



Tinosys SMS Salesforce Notes - User Guide

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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

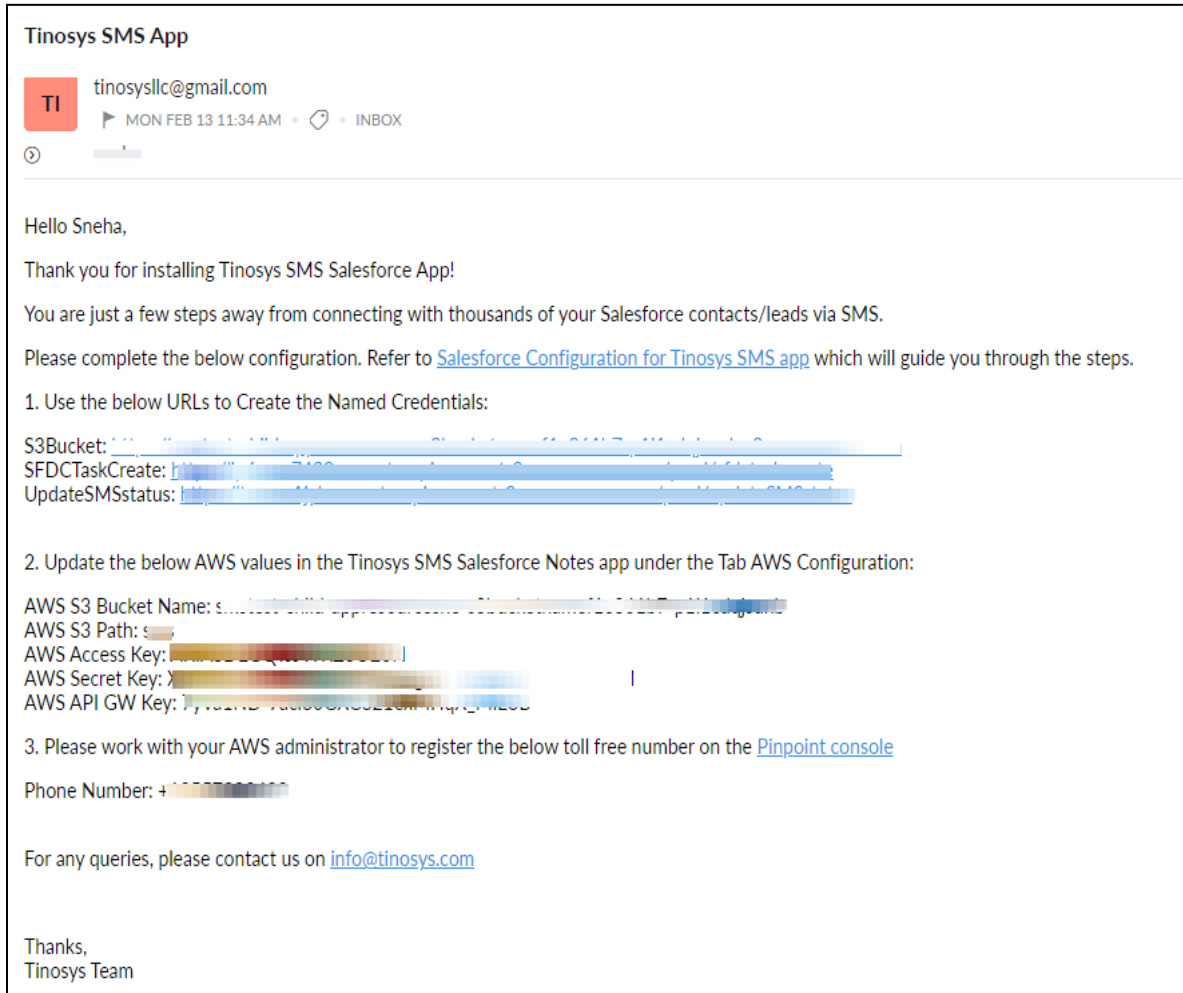
CustomerName
User Name

PinpointNumberPresent
Do you have a pinpoint number

PinpointPhoneNumber
If Yes, enter your existing phone number



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



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**

▼ Two-way SMS

Enable two-way SMS
This feature allows you to receive and process messages. You can define keywords for messages that you want to receive and process outside of Amazon Pinpoint. When your number receives an SMS message that begins with one of these keywords, Amazon Pinpoint sends the message and related data to an Amazon SNS topic in your account. You can use Amazon SNS to publish the message to topic subscribers, or to AWS services for further processing.

