Tinosys SMS Salesforce Notes - User Guide

Contents

Overview

Tinosys SMS app is the ideal option if you're seeking for a means to send and receive SMS messages on Salesforce. With the use of this software, sending SMS to leads, opportunities, and clients is simple and doesn't require a company phone or reimbursements.

The Tinosys SMS app is easy to use and as simple as adding a note on Salesforce. Additionally, you can access all of your SMS message replies in Salesforce's activities area. Tinosys' new approach of messaging is simple and affordable. There is no setup necessary because Tinosys uses your AWS account's toll-free number.

Prerequisites

1. Install [Tinosys SMS APP CloudFormation stack](#) in AWS in the **us-east-1** region. The stack will claim a number (if none exist) in your AWS Account to send and receive SMS.
2. Ensure [Notes is enabled](#) in your Salesforce org.
3. [Notes related list](#) should be added to the page layout of the concerned object.
4. Phone numbers should be updated in the 'Phone' field for Contacts and Leads.
5. Ensure the **Phone** field is updated in the related **Contact/Person Account** record of the Opportunity or Case.
6. If **Primary OpportunityContactRole** is available for the Opportunity, the Phone number from that Contact is used, else the **Last Modified Contact** from the related Account is used.

AWS Stack Deployment and Configuration

1. Install AWS Tinosys SMS App CloudFormation stack using [this link](#)
2. Stack Configure Parameters:
   a. CustomerEmailAddress - Provide the Email address of the user who installed the Salesforce app.
   b. CustomerName - Provide the Name of the user who installed the Salesforce app.
   c. PinpointNumberPresent - Select **Yes** if you want to reuse a Toll-Free number available in your account. Select **No** to claim a new Toll-Free number
   d. PinpointPhoneNumber - If you selected **Yes** above, provide the Toll-free number here else leave it blank

Parameters

Parameters are defined in your template and allow you to input custom values when you create or update a stack.

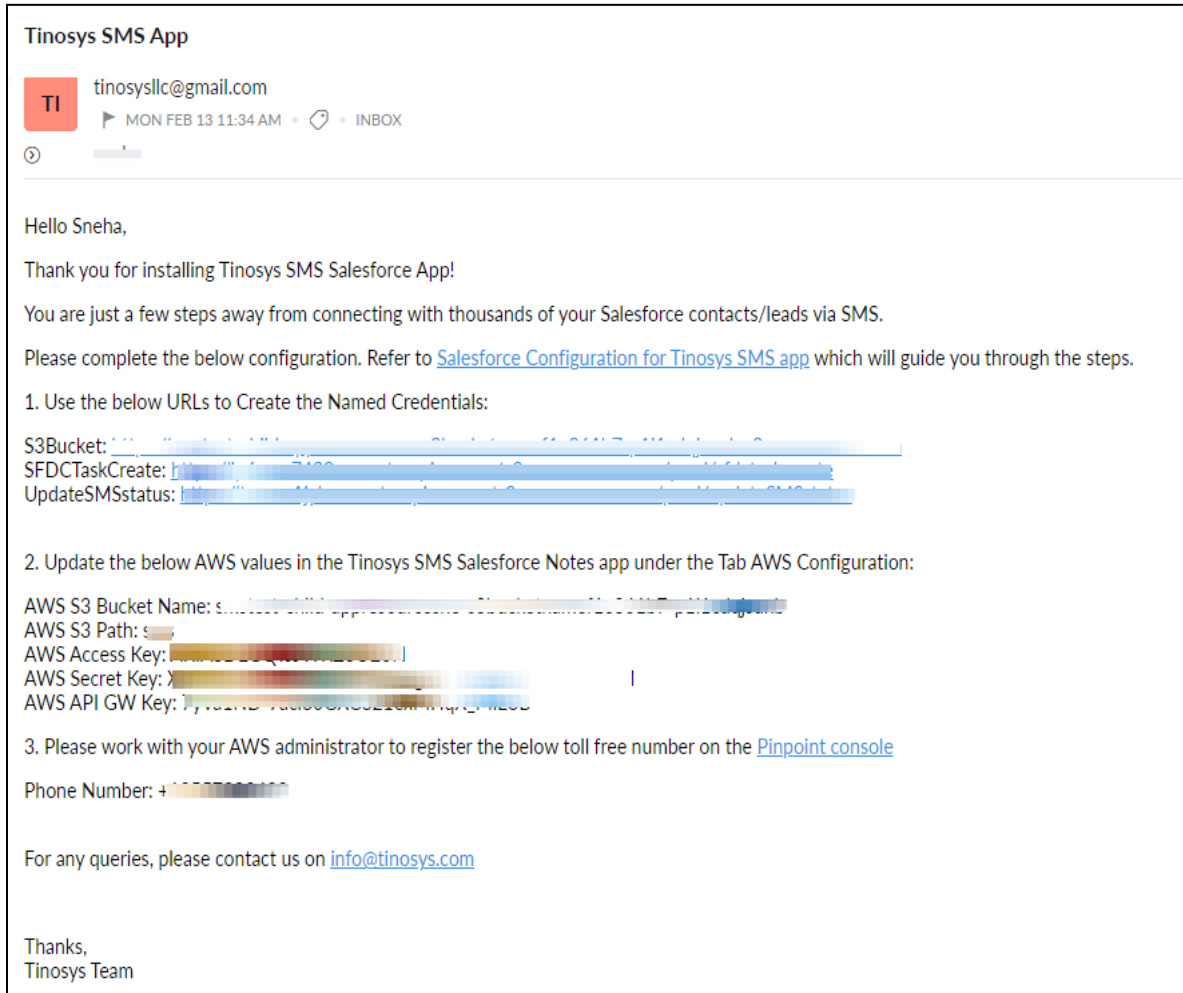**CustomerEmailAddress**
Enter your email address

