

# Vonage Conversations for Salesforce

## Admin & Developer Guide

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# Release Notes - v1.5

## **New features:**

- Support allocation of specific number(s) to agent(s).
- Additional Flow template, demonstrating how to handle incoming messages that create new records.

## **Bug fixes at the UI widget:**

- Set the "From" default number to be the one used at the last message in the conversation.
- Show "loading" gif while downloading images into the conversation.

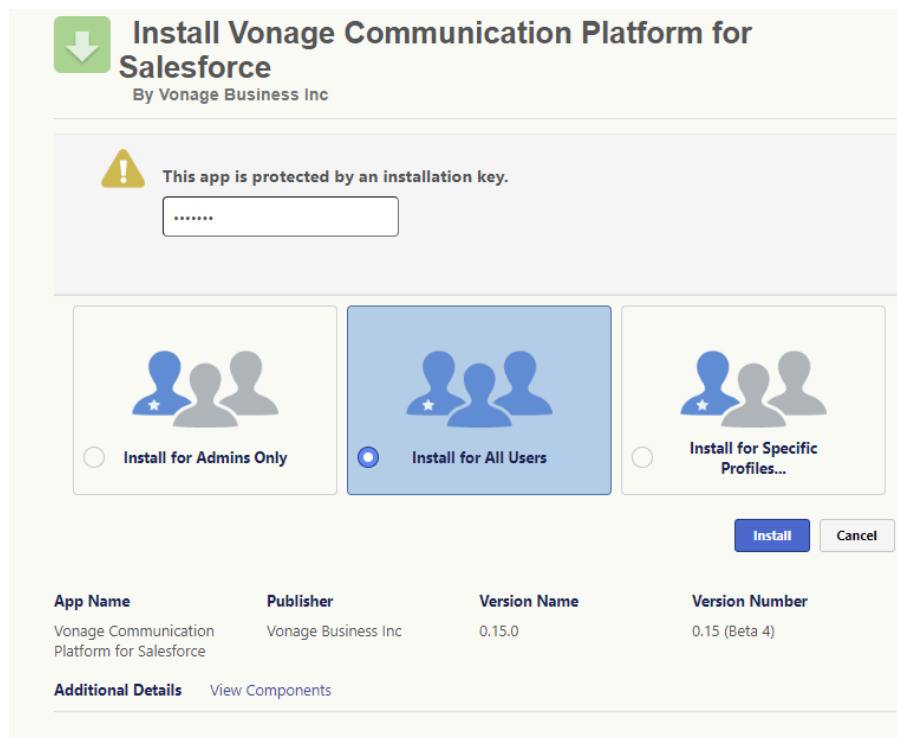
# Pre-Requisites

1. A [Vonage account](#) with your **api-key** and at least one [purchased long virtual number](#) (LVN).
2. The LVN should be configured to use WhatsApp or SMS/MMS:
  - a. To use WhatsApp, your LVN should be configured and approved for using WhatsApp with the Messages API; if you are a managed customer, [you can follow this guide](#), or if you are non-managed [you can follow our self-service guide](#).
3. Note: MMS messaging is only available in the US & Canada. To use images, your LVN must be a USA/CA number that is approved for [10 DLC](#).

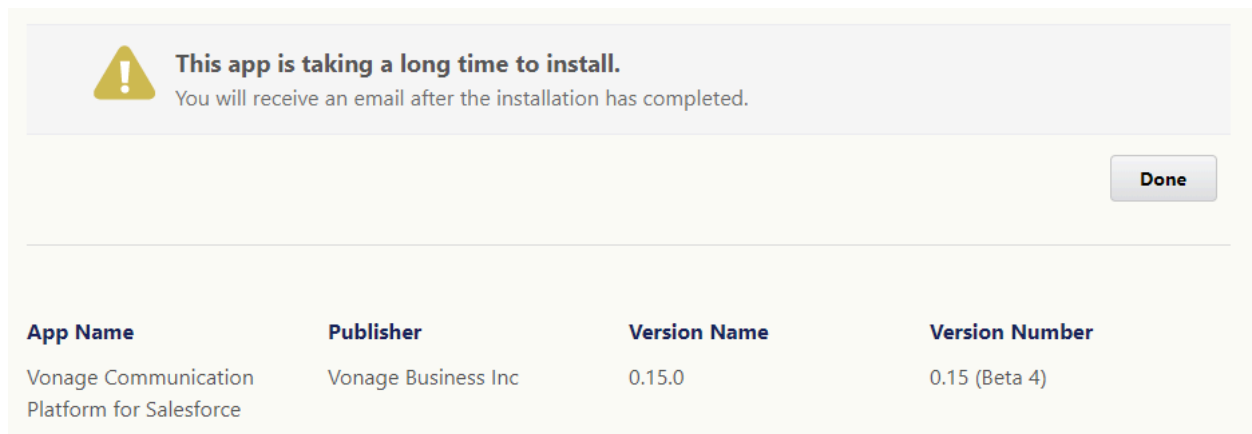
# Deployment

To install the package, you will need the deployment URL and installation key. These will be provided by your Vonage point of contact.

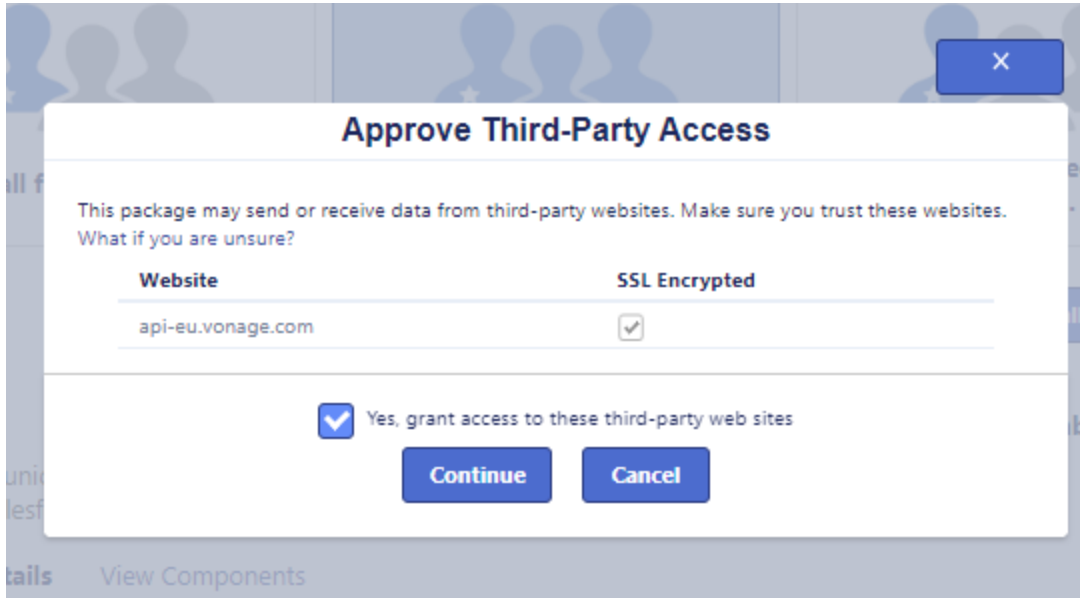
First, go to the deployment URL and login to your Salesforce organization. You will see this screen:



Select the group that you want to install the package for, and enter the installation key provided. The warning below may appear. If it does, select "Done" and wait for the package deployment to complete.



Should the following window popup, please grant access, as the URL is used by the package to access Vonage services:



## First Time Deployment


Once the initial deployment is done, the 'Bell Notification' will indicate a new message:



Select the link in the message to complete the setup:




Notifications [Mark all as read](#) ✕

 **Vonage Package installed - click to complete setup**  
Click here to finalise setup of the package you have just installed

a minute ago ●

Click 'Next' to start the deployment process:

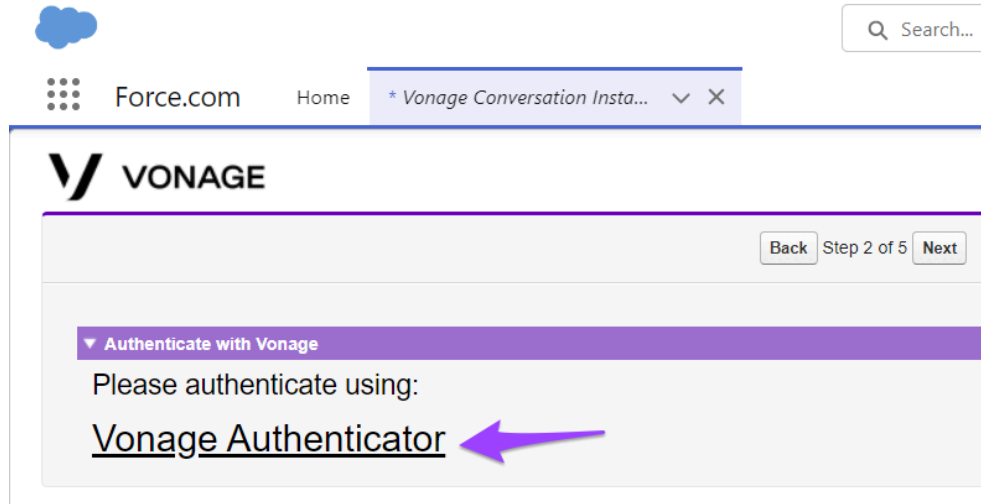


Step 1 of 5 Next

▼ **Welcome**

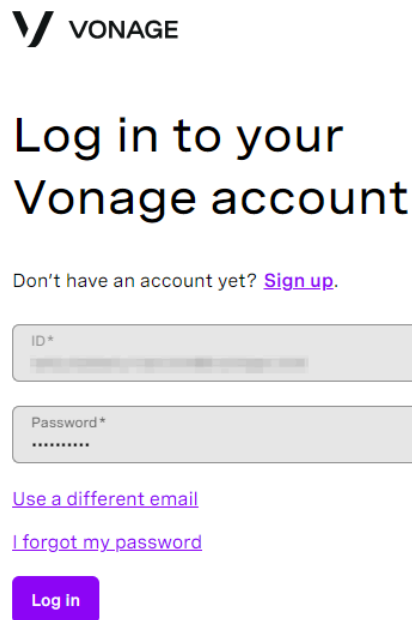
Let's get started with Vonage Messaging in Salesforce.

For Step 2, click the link to authenticate with Vonage - please ensure that you are logged-off from any other Salesforce ORG while completing this process:

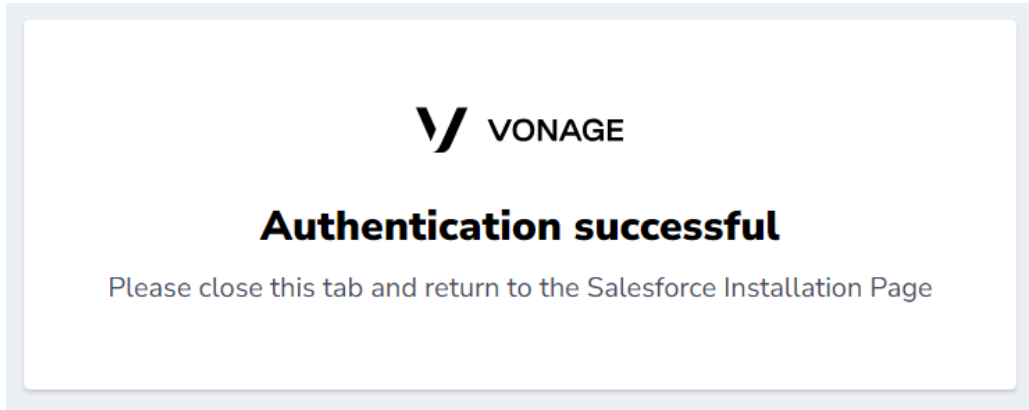


**Failure to complete the authentication will cause errors in later stages of the wizard.**

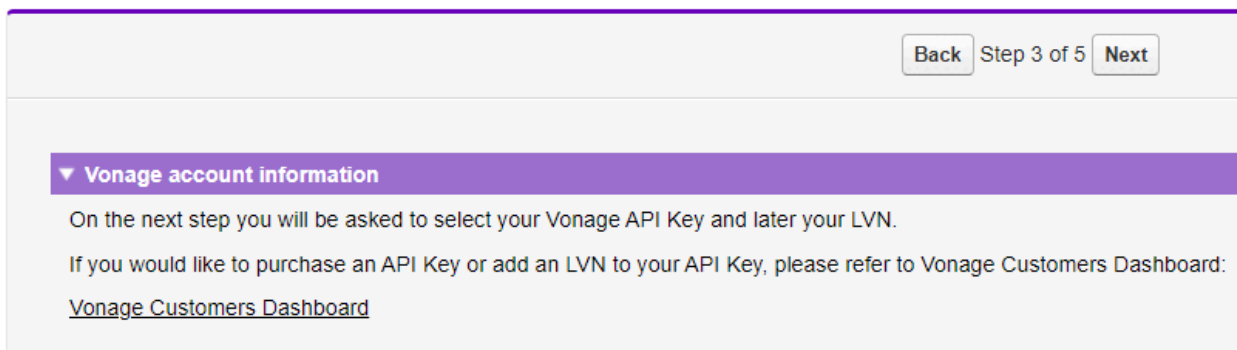
Next, you will be taken to the Vonage customer dashboard to login:



Once authentication is completed, you will see this confirmation and can return to Salesforce:



Step 3 of the installation wizard contains a link back to the Vonage customer dashboard, where you can configure your account, add API keys, and rent additional LVNs:



In step 4, select the API key you want to use:





Vonage API Key Selection

Please select which one of your Vonage API Keys to use:

- [redacted] Key
- [redacted] Key
- [redacted] Key
- [redacted] Key
- [redacted] Key
- [redacted] Key
- [redacted] Key
- [redacted] Key
- [redacted] Key

The final step will show the LVNs associated with that API key, along with the channels those numbers support. Select a number, then click Finish:



Number Selection

Please select one of Vonage APIKey [redacted] numbers to use, then click the **Finish** button to complete the setup. This is a long process. Please do not close or refresh this window before the operation is completed.

- 1 [redacted] - Country: US, supported channels: MMS;SMS
- 1 [redacted] - Country: US, supported channels: MMS;SMS
- 447 [redacted] - Country: GB, supported channels: SMS
- 447 [redacted] - Country: GB, supported channels: SMS;WHATSAPP, WABA: [redacted]
- 447 [redacted] - Country: GB, supported channels: SMS

After the initial deployment it will be possible to add additional numbers.

Once this is complete, setup is done and you will see the following message:

▼ Post Setup

The setup is done!

Please assign the **Vonage Connector User Permissions Set** to the relevant users.  
The **Vonage Conversation** Lightning Web Component is ready to be added to any record page.

## Release Notes

**\*\* Release 0.14 \*\***

Target: Early access customers

Minor fixes:

1. WhatsApp templates configuration save failure
2. Rolling log cleanup

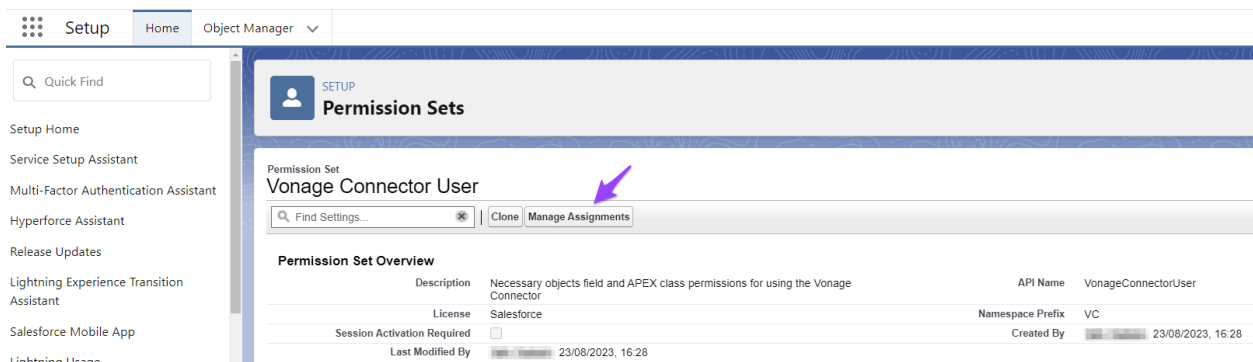
**\*\* Release 0.13 \*\***

Target: Early access customers

New Features:

1. WhatsApp templates support
2. External channel support
3. Delivery status support

The next step is to set the permissions for which users can use the Vonage package. To do this, navigate to 'Permission Sets', then select 'Vonage Connector User' and click Manage Assignments:



Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Permission Sets

Permission Set: Vonage Connector User

Find Settings... Clone Manage Assignments

**Permission Set Overview**

Description	Necessary objects field and APEX class permissions for using the Vonage Connector	API Name	VonageConnectorUser
License	Salesforce	Namespace Prefix	VC
Session Activation Required	<input type="checkbox"/>	Created By	23/08/2023, 16:28
Last Modified By			23/08/2023, 16:28

Assign the permission set to the agents you want to use the Vonage package to complete deployment.

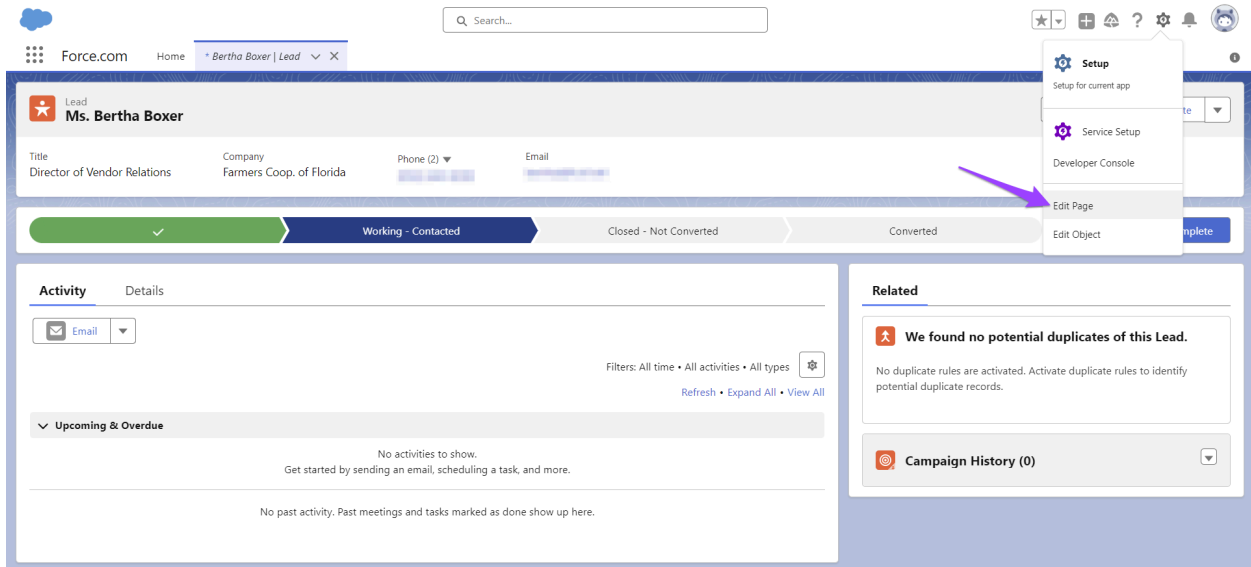
The next section will explain how to add the UI widget to a record page.

