

Vonage Conversations for Salesforce

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Pre-Requisites

This guide will explain how to deploy the Vonage Conversations for Salesforce package and send an SMS/MMS message using the UI.

1. A Vonage account with your api-key.



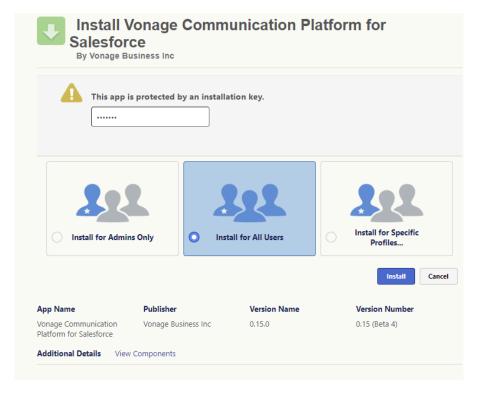
- 2. To use WhatsApp, your external account should be configured and approved for use with Vonage; if you are a managed customer, <u>you can follow this guide</u>, or if you are non-managed <u>you can follow our self-service guide</u>.
- 3. Note: MMS messaging is only available in the US & Canada. To use images, your LVN must be a USA/CA number that is approved for <u>10 DLC</u>.
- 4. For RCS onboarding support, please connect with your Vonage account manager or point of contact.



Deployment

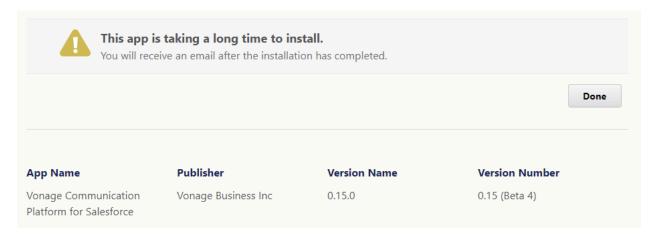
To install the package, you will need the deployment URL and installation key. These will be provided by your Vonage point of contact.

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

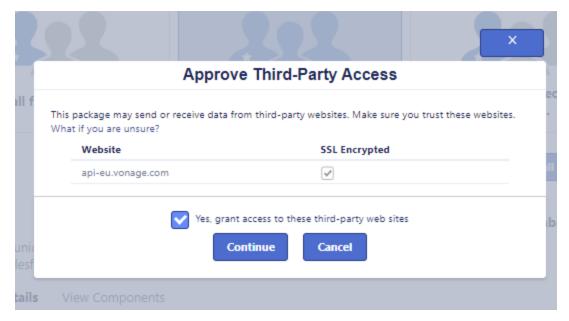


Select the group that you want to install the package for, and enter the installation key provided. The warning below may appear. If it does, select "Done" and wait for the package deployment to complete.





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



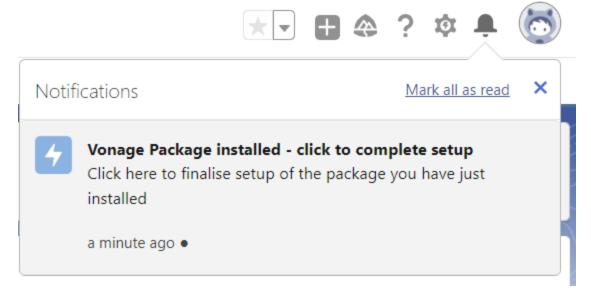
First Time Deployment

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

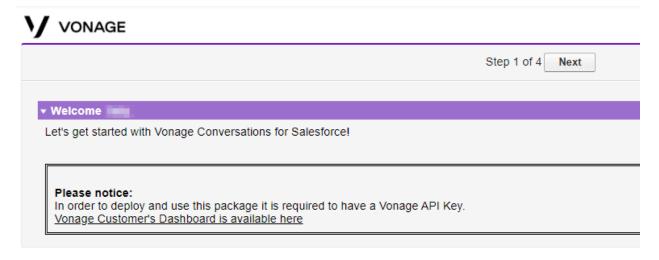




Select the link in the message to complete the setup:

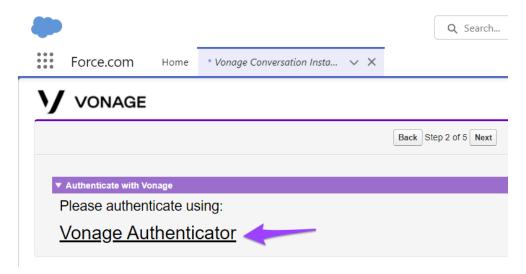


Click 'Next' to start the deployment process:



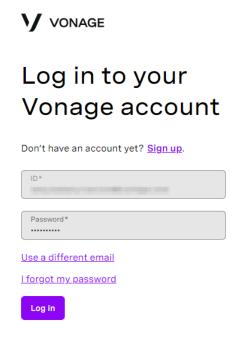
For Step 2, click the link to authenticate with Vonage - please ensure that you are logged-off from any other Salesforce ORG while completing this process:





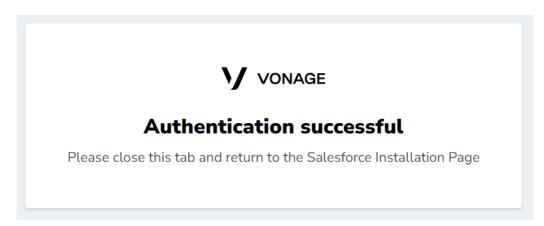
Failure to complete the authentication will cause errors in later stages of the wizard.

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

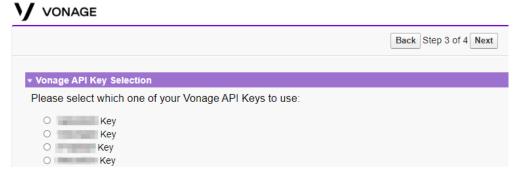


Once authentication is completed, you will see this confirmation and can return to Salesforce:





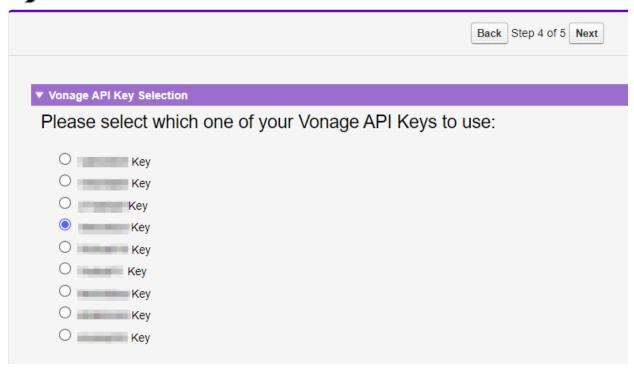
Step 3 of the installation wizard contains a link back to the Vonage customer dashboard, where you can configure your account, add API keys, and rent additional LVNs:



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



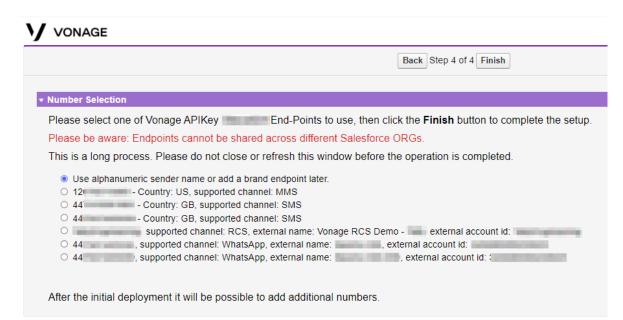
VONAGE



The final step will allow you to select one of the following options:

- The default option is to continue without selecting any endpoint. Later, using the Admin application you can add your Brand or select any of your available numbers and external accounts.
- Alternatively, select one of the numbers or external accounts associated with the selected Vonage API Key.