> Enter String

CustomerName
User Name

> Enter String

PinpointNumberPresent
Do you have a pinpoint number

> Select String

PinpointPhoneNumber
If Yes, enter your existing phone number

> Enter String

3. Once the stack is successfully deployed, you will receive a confirmation email like below:

Tinosys SMS App

TI   tinosysllc@gmail.com
      🏴 MON FEB 13 11:34 AM · 🕐 · INBOX
⊙

Hello Sneha,

Thank you for installing Tinosys SMS Salesforce App!

You are just a few steps away from connecting with thousands of your Salesforce contacts/leads via SMS.

Please complete the below configuration. Refer to Salesforce Configuration for Tinosys SMS app which will guide you through the steps.

1. Use the below URLs to Create the Named Credentials:

S3Bucket: _____
SFDCTaskCreate: _____
UpdateSMSstatus: _____

2. Update the below AWS values in the Tinosys SMS Salesforce Notes app under the Tab AWS Configuration:

AWS S3 Bucket Name: s_____
AWS S3 Path: s___
AWS Access Key: _____
AWS Secret Key: _____
AWS API GW Key: _____

3. Please work with your AWS administrator to register the below toll free number on the Pinpoint console

Phone Number: +_____

For any queries, please contact us on info@tinosys.com

Thanks,
Tinosys Team

4. Configure AWS Org
   a. The Cloudformation stack would claim a toll free number in Amazon Pinpoint if none exists in your AWS account. To view the number, go to Pinpoint -> SMS and voice -> Phone numbers
   b. To be able to start using this phone number, it is mandatory to complete a registration process. Please follow the steps given here to complete the registration. Registration can take up to 15 business days.
   c. By default, the monthly SMS spending limit will be $1.00 USD. Raise a support case to increase the monthly SMS spending quota as per your

needs. Refer [Requesting increases to your monthly SMS spending quota for Amazon Pinpoint](#)

d. To be able to receive SMS, please enable the 2-way SMS feature in AWS SNS.

