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QUICK START GUIDE

Salesforce Integration

with BulkSMS.com

Connect Salesforce to the BulkSMS Integration Gateway, see deliveries and replies on your contacts and leads, and send bulk SMS to your list views, users, custom objects and custom queries.



Welcome to BulkSMS.com

Trusted, scalable SMS messaging for your business

IN THIS GUIDE

01 Connect Salesforce with a single sign-in

02 Choose the phone fields to text

03 Create templates and send bulk SMS

salesforce

BULKSMS.COM INTEGRATION GATEWAY FOR SALESFORCE

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01 Foreword

The Salesforce integration connects with a single sign-in—there are no API keys to copy. Before you start, make sure you have the following ready.

BulkSMS account
Sign up or log in at bulksms.com/integration-gateway

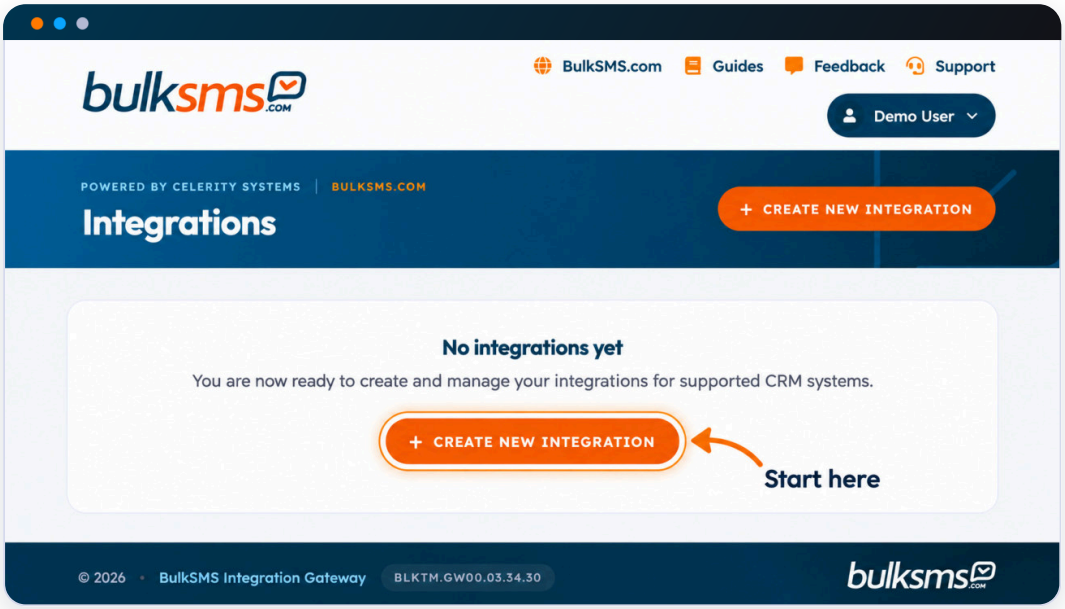
Salesforce login
A user who can sign in to your Salesforce org and approve the BulkSMS connection

Environment
Whether your org is Production or a Sandbox—you choose it before you sign in

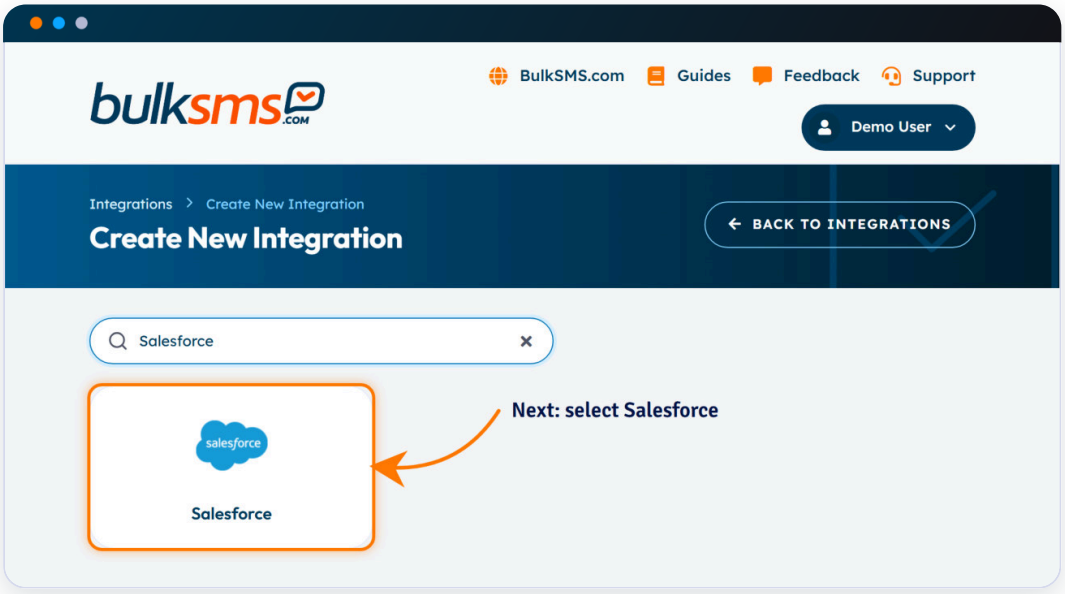
Bulk messages go to the records in a Salesforce **list view**, to all active users, or to the results of a custom query you build in the Integration Gateway. Create or tidy up your list views in Salesforce first.