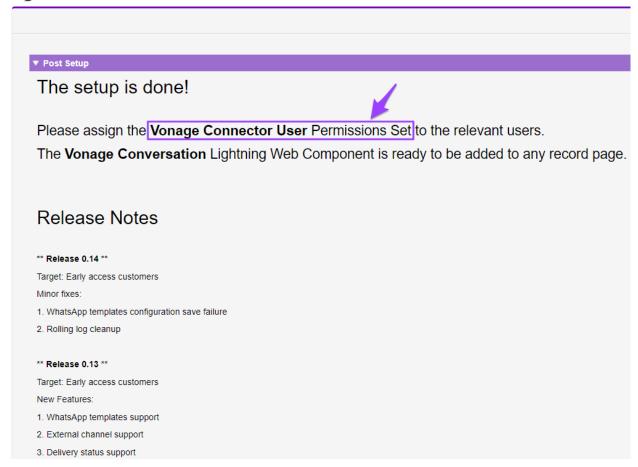




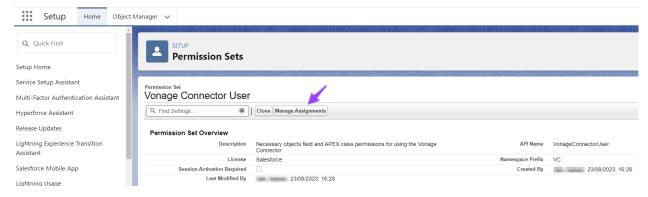
Once this is complete, setup is done and you will see the following message:



VONAGE



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:



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.

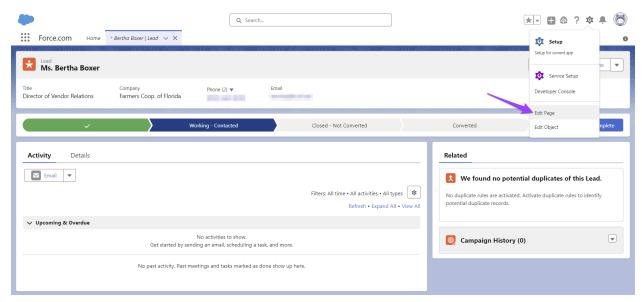


UI Setup

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

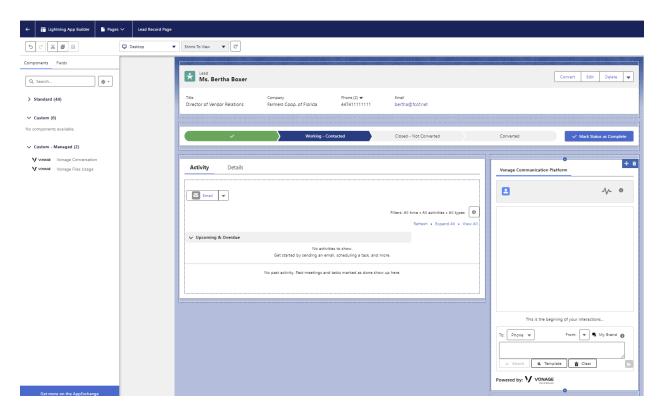
Add the widget to a standard sObject

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

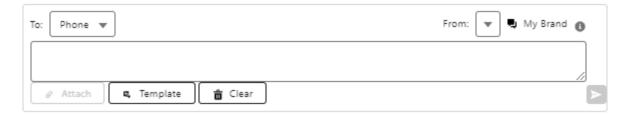


Drag the widget to the suitable place on the page using the components menu on the left. For example, editing the page for a lead would take you to this screen:





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:





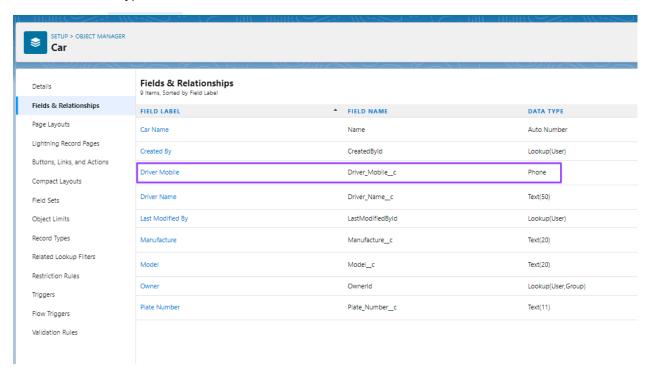






Add the widget to a custom sObject

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:

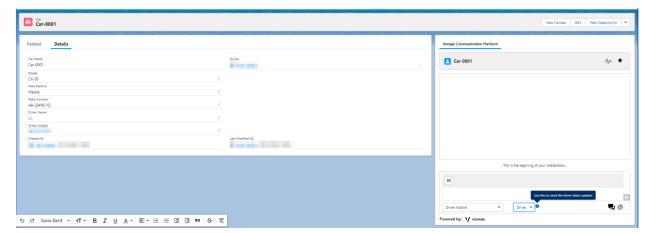


The VC_Interaction__c sObject should also contain a field that has a lookup relationship with the Car__c sObject:





Once that's in place, it is possible to add the widget to the Car__c record page:





Sending Messages from the UI

Sending an SMS or 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, choose the brand endpoint you want to use to send the message using the drop down. This is automatically populated with all of the different phone numbers that you can use, across all of the different channels.
 - a. 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.
- 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. You can attach an image to the message using the 'Attach' button; see the <u>next section</u> for more information. You can also choose to use a predefined template for your message by selecting the 'Template' button the list of available options will change depending on the selected endpoint.
- 4. 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 <u>10DLC</u>.

When sending messages, you can attach **one** resource by selecting the 'Attach' button in the bottom left:

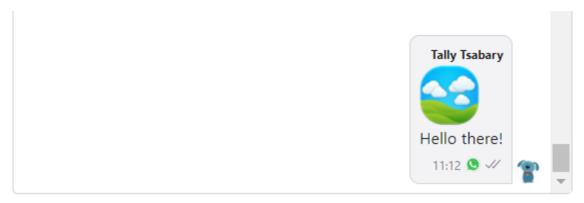


You will see a list of images that you are permitted to send. The icon on the left indicates what type of file that resource is, and you can preview the resource by clicking the eye icon on the right:





These resources are managed through the 'Files' section. Once selected the resource will be presented in the message editor, and once sent it will be shown in the conversation history:





Flow Development

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

This guide will explain how to use the template to send an automatic response based on an incoming message, but full details on all of the templates can be found in the <u>Admin & Developer guide</u>. All of the provided flow templates are deactivated. In order to use one, please copy it and amend it to the specific org needs.

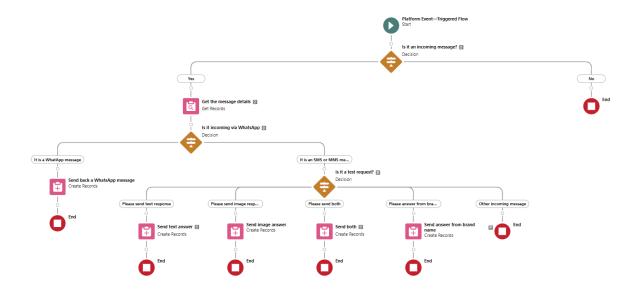
Send Automatic Response

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

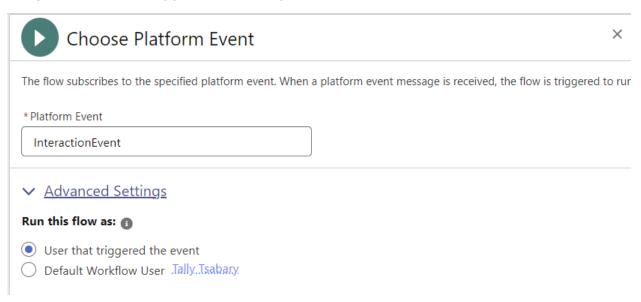
The flow: The Flow is activated when a new SMS/WhatsApp message is created in org. If it is an outbound message, the flow ends. If it is an inbound message, the flow will do the following:

- 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.