i. Go to Pinpoint -> SMS and voice -> Phone numbers and click on the phone number.

ii. Scroll down to the section Two-way SMS and check the option **Enable two-way SMS**.

iii. Select **Choose an existing SNS topic** and select the topic created by the AWS stack with the phrase **smsreceive** in its name

iv. Click **Save**

e. If your account is in SMS Sandbox, Go to Amazon SNS -> Text messaging (SMS) and under the section **Account information**, click on **Exit SMS Sandbox**. Refer [Moving out of the SMS sandbox - Amazon Simple Notification Service](#)
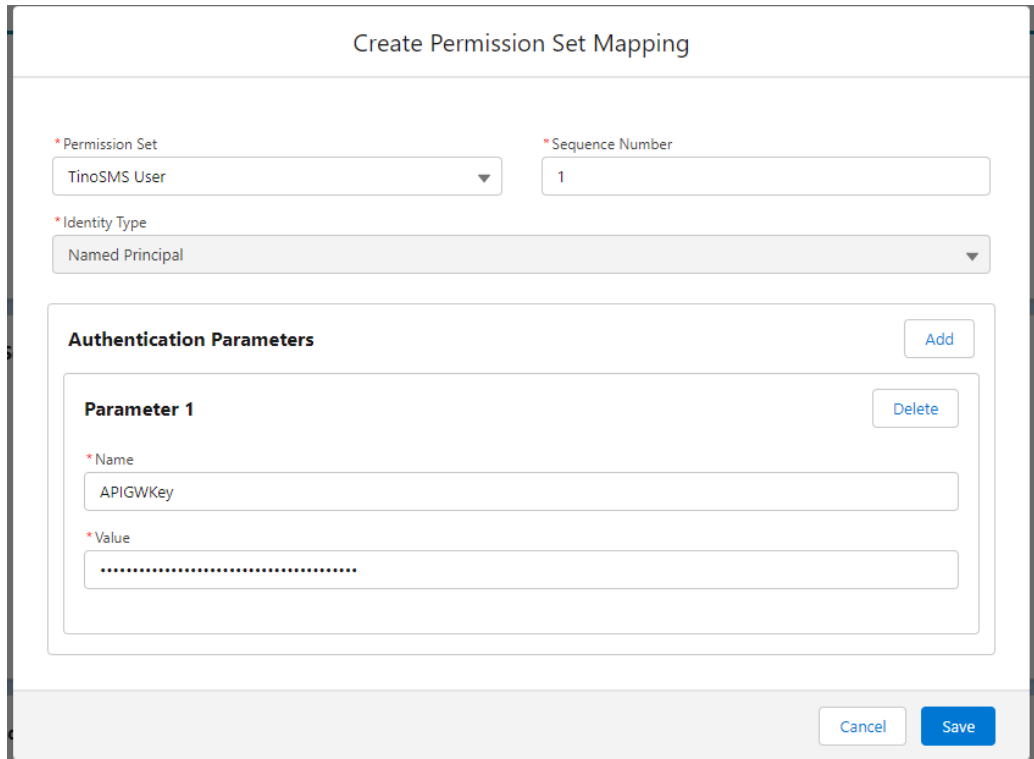
5. Configure Salesforce Org
   a. Go to Named Credentials under Setup
   b. Create a new External Credential as below
      i. Label: SMSCredential
      ii. Name: SMSCredential
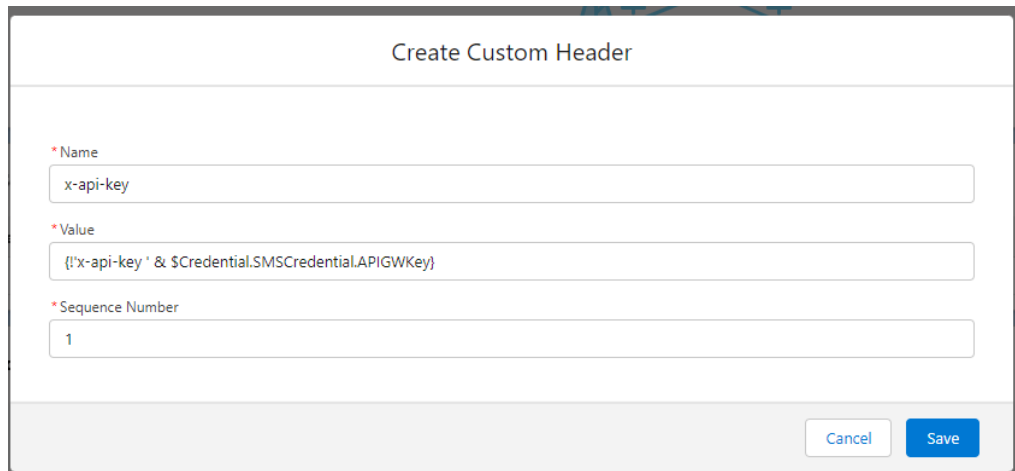   iii. Authentication Protocol: Custom

