS i.e. the text message will be displayed here that you will send. In case you have already selected a SMS Template then this field will be auto-displayed with the text saved in the template, still you can edit the text here. If you have not selected any saved Msg. Template, then you can type your message here before sending SMS. This is a mandatory field and should not be left blank before sending SMS.
- 9. Frequency: You can set the frequency here –

#### a. Monthly:

- You can set monthly frequency to send SMS.
- In this mode you have option to choose day when to SMS will be sent.
   For example, On 1<sup>st</sup> Date of the Month or on 1<sup>st</sup> Monday of every month.
- You can also set the Start Date and End Date
- And, the last option is you can set the exact time of the day to send SMS.

On Day   I  On Day  On  On  On  On  On  On  On  On  On  O	The 1st 🔹 Monday 🔹 of every month	
* Start Date	* End Date	
Aug 2, 2023	🖬 Aug 2, 2023	曲
* Start Time 00 🔹 00 💌		

#### b. Weekly

- Here you can set the Weekday/Weekdays when SMS will be sent.
- You can also set the **Start Date** and **End Date**.
- And, the last option is to set the exact time of the day to send SMS.

Frequency 🔵 Monthly 🧿 Weekly 🔵 Se Weekdays	end Now	
Sunday Monday Tuesday V	Vednesday 🗌 Thursday 📄 Friday 📄 Saturday	
* Start Date	* End Date	
Aug 2, 2023	🛗 Aug 2, 2023	i
* Start Time 00 💌 00	▼	
Schedule Msg. Cancel		

GirikSMS

#### c. Now

 If you choose this option SMS will be send immediately after you click Send Now button.

Frequency 🔵	Monthly 🔘 Weekly 💽 Send Now
Send Now	Cancel

10. Start Date: This is the date of the month, when scheduler will start sending SMS.

**11. Start Time:** The date when scheduler will stop sending SMS.

**12. Scheduler List:** This list will display all your scheduled SMS names.

#### 19) Survey List

- To send SMS Survey you have to first create a Survey and then send SMS Survey to contact numbers.
- Let's create a Survey
- Click on Survey List tab and then click on New button.

Girik SM(S				Q Se	earch					*		\$ <b>\$</b>	S
GirikSMS App	Home	APP Admin	Bots 🗸	Schedule Msg.	Msg. From Report	SMS Survey	Survey List 🗸	All Conversation	Msg. History 🗸	Leads 🗸	✓ Contacts ✓	Cases 🗸	
Survey List All Survey V	*	JACOLL	/////~*\\\\		7 - JAGA (77	187 MART - 2		108-71 (- <b>1711</b> 8-7	New	Import	Change Owner	Printable	View
6 items • Sorted by Survey Title •	· Filtered by Al	l survey list • U	Jpdated 3 minu	utes ago				Q, Sec	arch this list		\$ • <b>∏</b> • 0		) T
Survey Title 1					e Through		Description			Total Questi			

• Then, create a New Survey.





			Q Search			×
› Adm			New SM	MS Survey		С с
					* = Required Information	Imp
vey lis	Information					
			5	Owner	SMS Dev Team	estic
	* Survey Title		Demo Survey			
	* Response Through	0	None 💌	Description		
	Inrough					
	* Status		Draft 💌	Success Message	Thank you	
					4	18
	Header 🚺		Salesforce Sans 💌 12 💌	Footer	Salesforce Sans 💌 12 💌	
			■ B I ⊻ 5		■ <b>B</b> I <u>U</u> <del>S</del>	18
						18
						18
			Cancel S	ave & New Save		
						~

- 1. Survey Name: The name that you want to give to your survey.
- Response Through: There are two ways through which one can reply to the Survey –
  - a. SMS: The contact can reply to your survey (question) by sending SMS against the received SMS. In this mode only one SMS can be sent at a time.
  - b. Link: The contact will receive a link (URL) in SMS, he/she has to open the link/URL in any browser, read the survey question and answer/reply there itself. In this mode more than one question can be set for survey.
- Status: This is important, as in Draft mode you cannot send SMS Survey. You can send SMS Survey only in Published mode. And, Closed mode means you cannot use the SMS Survey.
- 4. Header: This is the header part of your Survey SMS.
- 5. Description: This is where you can mention description of your survey.
- 6. Success Message: The message that will be displayed when one fills the survey and submits it.
- 7. Footer: This is the footer part of your Survey SMS.
- After filling all the required fields, Save it. Then, go to your saved survey, click on the Survey Name.



Girik SMS		Q Search_							*	₿ ♣	?\$	<b>.</b> .	3
GirikSMS App Home APP Admin	Bots 🗸 Schedule Msg.	Msg. From Report SM	MS Survey Survey List	<ul> <li>All Conversation</li> </ul>	Msg. History 🗸	Leads ∨	Contac	ts ∨ Cas	es ∨				
Survey List All Survey ▼ 🖈	944 - <i>746</i> - 946 17 - 94	SSSS 11107 - 118851	116 <i>7412</i> 5366 11	ASSING THE T	841 (- 1717 - S			lew Impo	rt Chi	inge Ownei	r Pri	ntable Vi	iew
6 items • Sorted by Survey Title • Filtered by All survey list •	Updated a few seconds ago					Q. Search th	nis list		\$		C /	C	Y
Survey Title ↓	v 1	Response Through	~	Description			v 1	otal Question				~	
1 Survey Questions	5	5MS					3						V

• Then detail page will open.