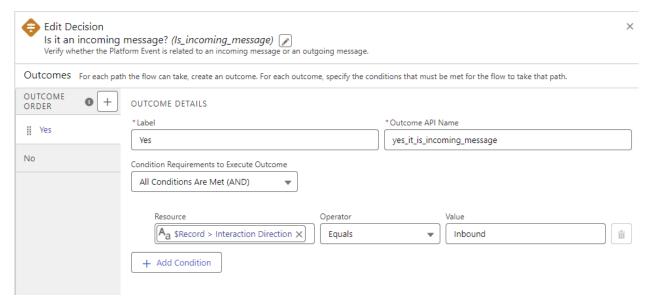
The platform event trigger for initiating the Flow:



Is it an incoming message?

For the "Yes" section:





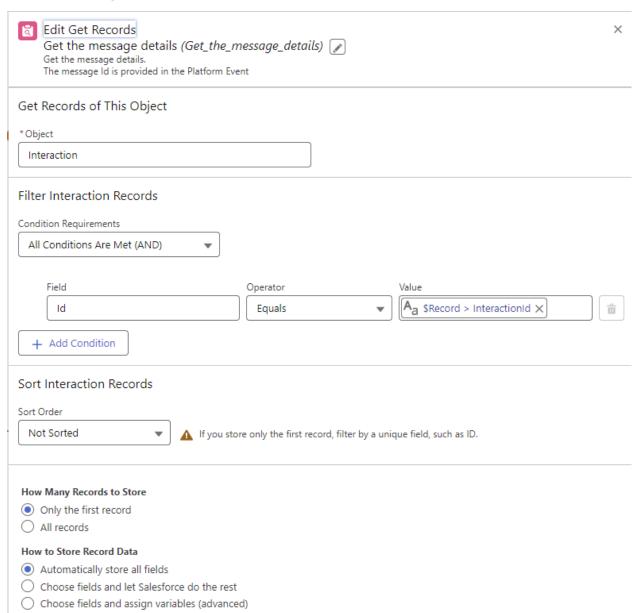
Note: While copying the template to your own Flow, make sure that the relevant field names are updated to reflect the package name space.

For the "No" section:



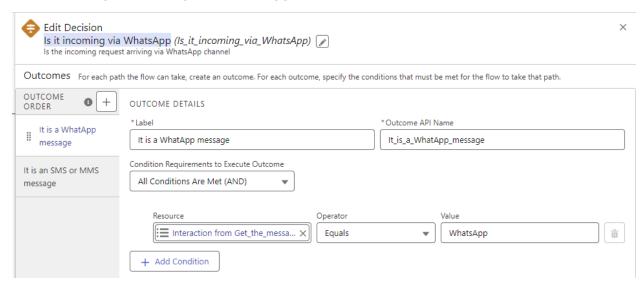


Get the message details:



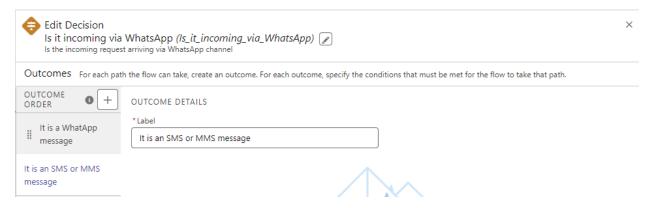


Is the message incoming via WhatsApp?