   c. Go to the External Credential created and scroll down to section
      Principals and Click on **New**
      i. Parameter Name: Provide a name (e.g. APIGW)
      ii. Sequence Number: 1
      iii. Identity Type: Named Principle
      iv. Under Authentication Parameters, click **Add**
         1. Name: APIGWKey
         2. Value: Paste the ApiGWKey value provided in the email and
            click on **Save**

Create Permission Set Mapping

d. Scroll down to section **Custom Headers** and click on **New**
    i.   Name: x-api-key
    ii. Value: {!'x-api-key ' & $Credential.SMSCredential.APIGWKey}
    iii. Sequence Number: 1
    iv. Click on **Save**

Create Custom Header

e. Now go to the tab Named Credentials and click on **New** to create the 3 Named Credentials as shown in the screenshots.

i. Label/Name: **S3bucket/SFDCTaskCreate/UpdateSMSstatus**
ii. URL: Use the corresponding URL provided in the email
iii. External Credential: Select **SMSCredential** created earlier
iv. Client Certificate: None
v. Callout Options: leave all unchecked
vi. Allowed namespaces: smsnotes

New Named Credential

* Label
SFDCTaskCreate

* Name
SFDCTaskCreate

* URL
https://zq7bxxfu18.execute-api.us-east-1.amazonaws.com/prod/sfdctaskcreate

Authentication

* External Credential
SMSCredential ▼

Client Certificate
--None-- ▼

Callout Options

Generate Authorization Header ⓘ
☐

Allow Formulas in HTTP Header ⓘ
☐

Allow Formulas in HTTP Body ⓘ
☐

Managed Package Access

Allowed Namespaces ⓘ
smsnotes

Cancel   Save

New Named Credential

* Label
UpdateSMSstatus

* Name
UpdateSMSstatus

* URL
https://zbdbndn1h2.execute-api.us-east-1.amazonaws.com/prod/updateSMSstatus

Authentication

* External Credential
SMSCredential

Client Certificate
--None--

Callout Options

Generate Authorization Header ⓘ ☐

Allow Formulas in HTTP Header ⓘ ☐

Allow Formulas in HTTP Body ⓘ ☐

Managed Package Access

Allowed Namespaces ⓘ
smsnotes

Cancel   Save

f. Create Permission Set

  i. Under setup, Go to Permission Sets and Click on **Clone** next to the permission set **TinoSMS User**

  ii. Provide a name (e.g. TinoSMS App User) and click **Save**.

  iii. Open the new Permission Set created and click **External Credential Principal Access** in the Apps section

  iv. Click **Edit**

  v. Select the external credential principal "**SMSCredential**" from the list of available principals. Click the Add arrow to move them into the Enabled column.