Incoming messages destination
Specify an Amazon SNS topic to publish HELP and STOP messages, as well as forwarding incoming SMS messages

Create a new SNS topic
 Choose an existing SNS topic

arn:aws:sns:us-east-1:168559913417:smsapp-Child-appresourcesNestedStackappresourcesNested...

Two-way SMS keywords - *Optional*
You can set up Amazon Pinpoint to send responses when an incoming message contains certain words or phrases.

Self-managed opt-outs - *Optional*
Enable this feature if you want manage opt-outs outside of Amazon Pinpoint. [Info](#)

Enable self-managed opt-outs

Cancel

- 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](#)

Account information

Status

⚠ This account is in the SMS sandbox in US East (N. Virginia).

When in the sandbox, you can only deliver SMS to the sandbox destination phone numbers you have verified below. [Learn more](#)

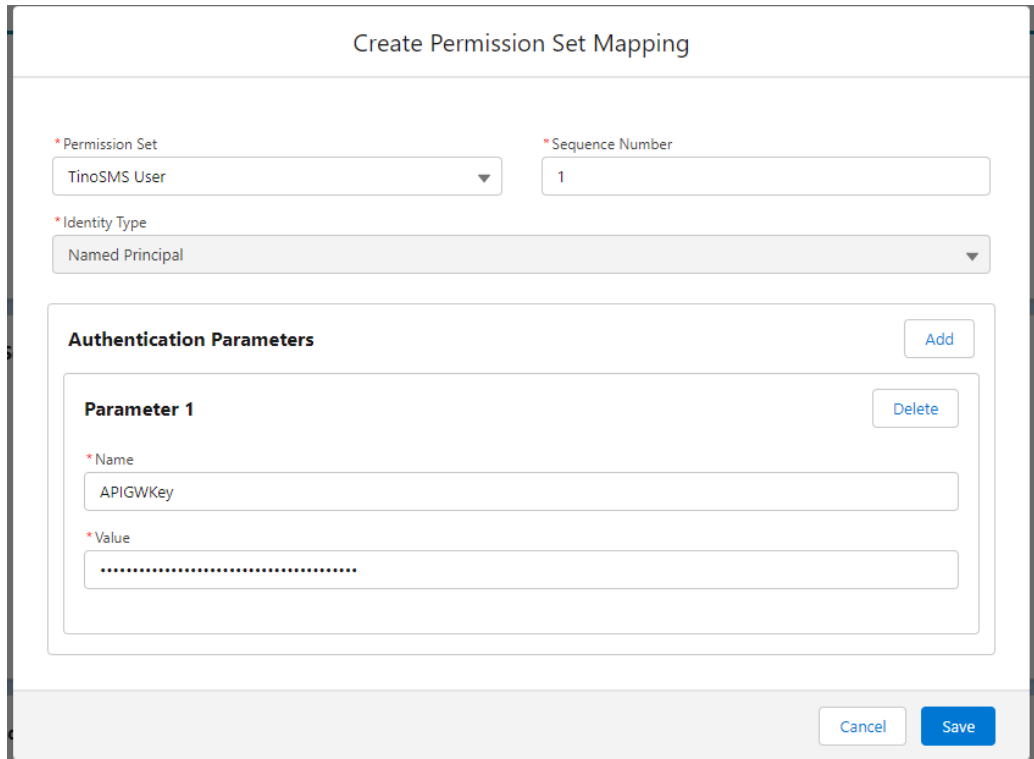


5. Configure Salesforce Org

- 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

A screenshot of the "New External Credential" form in Salesforce. The form has a title bar "New External Credential". Below the title bar, there are three input fields: "Label" with the value "SMSCredential", "Name" with the value "SMSCredential", and "Authentication Protocol" with a dropdown menu showing "Custom". At the bottom right of the form, there are two buttons: "Cancel" and "Save".