# UI Setup

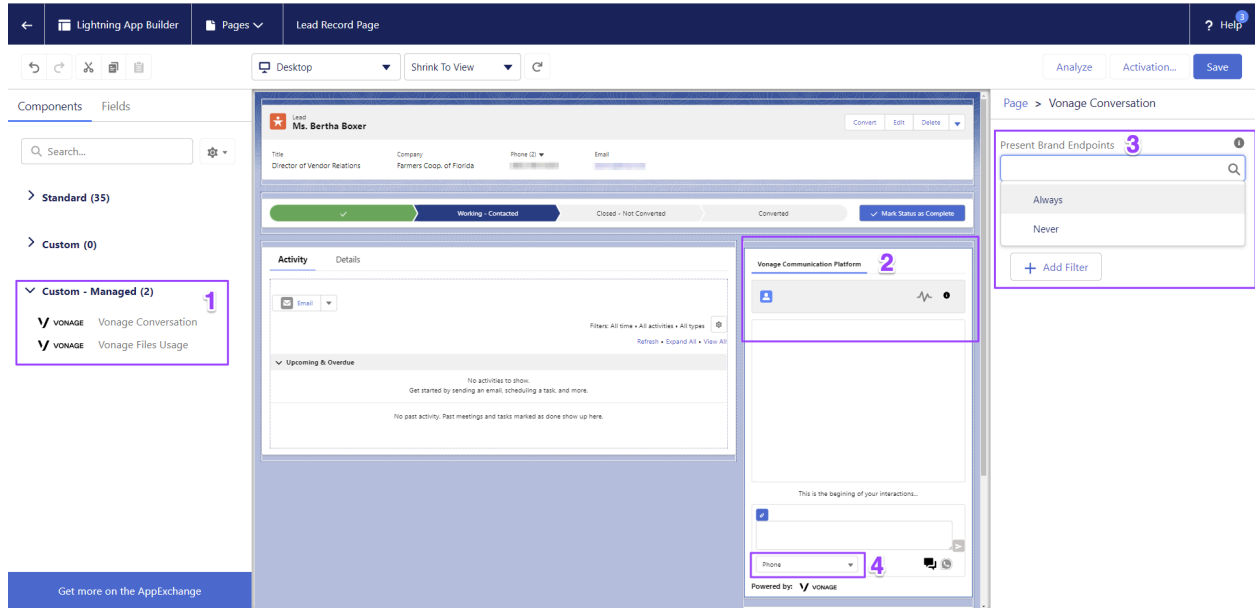
The UI Widget can be added to the record page of any standard sObject or custom sObject.

## Add the widget to a standard sObject

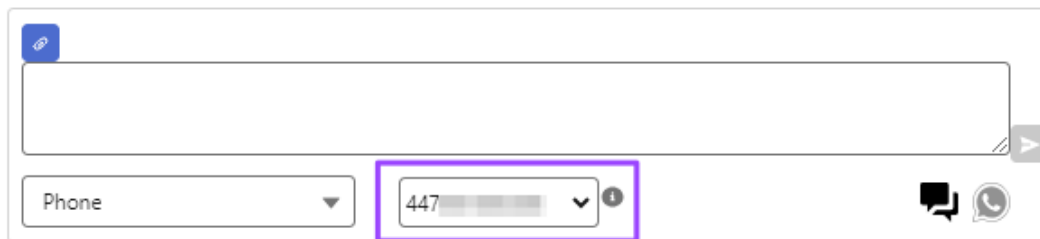
To add the widget to a standard sObject, go to the record page and select "edit page":



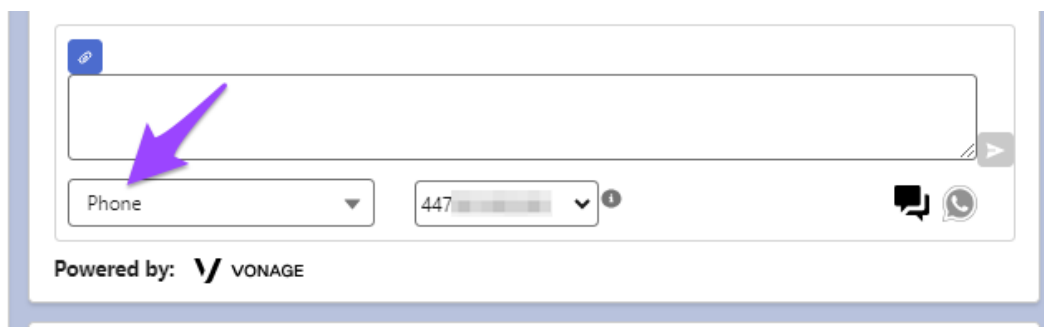
Drag the widget to the suitable place on the page. For example, editing the page for a lead would take you to this screen:



1. Locate the 'Vonage Conversation' UI widget in the Components menu.
2. Drag it to its designated location on the screen.
3. Set if the agent can select the Brand Endpoint. If **Never** - the agent cannot select the Brand Endpoint and the default one will be used automatically. If **Always** - the agent will be able to choose the Brand Endpoint from the drop-down list (4):

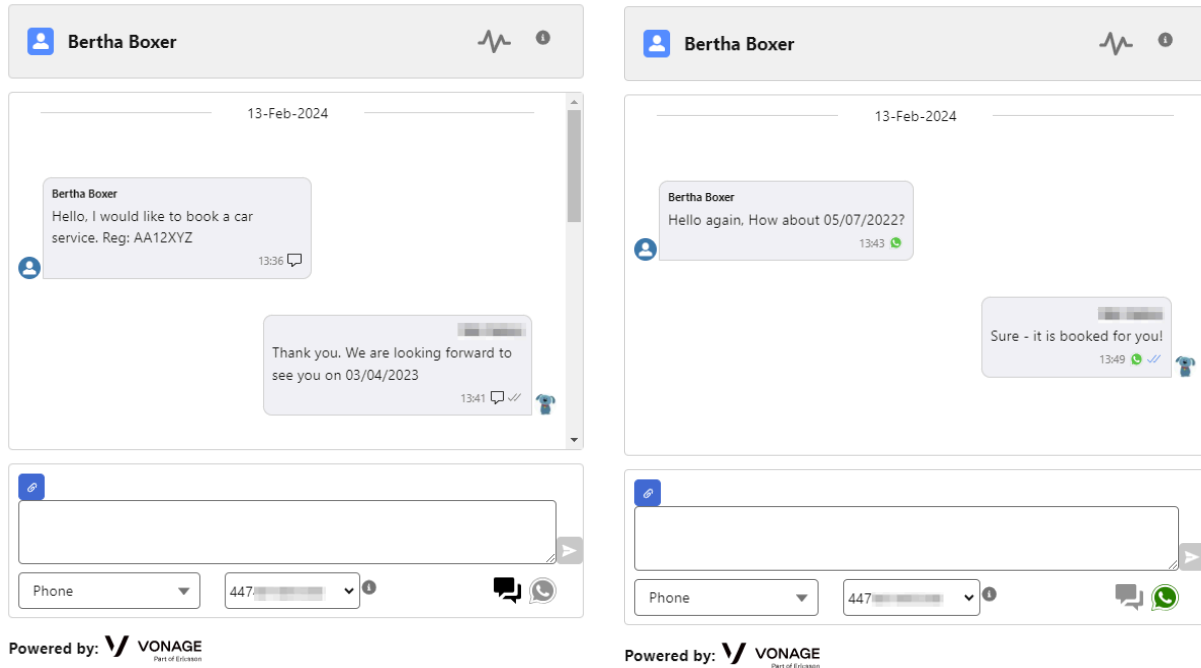


The widget will automatically identify all the populated "Phone" type fields in the record and will add them to the drop down to allow the agent to select which number to send messages to:



Note that the drop down uses the field label and not the phone number itself in order to allow the admin to hide the original phone numbers if they wish to do so.

Finally, save to activate the widget on the record page. The agents with the Vonage permissions set assigned will be able to see the widget and start sending messages:



## Add the widget to a custom sObject

In this example, we'll add the UI to a custom sObject named **Car\_\_c**. The sObject must include at least one field of type "Phone", such as 'Driver Mobile' here:

SETUP > OBJECT MANAGER

**Car**

Details

**Fields & Relationships**  
9 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Car Name	Name	Auto Number
Created By	CreatedById	Lookup(User)
Driver Mobile	Driver_Mobile__c	Phone
Driver Name	Driver_Name__c	Text(50)
Last Modified By	LastModifiedById	Lookup(User)
Manufacture	Manufacture__c	Text(20)
Model	Model__c	Text(20)
Owner	OwnerId	Lookup(User,Group)
Plate Number	Plate_Number__c	Text(11)

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Triggers

Flow Triggers

Validation Rules

The **VC\_Interaction\_\_c** sObject should also contain a field that has a lookup relationship with the **Car\_\_c** sObject:

SETUP > OBJECT MANAGER

**Interaction**

Details

**Fields & Relationships**  
36 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Account	VC_Account__c	Lookup(Account)
Brand Endpoint	VC_Brand_Endpoint__c	Text(255)
Car	Car__c	Lookup(Car)
Case	VC_Case__c	Lookup(Case)

Page Layouts

Lightning Record Pages

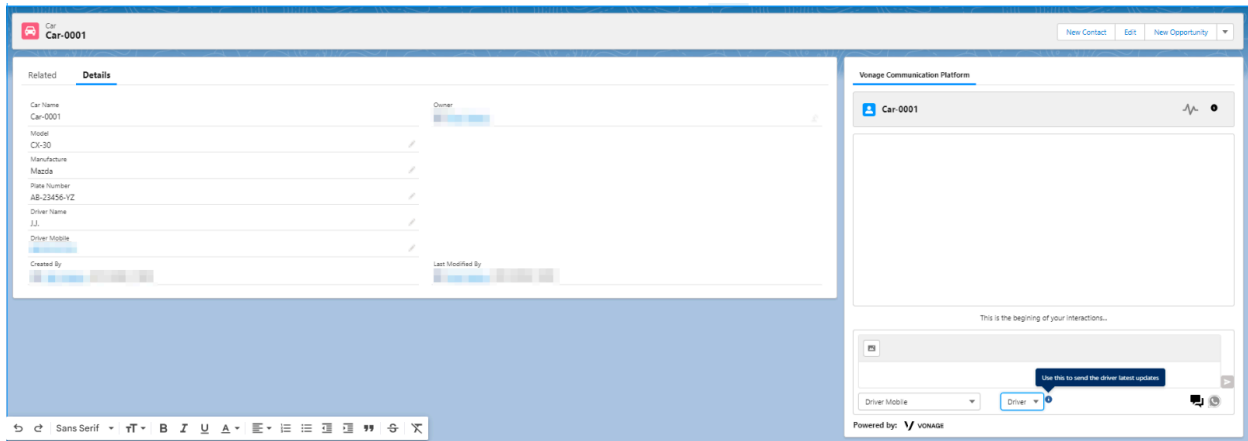
Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Once that's in place, it is possible to add the widget to the **Car\_\_c** record page:



The screenshot shows a Salesforce record page for 'Car-0001'. The left sidebar contains a 'Details' section with the following fields:

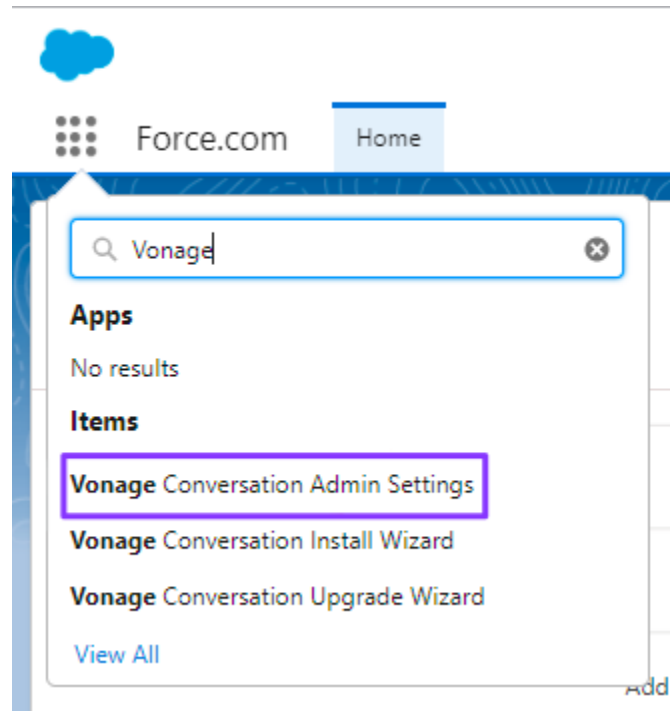
Field	Value
Car Name	Car-0001
Model	CX-30
Manufacture	Mazda
Plate Number	AB-23456-VZ
Driver Name	J.J.
Driver Mobile	[Redacted]
Created By	[Redacted]
Last Modified By	[Redacted]

The right sidebar features a 'Vonage Communication Platform' widget for 'Car-0001'. The widget displays a large empty area with the text 'This is the beginning of your interactions...'. Below this is a search bar with a dropdown menu set to 'Driver Mobile' and a 'Driver' button. A tooltip above the button reads 'Use this to send the driver latest updates'. At the bottom of the widget, it says 'Powered by: VONAGE'.



## Admin Configuration Page

The Admin Configuration Page allows the ORG Admin to perform a number of configuration and monitoring actions. To access the page, search Vonage to find the 'Vonage Conversation Admin Settings':

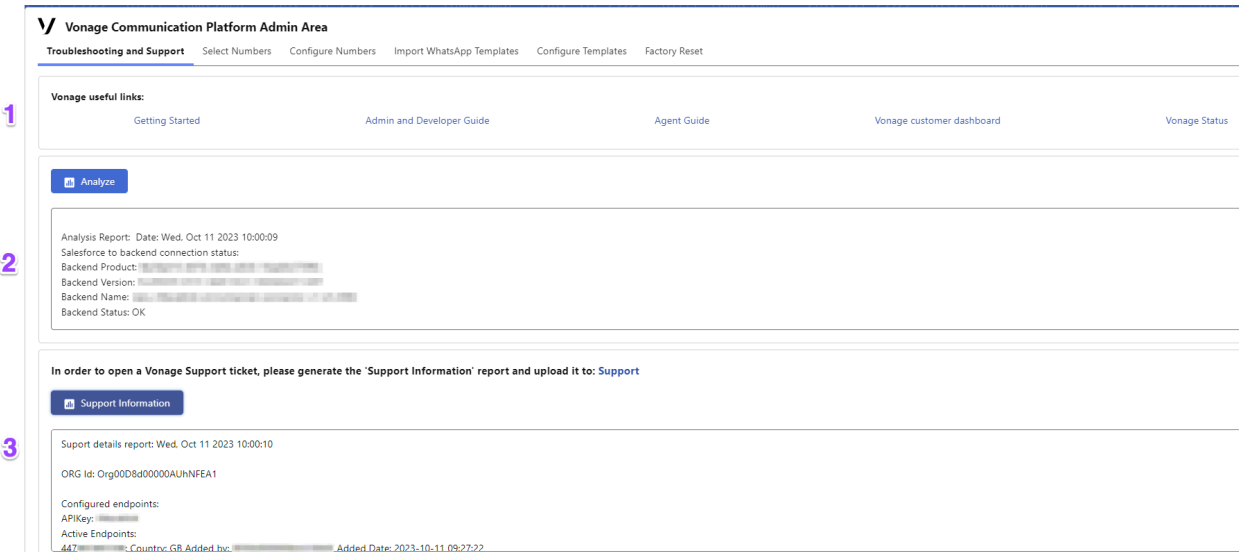


The page includes 8 tabs:

1. Troubleshooting and Support - Check the backend connectivity status, fetch logs, and see shortcuts to the Vonage documentation, status page and customer dashboard.
2. Select Numbers - Add and remove LVNs.
3. Configure Numbers - Choose an LVN to send messages from by default.
4. Import WhatsApp Templates - Import approved WhatsApp templates from Facebook.
5. SMS/MMS Templates Composer - Create and configure SMS templates, including dynamic parameter values fetched from Salesforce data.
6. Configure Templates - Configure the WhatsApp Templates so the dynamic parameters' values are fetched from Salesforce data.

7. Setup and Configuration - Configure incoming file names, enable/disable the sending of incoming files in outgoing messages in other interactions, and configure mobile and system notifications.
8. Factory Reset - Reset all configurations to initial state.

## Troubleshooting and Support



The screenshot shows the 'Vonage Communication Platform Admin Area' with a navigation menu including 'Troubleshooting and Support', 'Select Numbers', 'Configure Numbers', 'Import WhatsApp Templates', 'Configure Templates', and 'Factory Reset'. Three numbered callouts highlight key features:

- 1** Vonage useful links: Getting Started, Admin and Developer Guide, Agent Guide, Vonage customer dashboard, Vonage Status.
- 2** Analyze button: Analysis Report: Date: Wed, Oct 11 2023 10:00:09. Salesforce to backend connection status: Backend Product: Backend Version: Backend Name: Backend Status: OK.
- 3** Support Information button: In order to open a Vonage Support ticket, please generate the 'Support Information' report and upload it to: Support. Support details report: Wed, Oct 11 2023 10:00:10. ORG id: Org00D8d00000AUHNFEA1. Configured endpoints: APIKey: Active Endpoints: 447. Added Date: 2023-10-11 09:27:22.

### Vonage Useful links

Links to the Vonage documentation, status page and customer dashboard.

### Analyze

Clicking the 'Analyze' button will fetch the latest status of the connection between the ORG and the Vonage backend connector. You will see the name of the backend connector instance, along with the backend status. This information can be used for further communications with [Vonage support](#) in case of connectivity issues - any tickets raised should be under the category 'Using Conversations for Salesforce'.