  vi. Click **Save**

g. Assign the new Permission Set created to all users who will be using Notes to send an SMS
  i. Click on **Manage Assignments** and then **Add Assignments**
  ii. Select the users and click **Next**
  iii. Click on **Assign**
h. Update the Tinosys AWS Config parameters in the Tinosys SMS Salesforce Notes App
  i. Go to App Launcher and search for "Tinosys SMS"
  ii. Select the app **Tinosys SMS Salesforce Notes**
  iii. Select the tab **AWS Configuration**
  iv. Update the below fields with the values provided in the confirmation email.
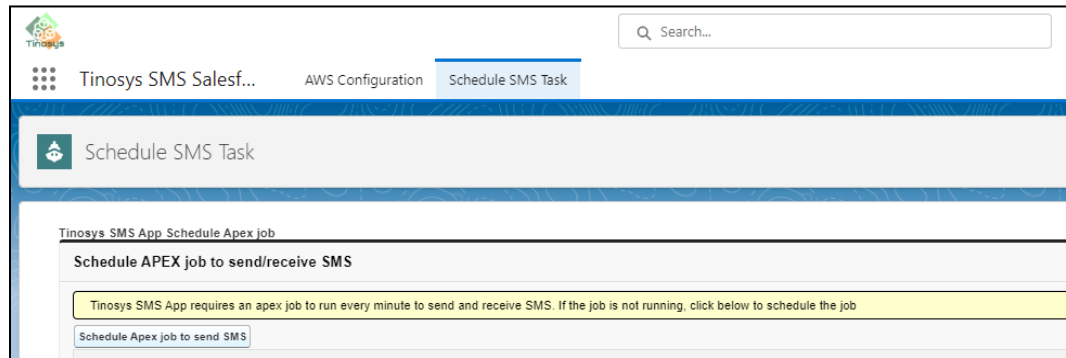   ■ S3 Bucket
    ■ S3 Path
    ■ AWS Access Key
    ■ AWS Secret Key
    ■ API GW Key

i. Schedule the SMS task so that the sent and received messages are logged under Activities related list

i.   Under app **Tinosys SMS Salesforce Notes,** select the tab **Schedule SMS Task**

ii. Click on **Schedule Apex job to send SMS**

Mandatory Requirements

1. **Enable Send/Receive SMS**: The Note must have the word 'SMS' / 'sms' in the subject. If there is no SMS word in the subject, it will ignore the Note for sending SMS.

2. **Country Code Configure:** The **Phone** field of the Lead/Opportunity/Case should have the record configured properly as below:

   a. The field **Phone** should have the phone number in E.164 format, i.e. [country code][area code][local phone number]. e.g.:

E.164 Format	Country Code	Country
+14155552671	1	US
+442071838750	44	GB
+551155256325	55	BR

b. If the Country code is not updated in the **Phone** field, then ensure the **Address** field has the country updated.