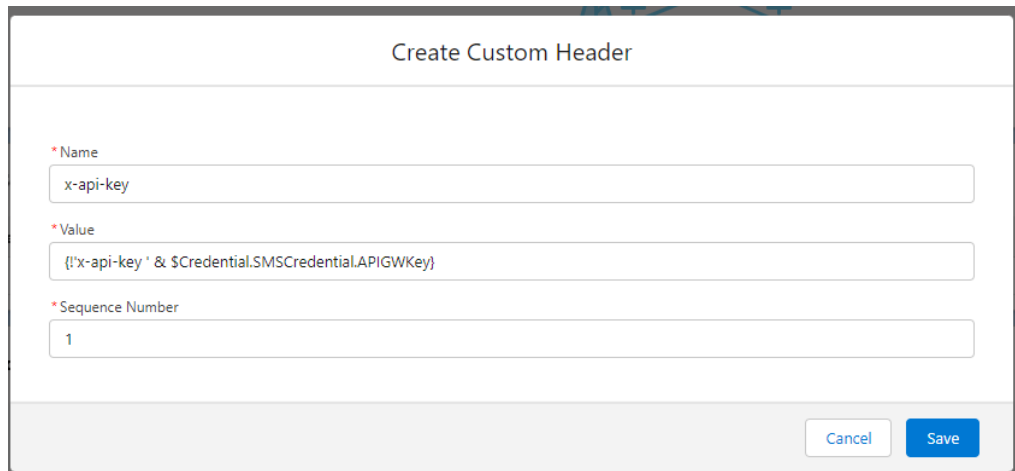
- c. Go to the External Credential created and scroll down to section **Principals** and Click on **New**
 - i. Parameter Name: Provide a name (e.g. APIGW)
 - ii. Sequence Number: 1
 - iii. Identity Type: Named Principle
 - iv. Under Authentication Parameters, click **Add**
 1. Name: APIGWKey
 2. Value: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



The screenshot shows a web form titled "Create Permission Set Mapping". It contains the following fields and controls:

- * Permission Set:** A dropdown menu with "TinoSMS User" selected.
- * Sequence Number:** A text input field containing the number "1".
- * Identity Type:** A dropdown menu with "Named Principal" selected.
- Authentication Parameters:** A section with an "Add" button and a "Delete" button. It contains a "Parameter 1" block with:
 - * Name:** A text input field containing "APIGWKey".
 - * Value:** A text input field containing a series of asterisks "*****".
- Buttons:** "Cancel" and "Save" buttons are located at the bottom right of the form.

- 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**



The screenshot shows a web form titled "Create Custom Header". It contains the following fields and controls:

- * Name:** A text input field containing "x-api-key".
- * Value:** A text input field containing the code `{!'x-api-key ' & $Credential.SMSCredential.APIGWKey}`.
- * Sequence Number:** A text input field containing the number "1".
- Buttons:** "Cancel" and "Save" buttons are located at the bottom right of the form.

- 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 <input type="text" value="S3bucket"/>	* Name <input type="text" value="S3bucket"/>
* URL <input type="text" value="https://smsapp-child-appresourcesnes-s3bucketnamef1e861b7-mzm9qi3k3xzd.s3.amazonaws.com"/>	
Authentication	
* External Credential <input type="text" value="SMSCredential"/>	
Client Certificate <input type="text" value="--None--"/>	
Callout Options	
Generate Authorization Header ? <input type="checkbox"/>	
Allow Formulas in HTTP Header ? <input type="checkbox"/>	
Allow Formulas in HTTP Body ? <input type="checkbox"/>	
Managed Package Access	
Allowed Namespaces ? <input type="text" value="smsnotes"/>	



New Named Credential

* Label * Name

* URL

Authentication

* External Credential

Client Certificate

Callout Options

Generate Authorization Header

Allow Formulas in HTTP Header

Allow Formulas in HTTP Body

Managed Package Access

Allowed Namespaces

New Named Credential

* Label

* Name

* URL

Authentication

* External Credential

Client Certificate

Callout Options

Generate Authorization Header

Allow Formulas in HTTP Header

Allow Formulas in HTTP Body

Managed Package Access

Allowed Namespaces

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

Tinosys SMS App AWS Credentials Config Page

AWS Security Config

Tinosys SMS App requires AWS security credentials to use AWS Pinpoint service to send and receive SMS. It also requires S3 bucket and path to pass the messages to SFDC. Please enter the AWS security credentials.