02 Integration Setup

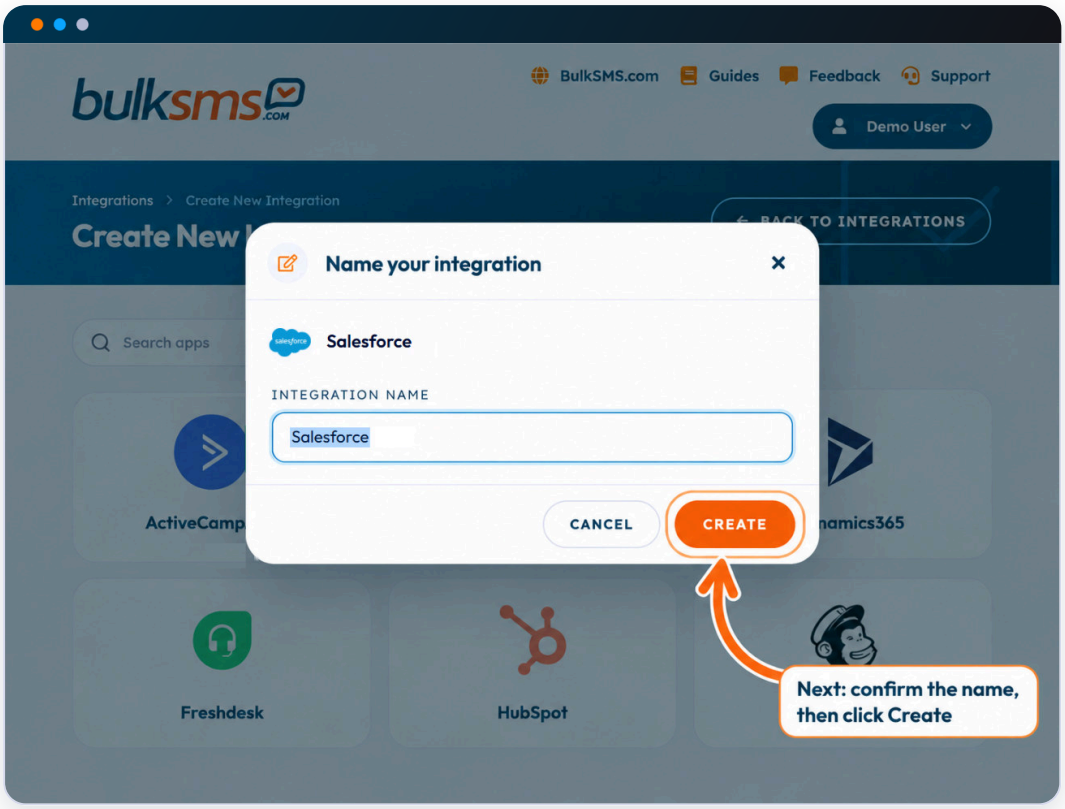
1 Sign up or log in to the BulkSMS Integration Gateway at www.bulksms.com/integration-gateway and click **Create New Integration**.



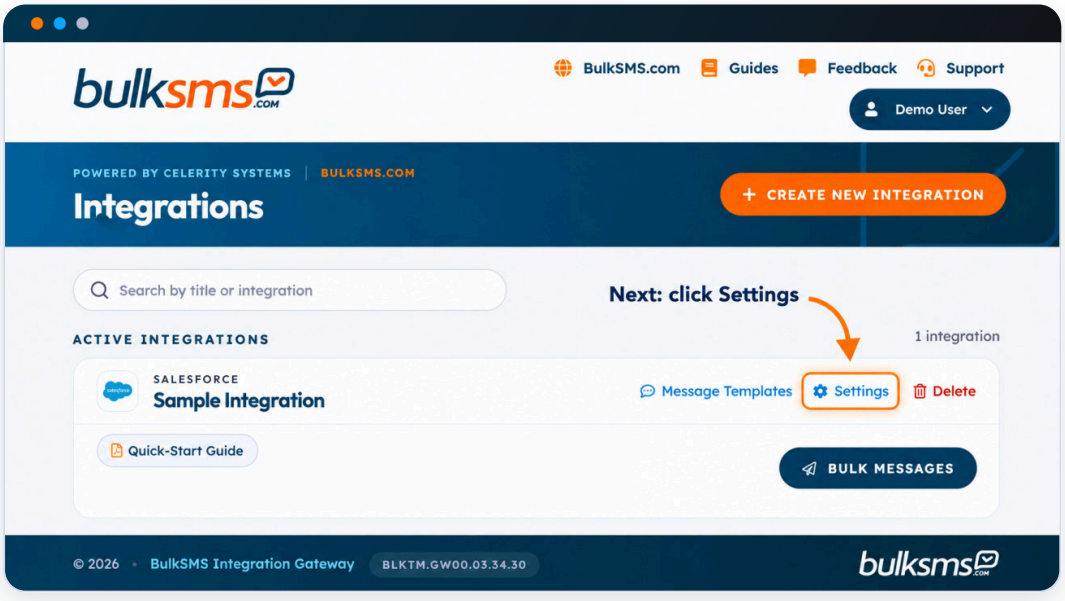
2 Select **Salesforce**. You can type in **Search apps** to find it quickly.



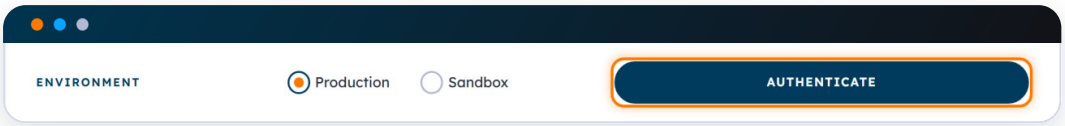
3 Give your integration a name, or keep the one suggested, and click **Create**. The name can use letters, numbers, spaces, hyphens and underscores, up to 40 characters.