c. If the Country is not updated in the **Address** field, then it takes USA as the default and appends +1 to the Lead/Contact's phone number.
d. If the Phone number is configured properly as above, then the Lead/Customer will receive the SMS with the signature of the Lead Owner appended to the SMS.
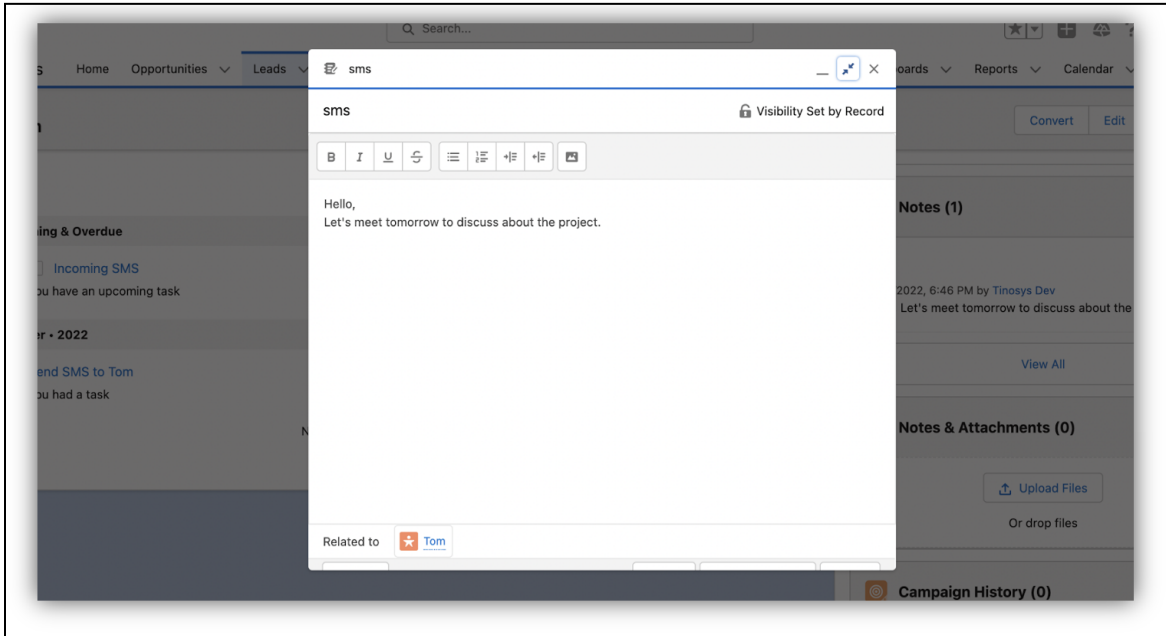
Send and Receive SMS using Salesforce

Lightning Experience

5.1.1 Send an SMS

1. Click on the **Leads/Opportunities/Cases/Contact** and open the record to whom you want to send an SMS.
2. Search for **Notes** related list and add **New** or Edit an existing Note.
3. Enter the subject and ensure it includes the word 'sms'.

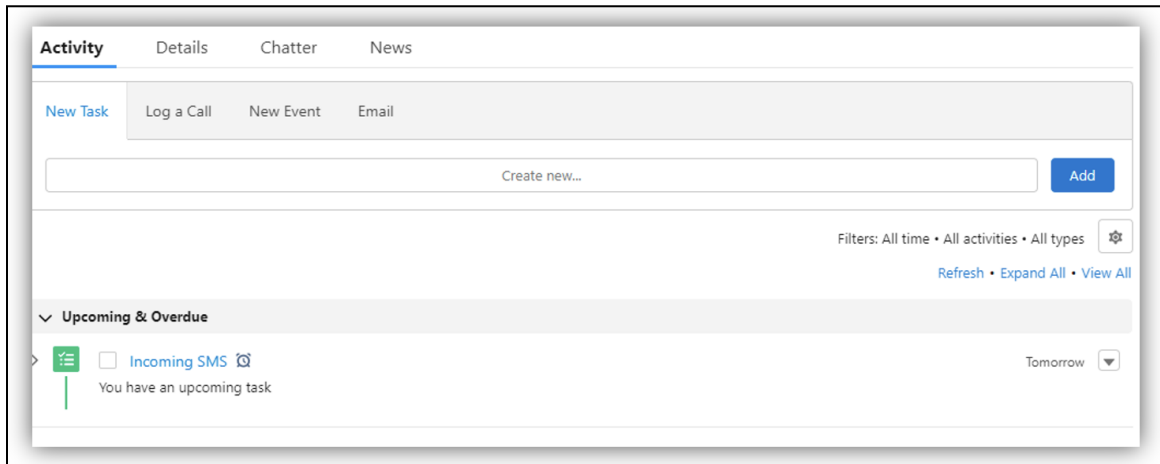4. Enter the message to be sent as SMS in the Body of the Note and click on **Done.**