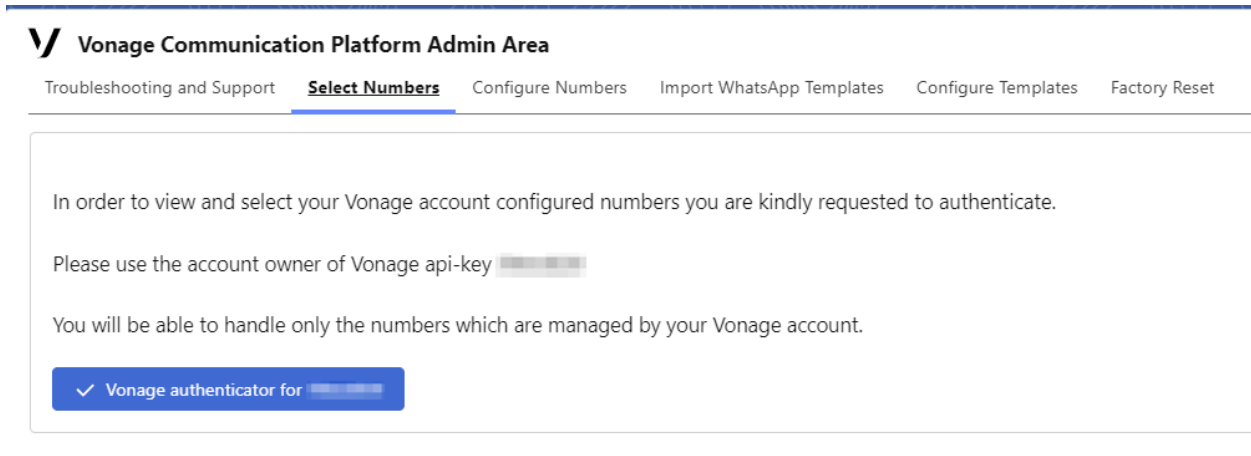
### Support Information

Clicking the 'Support Information' button will fetch the latest connection status, current configuration details and logs in one report. This information can be used for troubleshooting and

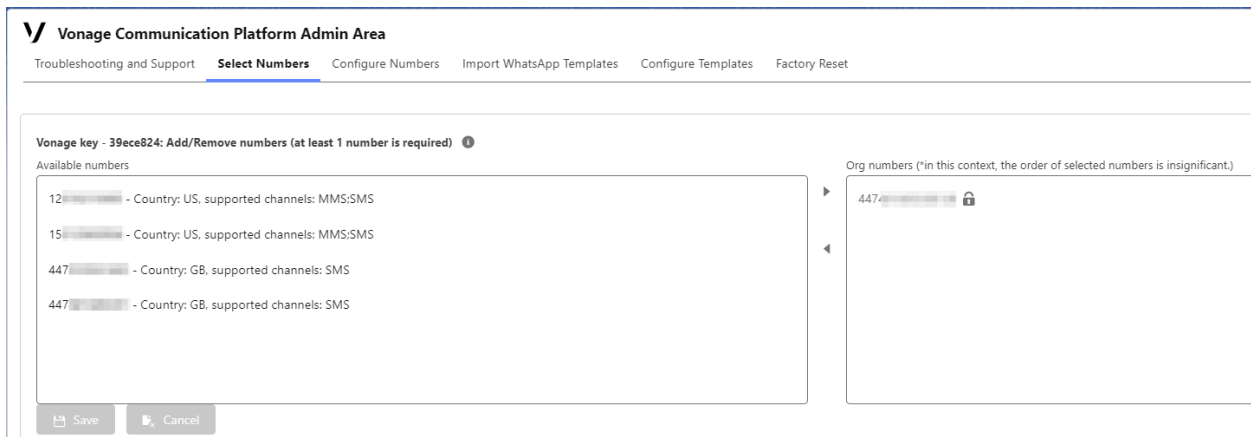
further communications with the Vonage [support team](#) - any tickets raised should be under the category 'Using Conversations for Salesforce'.

## Select Numbers

This section requires additional authentication at the Vonage Customer Dashboard:



Once authenticated, you can add and remove LVNs:



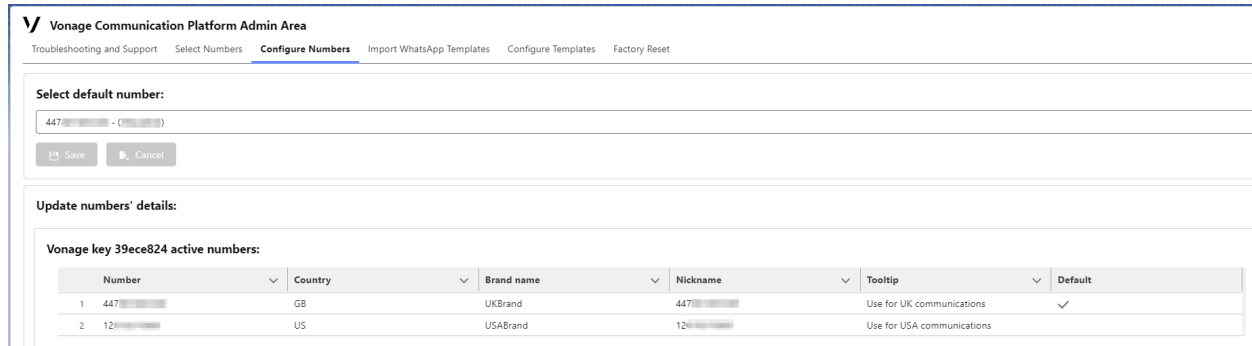
On the left is a list of all the available LVNs associated with your Vonage API key.

On the right is a list of all the LVNs already being used by the Salesforce package.

The default LVN, which is marked with the padlock, cannot be removed. To remove it, another LVN must be added and [configured as the default number](#).

## Configure Numbers

This section shows a list of active and inactive LVNs, and which LVN is the current default. Inactive LVNs are numbers that were previously in use and then removed. Through this screen, you can replace the current default number and assign a nickname / tooltip to each LVN:



**Vonage Communication Platform Admin Area**

Troubleshooting and Support | Select Numbers | **Configure Numbers** | Import WhatsApp Templates | Configure Templates | Factory Reset

Select default number:

447 - (Country)

Save Cancel

Update numbers' details:

Vonage key 39ece824 active numbers:

Number	Country	Brand name	Nickname	Tooltip	Default
1 447	GB	UKBrand	447	Use for UK communications	✓
2 12	US	USABrand	12	Use for USA communications	

## Select Default Number

There can only be one default LVN at a time. The dropdown list can be used to change the default number, and will include all the available active numbers configured for the org.

## Update an LVN's Details

Here, you can assign a nickname and/or tooltip to each LVN. The default LVN is always at the top of the list.

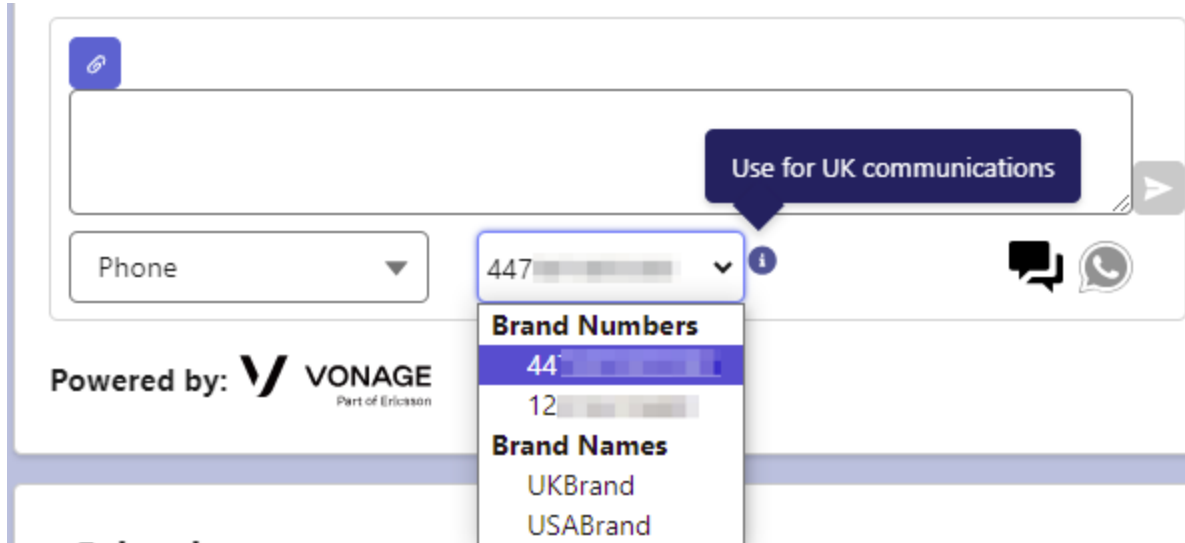
You can configure the following parameters:

- **Brand name:** The alphanumeric name to use as the sender name, instead of showing the phone number itself.
- **Nickname:** A name for the number that is presented on the UI for the agent. If a nickname is not used, the agent will see the LVN by default.
- **Tooltip:** The tooltip presented on the UI while selecting a specific phone number. It is recommended to set the tooltip with some description of the specific number usage.

For example, an updated nickname and tooltip could be:

1	447	GB	UKBrand	447	Use for UK communications	✓
---	-----	----	---------	-----	---------------------------	---

These values would then be shown in the UI:



- The Nickname is shown instead of the LVN and the tooltip next to the drop down will show the configured text.
- While selecting any of the **"Brand Numbers"** - the sent message will be from the corresponding Vonage number and will not use the presented Nickname.
- While selecting any of the **"Brand Names"** - the sent message will show the selected name instead of the Vonage number. The sender number will not be available to the receiver, so they will not be able to reply to the message.

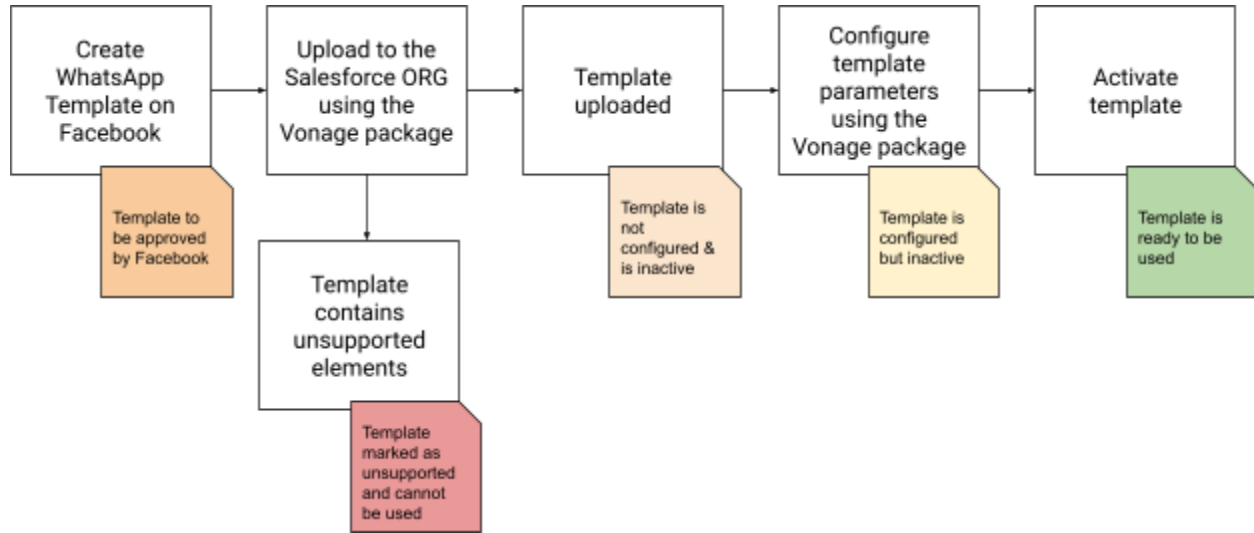
## Import WhatsApp Templates

**In order to use WhatsApp templates, your Vonage account and LVN must be configured for WhatsApp through the Vonage customer dashboard.**

WhatsApp templates are required to start a business-initiated conversation, for example shipping updates, appointment reminders, alerts, and more. Message templates are the only type of message that can be sent to customers who have not initiated a conversation with you, or have not sent a message in an existing conversation within the last 24 hours.

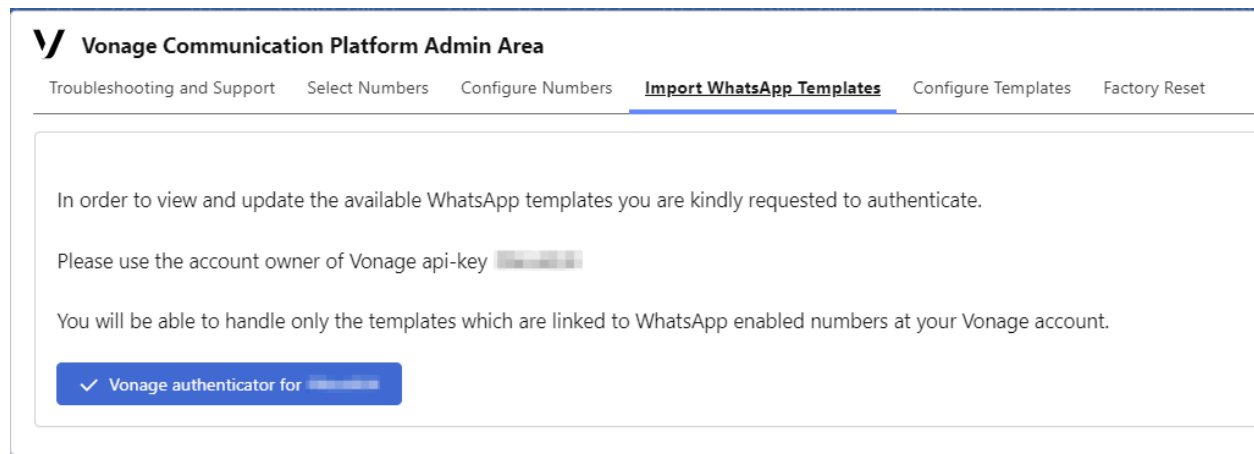
Templates are created through the Facebook Business Manager and must be approved by Facebook before use. Take a look at [Facebook's documentation](#) for more information.

The process of configuring and using WhatsApp Templates in Salesforce is as follows:

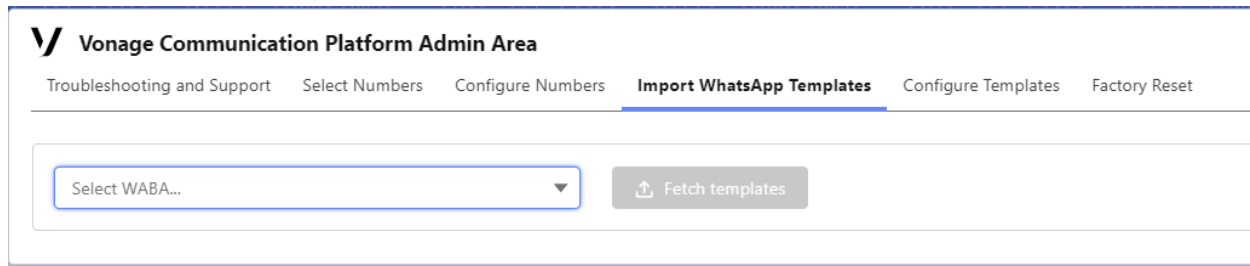


WhatsApp Template usage is also supported for Flow and APEX. Please refer to [WhatsApp Templates Usage](#) section for further details and examples regarding the templates usage, once they are imported, configured and activated.

Once the WhatsApp Templates have been created and approved by Facebook, go to the 'Import WhatsApp Templates' tab and authenticate with Vonage:



Once authenticated, select the relevant WABA (WhatsApp Business Account) and click 'Fetch Templates':



The screen will now populate with the available templates:



The templates are shown in 3 different sections according to their category: Authentication, Marketing, or Utility. In this example, there are only Authentication templates.

1. **Available templates** - a list of WhatsApp approved templates for that category which are not available in the ORG.
2. **Imported templates** - a list of templates which are already available to the ORG. To remove already imported templates, please refer to [Configure Templates](#).
3. **Imported but out of sync** - a list of templates which were already imported into the ORG, but were later changed on Facebook, and therefore need to be reset to reflect the latest changes.
4. **Reset** - a list of templates that are selected for reset.

### Import selected templates

Use the arrows to add/remove templates from "Available Templates" (1) to "Imported Templates" (2). Select the "Import" button (5) to complete the process. The imported templates will then be marked with the lock sign.

## Reset out of sync templates

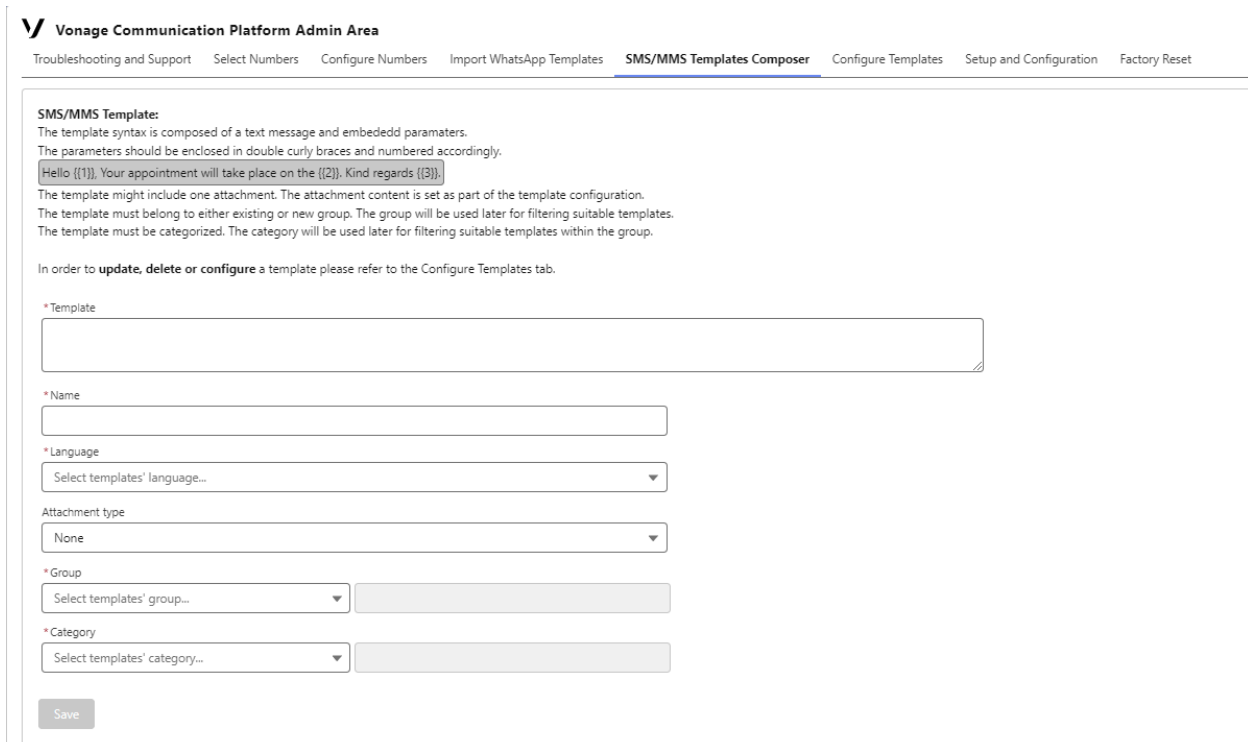
Use the arrows to add/remove templates from "Imported but out of sync" (3) to "Reset" (4) and select the "Reset" (6) button to import the template again. All of the template's current configuration will be deleted.