Survey Title	Survey Questions	1	Owner	3 SMS Dev Team	
Response Through  🕚	SMS	1	Total Question	3	
Status	Published	1	Description		2
Header 🕕		/	Success Message	Thank you, winner will be nominated soon!	1
			Footer		1
Created By	SMS Dev Team, 5/2/2023 3:38 PM		Last Modified By	SMS Dev Team, 8/2/2023 2:59 PM	

• Click on **New** button on **Questions** Tab. Set your question for survey here.

SMS Survey	y Questions				New Opportunity	Edit	New Case	•
Details		Steel NO 1		- 11 - 11 - 11 - 11 - 11 - 11 - 11 - 1	Questions (3)	Carlo V		<b>1</b>
Survey Title	Survey Questions		Owner	SMS Dev Team	 Q-0012 Type: Ontional		New	

				* = Req	uired Informat
nformation					
Question No			* Survey	Survey Questions	×
*Question			*Order		
		le			
* Type	None	•			
Is Required					

GirikSMS

- **1. Question:** The question that you want to ask in your Survey.
- 2. Type: This are the option that you give in your Survey
  - a. Text: A text box for the contacts to write in their reply.
  - **b. Optional:** Few options that you provide and contact can choose any one from them.
- 3. Is Required: Check the checkbox to make it mandatory question in your survey.
- 4. Survey: The name of your survey, you can choose from the saved surveys.
- 5. Order: The order this question appears in the survey.
- Fill the details and click **Save**. Now, click on the saved question.

Related Details				
Questions (1)				New
Question No	Туре	Is Required	Question	
Q-0000	Text		Rate Me?	-
		View All		

• The details page of your question will open.

Details				Questions (3)	
Survey Title	Survey Questions	Owner	SMS Dev Team	Q-0012 Type: Optional	(
Response Through	SMS	/ Total Question	3	Is Required: Question: Hi There, Would you like to partici	
Status	Published	Ø Description		Q-0016 Type: Optional	l
Header		Success Messag	Thank you, winner will be nominated soon!		pExcha
		Footer		Q-0017	(
Created By	SMS Dev Team, 5/2/2023 3:38 PM	Last Modified B	y SMS Dev Team, 8/2/2023 2:59 Pl	Type: Text Is Required: Question: Give name of APPs	
				View All	

#### 20) Msg History

• Here you can see your SMS History i.e. list of SMS sent (Outgoing) or received (Incoming).



iril M					C	λ Search						*		<b>@</b> ?	\$\$ <b>.</b>	
	Girik	SMS App Home	APP Admin	Bots 🗸	Schedule M	sg. Msg. From I	Report SMS Sur	rvey Survey List	∨ Al	ll Conversation Msg. His	story 🗸	Leads 🗸	Conta	acts 🗸	Cases 🗸	
		History								OL <i>THE</i> SWELLS	New I	mport	Change	Owner	Printable Vie	ew
		* *														
										Q. Search this lis			* .	<b>.</b>		
iO+ ite		rted by Created Date • Filtered	by All msg. histo	ry • Updated a	a few seconds	ago				Q Search this lis	t		\$ ·	<b>∏</b> • C		1
iO+ ite	ems • So		by All msg. histo	ry • Updated a		ago Customer N	To Number		~	Q Search this lis SMS Body		Status		T - C Created		٦
i0+ ite	ems • So	rted by Created Date • Filtered Subject	, ,	ry • Updated a	~		To Number +					<b>Status</b> Deliver	• •		Date 4	
0+ ite 1 2	ems • So	rted by Created Date • Filtered Subject	, ,	ry • Updated a	~	Customer N	To Number +			SMS Body			red	Created 8/2/2023	Date 4	
1	ems • So	rted by Created Date • Filtered Subject Thank you for providing d	etails, we are	rry • Updated a	~	Customer N Anurag Chau	+	. 827		SMS Body Thank you for providing d	etails, w	Deliver	red	Created 8/2/2023	Date ↓ 8:17 PM 8:17 PM	

• To view more details of each SMS, click on the **subject**, then the detail page will open.

GirikSMS App	Home APP Admin Bots 🗸 Schedu	de Mee	Mag From Banad SM	S Survey Survey List V All Conversation	Mea Lister	ny v Leads v Contacts v Cases v
Msg. History	r providing details, we are	ne wisg.	msg. From Report 344	s survey use V An conversation	wsg. Histor	New Opportunity Edit New Case
Related Details						Activity
Subject	Thank you for providing details, we are	1	Owner	0		
SMS Type	Outgoing	1	IsMMS		1	Filters: All time • All activities • All types
Status	Delivered	1	To Number	-	1	Refresh • Expand All • View
SMS Body	Thank you for providing details, we are redirecting you to Live Agent	1	From Number / Service	N Ja6a82	1	✓ Upcoming & Overdue
Segments	0	1	Object Name	Case	1	No activities to show.
Message Id	SMc4fd5b04caf498cdede6ed615ee316cf	1	Related Record	5006F00003IARbNQAX	1	Get started by sending an email, scheduling a task, and more.
Customer Name	Anurag Chauhan	1	Log Description	Bot Reply	1	
Template Name	choose_language	1	ReadSMS		/	No past activity. Past meetings and tasks marked as done show up here.
SMS Owner	0056F000007AU85QAG	1	Next Intent	a0V6F00001qwZvlUAE	1	
Is Whatsapp Message?	~	1	Question Id		1	
Field Api Name		1	Use?		1	
Conversation Id	a0Z6F000018705vUAA	1	Is Removed		1	
Created By	SMS Guest User, 8/2/2023 8:17 PM		Last Modified By	SMS Guest User, 8/2/2023 8:17 PM		

#### 21) OptOuts Numbers

This is the option using which you can remove the numbers (of contacts) who do not want to receive any kind of SMS in future from you i.e. **OptOut.** Here you can also view the list of numbers who have opted out from receiving SMS.

