Vonage Conversations for Salesforce

Agent Guide

Pre-Requisites
Sending Messages from the UI
    Sending an SMS Message
    Sending a Message with a Resource
    Sending a WhatsApp Message
Mobile Usage
    Incoming Messages
    Outgoing Messages
    Outgoing Messages from Other Agents
    Handling a record not owned by the agent on Mobile

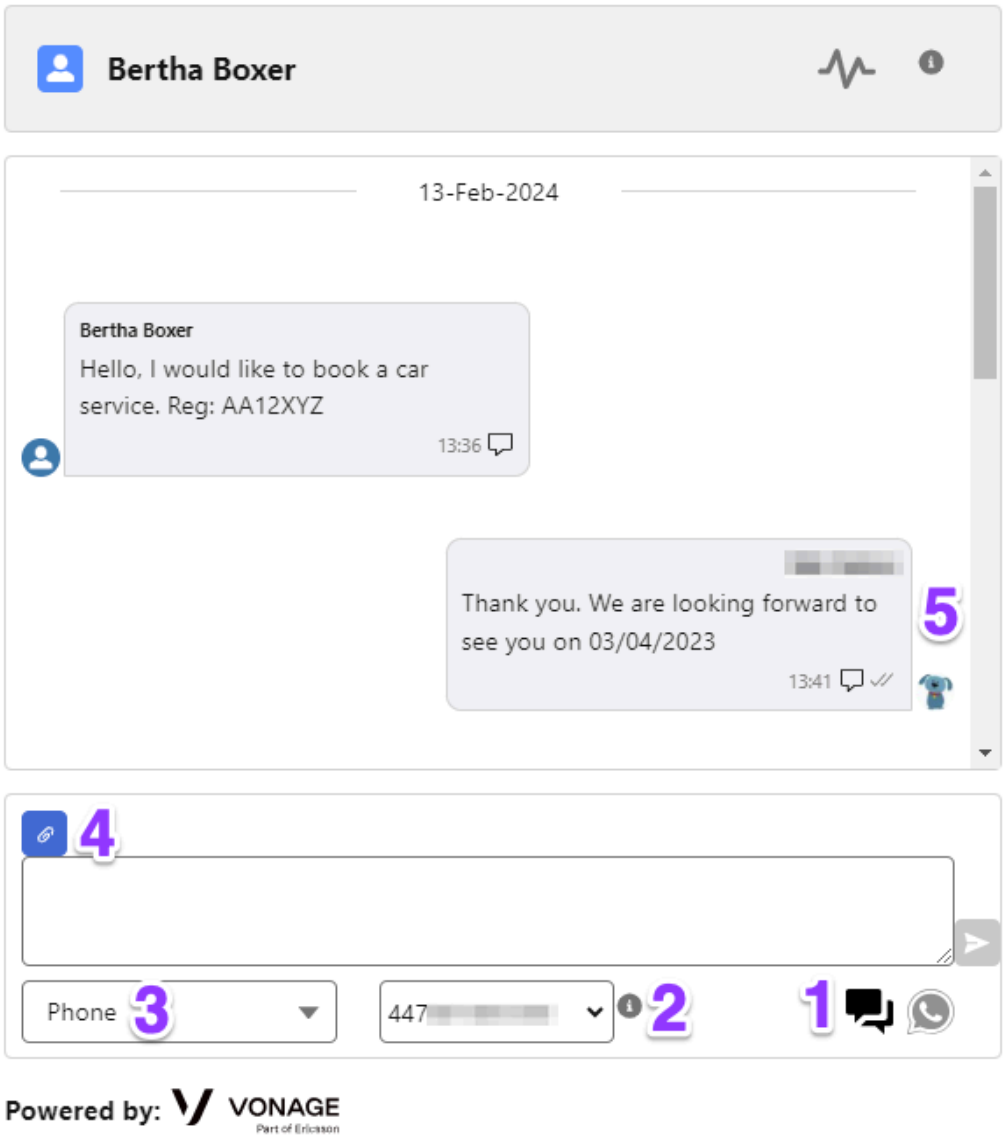
Pre-Requisites

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.
    b. To use SMS/MMS,
3. To use images, your LVN must be a USA/CA number that is approved for 10 DLC.

