for

User Guide

Version 1.0

Table of content

Presentation

Octopush for Salesforce allows you to send SMS directly from Salesforce.com.
Flexible and seamless system to send SMS to your contacts, leads or campaign members in just few clicks.

With Octopush you can send SMS messages to more than 190 countries that are directly connected to our infrastructure for the best price.

This document intends to provide Octopush for Salesforce.com usage instructions to Salesforce.com users.
You should register to www.octopush.com to use this app.
Please ask your System Administrator for more information.

 In case of any support and queries , we welcome you to reach us directly at support@octopush.com.

Salesforce Installation

STEP 1: Choose your user target and click Install button

STEP 3: [IMPORTANT] You must allow Salesforce to connect to Octopush service

Salesforce Configuration

This configuration must be set by the Salesforce administrator depending of organization needs.

STEP 0: On system administrator profile, set Octopush app visible and Octopush Settings visible to be able to access to Octopush settings

STEP 1: Set Octopus settings (see next slide)
STEP 2: Set profile for users who will use Octopush for Salesforce
- Common user profile should be configured as below. (it depends on your needs)
    - Object permissions:

    - Tab settings

    - API Enabled on profile
    - Marketing user to "Checked" if you user is a campaign manager

STEP 3: Add buttons to layouts
- Page Layout for Contact, Lead & campaign
- Search Layout (Contacts List view & Leads List View)

Octopush Settings

STEP 1: Click on « Octopush Settings» tab

Octopush Settings   Save

▼ **General information**

User Name   octopush_login@xxxxxxx.com

API KEY   xxxxxxOctopushAPIKEYxxxxxxxxx

Real SMS Sending   ☐

History Recording   ☑

Default Sender Name   My Company

SMS Purpose   ◉ Marketing SMS   ○ Transactional

▼ **Contact us**

Fill in your Octopush's Login (email format) provided when you first registered on Octopush website

If you want to test your SMS sending keep it uncheck (simulation mode) Otherwise it will send real SMS. Must be checked when in PRODUCTION

Provide your Octopush API KEY. You can get in from Octopush customer interface at Octopush.com (My account)

Activate or not history tracking of all SMS. You should enable it if you want to do some reports.

When you send a SMS , you must specify if it is for marketing or transactional purpose (alert, info, reminder, step confirmation, etc...)

This is the default sender ID (name) that will be automatically appear in all SMS sent through Salesforce.
Your Alfa numeric sender ID would be automatically replaced by a short code when the country, you are sending SMS, does not support Alfa numeric sender ID.

❑ Octopush Settings tab must be visible and editable only for administrators
❑ This settings are mandatory to be able to use Octopush for Salesforce

Send SMS to any physical person

STEP 1: Click on « SMS Send» tab

STEP 3: Enter SMS content

STEP 2: Enter a mobile number (international format) +countrycode+number

Optional STEP: You can do some deffered sending by checking this field and specifying your desired sending date / time.

STEP 4: Click on « Send » button

❑ TIPS: The current info message (in yellow box) informs you that your are in simulation mode. It means that all SMS sent won't cost any Octopush credits with this mode made for testing. This option can be modified in Octopush Settings (contact your administrator)

Send SMS to individual Lead or Contact (1/2)

Mr Mike Braund

From a contact or lead

Customize Page | Edit La

STEP 1: Click on « Send SMS » button to send a SMS to current lead, contact or any physical person

Show Feed

« Back to List: Leads

Open Activities [0] | Activity History [0] | Campaign History [0] | HTML Email Status [0] | Notes | Content Deliveries [0] | Approval History [0]

Lead Detail

Edit Delete Convert Clone Find Duplicates Send SMS

Lead Owner	salim mohamed [Change]
Name	Mr Mike Braund
Company	Metropolitan Health Services
Title	VP, Technology
Lead Source	Purchased List
Industry	Banking
Annual Revenue	€5,200,000
test	
Address	156 avenue République Paris, Paris 75002 FRANCE
Product Interest	GC5000 series
SIC Code	2768
Number of Locations	130
Created By	salim mohamed, 06/06/2012 10:01
Description	

Phone	
Mobile	+33600000001
Fax	
Email	likeb@metro.com
Website	
Lead Status	Open - Not Contacted
Rating	
No. of Employees	155
Current Generator(s)	All
Primary	Yes
Last Modified By	salim mohamed, 12/06/2015 11:50

Default mobile phone field will be used as SMS recipient phone number.
International format is required + country code; number

Edit Delete Convert Clone Find Duplicates Send SMS

❑ TIPS: If mobile phone is not set, you can fill it on next screen (after clicking on « Send SMS » button)

Send SMS to individual Lead or Contact (2/2)

Send sms campaigns or simple sms to your contacts, leads and more..