	4	DptOuts Numbers All ▼ 📌 Sorted by OptOut Name •	Filtered by All optou	ts numbers • Updated 4 mi	nutes ago				2 Q. Search this list.	New Import	Change Owner	Printable View
Ľ		OptOut Name ↑	~	To Number	~	From Number	~	isOptOut	~	Related Record Id		~
E	1	0-0152 1		+1		+		<b>v</b>		00Q6F00001bi4szU	AA	
	2	O-0153		•		+1` 2aa		<b>V</b>		00Q6F00001guBq7	UAE	V
L												



- 1. OptOut Name: The number which has opted out of SMS. You can view more details by clicking it and going to the details page.
- 2. New: Use this option to add new numbers to OptOut List. Click on New to do this.

	New OptOut	
Information		
OptOut Name To Number	Owner 🕝 SMS Dev Team	
From Number		
isOptOut		
Related Record Id		
	Cancel Save & New Save	

- **1. To Number:** The number which is to be Opted Out.
- 2. From Number: Your From Number.
- **3. IsOptOut:** Check this checkbox to OptOut Number.
  - Another way to OptOut from the SMS service is user can send sending a text message like Cancel or Stop then that user is added to the OptOut list automatically.

In the contact page also, you can use **SMS OptIn/OptOut** button in the Quick action of Lightning.

- The end user can opt out from receiving the SMS by sending a text like **STOP** or **CANCEL**.
- The end user can again start receiving the SMS by sending text SMS like **START**.

#### 22) <u>APP Settings</u>

• Here you set advanced features of your SMS as per your requirement.


GirikSMS App Home APP Admi	Q, Search.	■ @ ? ☆ ₽ 🥳
Setup Assistant Account Settings APP Settings Whatsapp Settings	Advance Settings Enable/Disable following settings for your advance features.     Enable/SmartSMS APP Debug Log?	Clear Debug Log
Map From Number Configuration Add New	Chelug (cay like available in tab "SMSApp Debugr". Open Debug Log	Enabled
View All Whatsapp Templates Add New	2 Enable From Number Mapping? Enable this feature to give user access to mapped from Number only. For example if you bought multiple numbers and mapped each number with different users respectively, then on 13x45 Send Screen: only mapped number will each user.	be visible to
View All SMS Templates Add New	3 Enable Reply from Email Enable this setting to receive and reply to SMS from email indox. Create an email Service and provide email address here.	Disabled
View All Other Links Feedback	4 Agent based notification Enable this feature to give user permission to view higher own sms only and not view those belonging to others.	Disabled
Workflow Setup Auto Response	5 Agent based chat window Enable this feature to give user permission to view his/her own sms chat conversation only and not view those belonging to others.	Disabled

- 1. Enable SmartSMS APP Debug Log? If you want to view the Debug logs, then enable this setting. And, Debug Log will be available in tab "SMSApp Debugs".
- Enable From Number Mapping? Enable this feature to give user access to mapped From Number only. For example, if you bought multiple numbers and mapped each number with different users respectively, then on 'SMS Send Screen' only mapped number will be visible to each user.
- **3.** Enable Reply from Email: Enable this setting to receive and reply to SMS from email inbox. Create an email Service and provide email address here.
- 4. Agent based notification: Enable this feature to give user permission to view his/her own SMS only and not view those belonging to others.
- 5. Agent based chat window: Enable this feature to give user permission to view his/her own SMS chat conversation only and not view those belonging to others.

## 23) WhatsApp Settings

Here if you want to send message to contacts on WhatsApp or even communicate through WhatsApp, then enable this setting. Then, fill the details Name, From Number and Country Code and Save.

**Important:** You need to have WhatsApp Business account to send message through WhatsApp.



Girik SiMiS		Q Search					*• • •	?‡	<b>.</b> 3
GirikSMS App	Home APP Admin	Bots 🗸 Schedule Msg	. Msg. From Report	SMS Survey	Survey List 🗸 🗸	All Conversation	Msg. History 🗸	Leads 🚿	<ul> <li>More</li> </ul>
Setup Assistant Account Settings		op Settings app number here to comm	unicate through Whatsa	pp.	ANSA (1447)	- 140 F XXIIII O////:			Enabled
APP Settings Whatsapp Settings	Whatsapp N	umber 1(Sales and M	arketting)		1		900 X - 583	H MG	A1165
Map From Number	* Name								
Configuration	Twilio Whatsap	рр							
Add New	* Whatsapp Numb								
Add New									
View All	* Country Code								
	4								

# 24) Map From Number

• Here you can map the From Number to User and they will be able to use that number only.