Sending Messages from the UI

Sending an SMS Message

To send a message, navigate to the record for the recipient of that message. You will see this UI on the page:



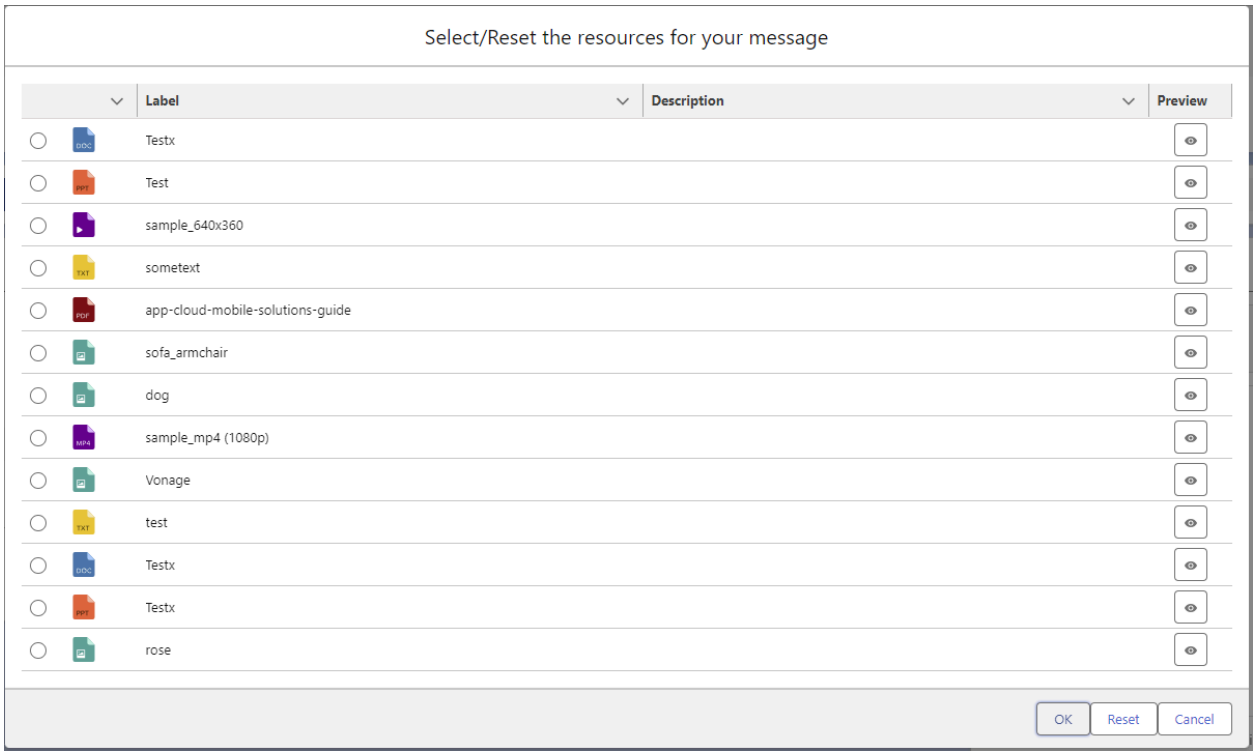
1. First, to send an SMS/MMS message, ensure that the speech bubble icon is selected in the bottom right corner.
2. Next, choose the phone number that you want to send the message to; the drop down is automatically populated with all phone numbers associated with that record.
3. The next drop down shows the brand number the recipient will see. For example, you may have one brand number for communications in the USA and another for communications within the UK. If the permissions have been enabled, you can use the drop down to choose between the numbers; if not, the default number will be selected.
4. You can attach an image to the message using the link button; see the next section for more information.
5. Once you've sent a message, you will be able to see it in the conversation history along with the channel used and the message delivery status. The name of the agent that sent the message will be shown, but you can also see it by hovering over the sender icon.