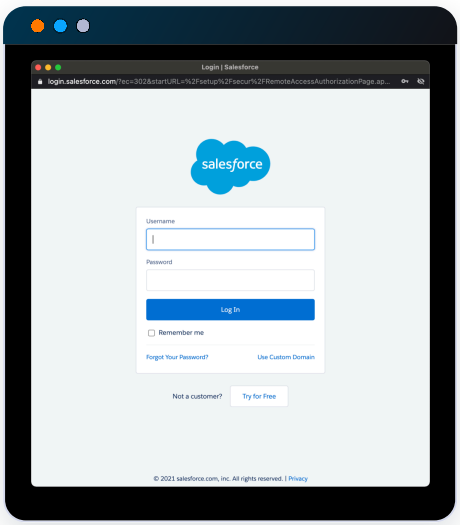
4 Your integration now appears on the Integrations page. Click **Settings**.



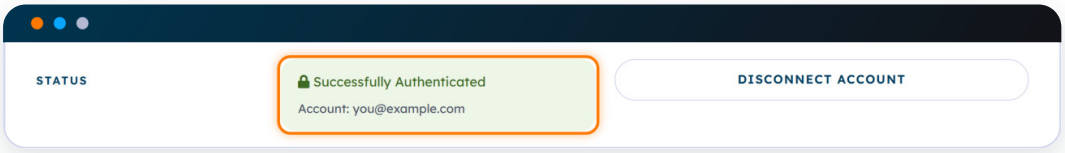
5 Under **Connection Details**, choose the **Environment**—**Production** for a live or Developer Edition org, or **Sandbox** for a sandbox—then click **Authenticate**.



6 A Salesforce window opens. Sign in and allow access, then click **OK** on the **Successfully Authenticated** message to close the window and refresh the Settings page.



7 The **Status** now shows **Successfully Authenticated** and the Salesforce account's email address. The rest of the Settings page appears below.



8 Complete the **Settings** section, then click **Save Settings**:

- **Default Country Code** – added to numbers that don't include one (see Sending Tips). **Force Country Code** changes when it is added.
- **Leads Phone Field**, **Contacts Phone Field** and **Users Phone Field** – which Salesforce phone field to text for each kind of record. The lists show your phone fields in alphabetical order; Mobile Phone is selected unless you've chosen another field.

> *i* Check all three phone fields before you save, and choose **Mobile Phone** or the field where you keep mobile numbers.

> *i* The environment can only be changed while you're not connected. To switch, click **Disconnect Account**, choose the other environment and click **Authenticate** again.

03 Activity Updates & Two-Way SMS

Activity Updates record what happens to your messages in Salesforce: when an SMS is delivered or fails, and when the recipient replies.

Turn on Activity Updates

1. On the Settings page, scroll to **Activity Updates**. It appears once you've authenticated.
2. Tick **Enabled** and click **Save Settings**. One tick switches on all of the updates below, including the message text.

What you'll see in Salesforce

Each update is added as an **Event** in the Activity of the record the message was sent to:

EVENT	WHEN	DETAILS
SMS Delivered	The message reaches the phone.	The subject shows the start of the message; the description has the full message and the template used.
SMS Failed	The message couldn't be delivered.	
SMS Reply	The recipient replies.	The subject shows the start of the reply; the description has the reply and the message it answers.

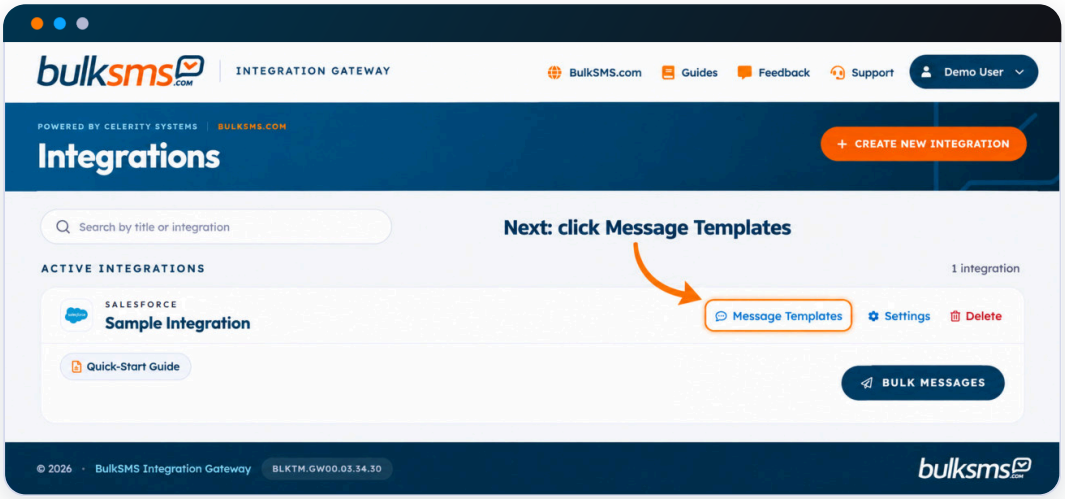
Good to know

- Recipients can only reply to messages sent from a **(repliable)** sender address or a phone number—not from a text sender name. See Sending Tips.
- A reply is linked to the last message you sent to that number. Replies from numbers you haven't messaged through the integration aren't recorded.
- If **Enabled** is unticked when you return to the page, the connection to your BulkSMS account needs setting up again—tick it and click **Save Settings**.
- To stop recording activities, untick **Enabled** and save.