irik MS		Q Search			*• 🖬 🎕 ? 🌣 🐥 🄇
GirikSMS App	Home APP Admin Bots 🗸	Schedule Msg. Msg. From	n Report SMS Survey Surve	ey List 🗸 🗸 All Conversation	Msg. History 🗸 Leads 🗸 More
Setup Assistant	🛔 Map Number with	Profile/User		94 ( <i>1412</i> - Met 7 - Million (	Submit Cancel
Account Settings	From Number	Map With	Profile	User	Action
APP Settings Whatsapp Settings	Map 6	User	▼ Select an Option	▼ SMS Dev	Team 🔻 Add Remove
Map From Number	Twilio Whatsapp (MGdbfb8-	k 🔻			

# 25) SMS Reply from Email Setup

- Click on New Email Service Button to create a new email service).
- In Apex Class lookup field select gkn\_sms. ReplyFromEmailToSMS class and save email service.
- Click on New Email Address Button to add email address.
- Enter email address in Email Address Name field and click Save button



		Q. Search Setup			5386 1865.66 KG 🔄 - 🖶 ? 🕸 🌲 🌘
Setup Home Objec	t Manager 🐱				
Q, email service Email	SETUP Email Service	25			Sandi - Arssan C <i>arace</i> Angel Commoning
Send through External Email Custom Code	Email Services				
Email Services Didn't find what you're looking for? Try using Global Search.	Contact information in messages Before creating email global class myRi global Mo	Each email service has one or more services, create Apex classes that imp indier implements Messaging. In ssaging. InboundEmailResult has lessaging. InboundEmailResult has	e email service addresses that can receive plement the Messaging.InboundEmailHandl	nessages for processing. n interface. mail email. Messaging, InboundEnvelope envelop	nall service that automatically creates contact records based on
	View: All V Create New View			A   B   C   D   E   F   G   H	(   J   K   L   M   N   O   P   G   R   S   T   U   V   W   X   Y   Z   Other []
	Action Active Email	Service Name 1	Apex Class	w Email Service Last Modified By	Last Modified Date

Q email service	SETUP	ANNING THE CHARTENESS AND AND THE CONTRACT THE CONTRACT AND A CONTRACT AND A CONTRACT AND A CONTRACT AND A CONT
	Email Services	
<ul> <li>Email</li> </ul>		
Send through External Email	messages for processing.	
Custom Code		
Email Services		Save Save and New Email Address Cancel
	Email Service Information	
Didn't find what you're looking for?	Email Service Name	SMS Reply from email
Try using Global Search.	Apex Class	ReplyFromEmailToSMS
	Accept Attachments	None
	Advanced Email Security Settings	
	Accept Email From	
	Convert Text Attachments to Binary Attachments	
	Active	
	Failure Response Settings	
	Configure how salesforce.com responds wh	en an attempt to access this email service fails for the reasons shown below.
	Over Email Rate Limit Action	Discard message 🔻
	Deactivated Email Address Action	Discard message 🔻
	Deactivated Email Service Action	Discard message 🔻
	Unauthenticated Sender Action	Discard message 🔻
	Unauthorized Sender Action Enable Error Routing	Discard message





Q email service	Email Services
Send through External Email	
✓ Custom Code	Email Service Address
Email Services	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.
Didn't find what you're looking for? Try using Global Search.	Email Service Information           Email Service Name         SMS Reply from email           Accept Email From         All email addresses (subject to security settings)
	Email Address Information
	Email Address Name SMS Test Email address SMS_Reply_from_email Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.
	Active Context User Mukesh Gupta
	Accept Email From mukesh.gupta@girikon.com
	Save ] Save and New Cancel



-	Q. Search Setup
Setup Home Object	Manager 🗸
Q email service	Email Services
Send through External <mark>Email</mark>	
✓ Custom Code	Email Service Address
Email Services	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.
Didn't find what you're looking for? Try using Global Search.	Email Service Information         Email Service Name         SMS Reply from email           Accept Email From         All email addresses (subject to security settings)
	Email Address Information
	Email Address Name       SMS_Test         Email address       SMS_Reply_from_email         Specify the local-part of the email address. Salesforce com assigns the domain name part of the address.
	Active 🖉
	Context User Mukesh Gupta
	Accept Email From mukesh.gupta@girikon.com
	Save Save and New Cancel

# 26) <u>Send SMS from your own Apex class by using SMSSender</u> <u>class</u>

• You can create process builder to send SMS by using our "Send SMS" invocable method of SMSSender global class.

## b) Used to send BulkSMS from List View

#### /\*\*

\* [Use send method to send MMS on one or more number with comma separated tonumber. SMSBody should be comman for all MMS.]

- \* [Remember that we are provide only domestic MMS]
- \* @param recordId [List of recordId of object]
- \* @param countryCode [Country code]
- \* @param toNumberField [to number field of object]
- \* @param fromNumber [fromnumber/serviceid without country code]
- \* @param SMSBody [SMSBody along with merge field ]
- \* @param objectName [objectName from where you want to send]
- \* @return [return job id, on the base of job id you can check how many item process



```
and how many remain ]
```

```
*/
```

public class SendSMS {

public static void bulkMessage(){

String recordId='0035w000035SfHVAA0';

String fromNumber='+12057821060';

String SMSBody ='Hello Testing From Apex With Media URL';

String countryCode='+1';

String toNumberField='Phone';

String SMSBody='Testing for Bulk SMS';

```
String objectName ='Contact';
```

List<String> recordId= new list<String> { '0035w000035SfHVAA0','0035w000035UQgcAAG'};

#### // recordId of object

gkn\_sms.SMSSender.sendBulkSMS(recordId,countryCode,toNumberField,fromNumber,SMSB ody,objectName);

} }

## c) Used to send SMS with Media

/\*\*

\* [Use send method to send MMS on one or more number with comma separated tonumber. SMSBody should be common for all MMS.]