The template will then be shown in the "Imported Templates" (2) section.

## SMS / MMS Templates Composer

SMS/MMS templates are composed of a body, one optional attachment, and a language, group and category.

Once a template is created, it can be configured, updated or deleted using the Configure Templates tab.



**Vonage Communication Platform Admin Area**

Troubleshooting and Support   Select Numbers   Configure Numbers   Import WhatsApp Templates   **SMS/MMS Templates Composer**   Configure Templates   Setup and Configuration   Factory Reset

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**SMS/MMS Template:**  
 The template syntax is composed of a text message and embedded parameters.  
 The parameters should be enclosed in double curly braces and numbered accordingly.  
 Hello {{1}}, Your appointment will take place on the {{2}}. Kind regards {{3}}.

The template might include one attachment. The attachment content is set as part of the template configuration.  
 The template must belong to either existing or new group. The group will be used later for filtering suitable templates.  
 The template must be categorized. The category will be used later for filtering suitable templates within the group.

In order to **update, delete or configure** a template please refer to the Configure Templates tab.

\*Template

\*Name

\*Language  
 Select templates' language...

Attachment type  
 None

\*Group  
 Select templates' group...

\*Category  
 Select templates' category...

Save

### Name, group and category

The template name, group and category are mandatory. The group and category fields are used to help organize the templates by subjects and topics as required by your organization.

It is possible to create a new group by selecting the "Create New Group" at the dropdown, or add the template to an already existing group.



### Template unique identifier

A template's unique identifier is the concatenation of the template name, language and group, for example `myTemplateName_en_myGroup`.

### Template body and attachment

The template syntax is composed of a text message and optional embedded parameters. The parameters should be enclosed in double curly braces and numbered accordingly; parameter configuration is done on the Configure Templates tab. For example:

`Hello {{1}}, Your appointment will take place on the {{2}}. Kind regards {{3}}.`

The template's attachment type is optional, and the supported attachment types are Image or Video. If used, the attachment value configuration is done on the Configure Templates tab.

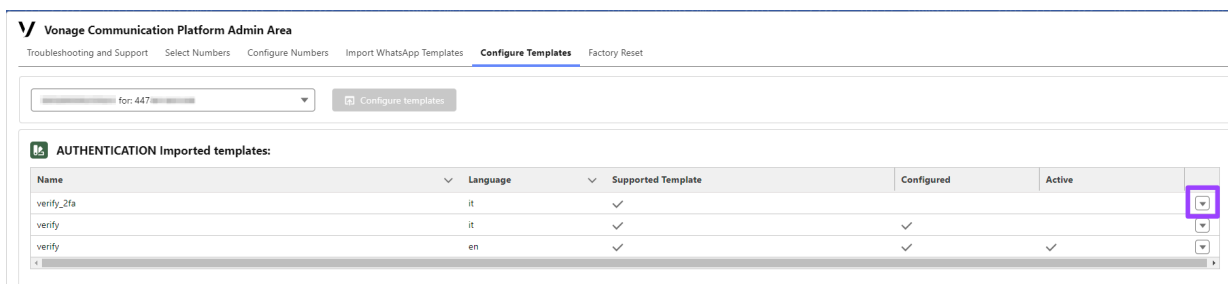
### Language

The template language parameter is mandatory.

Please notice that the language is not enforced by the package but used as part of the unique identifier of the template, providing a convenient naming mechanism for the same message in several languages. It is the user's responsibility to select the suitable template.

## Configure Templates

This tab is used to manage all created or imported templates for both SMS/MMS and WhatsApp..



The drop down menu on the right side of each line will present the suitable actions based on the current template status. The available actions are:

Preview	View the original template definition as it was imported from Facebook or created in the SMS/MMS Composer.
Delete	Remove the template and its configuration from the ORG.

Configure	Configure the template and map its parameters to Salesforce data. The template can only be configured if it is supported.
Activate/Deactivate	Activate/deactivate the template for use. A template can only be set to active if it has been configured.
Edit	SMS/MMS templates can be edited here. WhatsApp templates can only be updated via the Facebook interface.
View unsupported reasons	Shows the sections in the template that are unsupported. This action is only available when the template is not marked as supported. The elements that are not currently supported are: <ul style="list-style-type: none"> <li>• Headers of type Document or Video</li> <li>• Dynamic Buttons</li> </ul>

## Configure the Template Parameters

Choosing 'Configure' from the list of actions will show the following screen:

WhatsApp Template: `boa_hip_btp_f`

**Name:** `boa_hip_btp_f`      **Language:** `it`      **Unique Identifier:** `boa_hip_btp_f_it_...`

**Header**

The header requires an image.

Token	Mapping	Mapping Type	Configure
image	image		Mapping type ▼

**Body**

Thanks for your order! Use code {{1}} for {{2}} off your next order! {{3}}

Token	Mapping	Mapping Type	Configure
{{1}}	{{1}}		Mapping type ▼
{{2}}	{{2}}		Mapping type ▼
{{3}}	{{3}}		Mapping type ▼

**Footer**

Enjoy your day

**Additional details**

A template can contain a Header, Body, and Footer - all of the template's available parts will be shown here.

The "Configure" drop down will present the list of potential mappings depending on the section type and format:

## Header

Currently, the supported Header parameter types are text, image, video, and document.

- Text parameters are shown in the message as "{{x}}", and can be mapped in the same way as the [Body Parameters](#).
- Image parameters can be mapped in two ways:
  - **Record field** - Select an SObject and one of its fields. The content of the field should be a ContentDocumentId (For example: **0698d00000CDuQAA1** ) which relates to an image that is managed through "Files".
  - **Constant image** - Select an image via the pop-up to attach to the message header.
- Video and Document parameters can be mapped in the same way as images; for Videos, you would use 'Constant Video, whereas for Documents you would use 'Constant Document'.

## Body

Currently, only text parameters are supported in the Body. They are shown in the message "{{x}}" and can be mapped to any of the following:

- **Record field** - Select an sObject and one of its fields. The String representation of the value will be used. In order to use an sObject it must be linked in a lookup relationship with the **VC\_\_Interaction\_\_c** sObject.
- **Environment variable** - Can be one of: Current date, Current Time, Current date and time, Agent name.
- **Constant value** - Any constant string.
- **Custom** - The content of the **VC\_\_Template\_Custom\_Field\_\_c** of the relevant **VC\_\_Interaction\_\_c** record . Only one custom object is supported per interaction and template.

## Footer

Can only contain text.

## Additional Details

Each template configuration must have a description.

The template configuration is also automatically populated with tags such as "Category=XXX;Language=YYY". Additional tags can be added to the list in the format "XXX=YYY", all separated by a semi-colon, and are used to filter on templates later on.

## Configured Template Example

WhatsApp Template: boa\_hip\_btp\_f\_it

**Header**

The header requires an image.	<b>Token</b> image	<b>Mapping</b> 	<b>Mapping Type</b> Constant image	<b>Configure</b> Mapping type ▼
-------------------------------	-----------------------	--------------------	---------------------------------------	------------------------------------

**Body**

Thanks for your order! Use code {{1}} for {{2}} off your next order! {{3}}	<b>Token</b> {{1}}	<b>Mapping</b> Case.CaseNumber	<b>Mapping Type</b> Record's field	<b>Configure</b> Mapping type ▼
	{{2}}	35%	Constant value	Mapping type ▼
	{{3}}	AGENT_NAME	Environment Variable	Mapping type ▼

**Footer**

Enjoy your day

**Additional details**

\* Template's description

Casediscountsmesssage

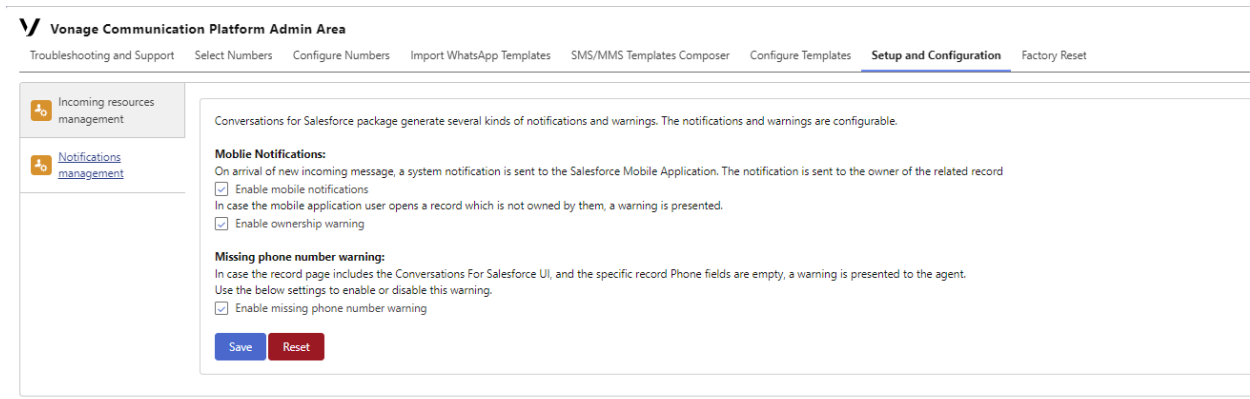
Template's tag ⓘ

Category=MARKETING;Language=it

# Setup and Configuration

This section has three tabs:

- **Incoming Resources Management:** Configure the names of incoming files and images when they are stored in the Salesforce Files system, and enable/disable if an agent can use a file that came from an incoming message for new outgoing messages in other interactions.
- **Notifications Management:** Manage both system and mobile notifications.
- **Numbers Allocation:** Allocate specific numbers to agents.



**Vonage Communication Platform Admin Area**

Troubleshooting and Support | Select Numbers | Configure Numbers | Import WhatsApp Templates | SMS/MMS Templates Composer | Configure Templates | **Setup and Configuration** | Factory Reset

**Incoming resources management**

**Notifications management**

Conversations for Salesforce package generate several kinds of notifications and warnings. The notifications and warnings are configurable.

**Mobile Notifications:**  
 On arrival of new incoming message, a system notification is sent to the Salesforce Mobile Application. The notification is sent to the owner of the related record.

- Enable mobile notifications  
 In case the mobile application user opens a record which is not owned by them, a warning is presented.
- Enable ownership warning

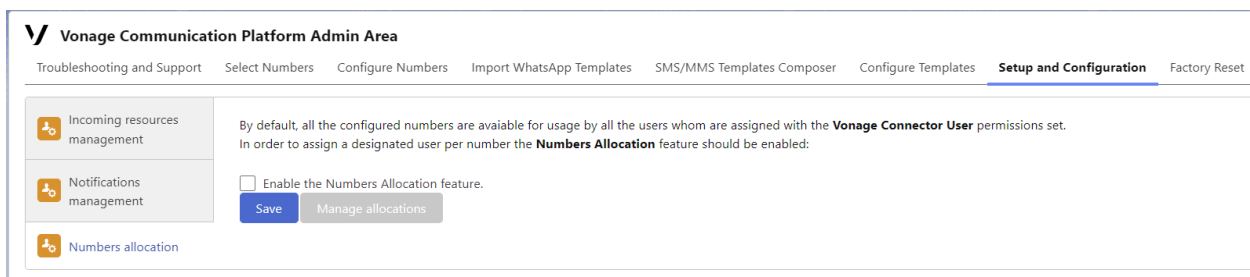
**Missing phone number warning:**  
 In case the record page includes the Conversations For Salesforce UI, and the specific record Phone fields are empty, a warning is presented to the agent. Use the below settings to enable or disable this warning.

- Enable missing phone number warning

Save Reset

## Number Allocation

This section allows you to allocate specific numbers for specific agents. This is an optional feature.



**Vonage Communication Platform Admin Area**

Troubleshooting and Support | Select Numbers | Configure Numbers | Import WhatsApp Templates | SMS/MMS Templates Composer | Configure Templates | **Setup and Configuration** | Factory Reset

**Incoming resources management**

**Notifications management**

**Numbers allocation**

By default, all the configured numbers are available for usage by all the users whom are assigned with the **Vonage Connector User** permissions set. In order to assign a designated user per number the **Numbers Allocation** feature should be enabled:

- Enable the Numbers Allocation feature.

Save Manage allocations

By default, all the numbers are available to all the agents which were assigned with the "Vonage Connector User" permissions set. For more information on this feature please refer to [Configuring Number Allocation](#).

# Factory Reset

Factory Reset provides the option to reset the package configuration to its initial state, or if there is a need to replace the originally selected account.

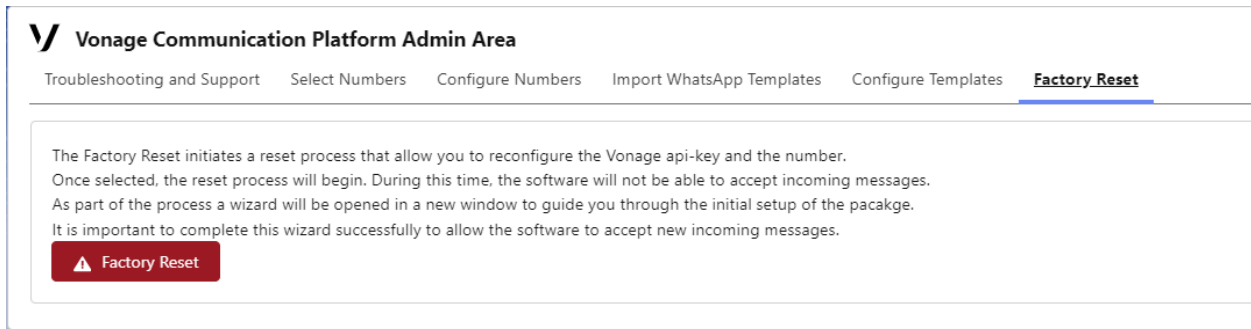
The reset process **deletes** the previously configured api-key and LVNs, including their nicknames, tooltips and brand name. The already existing messages and images are **not** deleted.

During this process the package will be inactive - incoming messages won't be accepted, and outbound messages will not be sent.

**The reset is irreversible.**

The reset process consists of 3 steps:

## 1. Initiate



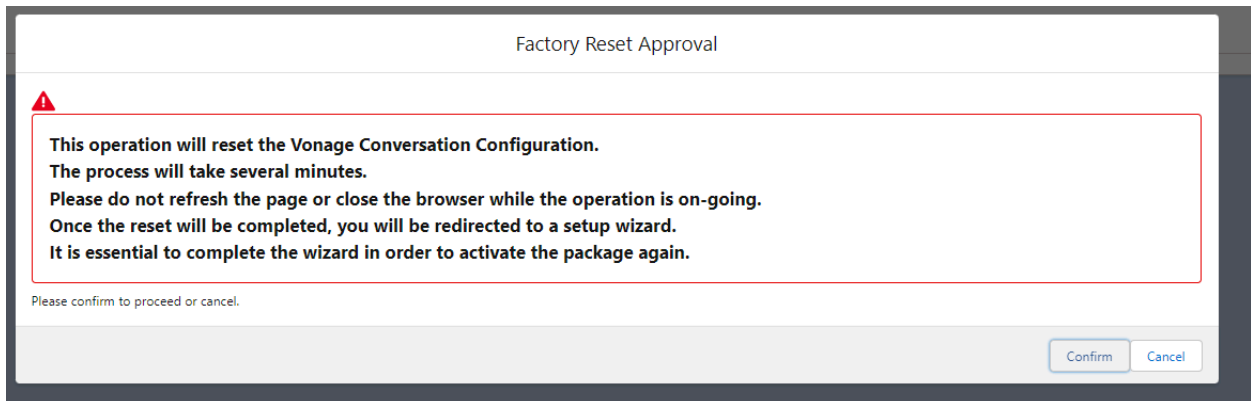
**Vonage Communication Platform Admin Area**

Troubleshooting and Support   Select Numbers   Configure Numbers   Import WhatsApp Templates   Configure Templates   **Factory Reset**

The Factory Reset initiates a reset process that allow you to reconfigure the Vonage api-key and the number. Once selected, the reset process will begin. During this time, the software will not be able to accept incoming messages. As part of the process a wizard will be opened in a new window to guide you through the initial setup of the pacakge. It is important to complete this wizard successfully to allow the software to accept new incoming messages.

**Factory Reset**

## 2. Confirm



Factory Reset Approval

**This operation will reset the Vonage Conversation Configuration.**  
**The process will take several minutes.**  
**Please do not refresh the page or close the browser while the operation is on-going.**  
**Once the reset will be completed, you will be redirected to a setup wizard.**  
**It is essential to complete the wizard in order to activate the package again.**

Please confirm to proceed or cancel.

Confirm Cancel

## 3. Reconfigure

It is important to complete the reconfiguration wizard. The package will be inactive until the wizard is completed successfully.