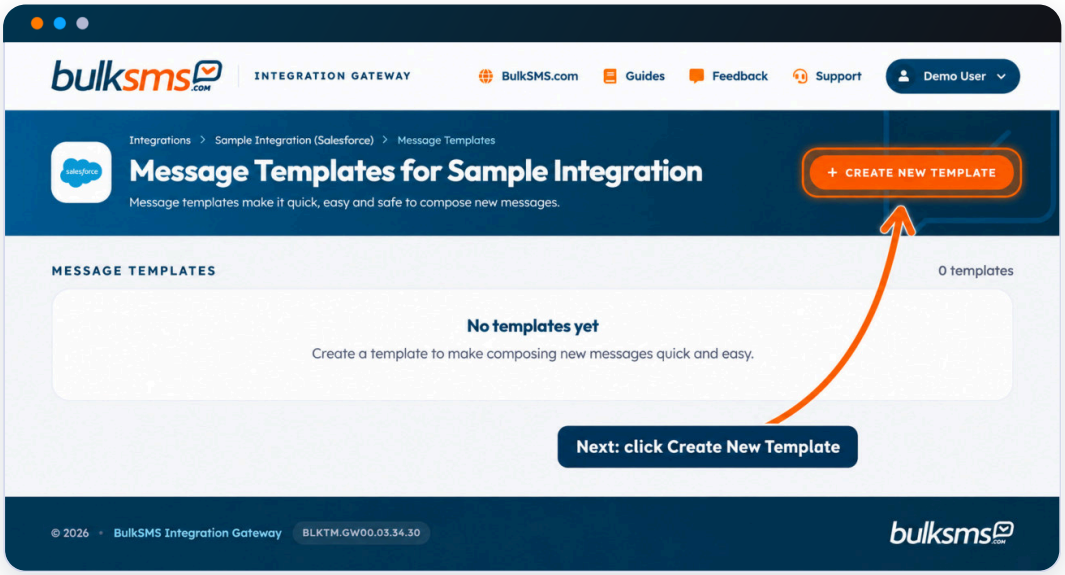
04 Message Templates

Templates let you save messages you send often, with tokens that personalise each message for the recipient.

1. On the Integrations page, click **Message Templates** for your integration.

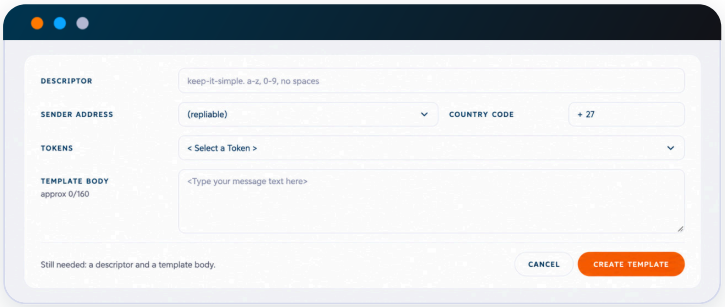


2. Click **Create New Template**.

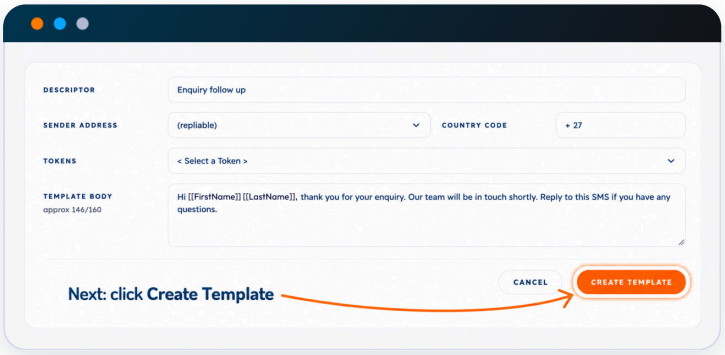


3 Fill in the template:

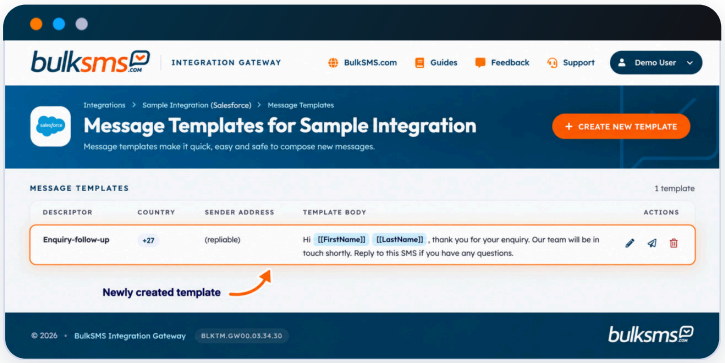
- **Descriptor** – a name for the template, using letters, numbers, spaces and hyphens (up to 30 characters). Spaces are saved as hyphens.
- **Sender Address** – keep **(repliable)** if you want recipients to be able to reply.
- **Country Code** – the default for this template. You can change it when you prepare a message.
- **Tokens** – pick a Contact or Lead token to insert it into the message. See Sending Tips.
- **Template Body** – your message. The counter shows the approximate length against 160 characters.



4 When the template is complete, click **Create Template**.



5 Your new template is listed under **Message Templates**. Use the icons on the right to **edit** it, **prepare a bulk message** from it, or **delete** it.