\* [Remember that we are provide only domestic MMS.]

\* @param recordId [recordId of object]

\* @param toNumber [comma separated to number with country code i.e., +12244668877,+19988776655]

\* @param fromNumber [fromNumber with country code provided by Twilio i.e., +15555332233]

\* @param SMSBody [SMSBody plain text max characters length 1500]

```
* @param mediaURL [mediaURL Public accessible url MIME type image or video] */
```

public class SendSMS {

```
public static void sendMessage(){
String recordId='0035w000035SfHVAA0';
String toNumber='+917042145596';
String fromNumber='+12057821060';
String SMSBody ='Hello Testing From Apex With Media URL';
```

String mediaURL='https://sms172--

c.documentforce.com/servlet/servlet.ImageServer?id=0155w000002dtoY&oid=00D5w0 00003xEC3';

gkn\_sms.SMSSender.send(recordId,toNumber,fromNumber,SMSBody,mediaURL);

}

}

## c) Used to send SMS without Media

/\*\*

\* [Use send method to send MMS on one or more number with comma separated tonumber. SMSBody should be common for all MMS.]

\* [Remember that we are provide only domestic MMS.]

- \* @param recordId [recordId of object]
- \* @param toNumber [comma seperated to number with country code i.e.,

```
+12244668877,+19988776655]
```

\* @param fromNumber [fromNumber with country code provided by Twilio i.e., +15555332233]

```
* @param SMSBody [SMSBody plain text max characters length 1500]
*/
```

public class SendSMS {

```
public static void sendMessage(){
```

```
String recordId='0035w000035SfHVAA0';
```

```
String toNumber='+917042145596';
```

String fromNumber='+12057821060';

String SMSBody ='Hello Testing From Apex With Media URL';

gkn\_sms.SMSSender.send(recordId,toNumber,fromNumber,SMSBody,mediaURL);
}

}

# 27) Other Links

#### a) Feedback

You can send us your feedback and/or suggestions using the **Feedback** option available.



ease use this feedback section to submit ;	our feedback .	
Description		
Enter description here		
		1
	1 Upload Image	

### b) Workflow

Using this you send SMS through customized Workflow.

Title	*Select From Number		
	None	•	
Object Name	* Select Template		
Q search	Select an Option	•	
To Number Field	SMS Content		
Select an Option	•		
		li	
Save Workflow Config Cancel			

- Fill details in the required fields and save. After setting up the workflow create a Process Builder to send SMS.
- The admin can create workflow configuration to send SMS from a workflow.
- Enter Title, select From Number, Object, To Number Field, Template. SMS message will get populated automatically in the SMS Content field as the template is selected from the picklist.

• In the Workflow Configuration List, you will see a list of SMS workflow configurations created for different objects with edit and delete buttons.

S.NO.	CONFIG NAME	OBJECT	TO NUMBER	FROM NUMBER	COUNTRY CODE	UNIQUE KEY	ACTION
1	SMS Workflow Configuration Contact	Contact	MobilePhone	5802192726	+1	Workflow-Config-2	🖌 Edit 🗴 💼 Delete
2	SMS Workflow Configuration Account	Account	Phone	4059902111	+1	Workflow-Config-1	🖌 Edit 👔 Delete

- After creating the SMS Workflow configuration, search workflow rules in the quick search box and click on it.
- Now click New Rule button to create a new rule. Select the object from the dropdown to which the workflow rule will apply.
- Enter the rule name, description. In Evaluation Criteria section, select the option which suits your requirement.

Object Rule Name	Contact Workflow Rule for Contact	
Description	Workflow Rule for Contact	1
aluation Criteria		
Evaluate the rule when a record is:	<ul> <li>created</li> <li>created, and every time it's edited</li> <li>created, and any time it's edited to subsequently meet criteria         <ol> <li>i</li> </ol> </li> <li>How do I choose?</li> </ul>	

• In the Rule Criteria section, create the criteria and click on Save & Next button.



Criteria		
Run this rule if the following criteria are met		
Field	Operator Value	
Contact: Mobile	▼ not equal to ▼	ANE
None	▼None ▼	ANE
None	▼None ▼	ANE
	▼None ▼	ANE
None		

- In Immediate Workflow Actions section, add a new workflow action by selecting New Task from the picklist.
- Choose user for Assigned to look-up field, enter Subject, Unique Name and Due Date.
- In the Comments field, you have to paste the Unique Key of SMS Workflow Configuration of the same object which you have created for sending SMS.

Object	Case				
Assigned To	Jane Doe				
Subject	Send SMS				
Unique Name	Send_SMS	i			
Due Date	Contact: Created D	ate	▼ plus	▼ 10	days

### c) Setup Auto Response

Here you set Auto-Response, if Keyword set by user matches all words in content of incoming SMS, then Auto Response will be send. You have to set the **Keyword** and the **Response Body**.



Setup Assistant	Setup Auto Response	ntent of incoming SMS, then Auto Response will be send. User can set the content for Auto Response here.	Submit Cano
Account Settings			
APP Settings	Keyword Match	Response Body	Action
Whatsapp Settings	Interested	Thank you for your interest. Our representative will contact with you asap. <a heef*"sket(0)"="">sjk/a&gt;</a>	Add
Map From Number			
Configuration			
Add New			
View All			
Whatsapp Templates			
Add New			
View All			
SMS Templates			
Add New			
View All			
Other Links			
Feedback			

## 28) WhatsApp Templates

### a) Add New

Here you can create WhatsApp template. Which you can use as template while sending WhatsApp/SMS.