Send SMS

STEP 3: Click on « Send SMS » button to send a SMS to current lead or contact

Send   Cancel

Send Message

Recipient Name	Mike Braund	
Mobile Number	+33600000001	
Additional Mobile Phone		
SMS Template		
Message		

Mobile number is automatically field with your contact mobile phone

459 characters remaining
1 SMS

Deffered Sending ☐

Deffered Sending Date   [30/06/2015 15:35]

Sender Name   SenderOcto

SMS Purpose   ○ Marketing SMS ● Transactional SMS

STEP 2: Fill all SMS information

Send   Cancel

❑ TIPS: you can modify mobile number if you want

Bulk SMS to Leads or Contacts (1/2)

STEP 3: Click on « Send SMS »

STEP 1: Create standard view to build your targeted contacts (or use an existing one)

STEP 2: Choose all contacts that you wish to send SMS to.

❑ TIPS: Filter only contacts (or leads) with mobile phone provided. If list contains contacts with no mobile phone, next screen will warn you about numbers of contacts with missing phone numbers.
❑ Reports can be done over this object to manage efficiently your SMS activity

Bulk SMS to Leads or Contacts (2/2)

Send sms campaigns or simple sms to your contacts, leads and more..
Send SMS to multiple person

STEP 3: Click on « Send SMS » button to send a SMS to all your contacts or leads

ℹ️ Your are currently in simulation mode. To send real SMS, please go to Octopush Settings tab and check Real SMS Sending.

Send SMS to contacts   Send SMS Cancel

List info

Total number of records	6
Records without mobile Number	0

This section will inform you about your contact or lead selection

Send Message

Additional Mobile Phone

Deffered Sending ☐

SMS Template 🔍

Deffered Sending Date [30/06/2015 15:38]

Message

Sender Name SenderOcto

459 characters remaining
1 SMS

SMS Purpose ⚪ Marketing SMS ⚫ Transactional SMS

Send SMS Cancel

STEP 2: Fill all SMS information

❑ TIPS: Filter only contacts (or leads) with mobile phone provided. If list contains contacts with no mobile phone, next screen will warn you about numbers of contacts with missing phone numbers.
❑ Reports can be done over this object to manage efficiently your SMS activity

Bulk SMS to Campaign (1/2)

From a campaign

STEP 2: Click on « Send SMS To Campaign » button to send a SMS to current campaign (all campaign members)

Campaign
N-DM Campaign to Top Customers - Nov 12-23, 2001

« Back to List: Contacts

Campaign Hierarchy [1] | Open Activities [0] | Activity History [0] | Attachments [0] | Opportunities [0] | Campaign Members

Campaign Detail
[Edit] [Delete] [Clone] [Manage Members ▾] [Advanced Setup] [Send SMS To Campaign]

Campaign Owner	😊 salim mohamed [Change]	Total Leads	3
Campaign Name	N-DM Campaign to Top Customers - Nov 12-23, 2001 [View Hierarchy]	Converted Leads	0
Active	✓	Total Contacts	4
Type	Direct Mail	Total Responses	0
Status	Completed	Num Total Opportunities	0
Start Date	23/09/2005	Num Won Opportunities	0
End Date	04/10/2005	Total Value Opportunities	€0
Expected Revenue	€2,500,000	Total Value Won Opportunities	€0
Budgeted Cost	€25,000		
Actual Cost	€23,500		
Expected Response (%)	7.00%		
Num Sent	15,000		
Parent Campaign			
Created By	salim mohamed, 06/06/2012 10:01	Last Modified By	salim mohamed, 05/05/2015 16:33
Description			

Campaign Members [Manage Members ▾]   Campaign Members Help ?