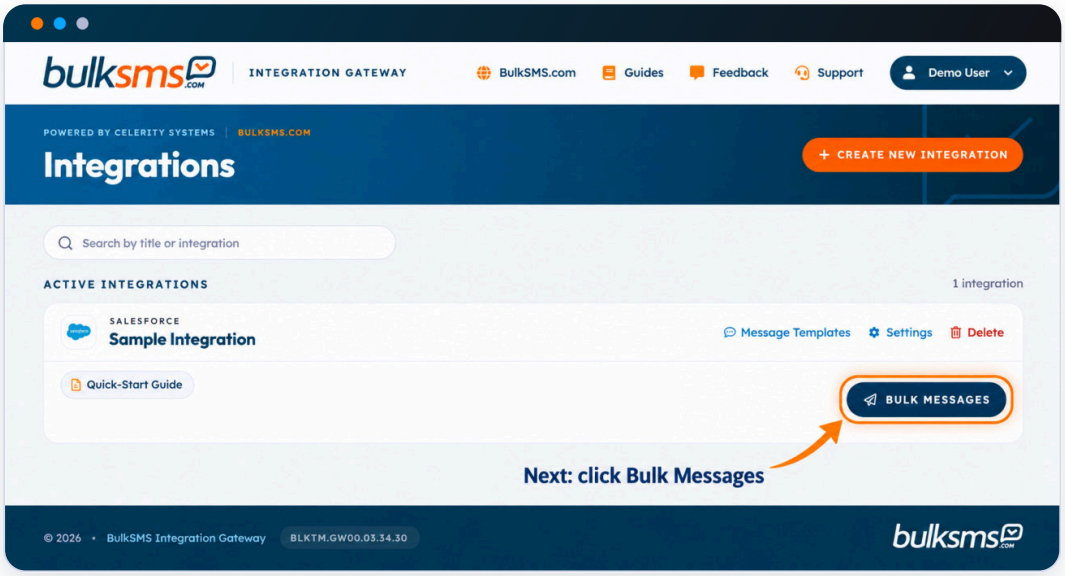


05 Bulk Messaging

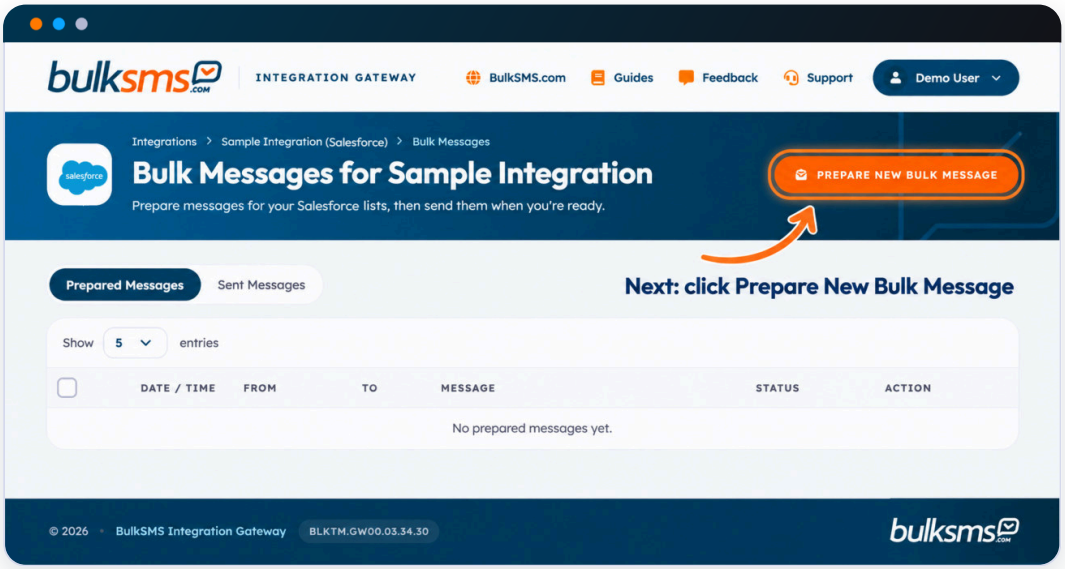
Send an SMS to the records in a Salesforce list view or to your active users. You prepare the message first, check a sample, then send it.