Details

Enter AWS S3 Bucket Name

Enter AWS S3 Path

Enter AWS Access Key

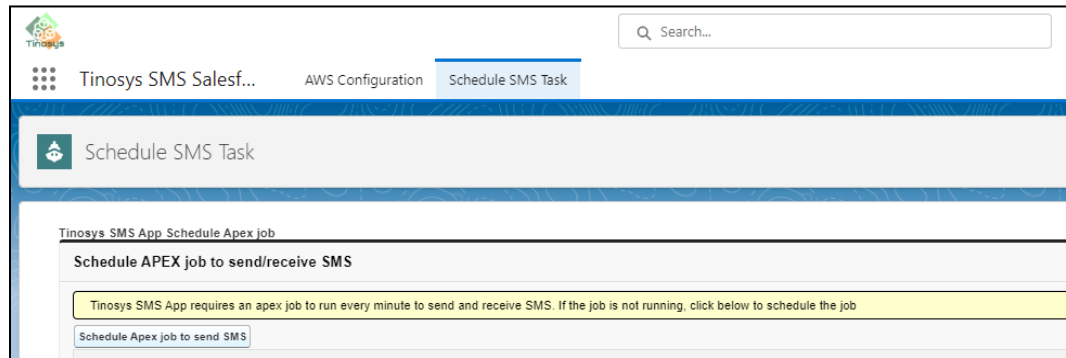
Enter AWS Secret Key *

Enter AWS 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.

A screenshot of the "Address" form in Salesforce Lightning Experience. The form is highlighted with a yellow background. It contains several input fields: "Street" (a large text area), "City" (a text field), "State/Province" (a text field), "Zip/Postal Code" (a text field), and "Country" (a dropdown menu with "US" selected). A back arrow icon is visible in the top right corner of the form.

- 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

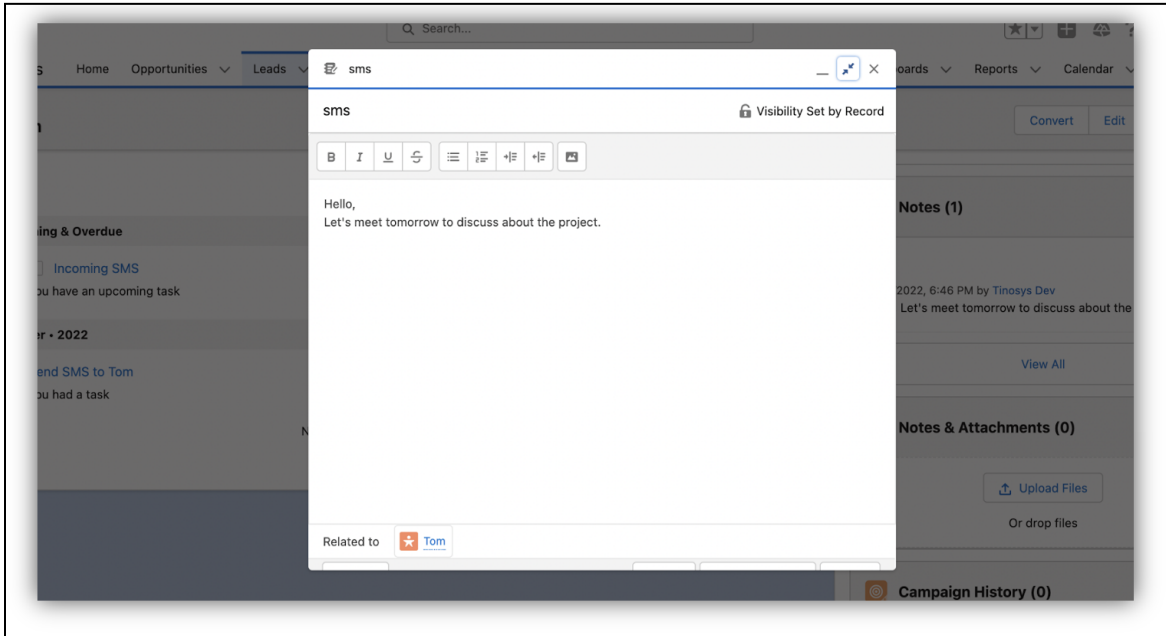
Lightning Experience

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**.