Sending a Message with a Resource

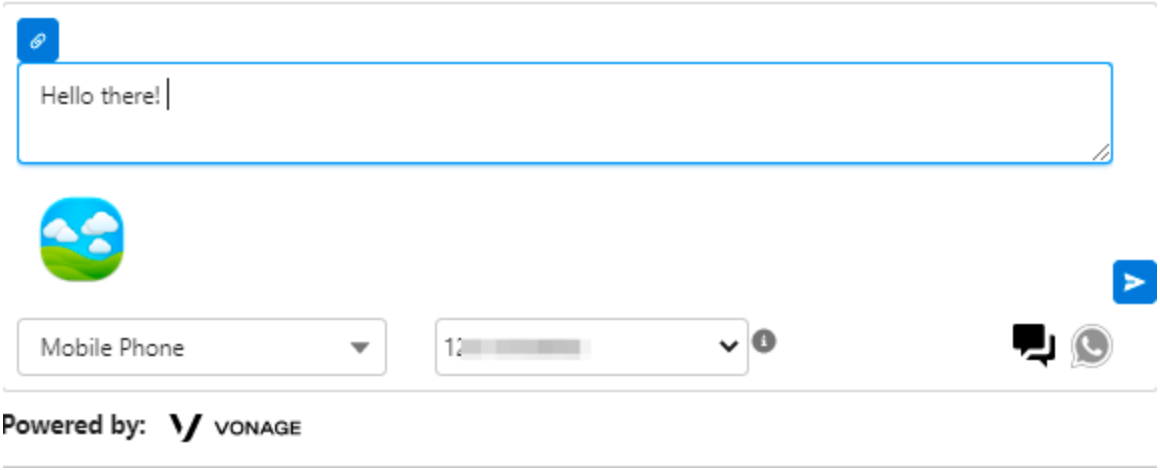
Note: MMS Images are only supported for USA or Canada numbers. The LVNs used must be approved for 10DLC.

When sending messages, you can attach **one** resource by selecting the link button in the top left:

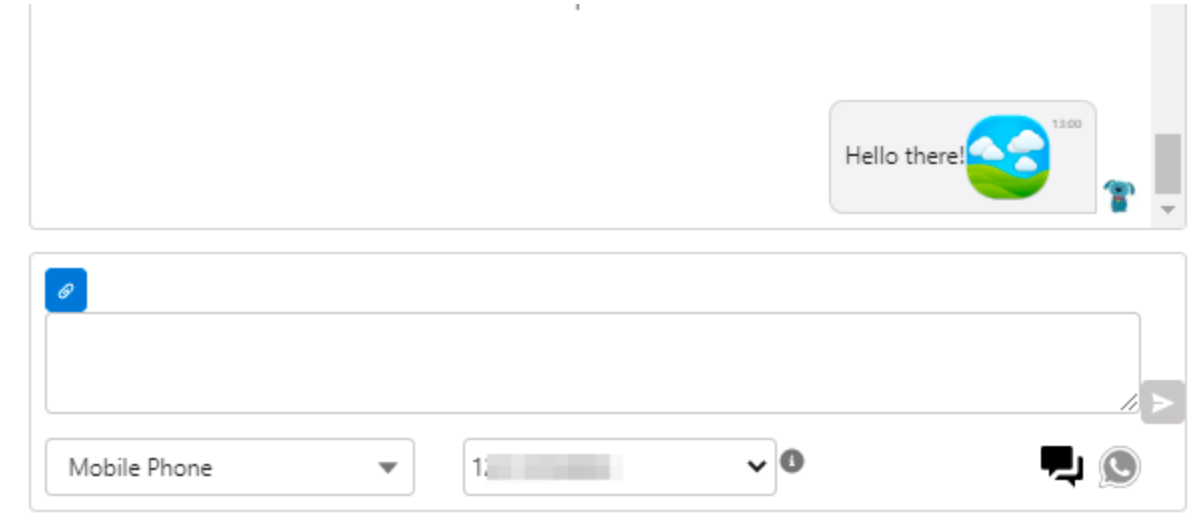
You will see a list of images that you are permitted to send. The icon on the left indicates what type of file that resource is, and you can preview the resource by clicking the eye icon on the right:



These resources are managed through the 'Files' section. Once selected the resource will be presented in the message editor; for example, here an image has been attached to the message:

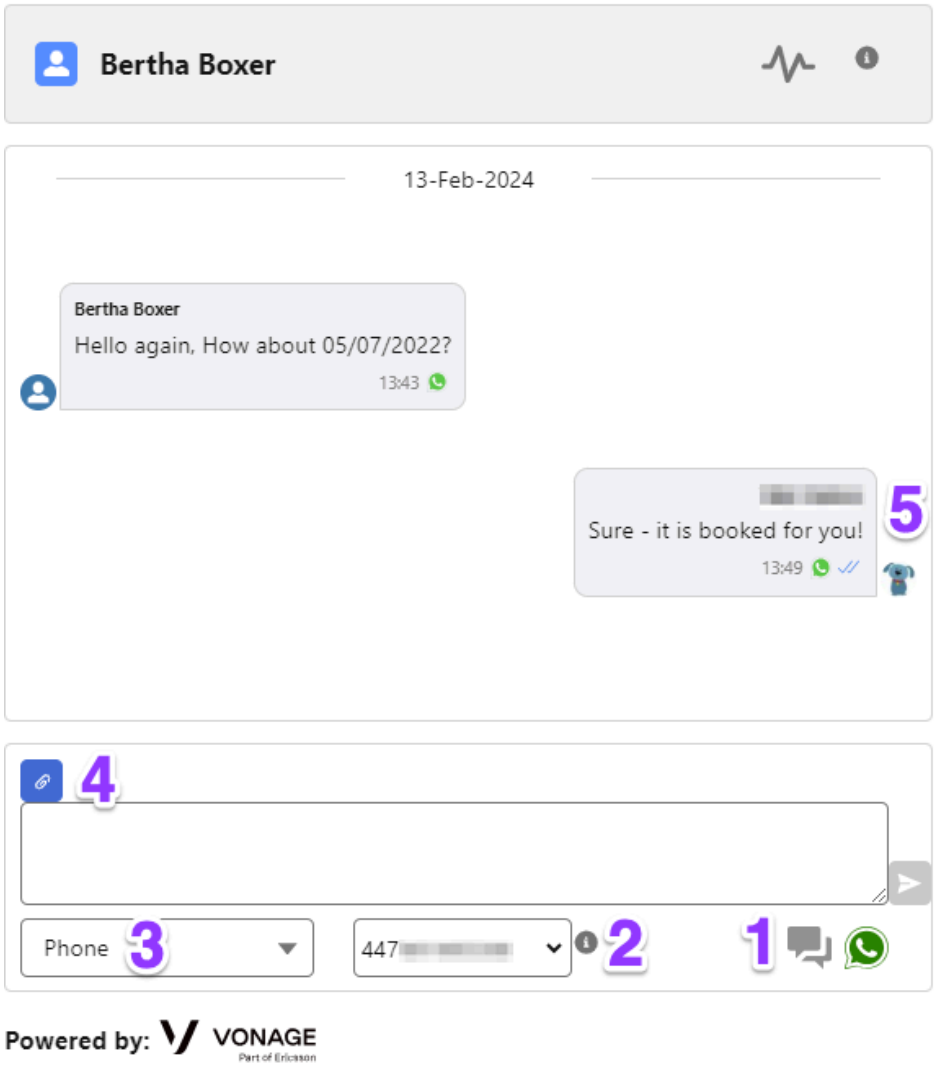


Once sent, it will be shown in the conversation history:


Hello there!
Mobile Phone
Powered by: VONAGE

Sending a WhatsApp Message

To send a message, navigate to the record for the recipient of that message. You will see this UI on the page:



1. First, to send a WhatsApp message, ensure that the WhatsApp icon is selected in the bottom right corner.
2. Next, choose the phone number that you want to send the message to; the drop down is automatically populated with all phone numbers associated with that record.

3. The next drop down shows the brand number the recipient will see. For example, you may have one brand number for communications in the USA and another for communications within the UK. If the permissions have been enabled, you can use the drop down to choose between the numbers; if not, the default number will be selected.
4. You can attach an image to the message using the link button; see the next section for more information.
5. Once you've sent a message, you will be able to see it in the conversation history along with the channel used and the message delivery status. The name of the agent that sent the message will be shown, but you can also see it by hovering over the sender icon.

Mobile Usage

Note: The following behavior is specific for the Salesforce Mobile Application.