 **Vonage Communication Platform Admin Area**

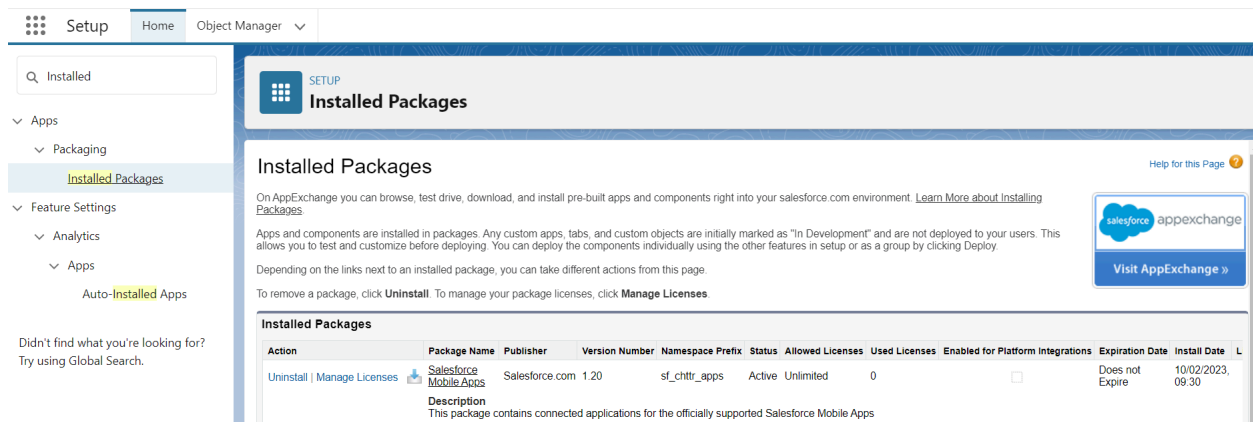
Troubleshooting and Support   Select Numbers   Configure Numbers   Import WhatsApp Templates   Configure Templates   **Factory Reset**

The Vonage Conversation Configuration was reset successfully.  
In order to reactivate the package, please complete the setup wizard: [Setup Wizard](#)

# Mobile Configuration

## Verify the Salesforce Mobile Package is installed in your ORG

From Setup, find "Installed Packages" and check if the 'Salesforce Mobile Apps' package is installed for your organization:



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Installed" and a navigation menu with "Apps" expanded to "Installed Packages". The main content area is titled "Installed Packages" and contains the following information:

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

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

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

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

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date
<a href="#">Uninstall</a>   <a href="#">Manage Licenses</a>	<a href="#">Salesforce Mobile Apps</a>	Salesforce.com	1.20	sf_chtr_apps	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	10/02/2023, 09:30

**Description**  
This package contains connected applications for the officially supported Salesforce Mobile Apps

If it is not installed, work through the [Salesforce documentation](#).

## Activate the UI for Mobile

Verify that the UI component is activated for Mobile:



### Activation: Lead Record Page

Custom record pages can be assigned at different levels:

- The org default** record page displays for an object unless more specific assignments are made.
- App default** page assignment, if specified, overrides the org default.
- App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

**ORG DEFAULT**    APP DEFAULT    APP, RECORD TYPE, AND PROFILE

Set this page as the org default to display it for all Lead records, except when app default or app, record type, or profile-specific assignments are defined.

In standard Salesforce console apps, some objects have a system app default record page. For those objects, if you assign a custom org default page, it doesn't display to users. To enable a custom org default page to show up in the console for those objects, assign a custom page as the app default. [Check your assignments.](#)

[Assign as Org Default](#)

Close

### Assign form factor

Select the form factors that you want your org default page to be available for.

- Desktop
- Phone
- Desktop and phone

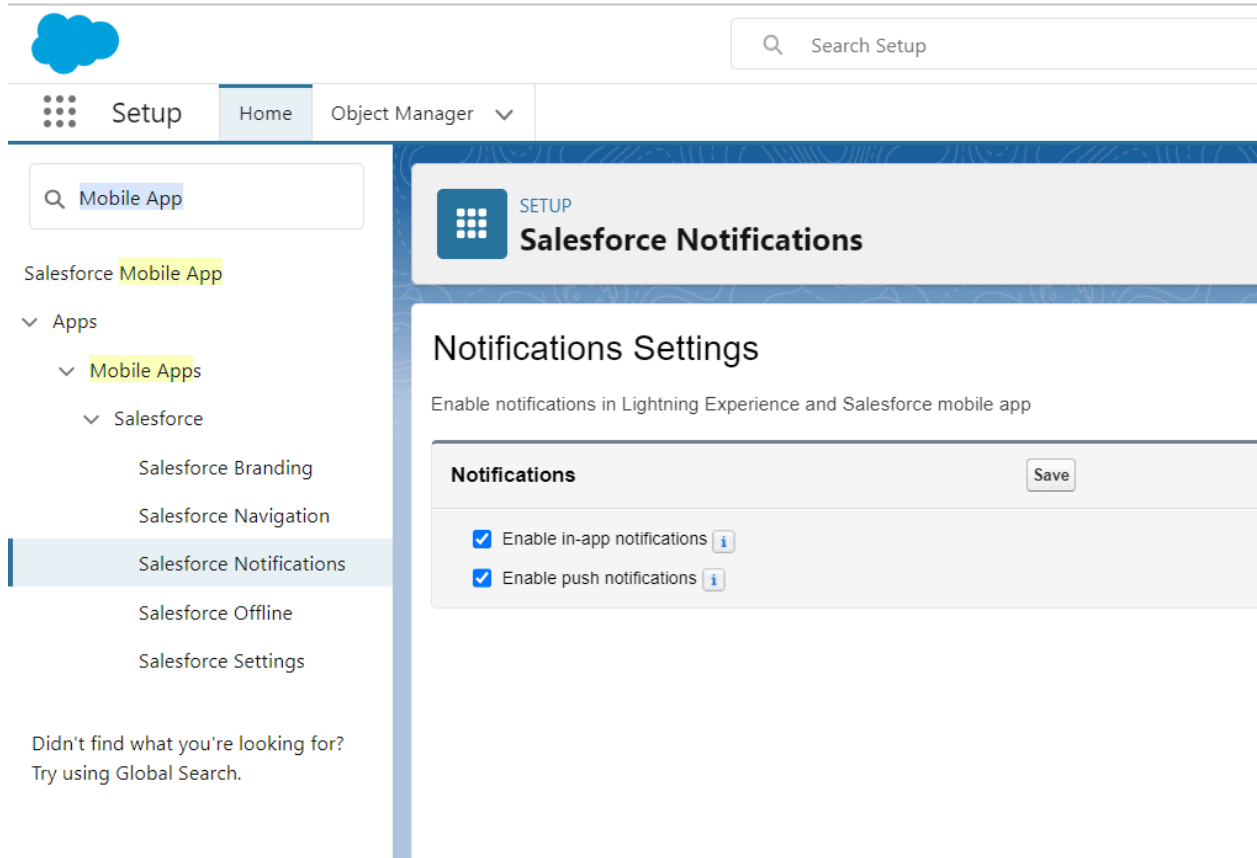
Cancel

Back

Next

## Verify the the ORG Mobile App notifications setup

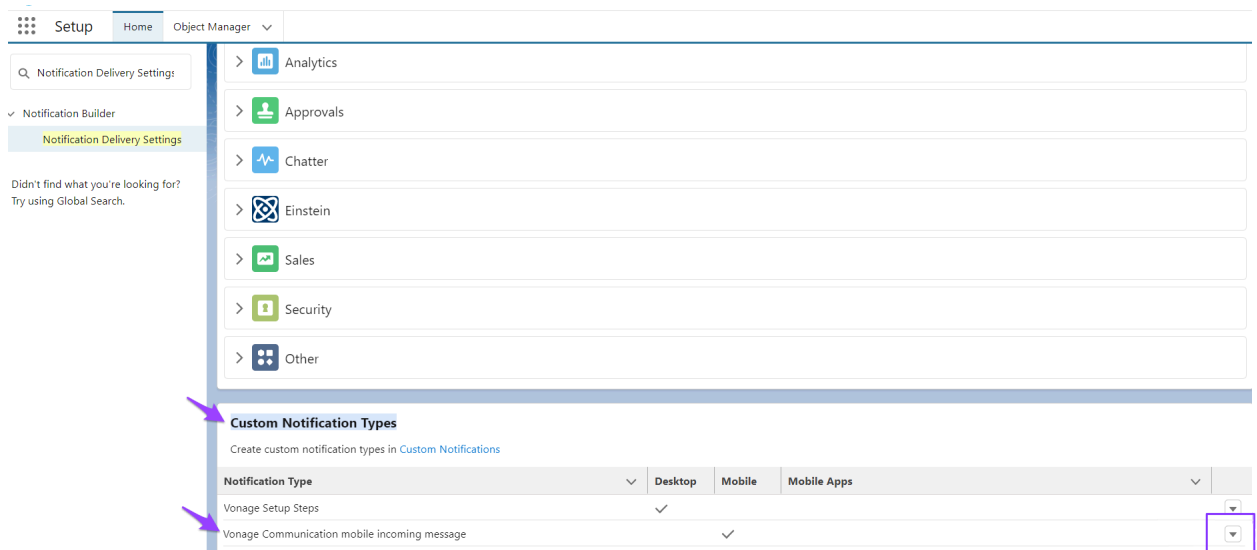
From Setup, look for "Mobile Apps", then ensure both in-app and push notifications are set:



The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". The left sidebar contains a search for "Mobile App" and a list of categories: "Salesforce Mobile App", "Apps", "Mobile Apps", and "Salesforce". Under "Salesforce", several options are listed, with "Salesforce Notifications" highlighted. The main content area is titled "Salesforce Notifications" and "Notifications Settings". It includes a sub-header "Enable notifications in Lightning Experience and Salesforce mobile app" and a "Notifications" section with two checked options: "Enable in-app notifications" and "Enable push notifications". A "Save" button is visible in the top right of this section.

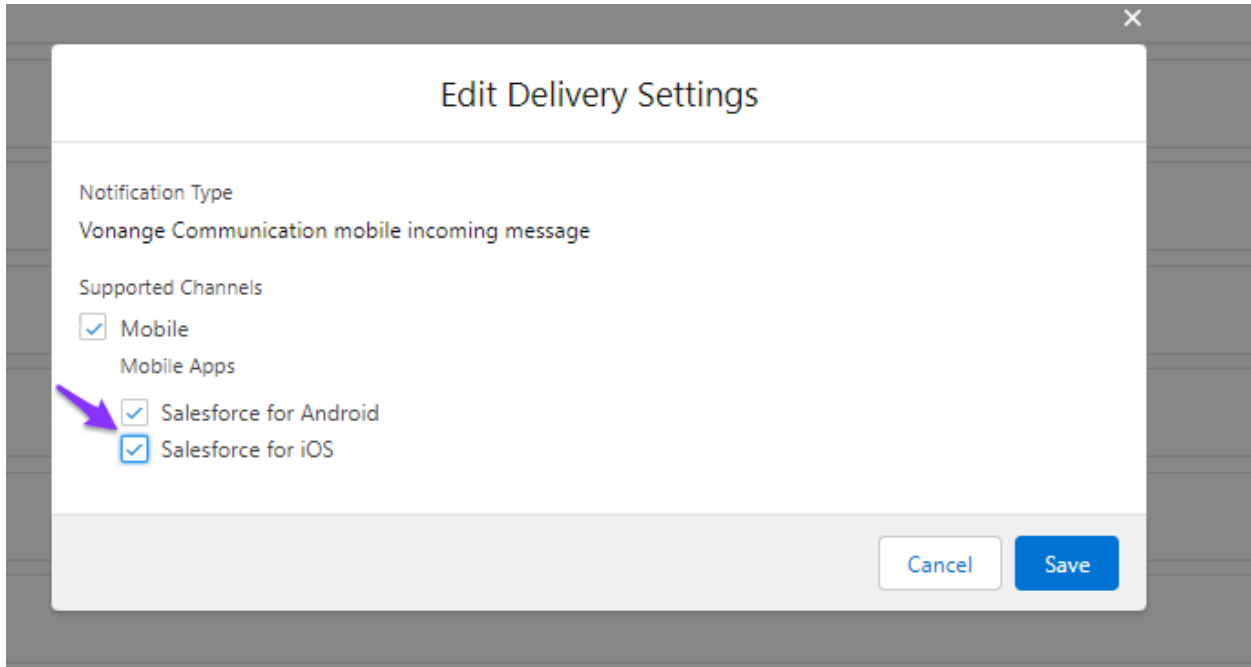
## Verify the the ORG Notifications Delivery Settings

From Setup, find "Notification Delivery Settings" and scroll down to "Custom Notification Types":



The screenshot shows the Salesforce Setup interface for "Notification Delivery Settings". The left sidebar has a search for "Notification Delivery Settings" and lists "Notification Builder" and "Notification Delivery Settings". The main content area shows a list of notification types: Analytics, Approvals, Chatter, Einstein, Sales, Security, and Other. Below this list is the "Custom Notification Types" section, which includes a sub-header "Create custom notification types in Custom Notifications". A table lists notification types with columns for "Notification Type", "Desktop", "Mobile", and "Mobile Apps". The first row is "Vonage Setup Steps" with checkmarks in the "Desktop" and "Mobile" columns. The second row is "Vonage Communication mobile incoming message" with checkmarks in the "Mobile" and "Mobile Apps" columns. A red box highlights the dropdown arrow in the "Mobile Apps" column for the second row.

Select the "Edit" option, and check both "Salesforce for Android" and "Salesforce for iOS":



After "Save" the Custom Notification Types" are set:

Custom Notification Types			
Create custom notification types in <a href="#">Custom Notifications</a>			
Notification Type	Desktop	Mobile	Mobile Apps
Vonage Setup Steps	✓		
Vonage Communication mobile incoming message		✓	Salesforce for Android; Salesforce for iOS

# Resources Management

As of version 1.1, Vonage Conversations for Salesforce supports the sending and receiving of Resources, including:

- Images
  - For MMS: Images are supported only for USA or Canada numbers. The used LVNs must be [10DLC](#) compliant.
  - For WhatsApp: Images are supported for all inbound and outbound messages.
- Video files
- Audio files
- Documents of type: .pdf, .doc, .docx, .ppt, .pptx, .txt

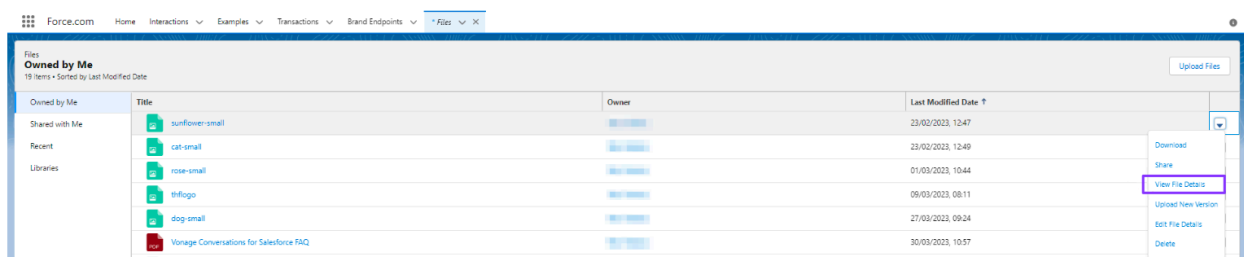
## Incoming messages with a resource

An incoming message from a customer might include a resource. In this case, the resource is automatically uploaded to the "Files" with the following name pattern:

`incoming-[file-type] [file-name-if-applicable] [date]-[time]`

## Resource Versioning

Any resource in the "Files" section can be updated and could include several versions. When looking at a specific resource's details, you can see the latest version, and the list of older versions at the File's Details:

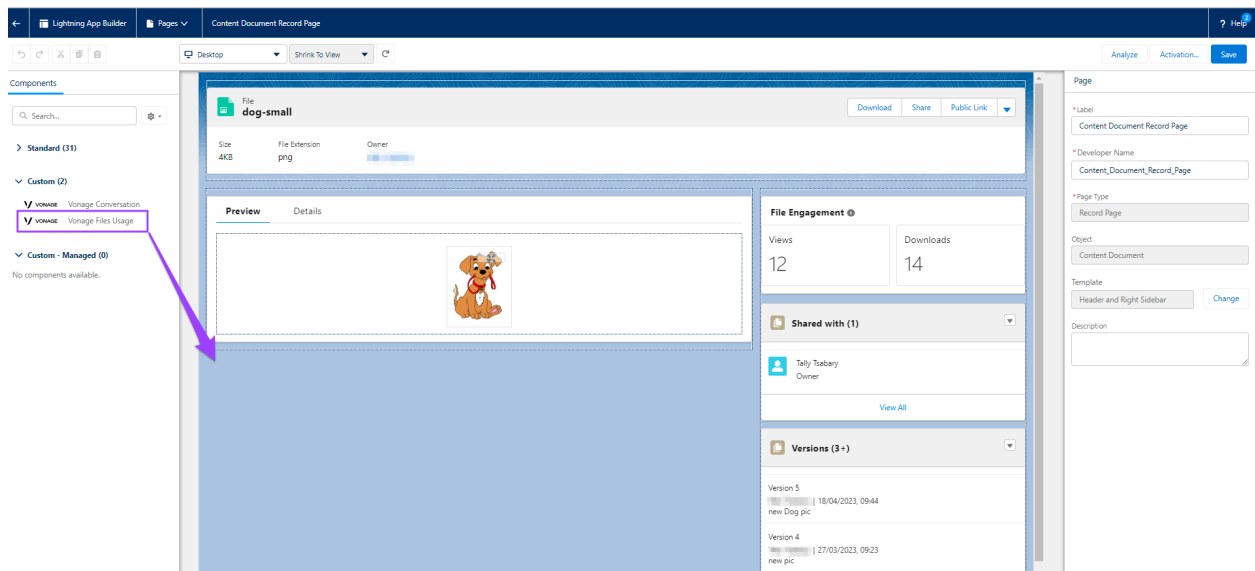


When sending out a new message, it will always use the latest version of the requested resource. It is impossible to send older versions.

# Monitoring Resource Usage

When looking at the conversation history, each message will include the specific version of the resource as it was used at the time of creating the message. In addition to this, you may need to search conversations for a specific version of a resource; for example, if the resource includes some Terms & Conditions, you may want to identify all of the conversations and messages that included a reference to that version.