Prepare the message

1. On the Integrations page, click **Bulk Messages** for your integration.

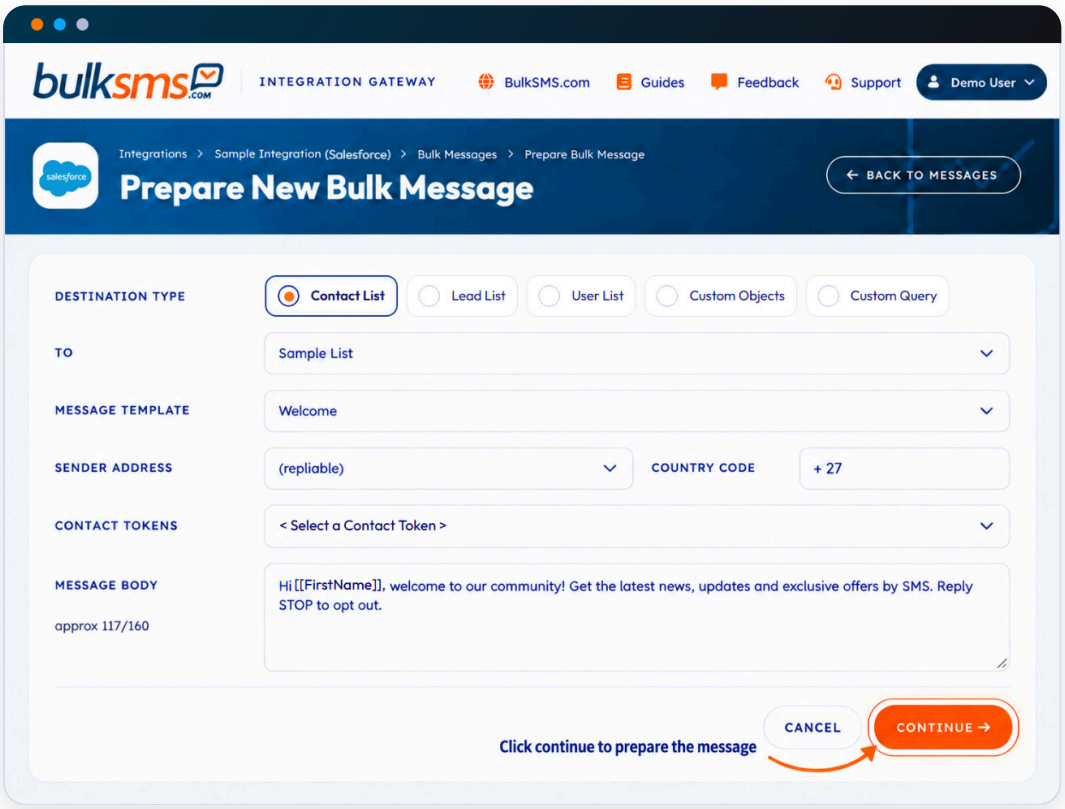


2. Click **Prepare New Bulk Message**.

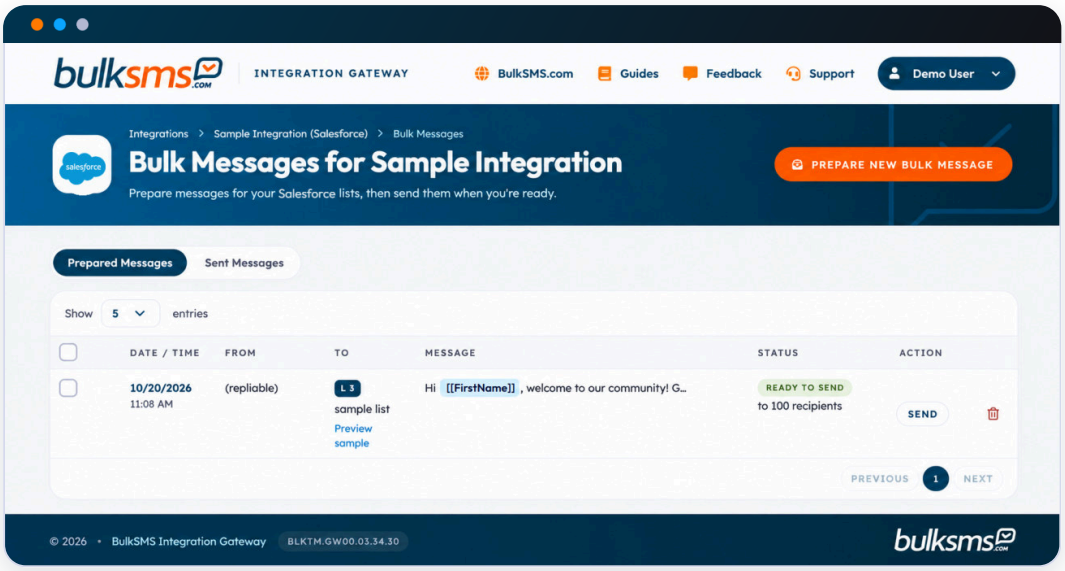


3 Fill in the form, then click **Continue**:

- **Destination Type** – **Contact List** or **Lead List**, then choose the list view under **To**. **User List** sends to all active users. For **Custom Objects** and **Custom Query**, see the next section.
- **Message Template** – optional. Choosing one fills in the message, sender and country code, and you can still edit them.
- **Sender Address** and **Country Code** – as for templates.
- **Contact Tokens** (or Lead, User or Object Tokens) and **Message Body** – write or adjust the message. The token list shows every field of the chosen record type, with your own fields under **Custom fields**.

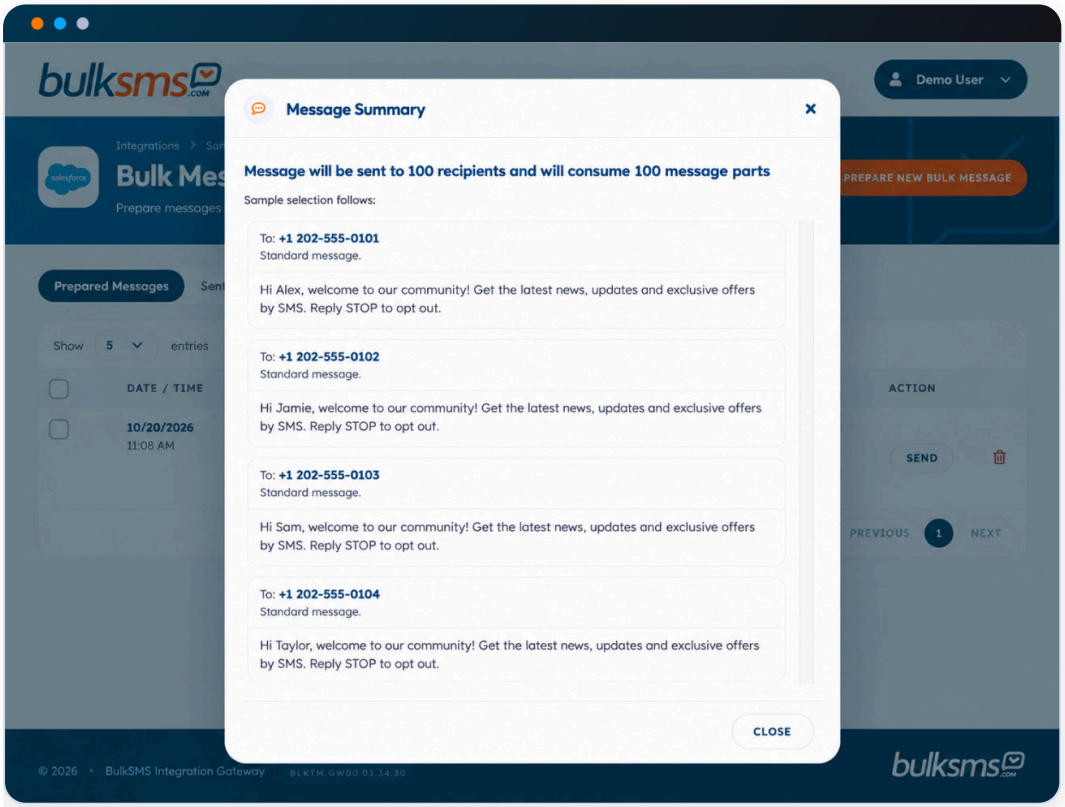


4 The integration collects the records and lists the message under **Prepared Messages**. When it shows **Ready to Send** you can preview it, send it, or delete it with the bin icon.