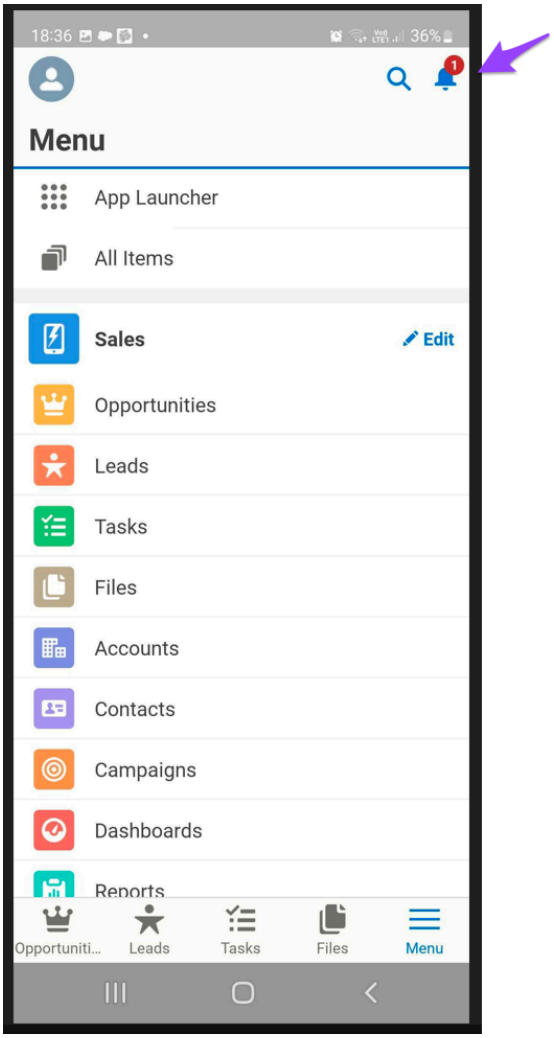
Managing Notifications

Mobile notifications can be managed in the Setup and Configuration tab of the Admin dashboard.

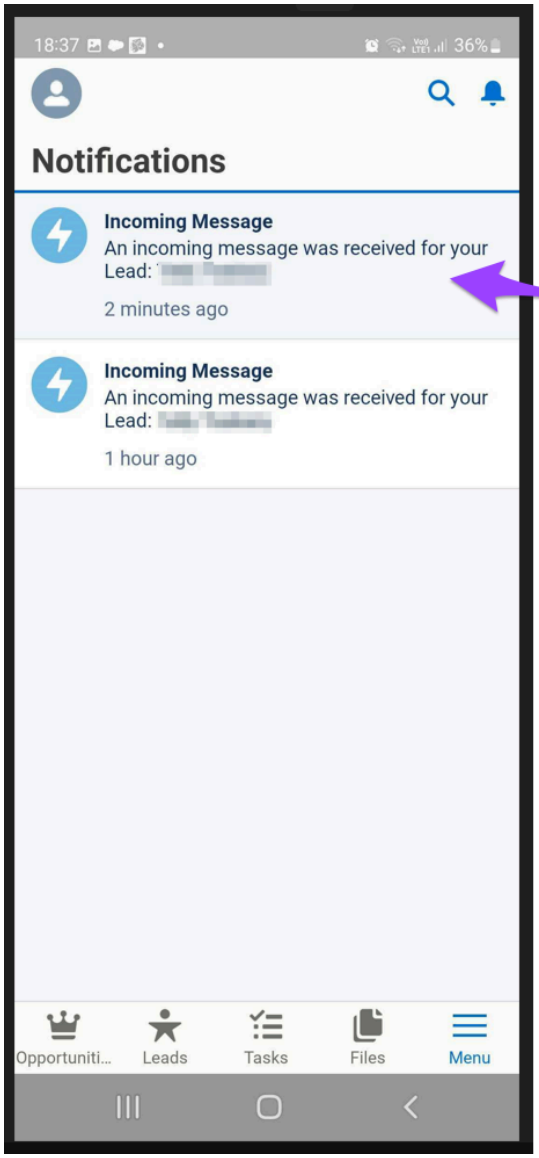
Incoming Messages

Each incoming message is connected to one or more records; this can be a Lead, Case, Account, Contact, Opportunity or Custom Object. Each of the related records has an owner; all the owners of a record will get a notification to their mobile about a new incoming message.