Girik GirikSMS App	Q Search Home APP Admin Bots V Schedule Msg. Msg. From Report SM:	Survey Survey List 🗸 All Conversation	★▼ <b>日 ② ③ ▲ ③</b> Msg. History         ∨         More         ▼
Setup Assistant Account Settings	WhatsApp Template Templates created here can be used for sending SMS by the APP.		
APP Settings Whatsapp Settings Map From Number	*Select Category *Select Template Types Select an Option Complete this field.	¥	
Configuration Add New			
View All Whatsapp			
Templates Add New View All			

• Click on Add New, here you can Select Category and Template Types.



Templates created here can be us	sed for sending SMS by the APP.	
* Select Category	* Select Template Types	2-11-
Select an Option	▼ Select an Option ▼	
Marketing Utility		
S WhatsApp Template		
	used for sending SMS by the APP.	
Templates created here can be u	ised for sending SMS by the APP.	
Templates created here can be u *Select Category	sed for sending SMS by the APP. *Select Template Types	
Templates created here can be u * Select Category	sed for sending SMS by the APP.  * Select Template Types  Select an Option	

#### • In Category there is two types

Marketing - This type of template can be used to promote your products or services. For example, you could create a template that announces a new product launch, offers a discount, or reminds customers about an upcoming event

Utility - This type of template can be used to provide customer service or other helpful information. For example, you could create a template that provides directions to your store, answers frequently asked questions, or reminds customers about their account balance.

- In Template Types there is three types
  - 1) Text
  - 2) Location
  - 3) Card- (Message Body, Button, Media, Header and Footer)



* Select Category	* Select Template Types	
1 Marketing	▼ 2 Text ▼	
* Template Name	Select Fields	Preview
3	9 Select an Option	
	Select field and use merge field in your SMS body.	
* Type	Merge Field	
4None	10	
• Restrict Visibility 5 Visible only to me	*Template Body	
Visible only to me	11	
*Select		
6 <sup>Q</sup> , search		
*Language		
7select an Option	·	le
	Characters Left: 160 , Segments: 0 Total Characters: 0 160 Characters = 1 Segment, Max-Length = 1024.	Θ
Select Button Type 8	tee entretere - r eegman, max-sengar - reser.	
None		
Call to action		
Quick reply		

- 1. Select Category: Select the "Marketing" or "Utility" category for your template. This is a mandatory field and should not be left blank before creating Template.
- Select template Types: Select Text, Location, Card- (Message Body, Button, Media, Header and Footer). This is a mandatory field and should not be left blank before creating Template.
- Template Name: Enter a name for your template, don't use underscore and small case while entering name. This is a mandatory field and should not be left blank before creating Template.
- 4. Type: Select types **Object** or **Report**. This is a mandatory field and should not be left blank before creating Template.
- 5. Restricted Visibility: Select Visible only to me or Visible to all users. This is a mandatory field and should not be left blank before creating Template.
- 6. Select: The type of button you select depends on whether you want to create a button for an object or a report. This is a mandatory field and should not be left blank before creating Template.
- 7. Language: Select appropriate language for your template. This is a mandatory field and should not be left blank before creating Template.
- 8. Select Button Type: Here are the button types for call to action and quick reply in Templates

a). Call to action: It can be either URL buttons or PHONE\_NUMBER buttons. URL buttons will open a website when clicked, while PHONE\_NUMBER buttons will initiate a phone call.

b). Quick reply: Text buttons simply contains text.

- 9. Select Field: Select field and use merge field in your Template body.
- **10**. Merge Field: Get the Field values here which can be used in Template Body.

- **11.** Template Body: This is the body of the SMS i.e. the text message will be displayed here that you will send. You can also use Merge Field. This is a mandatory field and should not be left blank before sending SMS.
- **12.** Preview: You can check the Template Body final outcome in Preview.

#### Note: If You select the Template Type- Location

13. Location: Here you can specify the Latitude and Longitude for the location.

		Characters Left: 160 , Segments : 0 Total Characters: 0 160 Characters = 1 Segment, Max-Length = 1024.	e
* Latitude	* Longitude	* Location Label	
1	2	3	

**13.1 Latitude:** Specify the desired Latitude value.

- **13.2 Longitude:** Specify the desired Longitude value.
- 13.3 Location Label: Specify the Location label.