The “Vonage Files Usage” UI component supports this monitoring. It can be added to the File details page by using the "Edit Page" button and dragging the widget to a suitable place on the page:




The added UI component shows each version of the resource, along with a list of all the conversations that used each version of that resource. By clicking the ‘Preview’ button on the right you can view that version to see what it looked like:

Force.com Home Interactions Examples Transactions Brand Endpoints \*dog-small X

File **dog-small**

Size 17KB File Extension png Owner [redacted]

Preview Details



**File Engagement**

Views 16

**Shared with (1)**

Owner [redacted]

**File usage by Vonage messages**

**Version 6 - Latest**

Direction	Date	Originator Type	Originator	References
Outbound	2023-05-11T07:52:01Z	Agent	[redacted]	<a href="#">Search</a>

**Version 5**

Direction	Date	Originator Type	Originator	References
Outbound	2023-05-11T07:49:34Z	Agent	[redacted]	<a href="#">Search</a>
Outbound	2023-05-11T07:48:56Z	Agent	[redacted]	<a href="#">Search</a>
Outbound	2023-05-11T07:37:30Z	Agent	[redacted]	<a href="#">Search</a>

**Versions (3+)**

Version 6 [redacted] | 11/05/2023, 08:50  
new dog

Version 5 [redacted] | 18/04/2023, 09:44  
new Dog pic


File **dog-small**

Size 17KB File Extension png Owner [redacted]

Preview Details

**File Engagement**

**Version 5**



[Close](#)

**File usage by Vonage messages**

**Version 6 - Latest**

Direction	Date	Originator Type	Originator	References
Outbound	2023-05-11T07:52:01Z	Agent	[redacted]	<a href="#">Search</a>

**Version 5**

Direction	Date	Originator Type	Originator	References
Outbound	2023-05-11T07:49:34Z	Agent	[redacted]	<a href="#">Search</a>
Outbound	2023-05-11T07:48:56Z	Agent	[redacted]	<a href="#">Search</a>
Outbound	2023-05-11T07:37:30Z	Agent	[redacted]	<a href="#">Search</a>

**Versions (3+)**

Version 6 [redacted] | 11/05/2023, 08:50  
new dog

Version 5 [redacted] | 18/04/2023, 09:44  
new Dog pic

Selecting the "Search" button will present the list of messages that contain that version of the resource, and will provide a link to the specific conversation:

**Message References**

Type	Name
Case	00001024
Contact	<a href="#">View Page</a>
Lead	<a href="#">View Page</a>

**File usage by Vonage messages**

**Version 6 - Latest**

Direction	Date	Originator Type	Originator	References
Outbound	2023-05-11T07:52:01Z	Agent	[REDACTED]	<input type="button" value="Search"/>

**Version 5**

Direction	Date	Originator Type	Originator	References
Outbound	2023-05-11T07:49:34Z	Agent	[REDACTED]	<input type="button" value="Search"/>

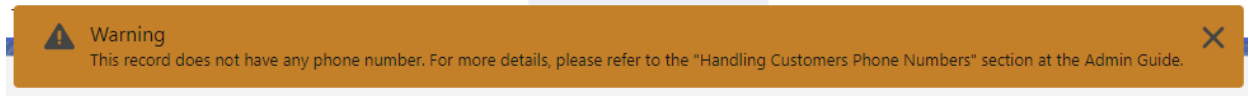
**Versions (3+)**

Version 6  
[REDACTED] | 11/05/2023, 08:50  
new dog

## Handling Customer's Phone Numbers

When adding the UI widget to a record page, the widget will search for all the available phone numbers in the record.

In case there are no available phone numbers the following message will be presented:



There are several potential reasons for this situation:

1. All the phone numbers of the specific record instance are not populated. In order to mitigate this situation either populate one of them or choose another record instance of this record type that includes a phone number.
2. The record does not include any field of type Phone. In order to mitigate this situation add a custom field of type Phone to the sObject.
3. The User does not have permissions to view any of the phone numbers of this record. In order to mitigate this situation, grant the user the permission to access the Phone fields.

It is not mandatory to add the Phone field to the record layout; in that case, the Phone number is not exposed but still can be used by the widget. While presented in the widget, the number is hidden and the drop down includes only its label; the widget includes the Lead's phone on the drop-down, but the Phone itself is not presented as part of the Lead details:



Lead: **Mr Norm May**

Title: VP, Facilities | Company: Greenwich Media | Email: norm\_may@greenwich.net

Working - Contacted | Closed - Not Converted | Converted | [Mark Status as Complete](#)

Lead Owner: [User] | Email: norm\_may@greenwich.net

Name: Mr Norm May | Website: [Link]

Company: Greenwich Media | Lead Status: Working - Contacted

Title: VP, Facilities | Rating: [Value]

VP, Facilities | No. of Employees: [Value]

Lead Source: Web

Industry: [Value]

Annual Revenue: [Value]

Address: [Value] | City: [Value] | State: USA

Product Interest: GCS300 series | Current Generator(s): All

SI Code: 2768 | Primary: Yes

Number of Locations: 130

Created By: [User] | 20/01/2023, 19:59 | Last Modified By: [User] | 11/02/2023, 17:04

Description: [Text]

VONAGE Communication Platform

**Norm May**

This is the beginning of your interactions...

Phone: [Field]

Powered by VONAGE

The Phone definitions on the Lead sObject are:

SETUP > OBJECT MANAGER

**Lead**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Scoping Rules

Triggers

Flow Triggers

Field Accessibility

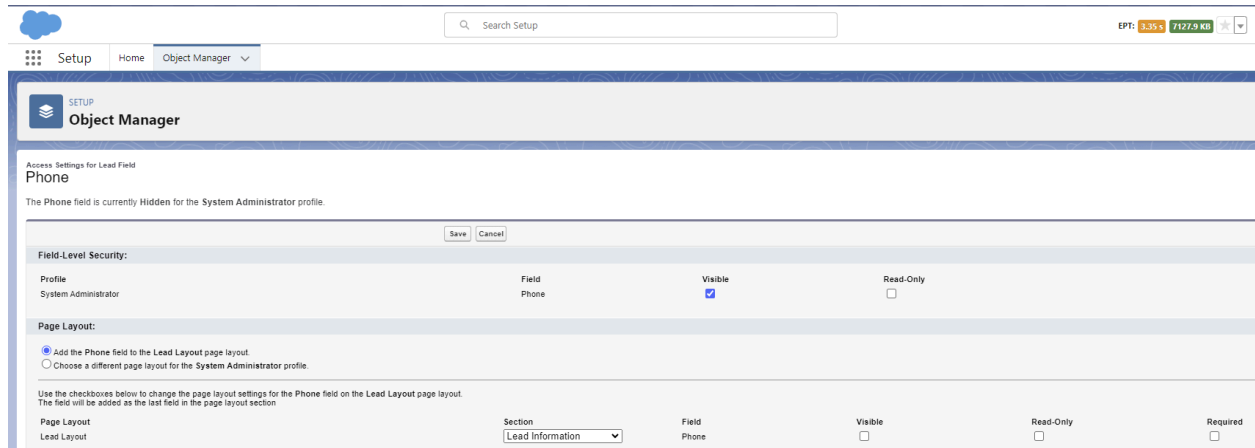
**Lead**

This page allows you to view Lead field accessibility for a particular field.

Field accessibility for Field: **Phone**

Click on a cell in the table below to change the field's accessibility.

Profiles	Field Access
Analytics Cloud Integration User	Hidden
Analytics Cloud Security User	Hidden
Contract Manager	Hidden
Custom: Marketing Profile	Editable
Custom: Sales Profile	Editable
Custom: Support Profile	Editable
External Apps Plus Login User	Hidden
External Apps Plus User	Hidden
Gold Partner User	Hidden
Marketing User	Hidden
Minimum Access - Salesforce	Hidden
Partner Community Login User	Hidden
Partner Community User	Hidden
Partner User	Hidden
Read Only	Hidden
Salesforce API Only System Integrations	Hidden
Service Cloud	Hidden
Silver Partner User	Hidden
Solution Manager	Hidden
Standard User	Hidden
System Administrator	Hidden
Profiles	Field Access



## Numbers Allocation

The correlation between agents and numbers is optional, and can be enabled/disabled from the [Vonage Admin Settings](#) application.

While disabled, all agents can use all numbers. When enabled, it is possible to assign agents with numbers, and recommended to designate an agent to each of the available numbers.

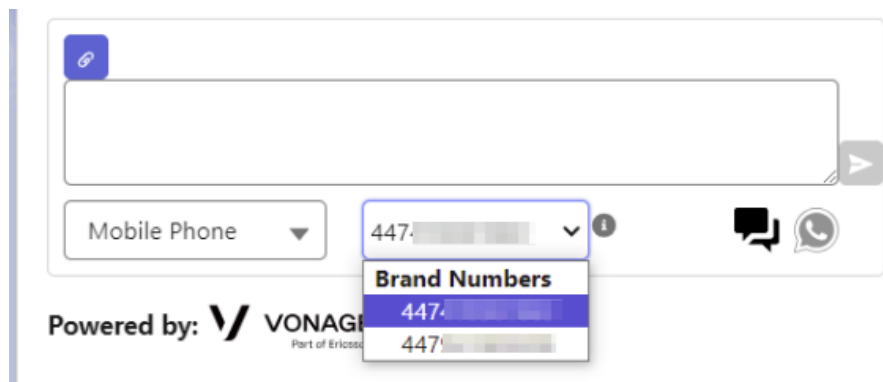
## Definitions

### Global Default Number

Global default number is configured at the "**Configure Numbers**" section. Usually it will be the number that was used during the initial deployment of the package.

### Allowed number

Each available number can be assigned for one or many agents to use. All the agent's allowed numbers will be visible to them on the UI widget:



### Designated agent

Each of the available numbers can be assigned to zero or one designated agents. The designated agent will be the owner of newly created records for incoming messages from new customers.

For example, an inbound message is automatically connected to all the records that already include the caller's phone number. In the case there is no such record, the inbound message is not connected to any record/sObject.

To mitigate this, you can create a flow that generates a record including, case, opportunity, lead or any other standard object or custom object. As the new record is created by a Flow, by default its owner will be one of the system admins (depending on the specific org configuration).

Some organizations would like to set the owner of this newly created record to a specific person, based on the dialed-in number, this is the designated agent.

Please refer to [BOT Development : Automatic processing and answering for incoming messages](#), where a Flow template for handling this use case is available.

### **Outbound messages from the UI**

The UI includes a drop-down list of potential numbers to use as the "From" of the outbound message. When the Number's Allocation feature is disabled, the list of numbers at the dropdown list would be:

- The last used number in the conversation.
- The general default number as configured in the "Configure Numbers" section in the Admin dashboard.
- Any other available numbers.

When the Numbers' Allocation feature is enabled, the list of numbers at the dropdown depends on the conversation status:

- If the conversation is ongoing, the agent would see:
  - The last number that was used at the conversation, whether it is assigned to the agent or not.
  - The numbers which this agent is designated for.
  - The other optional numbers which are available for the agent.

The global default number is not presented, unless it is specifically assigned to this agent. If this agent is not assigned with any number, the list will include only the last number used at the conversation.

- If it is a new conversation, the agent would see:
  - One of the numbers which this agent is designated for.
  - The rest of the numbers which this agent is designated for.
  - The other optional numbers which are available for the specific agent.

If any of the above lists include at least one number, the global default number is not presented, unless it is specifically assigned to this agent. If the agent is not assigned to any number, the drop-down list will include the global default number.

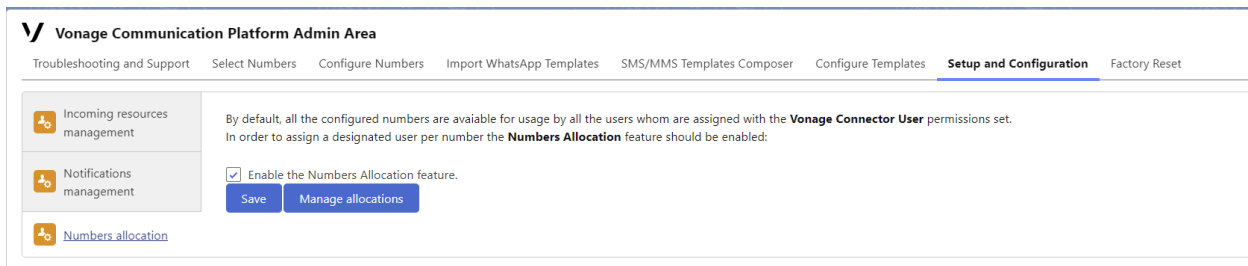
- If a new message is added to the conversation, directed to a brand endpoint which is not on the agent list:
  - The new Brand Endpoint will be added to the dropdown list of this user for this session, i.e. It won't be added permanently to this agent assigned numbers.

### Outbound messages from Flow/Apex

Sending an outbound message from a Flow or Apex code is done by creating an "Outbound Interaction" record. The record should include some mandatory fields, including the Brand Endpoint - this is the "From" number. The composer of the Flow/Apex code can use any of the available numbers as suitable for the required channel.

## Configuring Number Allocation

First, enable the feature in the 'Setup and Configuration' tab of the admin dashboard:



Then go to the 'Manage Allocations' application:

## Numbers Allocation Management

The list of available numbers for an agent at the UI widget depends on the agent's assignments and the conversation status:

**The conversation is on going:**

- The last number that was used at the conversation, whether it is assigned to the agent or not.
- The numbers which this agent is designated for.
- The other optional numbers which are available for the agent.

**New conversation:**

- One of the numbers which this agent is designated for.
- The rest of the numbers which this agent is designated for.
- The other optional numbers which are available for the specific agent.

The global default number is not presented, unless it is specifically assigned to this agent. If this agent is not assigned with any number, the list will include only the last number used at the conversation.

If any of the above lists include at least one number, the global default number is not presented, unless it is specifically assigned to this agent.

If the agent is not assigned to any number, the drop-down list will include the global default number.

2

Search:     5

12 [redacted] : SMS;MMS  4

Agent Name	Agent User	Designated Agent
Agent1 Agent	agent1@work10.com	<input type="button" value="3"/>
Agent2 Agent	agent2@work10.com	<input type="button" value="3"/>

447 [redacted] : SMS

1. The list of all available numbers is presented. Each number section includes the list of assigned agents.
2. In order to filter the list, search the assignment based on the available numbers and the permitted agents. (Agents that were assigned with the Vonage Connector User permissions set).
3. Assigned agent can be removed or appointed as designated using the specific line actions:

12 [redacted] : SMS;MMS

Agent Name	Agent User	Designated Agent
Agent1 Agent	agent1@work10.com	<input type="button" value="Designate"/>
Agent2 Agent	agent2@work10.com	<input type="button" value="Remove"/>

4. In order to assign agents for the specific number use the corresponding "Assign agents" button

Add assigned agents to: 12 [redacted]

Available agents

[redacted] ([redacted])

[redacted] ([redacted])

[redacted] ([redacted])

[redacted] ([redacted])

Add agents

Agent3 Agent (agent3@work10.com)

- In order to verify what would be the agent available list of numbers at the UI widget use the "Analyze assignments" button

Agent Available Numbers

Last used number:  Agent:

12  Assigned

Select the conversation last used number, and the agent. use the "Analyze" button to get the list of numbers as will be available for this agent at the UI widget.

## Flow Development

Vonage Conversations for Salesforce can also be used to send and receive messages without using the UI. The package can be used by APEX code or by Flow for sending outbound messages or building BOTs to automatically process and respond to incoming messages.

### Outbound messages

Every time that an outbound **VC\_Interaction\_\_c** record is created it is sent automatically.

Create an Outbound **VC\_Interaction\_\_c** record

The important fields are:

API Name	Description	Valid values
<b>VC__Brand_Endpoint__c</b>	The LVN from which the message is sent	A configured LVN number, OR the Brand Name.
<b>VC__Channel__c</b>	The type of message (SMS, MMS, WHatsApp)	SMS is currently the only supported value.

VC__Content_Text__c	The message text	
VC__Direction__c	The direction of the message. Valid values are Inbound or Outbound	For sending out a message always use "Outbound"
VC__Interaction_Media__c	The type of media that is used.	Always use "Text"
VC__Interaction_Originator__c	Free text, to add details about the sender. This information is not sent with the outbound message but can be used later by the package for monitoring.	It is our recommendation to populate this field with the identifier of the process which created the message. For example, if it was created by a flow - use here the flow name.
VC__Interaction_Originator_Type__c	The type of process which created this message. Valid values are: Customer, Bot, Agent, Agent Assist	Customer is the value for Inbound messages. Bot is the recommended value for messages created by flow or apex. Agent is the value for all the outbound messages sent from the UI widget. Agent Assist is not supported yet
VC__Party_Endpoint__c	The phone number of the customer being contacted by the brand.	International phone number

<b>VC__Thread__c</b>	The Thread which owns this Interaction.	In case there is no existing Thread, it can be created using <b>VC__Thread__c</b> (All the <b>VC__Thread__c</b> fields are optional.)
----------------------	---	---

Correlate an interaction to a record (Lead, Case, Opportunity, Account, Contact) or custom sObject

It may be required to link Outbound messages to a specific record.

The **VC\_\_Interaction\_\_c** sObject already includes the following lookup fields:

- **VC\_\_Account\_\_c**
- **VC\_\_Case\_\_c**
- **VC\_\_Contact\_\_c**
- **VC\_\_Lead\_\_c**
- **VC\_\_Opportunity\_\_c**

In the case that the correlation is required for an sObject the **VC\_\_Interaction\_\_c** should be enhanced with the relevant lookup custom field.

## Inbound messages

Every time that an inbound message is received, a **VC\_\_Interaction\_\_c** record is created. As part of the record creation there is an attempt to automatically link it to previous messages which arrived from the same number.

### Automatic Correlation to other sObjects

When an inbound message is received, the package is searching for the **Party-Endpoint** (the "from") in all the available Phone fields of the sObjects which has lookup relationship with the **VC\_\_Interaction\_\_c** sObject.

If such Phone exists already the specific record is linked to the newly created **VC\_\_Interaction\_\_c** record.



This feature allow linking all the messages related to a case, or lead etc to be linked as a conversation.

**Note:** The Case sObject does not include Phone fields of its own. It is linked to the "Contact" Phone fields. Should it be required to automatically link the `VC__Interaction__c` record to a Case, it is required to have a suitable "Phone" type custom field on the Case sObject

## Platform Events

On every record creation a platform event is published: `VC__InteractionEvent__e`

Please notice that the event is published for Inbound AND Outbound records.

`VC__InteractionEvent__e` content

The event fields are:

API Name	Description
<code>VC__Event_Type__c</code>	Event Type identifies the nature of the event. InteractionCreated : A new Interaction record was created. Internal : An internal event, to be used only by the package.
<code>VC__Interaction_Direction__c</code>	In case of Interaction related events, this field shows the Interaction direction: Inbound or Outbound.
<code>VC__Interaction_Record_Type__c</code>	Relevant for Interaction related events. This field include the specific record type of the Interaction. For now it is always Interaction
<code>VC__InteractionId__c</code>	The Interaction Id in Salesforce. - The Id of the created <code>VC__Interaction__c</code> record.
<code>VC__Internal_Data__c</code>	Relevant only for "Internal" event. For internal usage only.