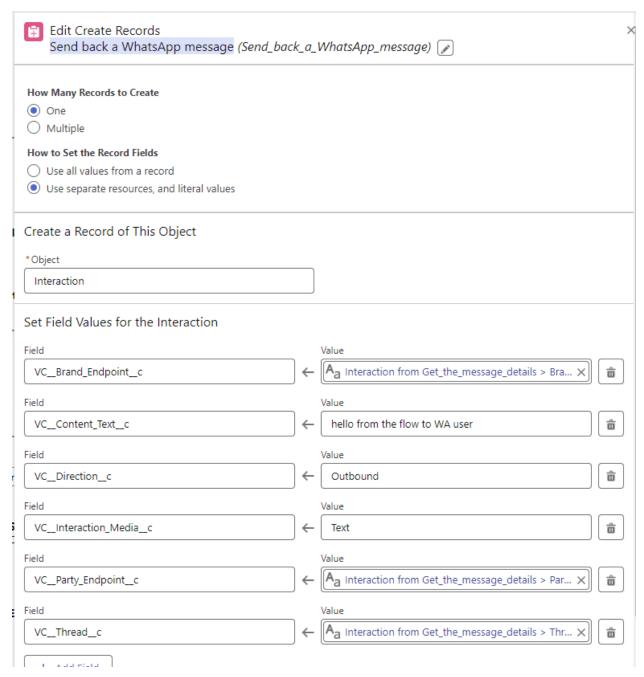
Note: The Resource name is: {!Get_the_message_details.VC__Channel__c}

Is the message incoming via SMS/MMS?





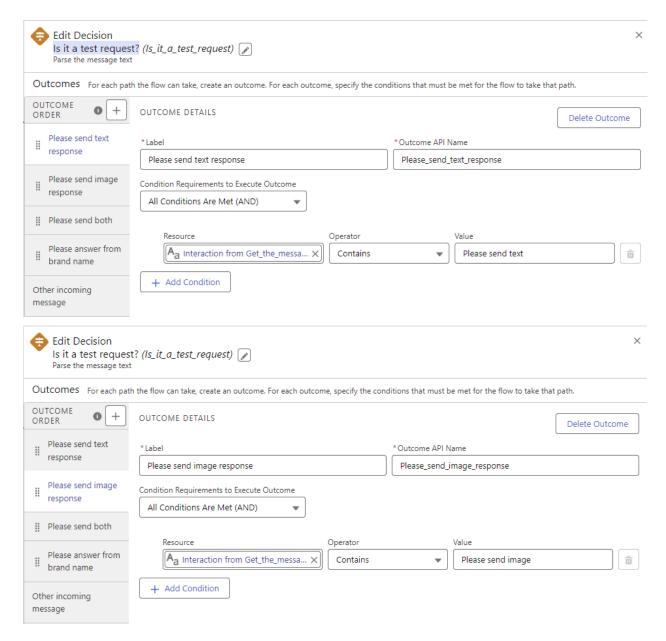
Send back a WhatsApp message



Is it a test request?