Note: If You select the Template Type- Card- (Message Body, Button, Media, Header and Footer)

14. Location:

Media URL	Characters Left. 100 , segments . 160 Characters = 1 Segment, Max-L
1 Footer Text	3 Select Media
2 maximum 60 characters	

14.1 Media URL: Specify the URL.

14.2 Footer Text: Specify the footer text.

14.3 Select Media: Here you can select the media file from your saved Media on org.

b) View All

- Here you view created WhatsApp templates. Also, you can view, Delete and check status of your WhatsApp template.
- Click on **View All** under WhatsApp Templates

GirikSMS App	Home APP	Admin Bots 🗸 Sc	hedule Msg. Msg. From Report	SMS Survey Survey	ey List 🗸 🗸 All Cor	nversation Msg. H	listory 🗸	More 🔻
Setup Assistant	<b>S</b> v	VhatsApp Template Lis	st (50)					
Account Settings	Hover ov	er the template content fie	eld to view all text in the template.					
APP Settings			TEMPLATE NAME &	OBJECT /	<b></b>			
Whatsapp Settings	S.NO.	TEMPLATE ID	TYPE	REPORT NAME	STATUS	CREATED DATE	ACTION	4
Map From Number	1	a016F00002eqE7mQAE	for_arabic_lang (Object)	Case	Approved	08/04/2023	•	<b>a</b>
Configuration	2	a016F00002eqCwlQAE	badge_registration_is_live (Obj	Contact	Approved	08/02/2023	•	亩
Add New	3	a016F00002eqCuXQAU	arab_health_exhibition_manual	Contact		08/02/2023	•	<b>m</b>
View All	4	a016F00002eqAgxQAE	select_event (Object)	Case	Approved	07/31/2023	•	亩
Whatsapp Templates	5	a016F00002eqAa4QAE	confusion_template (Object)	Case	Approved	07/31/2023	•	<b>a</b>
Add New	6	a016F00002eq66dQAA	start_over_chat (Object)	Case	Approved	07/25/2023	•	曲
View All	7	a016F00002eq652QAA	choose language (Object)	Case	Approved	07/25/2023	•	<b>a</b>

(a) To check the status of a WhatsApp template, you can click the Status button next to the template. This will show you the current status of the template, such as whether it is pending approval, approved, or rejected.

	18	a016F00002eq3XEQAY	event_location_template (Object)	Contact	Received	07/21/2023	Refresh Status
1	19	a016F00002eq3XZQAY	test_card_template (Object)	Lead	Approved	07/21/2023	<ul> <li></li></ul>
ź	20	a016F00002eq2U7QAI	test_whatsapp_template_with	Lead	Approved	07/20/2023	•

(b) To **delete** a WhatsApp template, you can simply click the Delete button next to the template. You will be asked to confirm your deletion.

<b>(</b> ) w	VhatsApp Template Lis	st (50)				
Hover ov	er the template content fie	ld to view all text in the templat	e.			
		TEMPLATE NAME &	OBJECT /			
S.NO.	TEMPLATE ID	TYPE	REPORT NAME	STATUS	CREATED DATE	ACTION
1	a016F00002eqE7mQAE	for_arabic_lang (Object)	Case	Approved	08/04/2023	<ul> <li></li></ul>

Note: Once your WhatsApp template is approved, you can use it to send SMS or WhatsApp messages to your customers. To do this, you will need to create a new message and select the template from the Templates list.



# 29) <u>SMS Templates</u>

#### a) Add New

Here you can create SMS template. Which you can use as template while sending WhatsApp/SMS.

-ik AS	Q Search		★ 🖬 🚓 ? 🌣 🐥
GirikSMS App Home	APP Admin Bots V Schedule Msg. Msg. From Report SM	5 Survey Survey List 🗸 All Conversation Msg. Histo	ory $\checkmark$ OptOuts Numbers $\checkmark$ Leads $\checkmark$ Contacts $\checkmark$ Cases $\checkmark$
CERTS AND CARMING	MATE TRANSFOLD THE STATE OF ANNUAL MARTE TRANSFOLD	- THE STAND THE TANK	The subset will during the subset of the sub
Setup Assistant	SMS Template		
Account Settings	Templates created here can be used for sending SMS by the APP.		
APP Settings			10 <sup>Template preview</sup>
-	*Template Name	Merge Field	10 10 10 10 10 10 10 10 10 10 10 10 10 1
Whatsapp Settings	L		
Map From Number	* Type	Select Survey	
Configuration	2 None	7 None	•
Add New	Restrict Visibility	Select survey and use survey link in your SMS body.	
View All	Visible only to me	Survey Link 8	
view Au	Visible to all users		
Whatsapp Templates	* Select	*Template Body	
Add New	4 Q search	9	
View All			
	Select Fields 5 Select an Option		
5MS Templates	Select field and use merge field in your SMS body.		
Add New			1.
View All	Save Template Cancel	Characters Left: 160 , Segments : 0 Total Character 160 Characters = 1 Segment, Max-Length = 1440.	ers: 0
Other Links			
iksms			

- 1. Template Name: Enter a name for your template, don't use underscore and small case while entering name. This is a mandatory field and should not be left blank before creating Template.
- 2. Type: Select types **Object** or **Report**. This is a mandatory field and should not be left blank before creating Template.
- 3. Restricted Visibility: Select Visible only to me or Visible to all users. This is a mandatory field and should not be left blank before creating Template.
- 4. Select: The type of button you select depends on whether you want to create a button for an object or a report. This is a mandatory field and should not be left blank before creating Template.
- 5. Select Field: Select field and use merge field in your Template body.
- 6. Merge Field: Get the Field values here which can be used in Template Body.
- 7. Select survey: Select created SMS Template in survey and if there is any link is present then it would be appeared in Survey Link.
- 8. Survey Link: It appeared if Select survey field is having any URL.
- 9. Template Body: This is the body of the SMS i.e. the text message will be displayed here that you will send. You can also use Merge Field. This is a mandatory field and should not be left blank before sending SMS.
- **10. Preview:** You can check the Template Body final outcome in Preview.