5. Once the SMS is sent, a task is created with the subject 'Send SMS to <Lead/Contact Name>'. This can be viewed in the Activity History of the record.
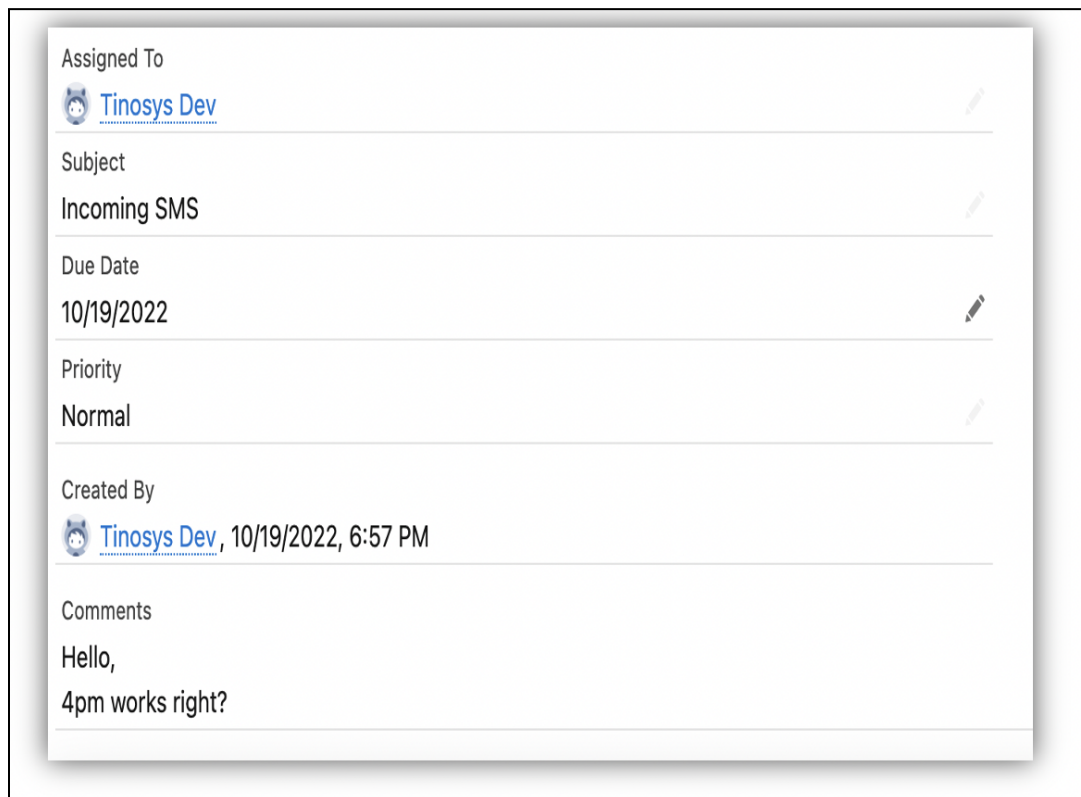

5.1.2 Receive an SMS

1. When the Lead/Opportunity/Contact replies to the SMS, the SMS is listed under **Open Activities** with the subject 'Incoming SMS'.