## Sending a message with a resource from Flow

In order to send a message from Flow use Create Record element and insert an outbound message.

In order to attach a resource to the message set the resource ID as resource:

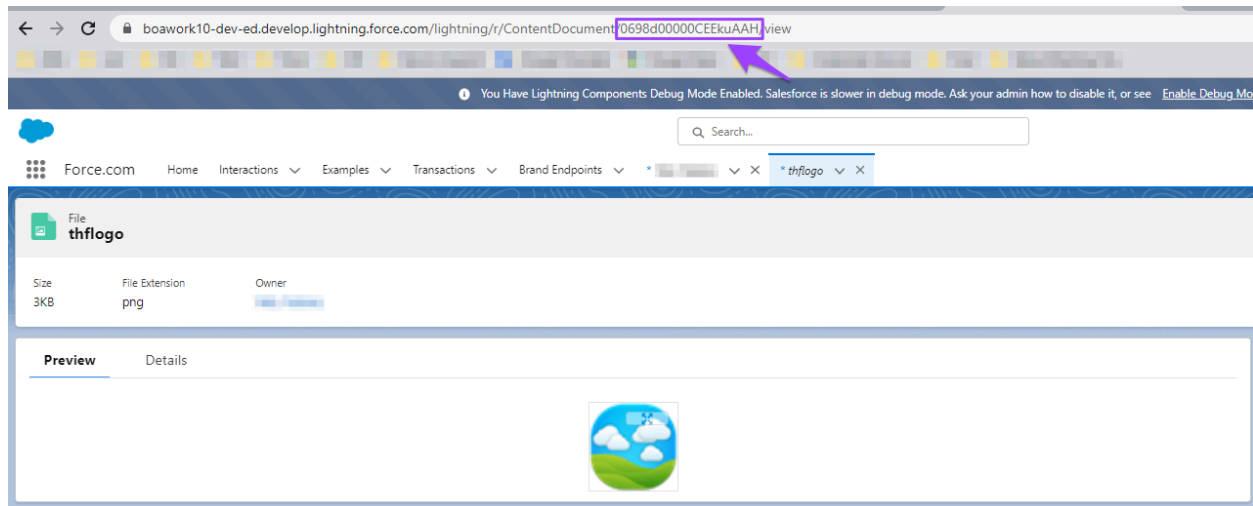
Field	Value
Resources__c	0698d00000F4grxAAB

The outbound message can include only the latest version of a resource.

All resources are managed in the "Files" Application:

Owned by Me	Title	Owner	Last Modified Date ↑
Shared with Me	sunflower-small	thflogo	23/02/2023, 12:47
Recent	cat-small	thflogo	23/02/2023, 12:49
Libraries	rose-small	thflogo	01/03/2023, 10:44
	thflogo	thflogo	09/03/2023, 08:11
	dog-small	thflogo	27/03/2023, 09:24

The specific resource id is available at the URL:



## Working with WhatsApp Templates

When creating an outbound interaction the following points should be considered:

The template must be supported, configured and active.

If the template mapping include references to other sObject and field - a specific record instance of the relevant object should be set at the created **VC\_\_Interaction\_\_c**.


For example:

If the mapping for a particular parameter was:

Token	Mapping	Mapping Type	Configure
{{1}}	Case.CaseNumber	Record's field	Mapping type ▼


Then the VC\_\_Interaction\_\_c should include the specific Case record to use:

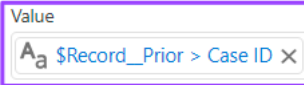
Create a Record of This Object

\*Object  Interaction

---

Set Field Values for the Interaction

Field  Case\_\_c

Value  Aa \$Record\_\_Prior > Case ID x

The VC\_\_Interaction\_\_c record must include the template's unique identifier. The template unique identifier is:

[template name]\_[template language]\_[waba number]

The VC\_\_Interaction\_\_c.Content\_Text\_\_c must stay empty!! - During the send out of the interaction the expected message content will be calculated based on the mapping and will be added automatically to the record.

The VC\_\_Interaction\_\_c.Channel\_\_c should be set to WhatsApp

When a template based message is sent out the following internal steps are performed:

1. Fetch the requested template and its configured mapping.
2. Find out the mapping result for each of the templates parts based on the specific VC\_\_Interaction\_\_c record values and related other record values.
3. Build the expected message as will be presented to the recipient.
4. Send the message to Vonage backend.

The message will be available at the UI as any other outbound message.

## External channel support

External channel can be used in order to integrate other messages providers/consumers as part of the package managed conversations, via Flow, APEX, and the UI (Limited usage)

The `VC__Intercation__c.External_Channel__c` can be populated with any string value to sign it is an interaction which is related to external provider.

When this value is present the `VC__Intercation__c.Channel__c` value **is ignored**.

An outbound message which include `VC__Intercation__c.External_Channel__c` will not be sent to Vonage backend, but will be created and presented at the UI. Such message status will be set to "Diverted to external channel".

An inbound message which include `VC__Intercation__c.External_Channel__c` will be presented in the UI.

While using the UI to send outbound message, its external channel value will be set to the same value as the last message on the conversation. Meaning: If the last message (inbound or outbound) include an external channel value - that same value will be set at the newly created outbound message.

It is impossible to initiate an outbound message from the UI to an external channel without first receiving an inbound message from this external channel. This limit applies ONLY to the UI. It is possible to initiate conversation on external channel from Flow or APEX without first receiving an inbound message from this external channel.

## BOT Development - Automatic Message Processing

BOTs can be developed very easily using the Salesforce Flow infrastructure. As the creation of any interaction is published by Platform Event, we can use the `Platform Event-Triggered` Flow in order to build a BOT.

The package includes several example BOTS based on Flow templates:

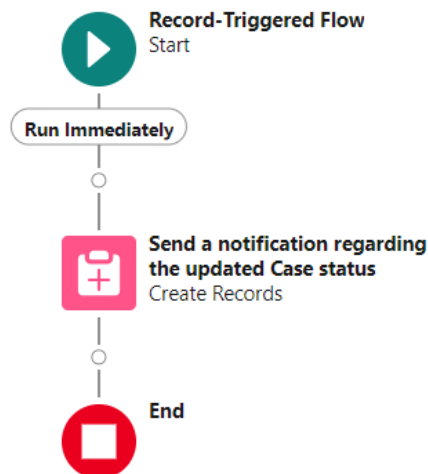
Flow Template	Feature
Vonage WhatsApp Notification Example	Send a WhatsApp message using a WhatsApp template.
Vonage SMS Notification Example	Send an SMS message using an SMS template.
Vonage Handle Incoming Message Example	Create a new Lead record based on incoming messages from an unknown customer. Assign the new Lead to the designated agent.
Vonage Send Automatic Response Example	Accept and incoming message and response back based on its content

All of the provided flow templates are deactivated. In order to use one, please copy it and amend it to the specific org needs.

## Vonage WhatsApp Notification Example

**Use case:** Send a WhatsApp message regarding Case status change.

**The flow:** The Flow is activated when a Case's status has changed. On any status change the Flow will send a notification using a WhatsApp template:



Notification configuration example:

### Create a Record of This Object ✕

\* Object

Interaction

---

#### Set Field Values for the Interaction

Field	←	Value	
<div style="border: 1px solid #ccc; padding: 5px;">VC__Brand_Endpoint__c</div>		<div style="border: 1px solid #ccc; padding: 5px;">your lvn</div>	✕
<div style="border: 1px solid #ccc; padding: 5px;">VC__Case__c</div>		<div style="border: 1px solid #ccc; padding: 5px;">Aa \$Record__Prior &gt; Case ID ✕</div>	✕
<div style="border: 1px solid #ccc; padding: 5px;">VC__Channel__c</div>		<div style="border: 1px solid #ccc; padding: 5px;">WhatsApp</div>	✕
<div style="border: 1px solid #ccc; padding: 5px;">VC__Direction__c</div>		<div style="border: 1px solid #ccc; padding: 5px;">Outbound</div>	✕
<div style="border: 1px solid #ccc; padding: 5px;">VC__Interaction_Originator_Type__c</div>		<div style="border: 1px solid #ccc; padding: 5px;">Bot</div>	✕
<div style="border: 1px solid #ccc; padding: 5px;">VC__Interaction_Originator__c</div>		<div style="border: 1px solid #ccc; padding: 5px;">Case status update flow</div>	✕
<div style="border: 1px solid #ccc; padding: 5px;">VC__Party_Endpoint__c</div>		<div style="border: 1px solid #ccc; padding: 5px;">Your notification destination (some Phone field)</div>	✕
<div style="border: 1px solid #ccc; padding: 5px;">VC__Template_Unique_Id__c</div>		<div style="border: 1px solid #ccc; padding: 5px;">[template name]_[template language]_[waba numb</div>	✕

+ Add Field

Manually assign variables

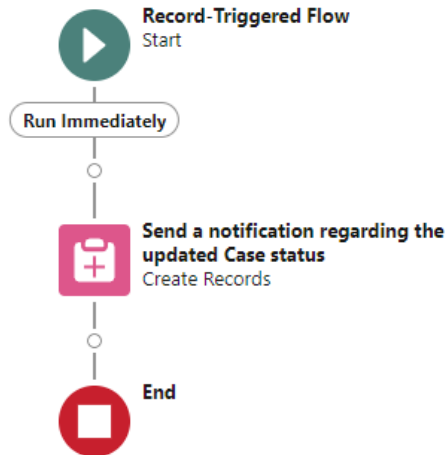
Fill in the relevant details as presented above. For more details regarding the WhatsApp templates usage please refer to [Working with WhatsApp Templates](#).

Here, **VC\_\_Template\_Unique\_Id\_\_c** will be a combination of three values, the name of the template you want to use, the language it uses, and your WABA number. For example, if the template name is **example name**, its language is **EN\_US**, and your WABA is **12346**, then the required value would be **example name\_EN\_US\_123456**.

## Vonage SMS Notification Example

**Use case:** Send an SMS message regarding Case status change.

**The flow:** The Flow is activated when a Case's status has changed. On any status change the Flow will send a notification using an SMS template:













Notification configuration example:

Create a Record of This Object

\*Object  
Interaction

---

Set Field Values for the Interaction

Field	←	Value	
VC__Brand_Endpoint__c		your lvn	
Field	←	Value	
VC__Case__c		 \$Record__Prior > Case ID 	
Field	←	Value	
VC__Channel__c		SMS	
Field	←	Value	
VC__Direction__c		Outbound	
Field	←	Value	
VC__Interaction_Originator_Type__c		Bot	
Field	←	Value	
VC__Interaction_Originator__c		Case status update flow	
Field	←	Value	
VC__Party_Endpoint__c		Your notification destination (some Phone field)	
Field	←	Value	
VC__Template_Unique_Id__c		[template name]_[template language]_[Template gr	

[+ Add Field](#)

Manually assign variables

Fill in the relevant details as presented above. For more details regarding the SMS templates usage please refer to [SMS/MMS Templates Composer](#).

Here, **VC\_\_Template\_Unique\_Id\_\_c** will be a combination of three values, the name of the template you want to use, the language it uses, and the template's group. For example, if the template name is **example name**, its language is **EN\_US**, and the group is **Online Sales**, then the required value would be **example name\_EN\_US\_Online Sales**.

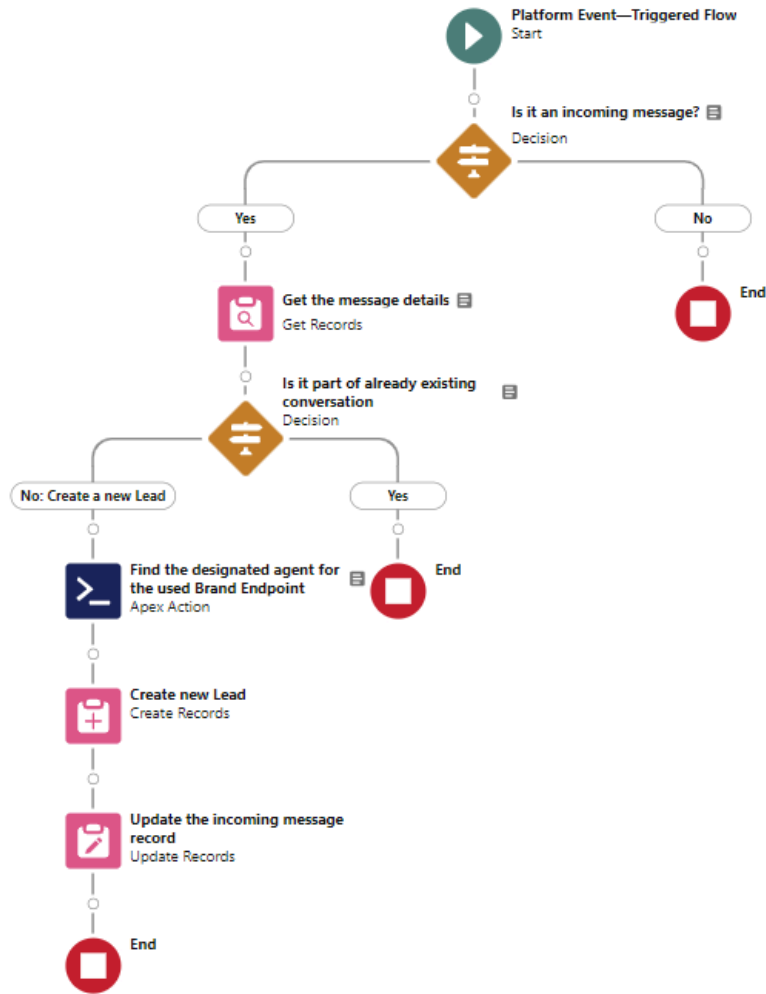


## Vonage Handle Incoming Message Example


**Use case:** Create a new Lead record based on an incoming message from an unknown customer. Assign the new Lead to the designated agent.

**The flow:** The Flow is activated when a new SMS/WhatsApp message is created in org. If it is an outbound message, the flow ends. If it is an inbound message, the flow will do the following:

- Fetch the message details.
- If the message is from a known customer, the flow ends. In this case, the message is already linked to the record (Lead or Case etc) which includes the caller phone number.
- If the message is from an unknown customer, its status is "Create Party".
- A new record should be created for that customer. In this case it is a Lead, but each org can decide what type of record they would like to create, or not to create any record at all.
- The newly created record can be owned by the default owner of the flow, a specific user, or queue. Also, it can be assigned to the designated agent for the called number. For more details regarding designated agents please refer to [Numbers Allocation](#).
- The example flow assigns the new Lead record to the designated agent. In order to find the designated agent, the Flow is using a dedicated Apex Action: Find the designated agent for the used Brand Endpoint
- Once the new Lead record is created, the incoming message should be updated: First it needs to be linked to the newly created Lead, so it will be part of the conversation on this Lead. Second, the message status should be updated.



The platform event trigger for initiating the Flow:

 Choose Platform Event
✕

The flow subscribes to the specified platform event. When a platform event message is received, the flow is triggered to run

\* Platform Event

InteractionEvent

---

v [Advanced Settings](#)

**Run this flow as:** ⓘ

- User that triggered the event
- Default Workflow User [.Tally..Tsabary](#)

## Is it an incoming message?

For the "Yes" section:

Edit Decision
✕

Is it an incoming message? (*Is\_incoming\_message*)

Verify whether the Platform Event is related to an incoming message or an outgoing message.

---

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS		
+	* Label	* Outcome API Name	
⋮ Yes	<input type="text" value="Yes"/>	<input type="text" value="yes_it_is_incoming_message"/>	
No	Condition Requirements to Execute Outcome		
	<input type="text" value="All Conditions Are Met (AND)"/>		
	Resource	Operator	Value
	<input type="text" value="Aa \$Record &gt; Interaction Direction"/>	<input type="text" value="Equals"/>	<input type="text" value="Inbound"/>
	<input type="button" value="+ Add Condition"/>		

**Note: While copying the template to your own Flow, make sure that the relevant field names are updated properly to reflect the package name space.**

For the "No" section:

Edit Decision
✕

Is it an incoming message? (*Is\_incoming\_message*)


Verify whether the Platform Event is related to an incoming message or an outgoing message.


---

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS
+	* Label
⋮ Yes	<input type="text" value="No"/>
No	

## Get Message Details:

 **Edit Get Records** ×

Get the message details (*Get\_the\_message\_details*) 

Get the message details.  
The message Id is provided in the Platform Event

---

### Get Records of This Object


\* Object

---

### Filter Interaction Records

Condition Requirements

All Conditions Are Met (AND) ▼


Field	Operator	Value	
<input type="text" value="Id"/>	<input type="text" value="Equals"/> ▼	<input type="text" value="\$Record &gt; InteractionId"/> ✕	

[+ Add Condition](#)

---

### Sort Interaction Records

Sort Order

▼  If you store only the first record, filter by a unique field, such as ID.

---

### How Many Records to Store

Only the first record

All records

### How to Store Record Data


Automatically store all fields


Choose fields and let Salesforce do the rest

Choose fields and assign variables (advanced)

## Is it part of an existing conversation?

For the "No" section:




 Edit Decision
×

Is it part of already existing conversation (*Is\_it\_part\_of\_already\_existing\_conversation*) 


Was this incoming message already linked to a specific record as part of a conversation which is on-going


---

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS									
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <span>⋮</span> No: Create a new Lead         </div> <div style="border: 1px solid #ccc; padding: 5px;">           Yes         </div>	<p>* Label</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">No: Create a new Lead</div>	<p>* Outcome API Name</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">It_is_a_new_caller</div> <p>Condition Requirements to Execute Outcome</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">All Conditions Are Met (AND)</div> <table style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="border: 1px solid #ccc; padding: 5px;">Resource</td> <td style="border: 1px solid #ccc; padding: 5px;">Operator</td> <td style="border: 1px solid #ccc; padding: 5px;">Value</td> <td style="border: 1px solid #ccc; padding: 5px; text-align: right;"></td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px;"> <div style="border: 1px solid #ccc; padding: 2px;"> <span>⋮</span> Interaction from Get_the_messa... X         </div> </td> <td style="border: 1px solid #ccc; padding: 5px;"> <div style="border: 1px solid #ccc; padding: 2px;">           Equals         </div> </td> <td style="border: 1px solid #ccc; padding: 5px;"> <div style="border: 1px solid #ccc; padding: 2px;">           Create Party         </div> </td> <td></td> </tr> </table> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; width: fit-content;"> <span style="color: #0070C0;">+</span> Add Condition         </div>	Resource	Operator	Value		<div style="border: 1px solid #ccc; padding: 2px;"> <span>⋮</span> Interaction from Get_the_messa... X         </div>	<div style="border: 1px solid #ccc; padding: 2px;">           Equals         </div>	<div style="border: 1px solid #ccc; padding: 2px;">           Create Party         </div>	
Resource	Operator	Value								
<div style="border: 1px solid #ccc; padding: 2px;"> <span>⋮</span> Interaction from Get_the_messa... X         </div>	<div style="border: 1px solid #ccc; padding: 2px;">           Equals         </div>	<div style="border: 1px solid #ccc; padding: 2px;">           Create Party         </div>								

For the "Yes" section:

 Edit Decision
×

Is it part of already existing conversation (*Is\_it\_part\_of\_already\_existing\_conversation*) 

Was this incoming message already linked to a specific record as part of a conversation which is on-going

---


**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <span>⋮</span> No: Create a new Lead         </div> <div style="border: 1px solid #ccc; padding: 5px;">           Yes         </div>	<p>* Label</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Yes</div>	

## Find the designated agent:


### Edit Fetch the designated agent per the message's Brand Endpoint

Use values from earlier in the flow to set the inputs for the "Fetch the designated agent per the message's Brand Endpoint" Apex action. To use its outputs later in the flow, store them in variables.