Action	Type	Mobile	Status	First Name	Last Name	Title	Company
Edit | Remove	Lead	0600000005	Sent	Kristen	Akin	Director, Warehouse Mgmt	Aethna Home Products
Edit | Remove	Lead			Andy	Young	SVP, Operations	Dickenson plc
Edit | Remove	Lead	0600000001	t	Bertha	Boxer	Director of Vendor Relations	Farmers Coop. of Florida
Edit | Remove	Contact	0600000006	Sent	_	smh1		Account 9
Edit | Remove	Contact	0600000004	Sent	_	smh3		Account 9
Edit | Remove	Contact	010000	Sent	_	smh2	qqq	Account 9
Edit | Remove	Contact	0000002	Sent	Michel	PERIE	IT Analyst	Salesforce.com

Always show me fewer ▲ / ▼ more records per related list

STEP 1: Manage your SMS campaign by adding, deleteing, importing campaign members

Bulk SMS to Campaign (2/2)

Send sms campaigns or simple sms to your contacts, leads and more..
Send SMS to multiple person

⚠️ **Warning:**
Some records have missing mobile phone. SMS will be sent only for records with a mobile phone provi...

ℹ️ Your are currently in simulation mode. To send real SMS, please go to Octopush Settings tab and ch...

Send SMS to campaign members   [Send SMS] [Cancel]

STEP 3: Click on « Send SMS To Campaign » button to send a SMS to current campaign (all campaign members)

List info

Total Number Of Records	7		Records Without Mobile Number	1
Total Number Of Leads	3		Leads Without Mobile Number	1
Number Of Contacts	4		Contacts Without Mobile Number	0

This section will inform you about your campaign membership

Send Message

Additional Mobile Phone [   ]   Deffered Sending ☐

SMS Template [   ] 🔍   Deffered Sending Date [30/06/2015 15:40]

Message [   ]   Sender Name [SenderOcto]

459 characters remaining
1 SMS

STEP 2: Fill all SMS information

SMS Purpose   ○ Marketing SMS   ● Transactional SMS

[Send SMS] [Cancel]

Estimation SMS Cost

Send sms or even sms campaigns to your contacts, leads and more...

Send SMS to multiple person

Warning:
Some records have missing mobile phone. SMS will be sent only for records with a mobile phone provided.

Your are currently in simulation mode. To send real SMS, please go to Octopush Settings tab and check Real SMS Sending

STEP 2: Click on « Estimate First » button to compute total estimation cost.

Send SMS to campaign members   Send SMS Estimate First Cancel

List info

Records Without Mobile Number   1
Leads Without Mobile Number   1
Contacts Without Mobile Number   0

STEP 1: Fill all SMS information

Number Of Contacts   4

Send Message

Additional Mobile Phone

SMS Template

Message

459 characters remaining
1 SMS

Send sms or even sms campaigns to your contacts, leads and more...

Send SMS to multiple person

Messages
- Total sending cost:0.32
- SMS success:5/7
- SMS in failure:2/7

STEP 3: You will get total sending cost

Success:
Estimation cost completed! Click on Send SMS if you wish to send your SMS campaign

Send SMS to campaign members   Send SMS Estimate First Cancel

STEP 4: Click on « Send SMS» button to confirm your sending.

Total Number Of Records   7
Total Number Of Leads   3
Number Of Contacts   4

Send Message

Additional Mobile Phone

SMS Template

Deffered Sending Date   [18/06/2015 09:51]

Message   test

Sender Name   SenderOcto

455 characters remaining
1 SMS

❑ Estimation button will appear only if your campaign, bulk contacts or leads contains more than 400 recipients.
❑ Send SMS button is disabled and estimation is mandatory prior to send SMSs

Creating a SMS Template (1/3)

STEP 1: Enter a template name

STEP 2: SMS content

OPTIONAL STEP: Enter a Sender IID (Name)
Alfa numeric max 11 characters

STEP 3: Click on « Save » button

Using a SMS Template (2/3)

Send sms or even sms campaigns to your contacts, leads and more...

Send SMS

⚠️ **Warning:**
Some fields couldn\'t be merged. Please check your sms template...