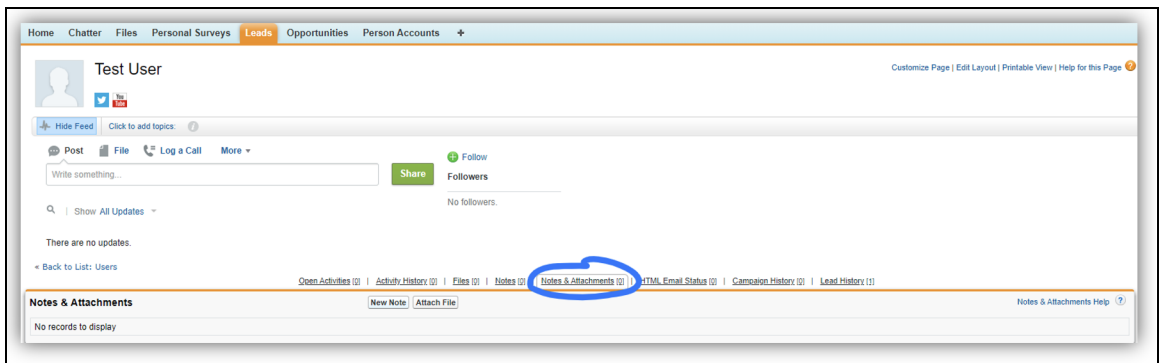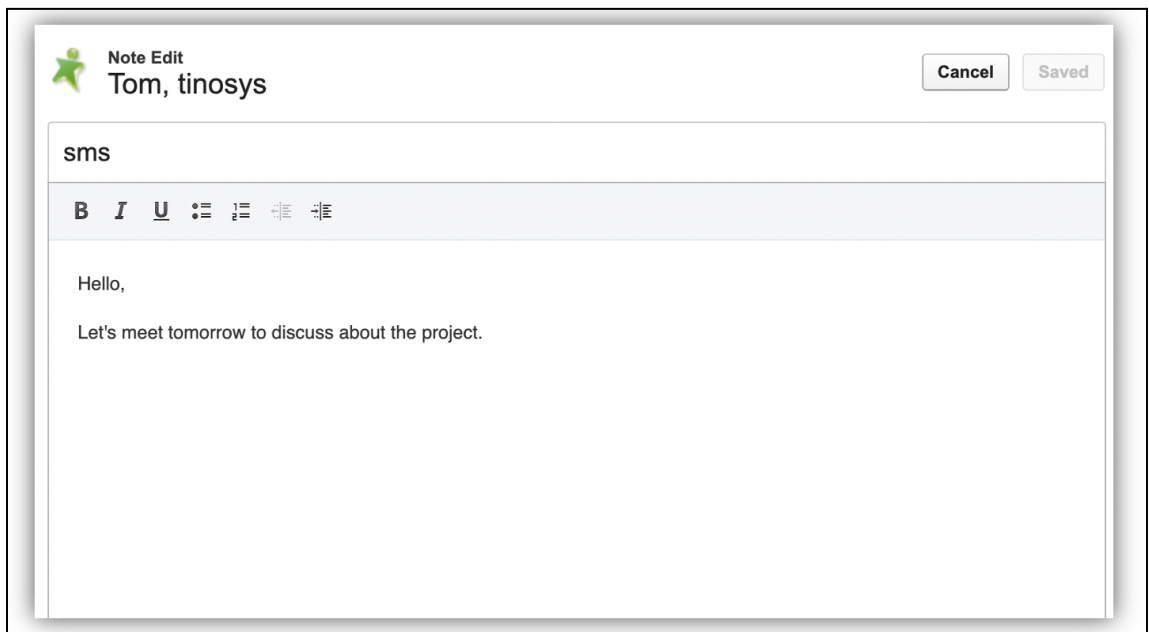2. Click on the task to open and view the message under the Comments section.

Salesforce Classic

5.2.1 Send an SMS

1. Click on the **Leads/Opportunities/Contact** tab and open the record to whom you want to send an SMS.
2. Search for **Notes & Attachments** and add **New Note** or Edit an existing Note.

3. Enter the subject and ensure it includes the word 'sms'
4. Enter the message to be sent as SMS in the Body of the Note and click on **Save**.

5. Once the SMS is sent, a task is created with the subject 'Send SMS to <Lead/Contact Name>'. This can be viewed in the Activity History of the record.

5.2.2 Receive an SMS

1. If the Lead/Opportunity/Contact replies to the SMS sent by the Owner, the SMS is listed under **Open Activities** with the subject 'Incoming SMS'.

2. Click on the task to open and view the message under the Comments section.

For more information please use the relevant links:

1. How it works: https://player.vimeo.com/video/776036266?dnt=1

2. Webpage link: https://tinosys.com/tinosys-sms-app