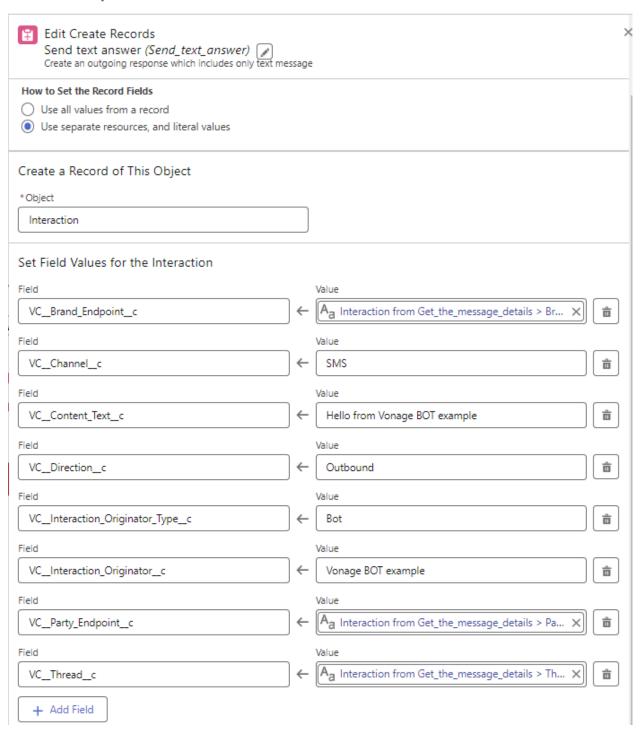
Filtering the Flow for different types of responses based on the message content. The message content (the Resource field) is: {!Get_the_message_details.VC__Content_Text__c}





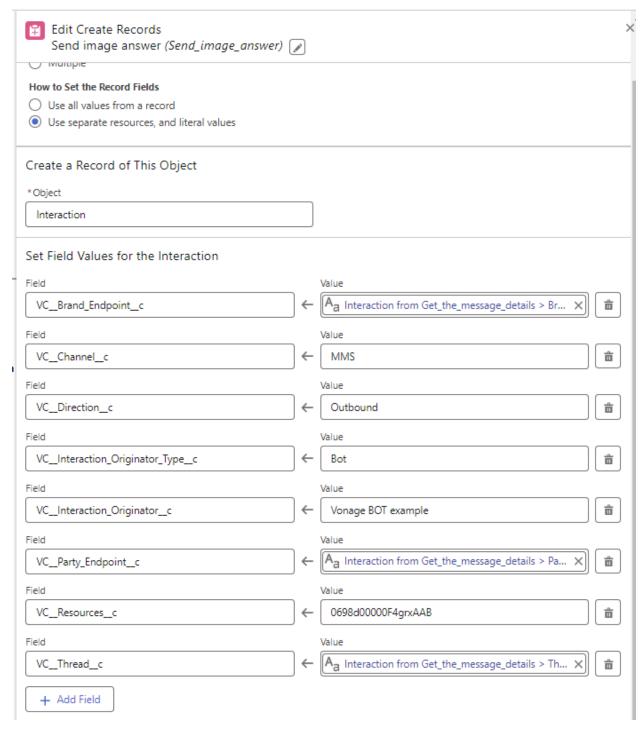


Send text response





Send image response



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.



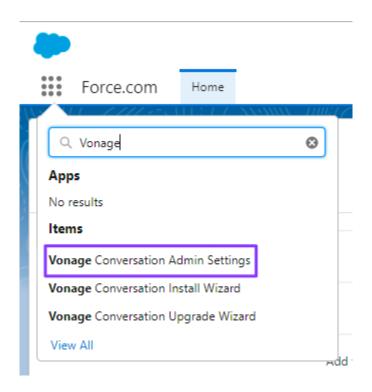


Troubleshooting and Support

The Admin Configuration Page allows the admin to access several useful troubleshooting and support functions:

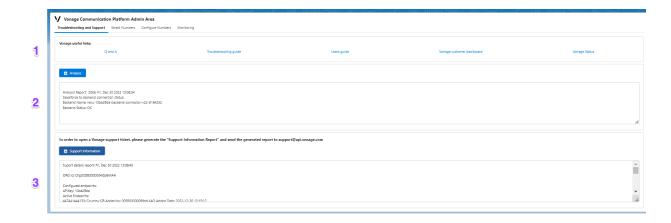
- 1. Check the backend connectivity status.
- 2. Fetch logs.
- 3. See shortcuts to the Vonage documentation, status page and customer dashboard.

To access the page search Vonage to find the 'Vonage Conversation Admin Settings':





The 'Troubleshooting and Support' tab contains three sections:



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 <u>Vonage support</u> 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'.