Send Cancel

Send Message

Mobile Number	
Additional Mobile Phone	
SMS Template	Template Campaign 1 🔍
Message	Hello Get your 15% discount now! Visit our website! salim mohamed

393 characters remaining
1 SMS

Deffered Sending ☐

Deffered Sending Date [16/06/2015 16:16]

Sender Name My Company

Send Cancel

STEP 1: Click on SMS template lookup

Sender name is automatically filled by SMS Template sender name

STEP 3: SMS Content is automatically filled by SMS Template

STEP 2: Choose a SMS Template previously created

Search ~ salesforce.com - Developer Edition - Google Chrome

🔒 https://c.na9.visual.force.com/_ui/common/data/LookupPage?lkfm=p%3Af&lknm=p

🔍 **Lookup**

Search... Go!

You can use "*" as a wildcard next to other characters to improve your search results.

Recently Viewed SMS Templates

SMS Template Name	Message	Created Date	Created By
Template Campaign 1	Hello {!Contact.name} Get your 15% discount now! Visit our website! {!User.name}	11/05/2015	salim mohamed, 11/05/2015 13:12
Template 3	Bonjour fdsfdsfds	09/04/2015	salim mohamed, 09/04/2015 14:54
Template 1	Template Corp du message {!Lead.name} {!lead.namea} ligne2	31/03/2015	salim mohamed, 31/03/2015 16:29

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Dynamic SMS Template (3/3)

You can add some dynamic merge field when creating the template. Format is « {!Object.fieldName}»

❑ Dynamic templates are templates containing merge fields
❑ A merge field is a field you can put in your SMS message template to incorporate values from a record
❑ The syntax consists of an open curly brace and exclamation point, followed by the object name, a period, the field name (= API name) and a closing curly brace. For example, if you want to include the contact birthdate of your recipient, you could enter in your template message:
  ❑ "Hello {Contact.firstName}, your birthday is: {!Contact.Birthdate}. See you soon {!User.Company}"
  ❑ "your recipient's SMS will display: "Hello Mick, your birthday is: 02/03/1972. See you soon Octopush"

❑ You can only use as object for merge field: Contact, Lead or User object
❑ You can use all standard and custom fields from those 3 objects (see Salesforce documentation for available fields)
❑ If mistake is made, invalid merge fields will be replaced by an empty string
❑ Please take in consideration following use cases while using dynamic template:
  ❑ From SMS Send tab : merge fields are not suitable because it's not related to a contact or lead
  ❑ From a lead or contact: merge fields are directly replaced on SMS message field. Invalid fields are replace by empty string
  ❑ From lead list or contact list: a preview with the first valid contact or lead is available as info. Don't modify merge fields in message field.
  ❑ From a campaign: a preview with the first valid contact/ lead is available as info. Don't modify merge fields in message field. As it is a mix of leads and contacts you can do the following to cover leads and contacts at the same time:
    ❑ "Hello {!Contact.title} {!Lead.title} {Contact.firstName}{Lead.firstName},…. {!User. Website}"
    ❑ During merging process, when a contact is proceeded contact merge fields while be replaced correctly and other will be replaced by an empty string. The same will occurs for leads

Workflow Rules – Automatic SMS 1/4

❑ Instead of sending SMS manually, you can configure workflow rules to do it automatically.
❑ Workflow rules can help automate the following types of actions based on your organization's processes
    ❑ Example of usage:
        ❑ Send a SMS an to a contact for his birthday
        ❑ Send a SMS to a lead every 6 months
    ❑ Event-based SMS processes can be various

Workflow Rules – Automatic SMS 2/4

Use standard wrokflow to send your SMS on event basis
SMS Workflow Settings

STEP 1: Select your workflow related object (Lead or contact).

Generate SMS Task | Can...