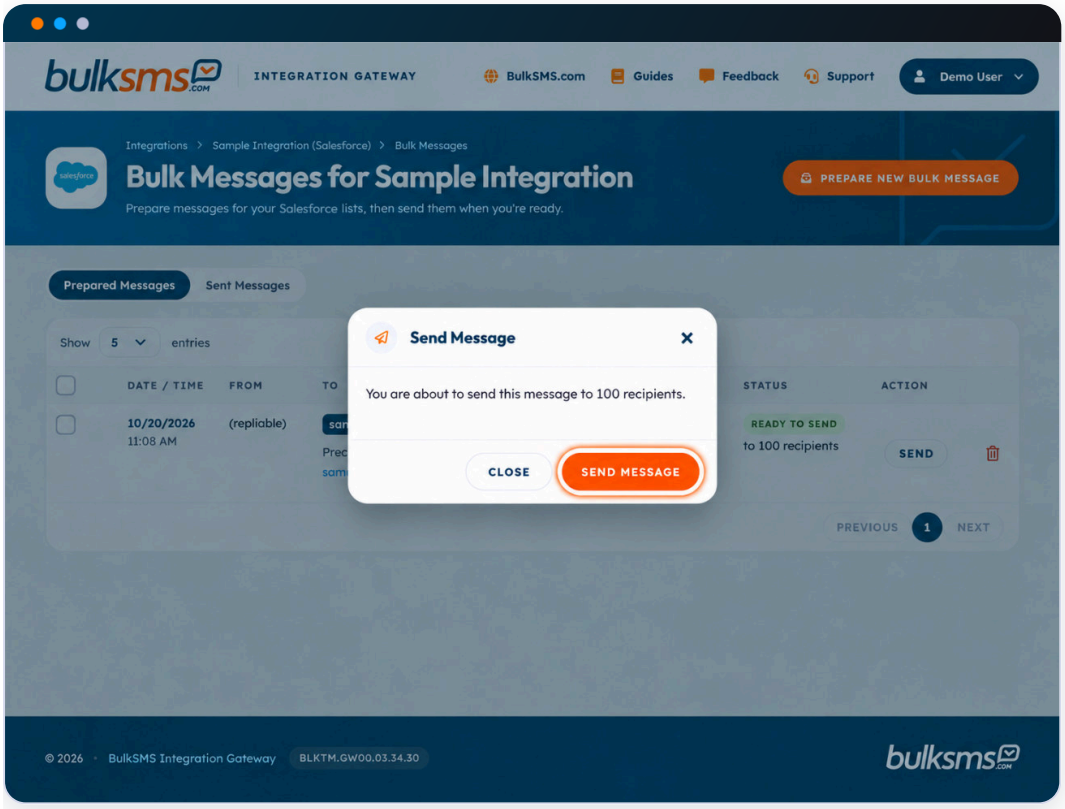


Preview and send

Click **Preview sample** to see how the message looks for a sample of up to 100 recipients, with each recipient's tokens filled in. The summary also shows how many recipients and message parts the send will use.

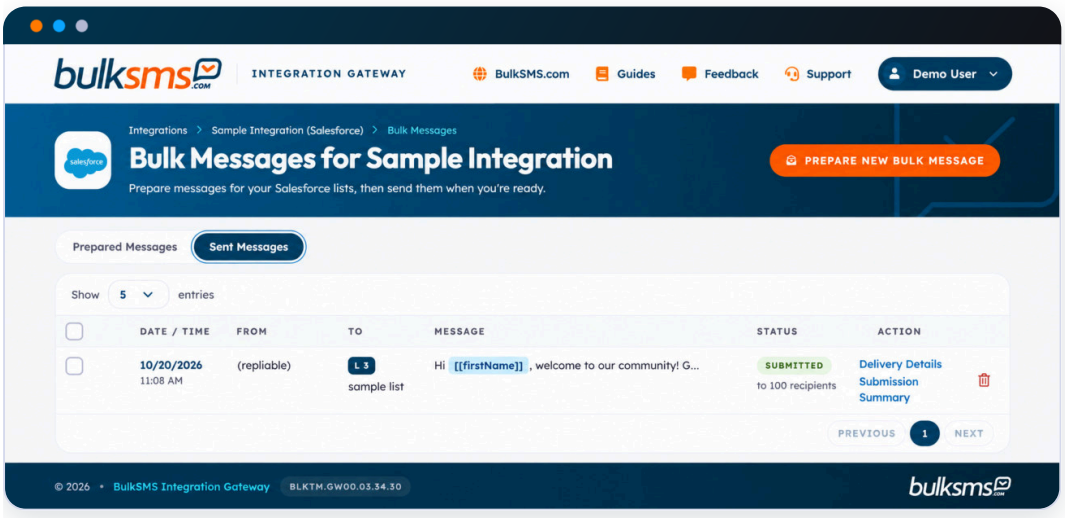


When you're happy, click **Send** and confirm with **Send Message**.



Track your message

Sent messages move to the **Sent Messages** tab. Click **Delivery Details** to see what happened to each message, or **Submission Summary** for totals, including any records that were skipped.



06 Custom Objects & Custom Queries

Besides contacts, leads and users, you can text the records of your own Salesforce objects, or build a filter to choose exactly who receives a message.

Custom Objects

Choose **Custom Objects** as the **Destination Type**, then:

- **Custom Object** – pick the object. Only your org's custom objects are listed.
- **List** – pick one of the object's list views. If you see "This object has no lists", create a list view for the object in Salesforce, then reload the page.
- **Mobile Number Field** – the field on the object that holds the number to text.

Personalise the message with the **Object Tokens** list, then continue as for any bulk message.