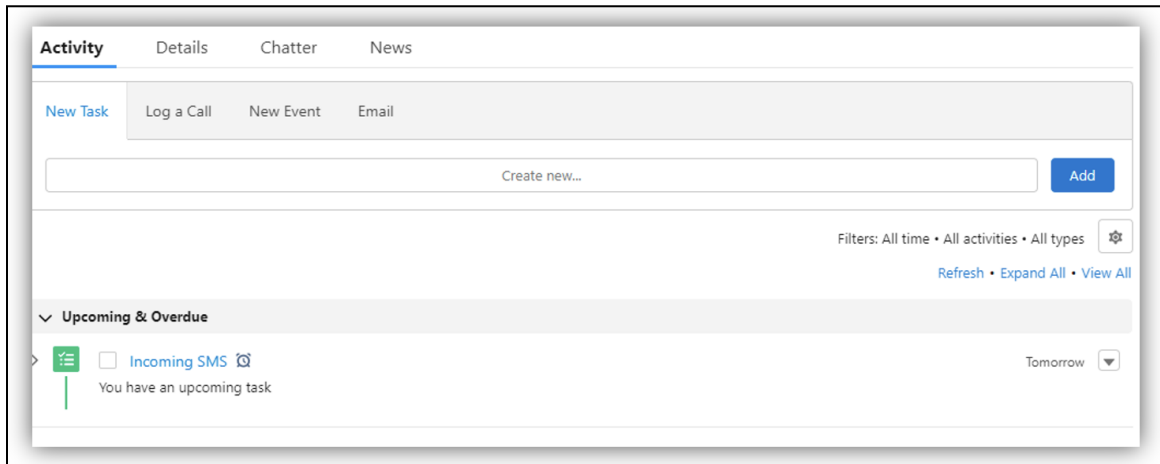


5. Once the SMS is sent, a task is created with the subject 'Send SMS to <Lead/Contact Name>'. This can be viewed in the Activity History of the record.

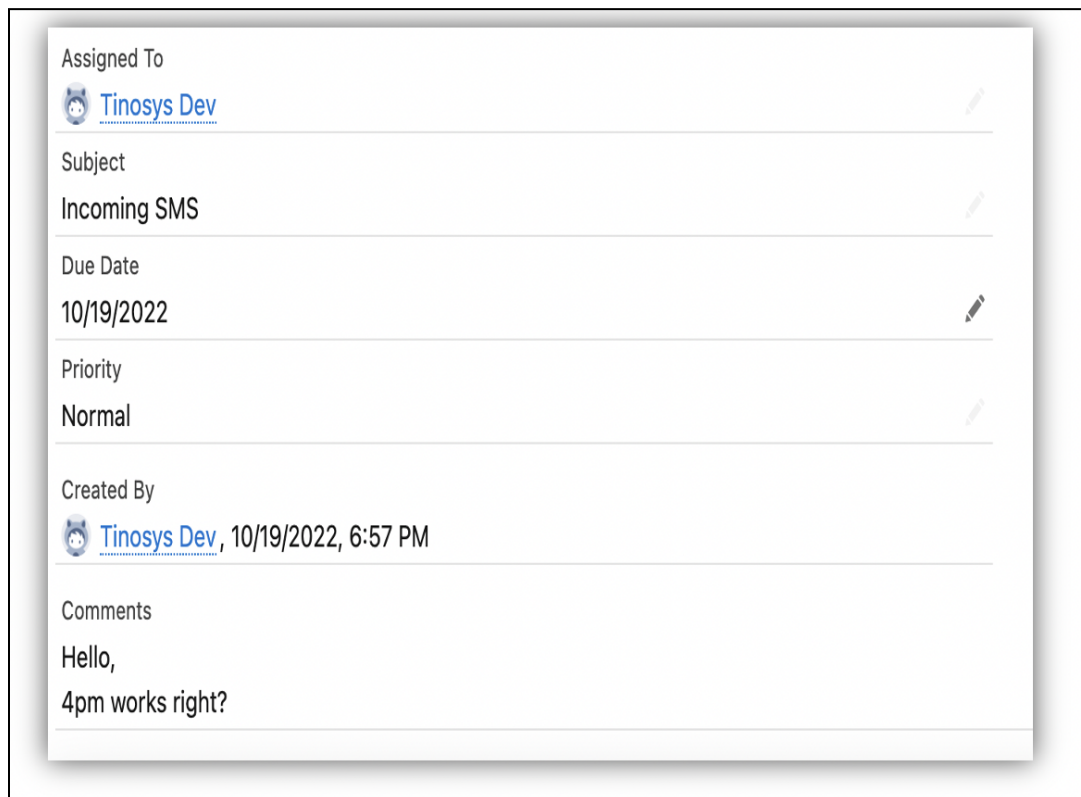


5.1.2 Receive an SMS

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.