Workflow Settings

Related object	Contact ▼
Mobile Phone Field	Account ID
Sender Name	SenderOcto
Additional Mobile Number	
SMS Template	🔍
SMS Purpose	○ Marketing SMS ● Transactional SMS
Message	

459 characters remaining
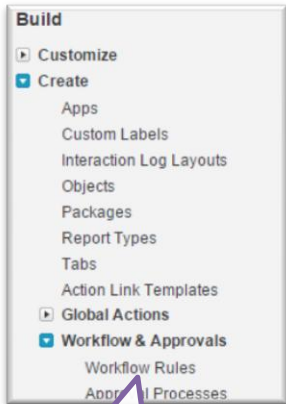1 SMS

Task Comment

Generate SMS Task | Cancel

STEP 2: According to object choosen, specify the mobile phone field (can be custom or standard field)

STEP 3: Fill all information needed for SMS: additional mobile, template, SMS Purpose, SMS content
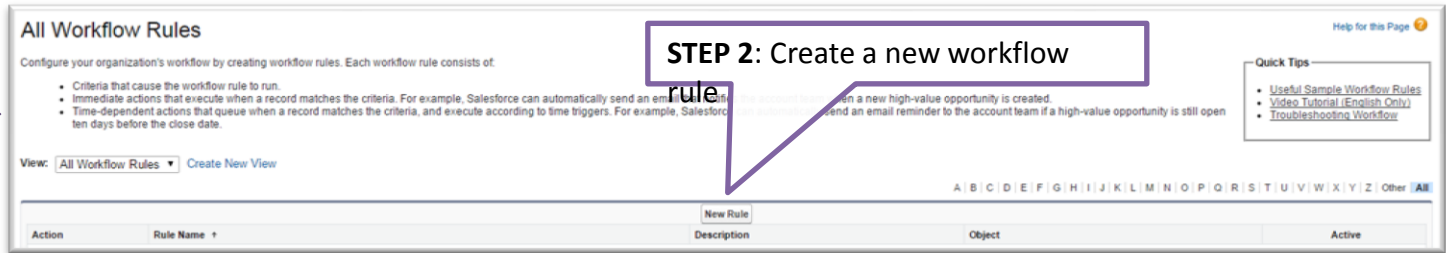
STEP 4: Click on « Generate SMS Task » to get the Task Comment. This is a auto-generated code that will be used during workflow creation. Copy in your clipboard the content of this field and paste it in task comment field (*see nextWorkflow Rules – Automated SMS 3/4 section*)
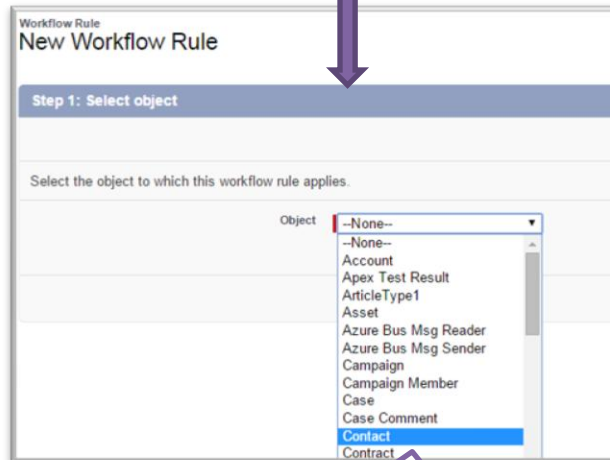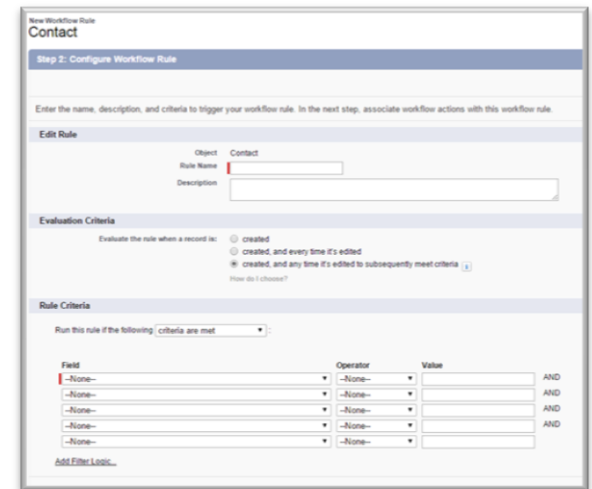
Workflow Rules – Automatic SMS 3/4

Build

▶ Customize
🔽 Create
   Apps
   Custom Labels
   Interaction Log Layouts
   Objects
   Packages
   Report Types
   Tabs
   Action Link Templates
▶ Global Actions
🔽 Workflow & Approvals
   Workflow Rules
   Approval Processes

All Workflow Rules

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email ... when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce ... send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

View: [All Workflow Rules ▾]   Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

New Rule

Action	Rule Name ↑	Description	Object	Active

Help for this Page ❓

Quick Tips
- Useful Sample Workflow Rules
- Video Tutorial (English Only)
- Troubleshooting Workflow

STEP 2: Create a new workflow rule

Workflow Rule
New Workflow Rule

Step 1: Select object

Select the object to which this workflow rule applies.