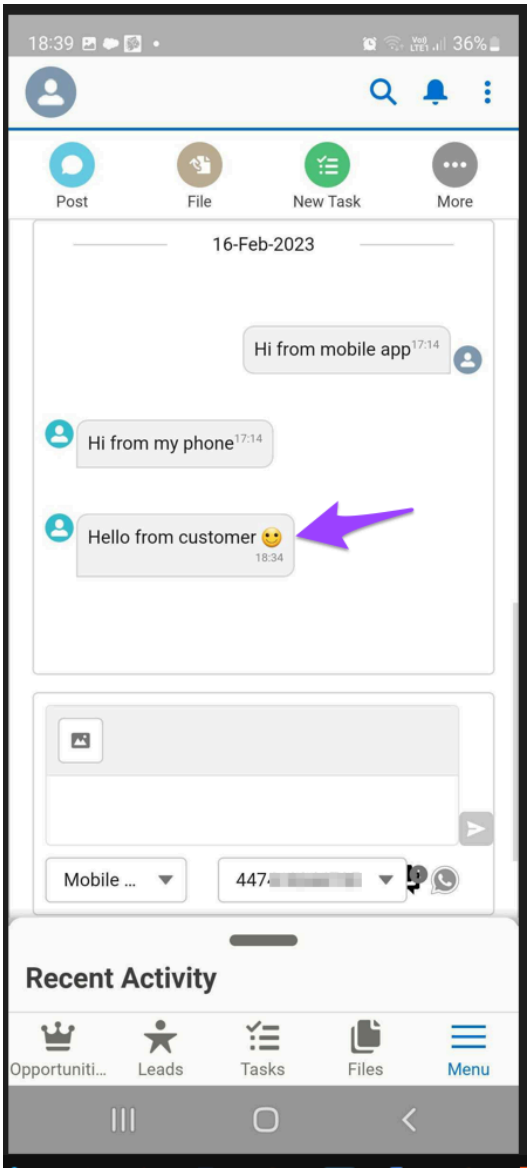
The notification looks like this:



When selecting the "Bell", the following message is presented:

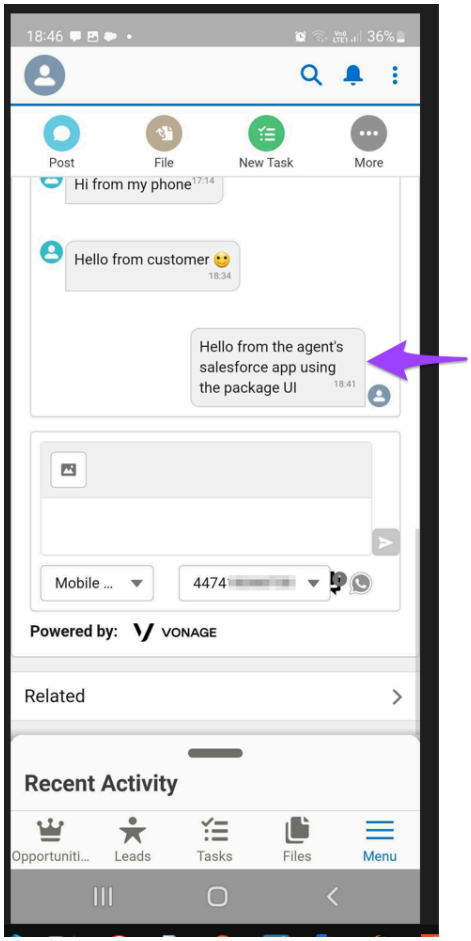


While selecting the relevant message, the agent is redirected to the updated record and the conversation is refreshed with the latest incoming message:



Outgoing Messages

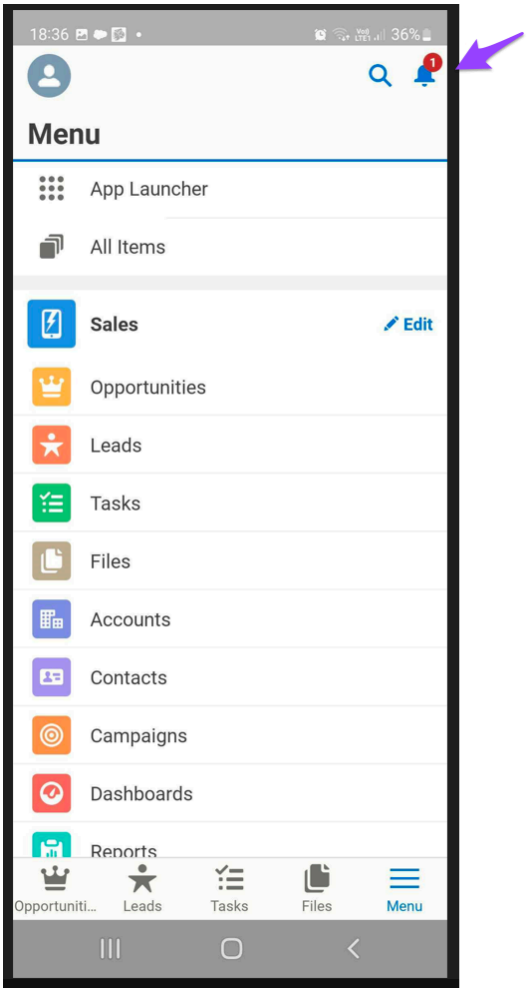
When the agent is sending an outbound message from the Mobile Salesforce App, the conversation is refreshed automatically with their message without any notification:



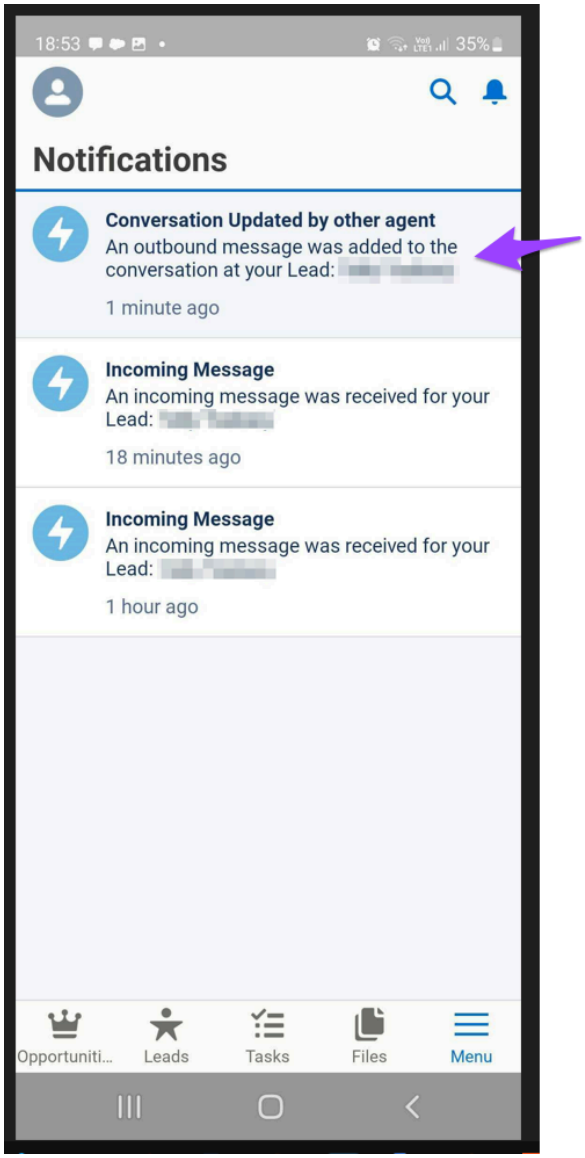
Outgoing Messages from Other Agents

As the same record can be watched and sometimes handled by several agents, another agent that is not the owner of the record could also send an outbound message to the customer. In this case, the record owner will get a notification to their mobile about the new outgoing message from the other agent.