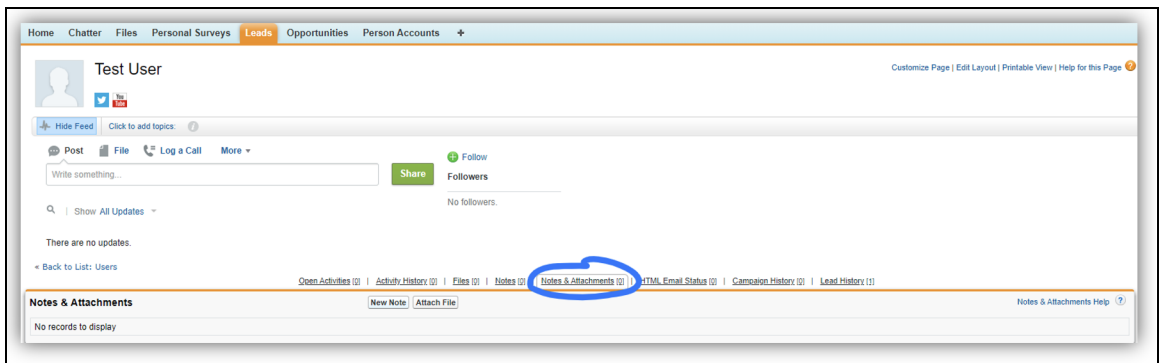




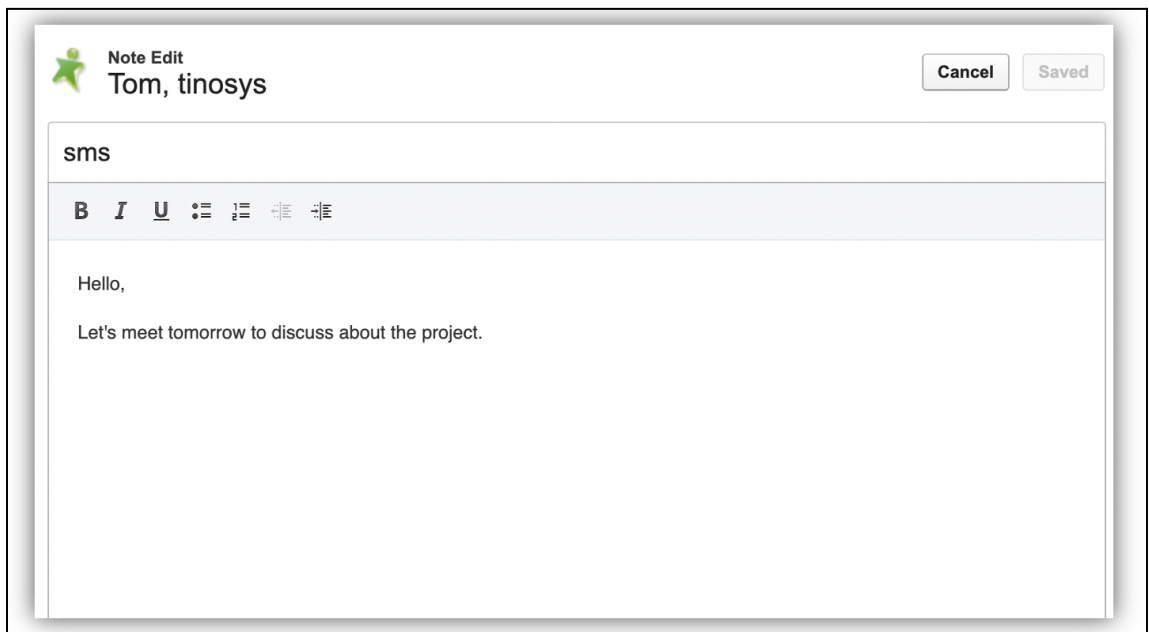
Salesforce Classic

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**.





- 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.

Activity History						
Log a Call Mail Merge Send an Email View All						
Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time	
Edit Del	Send SMS to Tom	✓	10/19/2022	Tinosys Dev	10/19/2022, 6:51 PM	

5.2.2 Receive an SMS

- 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'.

Open Activities						
New Task New Event						
Action	Subject	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Incoming SMS	✓	10/19/2022	Open	Normal	Tinosys Dev

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

Task Detail			
Edit Delete Create Follow-Up Task Create Follow-Up Event			
Assigned To	Tinosys Dev	Status	Open
Subject	Incoming SMS	Name	Tom, tinosys
Due Date	10/19/2022	Related To	
Phone	5086150314	Email	
Priority	Normal		
Created By	Tinosys Dev , 10/19/2022, 6:57 PM	Last Modified By	Tinosys Dev , 10/19/2022, 6:57 PM
Comments	Hello, 4pm works right?		



For more information please use the relevant links:

1. How it works: <https://player.vimeo.com/video/776036266?dnt=1>
2. Webpage link: <https://tinossys.com/tinossys-sms-app>