Object [--None-- ▾]
- --None--
- Account
- Apex Test Result
- ArticleType1
- Asset
- Azure Bus Msg Reader
- Azure Bus Msg Sender
- Campaign
- Campaign Member
- Case
- Case Comment
- **Contact**
- Contract

New Workflow Rule
Contact

Step 2: Configure Workflow Rule

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule
Object Contact
Rule Name
Description

Evaluation Criteria
Evaluate the rule when a record is: ○ created
   ○ created, and every time it's edited
   ◉ created, and any time it's edited to subsequently meet criteria ⓘ
How do I choose?

Rule Criteria
Run this rule if the following [criteria are met ▾]

Field	Operator	Value	
--None-- ▾	--None-- ▾		AND
--None-- ▾	--None-- ▾		AND
--None-- ▾	--None-- ▾		AND
--None-- ▾	--None-- ▾		AND
--None-- ▾	--None-- ▾		

Add Filter Logic

STEP 1: Click on « Setup » to get general left side menu. Under « Create », « Workflow & Approvals » click on Wrokflow Rules

STEP 3: Select contact or lead object

STEP 4: Design your event based workflow by filling your desired criteria

Workflow Rules – Automatic SMS 4/4

Edit Rule Octopush Workflow

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. See an example

Rule Criteria Contact: Phone NOT EQUAL TO null
Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▾
New Task
New Email Alert
New Field Update
New Outbound Message
Select Existing Action

STEP 5: After workflow creation, create a new task as workflow action

STEP 6: [IMPORTANT] Subject MUST start with the prefix « o_sms ».

New Task

Help for this Page

Configure Task

Save Save & New Cancel

Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When a task, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Edit Task

Object	Contact
Assigned To	Record Creator
Subject	o_sms_TASK FROM WF
Unique Name	o_sms_TASK_FROM_WF
Due Date	Rule Trigger Date ▾ plus ▾ 0 days
Protected Component	☐

Status Not Started ▾
Priority Normal ▾

STEP 8: Save your SMS task. You are done!

Description Information

Comments
OBJ=Contact|
SN=My Company|
a06E000000gJ37XIASI
MFI=mobilephone|
ADM=0033600000001|
MSG=Hello {!Contact.name} Get your 15% discount now! Visit our website! {!User.name}|

STEP 7: [IMPORTANT] Paste the code generated in step STEP 4.

Monitoring SMS Communication

☐ History recording is available for SMSs sent from lead, contact, SMS Send tab, workflow and APEX code
☐ Reports can be done over this object to manage efficiently your SMS activity

SMS from APEX

❑ Octopush allows you to send SMS from APEX.

❑ If you are confortable with Salesforce APEX coding, you can send SMS from a trigger, batch, job taking in consideration Salesforce governor limits.

❑ Please find below public static method to use:

❑ OCTOPUSH.sendSMS (String mobileNumber, String senderName, String SMSMessage, Boolean isDeffered, String defferedSendingDate);

❑ mobileNumber: is a list of mobile numbers in international format separated by comma if you want to send an SMS to multiple recipients

❑ SMSMessage: SMS body content. Must not exceed 459 characters

❑ isDeffered: true if you want to deffered your SMS Sending else false

❑ defferedSendingDate: DateTime format GMT + 1

OCTOPUSH.sendSMS (String mobileNumber, String senderName, String SMSMessage, Boolean isDeffered, String defferedSendingDate);

THANK YOU

We are listening ! You can reach support@octopush.com if you need any support regarding Octopush's app.

Your feedback is valuable to us, feel free to contact us.
Octopush's Team