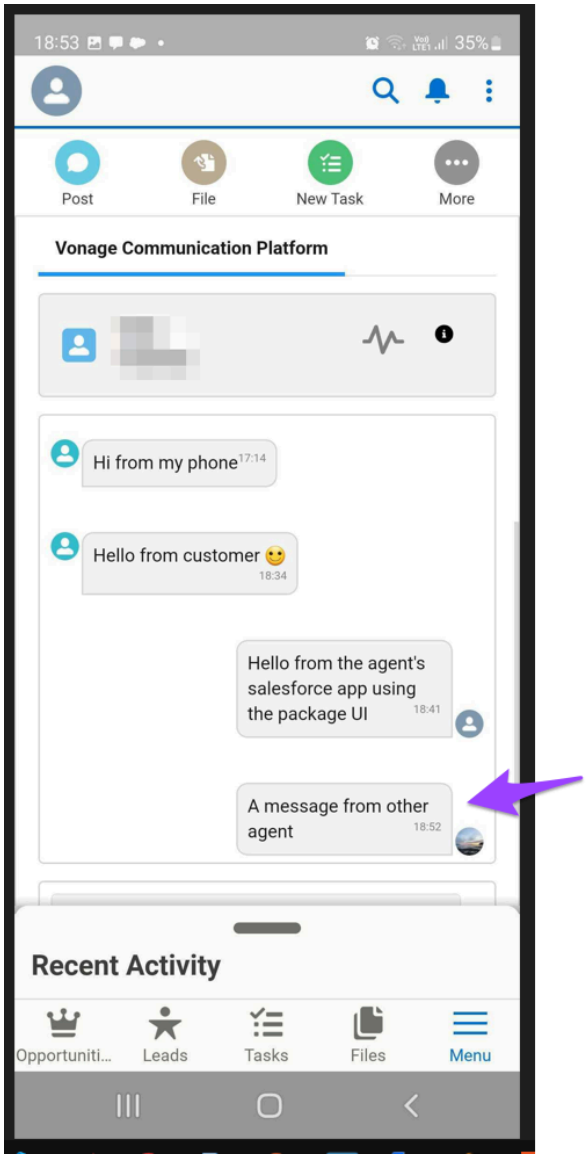
The notification looks like this:



When selecting the "Bell", the following message is presented:



While selecting the relevant message, the agent is redirected to the updated record and the conversation is refreshed with the latest incoming message:

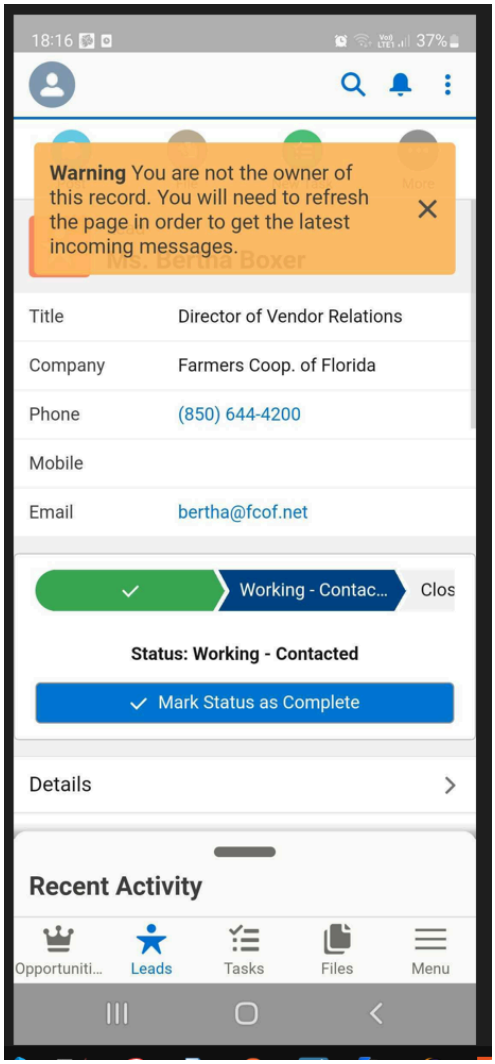


Notice that each agent has their own avatar, so it is easy to see that the two outbound messages were sent by two different agents.

Handling a record not owned by the agent on Mobile

As described above, the notifications regarding incoming messages are sent only to the mobile of the owner.

If the agent is handling a record which they do not own, they will be presented with a specific warning:



In order to see the incoming and outgoing messages, the agent will need to refresh .