### b) View All

Here you view created SMS templates. Also, you can edit and Delete.

ik 15			Q Search			*• 🖬 🚓	? 🏚 🌲
GirikSMS App Home	APP Admin	Bots 🗸 Schedule Msg.	Msg. From Report SMS Survey Surv	ey List 🗸 All Conversation Msg	g. History 🗸 OptOuts Numbers 🗸	Leads 🗸 Contacts 🗸	Cases 🗸
Setup Assistant	Т	emplate List (11)	AND THE AND A TH	11 - XXXXX JUNT - JIXX8-71 (	- 11115 × 10617 - XVIIII (111107	11145-114 - <i>CAUE</i> SAND	
Account Settings		er the template content field to	view all text in the template.				
APP Settings	-	10-01/					11
	S.NO.	TEMPLATE ID	TEMPLATE NAME & TYPE	OBJECT / REPORT NAME	TEMPLATE CONTENT	CREATED DATE	ACTION
Whatsapp Settings Map From Number	1	a016F00002eq0qeQAA	Lead SMS Report (Report)	New_Lead_SMS_Report	Hi {!New_Lead_SMS_Report.LA For any other query would you	07/17/2023	1
Configuration	2	a016F00002epzebQAA	test sms using report (Report)	New_Leads_Report_n7L	Hi {!New_Leads_Report_n7LFIR This message is for test sms usi	07/14/2023	1
Add New					Hello {!Lead.Name},		_
View All	3	a016F00002NZwUCQA1	Whatsapp startup (Object)	Lead	Start chat on whatsapp https://wa.me/ /?	02/10/2021	1
Whatsapp Templates					Hi {!Contact.Name},		
					Please open survey form and s		
Add New View All	4	a016F00002KOzflQAT	Contact Survey Template (Obje	Contact	https://smart-sms-developer-e	04/28/2020	1
5MS Templates					Thanks Girikon Inc.		
Add New					Hi {!Lead.Name},		
					Please open survey form and s		
View All	5	a016F00002KOzfDQAT	Mukesh Survey Teplate (Object)	Lead	https://smart-sms-developer-e	04/28/2020	1
Other Links							

Click on View All under SMS Templates

# 30) Get Notification for New Case

- User interacts with chatbot
- Can create Case through WhatsApp / SMS
- Can raise enquiry through WhatsApp / SMS
- Chatbot prompts user to create case





# 31) All Conversation

Here you can chat directly to object records that consist Mobile phone, Phone details.

Click on All Conversation Tab.

Sirik Sillis	-ik IIS			Q. Search						*• • • • • •		
GirikSMS App	Home APP Admin	Bots 🗸	Schedule Msg.	Msg. From Report	SMS Survey	Survey List 🗸	All Conversation	Msg. History 🗸	OptOuts Numbers 🗸	More 🔻		
Contact	Select Object 👻	0										
Search here												
AC Anurag Chauhan		2.46										

## a) Agent Searching Customer Name for Specific Object:

The agent has the ability to search for a particular customer's name with respect to a specific object. This means the agent can input a customer's name and find all relevant interactions or conversations related to that customer in relation to a particular item, topic, or issue.



	Contact 1	Select Object 🔻		
	Search here	Account	0 71 L	
		Case		
	AC Anurag Chauha	Contact		
5	AC	Lead		

- (i) Select Object: Here you can select the object type which you can find the related record related contacts to start the chart.
- (ii) Search here: Here you can search the record related details like Name and phone number and can select to start the chart.

Lead Select Object 🗸	3 Me 1	<b>&gt;</b> :		<u></u>
Search here		Twilio Org1 first Num ( 🗘		3 Switch to WhatsAp
JEAN OF TRATEIN			Today	
K Kuldeep				Hi Kuldeep, This is simple test SMS. Thanks Girikon 😝 07:96 PM 🛩
			Hi Kuldeep, This is simple test SMS. Thanks Girikon 👄	
		Say something		
-		ତ <b>ଡ</b> ଅ 🕨 🕨	0/1550, 0 Segn	nents, 160 Characters = 1 Segr

• Select the Lead related record like here in screenshot after that You can select the number

(1) Select User/Bot: Here you can switch between Bot and Agent.

(2) Select vendor type: Here you can choose between different vendors like Twilio.

(3) Switch Between SMS/WhatsApp: As you change between SMS and WhatsApp the vendor number get also changed according to licensees from different vendors.





**Note:** *If you haven't created any conversation then you to click on Start Conversation button.* 

∑) : Twilio Org1 first Num( ↓	Switch to SMS/MMS
	on not found!
Say something	
S 🙂 🛤 🔻 🕨 🕨	0/1550, 0 Segments, 160 Characters = 1 Segm

## 32) Drip Campaign

A drip campaign is a marketing strategy used to send automated and scheduled messages, such as WhatsApp or SMS, to users over a period of time. These messages are typically triggered based on the recipient's status or response to previous messages.

## 33) Chat Analysis

- 1. Click on All conversation tab.
- 2. After that click on number 2 as shown in screenshot



Girik GirikSMS App Home APP Admin	Q Search Bots V Schedule Msg.	Msg. From Report SMS Survey All Conversation	EPT: 1.875 323124168 ★ 🔻 🖶 🗞 ? 🔯 🐥 🐻 Survey List 🗸 Msg. History 🗸 Leads 🗸 Contacts 🗸 Cases V 🖌
All (11) All  Search here	Days 30 ▼ Sea	rch : 2) : WhatsApp Number (+ 🛟	Switch to SMS/MMS
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