**Find the designated agent for the used Brand Endpoi...** (Find\_the\_new\_Lead\_own... 

Identify the new record owner.  
The incoming message was sent to one of the org's brand endpoints (numbers).  
Find out which agent is the contact point for that brand endpoint...


#### Set Input Values for the Selected Action

 interactions ⓘ  Include

[Advanced](#)

Manually assign variables

#### Store Output Values

 Designated agent Id ⓘ

## Create New Lead:

 **Edit Create Records** ×  
Create new Lead (*Create\_Records\_1*) 

### How Many Records to Create

- One
- Multiple

### How to Set the Record Fields








- Use all values from a record
- Use separate resources, and literal values

## Create a Record of This Object

\*Object

Lead


## Set Field Values for the Lead


Field	Value
Company	Unknown 
LastName	 Interaction from Get_the_message_details > Part... 
MobilePhone	 Interaction from Get_the_message_details > Part... 
OwnerId	 designatedAgentId 

[+ Add Field](#)

Manually assign variables

## Update Incoming Message record:

 Edit Update Records ×

Update the incoming message record (*Update\_the\_incoming\_message\_record*) 

---

**\* How to Find Records to Update and Set Their Values**

Use the IDs and all field values from a record or record collection

Specify conditions to identify records, and set fields individually

---

Update Records of This Object Type

\* Object



Interaction

---

Filter Interaction Records

Condition Requirements to Update Records




All Conditions Are Met (AND) ▼

Field	Operator	Value	
Id	Equals ▼	 Interaction from Get_the_mess... 	

[+ Add Condition](#)

---

Set Field Values for the Interaction Records

Field		Value	
VC_Lead_c	←	 Leadid from Create_Records_1 	
VC_Next_Step_c	←	Reply needed 	

[+ Add Field](#)

**Note:** The `VC_Next_Step_c` can be any value, it is up to the specific org to decide what are the following steps after a new record was created.

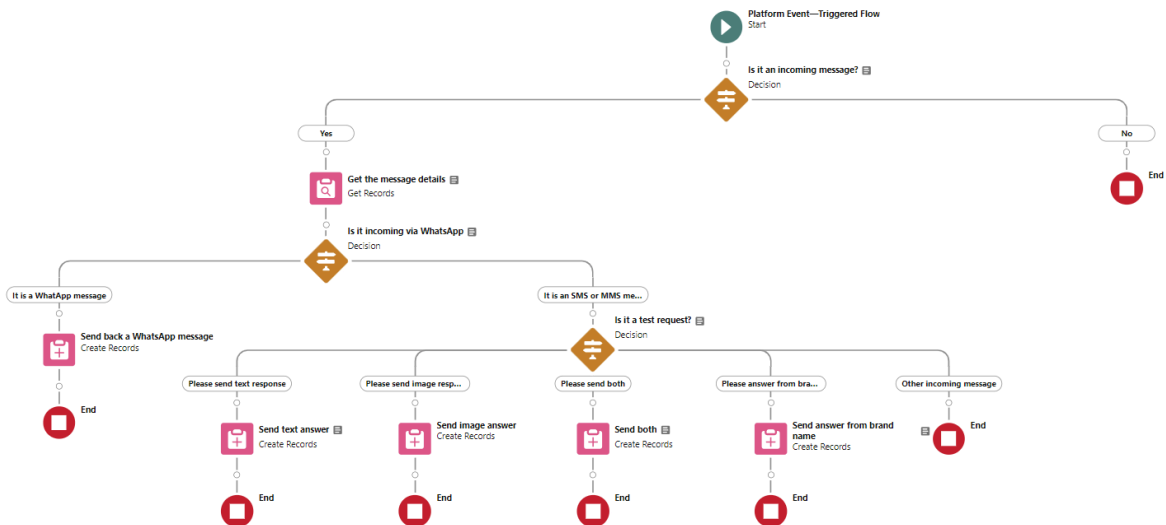


## Vonage Send Automatic Response Example


**Use case:** Send an automatic response, based on the incoming message content and channel.

**The flow:** The Flow is activated when a new SMS/WhatsApp message is created in org. If it is an outbound message, the flow ends. If it is an inbound message, the flow will do the following:

- Fetch the message details.
- If the message is from a known customer, the flow ends. In this case, the message is already linked to the record (Lead or Case etc) which includes the caller phone number.
- If it is a WhatsApp message - send a response via WhatsApp.
- If it is an SMS message - check the message content. In this example, we respond to messages which include a specific phrase, and ignore any other message.
- Based on the phrase used in the message, a suitable SMS response is sent back.



## The platform event trigger for initiating the Flow:

 Choose Platform Event ✕

The flow subscribes to the specified platform event. When a platform event message is received, the flow is triggered to run

\* Platform Event

InteractionEvent

▼ [Advanced Settings](#)


**Run this flow as:** ⓘ


User that triggered the event

Default Workflow User [Tally..Tsabary](#)

## Is it an incoming message?

For the "Yes" section:

 Edit Decision ✕


Is it an incoming message? (*Is\_incoming\_message*)   
 Verify whether the Platform Event is related to an incoming message or an outgoing message.


**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	
Yes	* Label Yes	* Outcome API Name yes_it_is_incoming_message
No	Condition Requirements to Execute Outcome All Conditions Are Met (AND)	
	Resource Aa \$Record > Interaction Direction ✕	Operator Equals
		Value Inbound
	+ Add Condition	

**Note: While copying the template to your own Flow, make sure that the relevant field names are updated to reflect the package name space.**


For the "No" section:


 **Edit Decision** ×

**Is it an incoming message? (*Is\_incoming\_message*)**   
Verify whether the Platform Event is related to an incoming message or an outgoing message.


---


**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS
 Yes	*Label <input type="text" value="No"/>
No	



## Get the message details:

 **Edit Get Records** ×

Get the message details (*Get\_the\_message\_details*) 

Get the message details.  
The message Id is provided in the Platform Event

---

### Get Records of This Object

\* Object



Interaction

---

### Filter Interaction Records

Condition Requirements

All Conditions Are Met (AND) ▼


Field	Operator	Value	
Id	Equals ▼	 \$Record > InteractionId ×	

[+ Add Condition](#)

---

### Sort Interaction Records

Sort Order

Not Sorted ▼  If you store only the first record, filter by a unique field, such as ID.

---

### How Many Records to Store

Only the first record

All records

### How to Store Record Data

Automatically store all fields

Choose fields and let Salesforce do the rest

Choose fields and assign variables (advanced)

## Is the message incoming via WhatsApp?

**Edit Decision** ✕

**Is it incoming via WhatsApp** (*Is\_it\_incoming\_via\_WhatsApp*) ✎

Is the incoming request arriving via WhatsApp channel

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS		
1 +			
<ul style="list-style-type: none"> <li style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">It is a WhatsApp message</li> <li style="padding: 5px; margin-bottom: 5px;">It is an SMS or MMS message</li> </ul>	<p>* Label</p> <input style="width: 100%;" type="text" value="It is a WhatsApp message"/>	<p>* Outcome API Name</p> <input style="width: 100%;" type="text" value="It_is_a_WhatsApp_message"/>	
	<p>Condition Requirements to Execute Outcome</p> <div style="border: 1px solid #ccc; padding: 2px; width: fit-content;">All Conditions Are Met (AND)</div>		
	<p>Resource</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span style="font-size: 0.8em;">☰</span> Interaction from Get_the_messa... ✕         </div>	<p>Operator</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span style="font-size: 0.8em;">▼</span> Equals         </div>	<p>Value</p> <input style="width: 100%;" type="text" value="WhatsApp"/> <div style="float: right; font-size: 0.8em;">✕</div>
	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">+ Add Condition</div>		

Note: The Resource name is: `{!Get_the_message_details.VC_Channel_c}`

## Is the message incoming via SMS/MMS?

**Edit Decision** ✕

**Is it incoming via WhatsApp** (*Is\_it\_incoming\_via\_WhatsApp*) ✎

Is the incoming request arriving via WhatsApp channel

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	
1 +		
<ul style="list-style-type: none"> <li style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">It is a WhatsApp message</li> <li style="padding: 5px; margin-bottom: 5px;">It is an SMS or MMS message</li> </ul>	<p>* Label</p> <input style="width: 100%;" type="text" value="It is an SMS or MMS message"/>	



## Send back a WhatsApp message

✕

Edit Create Records

Send back a WhatsApp message (*Send\_back\_a\_WhatsApp\_message*)

**How Many Records to Create**

One

Multiple

**How to Set the Record Fields**

Use all values from a record

Use separate resources, and literal values

**Create a Record of This Object**

\* Object

Interaction

**Set Field Values for the Interaction**

Field	←	Value	
<div style="border: 1px solid #ccc; padding: 2px;">VC_Brand_Endpoint__c</div>		<div style="border: 1px solid #ccc; padding: 2px;">Interaction from Get_the_message_details &gt; Bra... X</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC_Content_Text__c</div>		<div style="border: 1px solid #ccc; padding: 2px;">hello from the flow to WA user</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC_Direction__c</div>		<div style="border: 1px solid #ccc; padding: 2px;">Outbound</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC_Interaction_Media__c</div>		<div style="border: 1px solid #ccc; padding: 2px;">Text</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC_Party_Endpoint__c</div>		<div style="border: 1px solid #ccc; padding: 2px;">Interaction from Get_the_message_details &gt; Par... X</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC_Thread__c</div>		<div style="border: 1px solid #ccc; padding: 2px;">Interaction from Get_the_message_details &gt; Thr... X</div>	


[+ Add field](#)

### Is it a test request?

Filtering the Flow for different types of responses based on the message content. The message content (the Resource field) is: `{!Get_the_message_details.VC_Content_Text__c}`



**Edit Decision** ×  
 Is it a test request? (*Is\_it\_a\_test\_request*)   
 Parse the message text

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.


OUTCOME ORDER <span>+</span>	OUTCOME DETAILS <span style="float: right;">Delete Outcome</span>	
<ul style="list-style-type: none"> <li>⋮ Please send text response</li> <li>⋮ Please send image response</li> <li>⋮ Please send both</li> <li>⋮ Please answer from brand name</li> <li>Other incoming message</li> </ul>	<p>* Label <input type="text" value="Please send text response"/></p> <p>* Outcome API Name <input type="text" value="Please_send_text_response"/></p> <p>Condition Requirements to Execute Outcome  <input type="text" value="All Conditions Are Met (AND)"/></p> <p>Resource <input type="text" value="A Interaction from Get_the_messa..."/> Operator <input type="text" value="Contains"/> Value <input type="text" value="Please send text"/> </p> <p><span>+</span> Add Condition</p>	



**Edit Decision** ×  
 Is it a test request? (*Is\_it\_a\_test\_request*)   
 Parse the message text

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER <span>+</span>	OUTCOME DETAILS <span style="float: right;">Delete Outcome</span>	
<ul style="list-style-type: none"> <li>⋮ Please send text response</li> <li>⋮ Please send image response</li> <li>⋮ Please send both</li> <li>⋮ Please answer from brand name</li> <li>Other incoming message</li> </ul>	<p>* Label <input type="text" value="Please send image response"/></p> <p>* Outcome API Name <input type="text" value="Please_send_image_response"/></p> <p>Condition Requirements to Execute Outcome  <input type="text" value="All Conditions Are Met (AND)"/></p> <p>Resource <input type="text" value="A Interaction from Get_the_messa..."/> Operator <input type="text" value="Contains"/> Value <input type="text" value="Please send image"/> </p> <p><span>+</span> Add Condition</p>	

## Send text response

 Edit Create Records
✕

Send text answer (*Send\_text\_answer*) 

Create an outgoing response which includes only text message

**How to Set the Record Fields**

Use all values from a record









Use separate resources, and literal values

**Create a Record of This Object**

\*Object

Interaction

**Set Field Values for the Interaction**

Field	←	Value	
<div style="border: 1px solid #ccc; padding: 2px;">VC__Brand_Endpoint__c</div>	←	<div style="border: 1px solid #ccc; padding: 2px;">A<sub>a</sub> Interaction from Get_the_message_details &gt; Br... ✕</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC__Channel__c</div>	←	<div style="border: 1px solid #ccc; padding: 2px;">SMS</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC__Content_Text__c</div>	←	<div style="border: 1px solid #ccc; padding: 2px;">Hello from Vonage BOT example</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC__Direction__c</div>	←	<div style="border: 1px solid #ccc; padding: 2px;">Outbound</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC__Interaction_Originator_Type__c</div>	←	<div style="border: 1px solid #ccc; padding: 2px;">Bot</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC__Interaction_Originator__c</div>	←	<div style="border: 1px solid #ccc; padding: 2px;">Vonage BOT example</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC__Party_Endpoint__c</div>	←	<div style="border: 1px solid #ccc; padding: 2px;">A<sub>a</sub> Interaction from Get_the_message_details &gt; Pa... ✕</div>	
<div style="border: 1px solid #ccc; padding: 2px;">VC__Thread__c</div>	←	<div style="border: 1px solid #ccc; padding: 2px;">A<sub>a</sub> Interaction from Get_the_message_details &gt; Th... ✕</div>	

+ Add Field



## Send image response

✕

📄
Edit Create Records

Send image answer (*Send\_image\_answer*)
✎

🔍
Multiple

**How to Set the Record Fields**

Use all values from a record

Use separate resources, and literal values

**Create a Record of This Object**

\*Object

Interaction

**Set Field Values for the Interaction**

Field	Value
VC_Brand_Endpoint_c	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Aa Interaction from Get_the_message_details &gt; Br... ✕</span> <span style="float: right; border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">🗑</span>
VC_Channel_c	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">MMS</span> <span style="float: right; border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">🗑</span>
VC_Direction_c	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Outbound</span> <span style="float: right; border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">🗑</span>
VC_Interaction_Originator_Type_c	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Bot</span> <span style="float: right; border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">🗑</span>
VC_Interaction_Originator_c	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Vonage BOT example</span> <span style="float: right; border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">🗑</span>
VC_Party_Endpoint_c	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Aa Interaction from Get_the_message_details &gt; Pa... ✕</span> <span style="float: right; border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">🗑</span>
VC_Resources_c	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">0698d0000F4grxAAB</span> <span style="float: right; border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">🗑</span>
VC_Thread_c	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Aa Interaction from Get_the_message_details &gt; Th... ✕</span> <span style="float: right; border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">🗑</span>

+ Add Field

Note: MMS images are only supported in the USA and Canada. The **VC\_Resources\_c** value is the record Id of the ContentDocument that includes the image, which can be found in the Files app.

## Troubleshooting

1. MMS Images are only supported in the USA and Canada.
2. Any message can only include one resource (i.e. image, audio, video, file).
3. For MMS: When using images in the message, it is impossible to use Brand name in the from field. Only an LVN can be used with an image.
4. In order to send and receive messages for a USA LVN, it must be configured as part of 10DLC.
5. When a customer sends a file as an attachment (via the Documents on their mobile) it will arrive at Vonage with the file name, and so we can present the file name in CSF. If they send the file as an audio, video or image, the original name of the resource is not available. The name of that file in CSF will only include the file type and the arrival time stamp.
6. Files that are bigger than 6MB may fail to arrive due to a Heap Exception.
7. Outbound WhatsApp messages that have an audio file attached cannot include a caption.
8. In case the widget UI destination drop down is empty, please refer to [Handling Customer's Phone Numbers](#).
9. As of mid December 2023 Version 1.0.0 (the initial GA) is unable to import new WhatsApp templates. This is due to a change on WhatsApp limits for the query response size. In order to mitigate this issue - please upgrade to version 1.1.0
10. For already imported WhatsApp templates which are marked as "unsupported" due to unsupported header types or buttons: in order to utilize the enhanced template support introduced in version 1.10 and later, please delete those templates and import them again. Templates which are already supported do not need any action, they will continue to work as before.
11. In case of upgrade: If the "Vonage Communication Platform Admin Area" was open before the upgrade - please close its tab and open it in a new tab in order to reload all the latest updates regarding the WhatsApp templates.
12. In the case that an sObject does not include its own PHONE fields and is instead using the Contact sObject fields: if there is a need to automatically link incoming interactions to a Case sObject, then a custom field of type PHONE should be added to the Case sObject, and this field should automatically get a copy of the PHONE field from the Contact.
13. In case that all the Phone fields of a specific record are null, the following warning will be presented. To disable this feature, please refer to [Notifications Management](#).

## Previous Release Notes

### Release Notes - v1.4

#### What's New?

1. SMS Templates support for Flow and Apex.
2. Customization tab for controlling mobile notifications and warnings.

## Release Notes - v1.3

### What's New?

1. Updates to the UI of the widget to show message delivery status and the channel used.
2. A new tab in the Admin area to configure file names, along with enabling/disabling the ability to send incoming files from conversations as outgoing files in other interactions.

## Release Notes - v1.1

### What's New?

1. Added support for Video and Document header types in WhatsApp templates.
2. Added support for static URL buttons in WhatsApp templates.
3. File names are presented for both outgoing and incoming interaction for the end user and the agent.
4. Resources selector (the attach button on the Agent's UI) now includes an icon to indicate the resource type.
5. The "troubleshooting" section of the users' guide was enhanced.

### Bug Fixes

1. Allow to link sObjects without owner field to the interaction (i.e. the User sObject).
2. Handle the case when PHONE/FAX fields are not accessible.