Custom Query

A custom query sends to the records that match your conditions, without needing a list view. Queries are saved, so you can reuse them.

1. Choose **Custom Query** as the **Destination Type** and click **New Query** (or pick a saved query and click the edit icon to change it).
2. Enter a **Query Title** and choose the **Object**: **Contacts**, **Leads**, **Users** or one of your custom objects.
3. Under **Filter records by**, choose a field, a condition (**Equal to**, **Not equal to**, **Greater than**, **Less than**, **Like**, **Not-Like**, **Includes** or **Excludes**) and a value. Use **Add condition** to add more—records must match every condition.
4. Click **Save Query**, then choose the **Phone Field** to text. This is required for custom queries.

i Queries have a maximum length. If you see "Query exceeds maximum length", remove a condition. To delete a saved query, open it with the edit icon and click **Delete**.

07 Sending Tips

Who receives a bulk message

- **Contact List / Lead List / Custom Objects:** every record the Salesforce list view returns.
- **User List:** every active user in your org.
- **Custom Query:** every record that matches the query.
- The integration doesn't check Salesforce opt-out fields, and duplicates aren't removed—two records with the same number will both be messaged. Keep your list views and queries clean.
- Messages go to the phone field chosen on the Settings page (or on the Prepare page for custom objects and queries). If none has been saved, Mobile Phone is used, or Phone when the mobile is empty.

Phone numbers and country codes

Numbers are sent in international format. If a number in Salesforce doesn't include a country code, the integration adds the country code from the message. **Force Country Code** on the Settings page changes when it is added. With a country code of 44:

NUMBER IN SALESFORCE	FORCE COUNTRY CODE OFF	FORCE COUNTRY CODE ON
`07700900123`	`447700900123`	`447700900123`
`7700900123`	`7700900123` (not valid)	`447700900123`
`12025550143`	`12025550143`	`4412025550143` (wrong)
`+12025550143` or `0012025550143`	`12025550143`	`12025550143`

The safest option is to store numbers in Salesforce with a **+** and the country code (e.g. +44 7700 900123). Only turn on Force Country Code if all your records are in one country and their numbers are saved without a country code.

Message length

- One SMS holds up to **160 characters**, or **70** if the message contains Unicode characters such as emoji or some accented letters.
- Longer messages are sent in several parts, and each part uses credits. The Prepare screen shows an approximate character count and a **Long Message** warning with the number of parts.
- A message can't be sent if it reaches 10 parts or more—the **Continue** button stays disabled until you shorten it.

Tokens

Salesforce tokens use the field's API name in double square brackets, and they are case-sensitive—use them exactly as the token list shows them. Commonly used tokens:

TOKEN	INSERTS	TOKEN	INSERTS
`[[FirstName]]`	First Name	`[[Email]]`	Email
`[[LastName]]`	Last Name	`[[Title]]`	Title
`[[Name]]`	Full Name	`[[Company]]`	Company (leads)
`[[Salutation]]`	Salutation	`[[MobilePhone]]`	Mobile Phone

Your own fields end in `__c`, e.g. `[[Membership_Level__c]]`. A message can only use fields of the record type you send to: the Prepare page rejects any other token, so check templates you made from the Template page's Contact or Lead list before sending them to a different type.

If a record has no value for a token, it is skipped (First Name and Last Name are simply left blank). Smart token options let you control this:

OPTION	EXAMPLE	EFFECT
`:default=`	`Hi [[FirstName:default=there]]`	Uses "there" when the record has no first name. Leave the default empty (`[[FirstName:default=]]`) to send with the token blank.
`:if(>n)`	`[[FirstName:default=friend:if(>10)]]`	Uses the default if the value is longer than 10 characters.
`:if(unicode)`	`[[LastName:default=friend:if(unicode)]]`	Uses the default if the value contains Unicode characters, so the message stays at 160 characters per part.

Sender address

- **(repliable)** – recipients can reply, and replies are recorded in Salesforce when Activity Updates are on.
- **A phone number** – recipients can reply to that number.
- **A name** (e.g. your brand) – recipients **can't reply**.

> **Opt-outs:** the Integration Gateway doesn't unsubscribe people who reply STOP, and bulk messages don't check Salesforce opt-out fields. Handle opt-outs in Salesforce—for example by filtering opted-out records out of the list views or queries you send to.

08 Troubleshooting

YOU SEE	WHAT TO DO
The sign-in window shows an error instead of “Successfully Authenticated”	Close it and click **Authenticate** again. Check you chose the right **Environment** (Production or Sandbox) for the org you’re signing in to.
Settings, phone fields and Activity Updates aren’t showing	They appear once you’ve authenticated. Click **Authenticate** and finish signing in to Salesforce.
The list views, objects or tokens on the Prepare page are empty	The connection to Salesforce may have expired. On the Settings page click **Disconnect Account**, then **Authenticate** again.
A prepared message fails with “Unable to authenticate with Salesforce.”	As above: disconnect and authenticate again, then prepare the message again.
“Please select a Contact List and try again.” (or Lead List, Custom Object, List, Mobile Number Field, Object or Phone Field)	Complete that choice on the Prepare page, then click **Continue**.
“Please select or save a custom query before continuing.”	Pick a saved query, or finish your new query and click **Save Query**.
“Tokens are still loading. Please wait a moment and try again.”	Wait for the token list to finish loading, then click **Continue** again.
“Message contains the following invalid token: …”	The token isn’t a field of the record type you chose, or its spelling or capitals differ. Choose it from the token list instead.
Records skipped: “MSISDN is invalid”	The record has no valid number in the phone field being used. Check the phone fields on the Settings page (or the field chosen for your custom object or query), and see Phone numbers and country codes.
Records skipped: “Missing data for … token.”	The record has no value for a token in your message. Add a default, e.g. `[[FirstName:default=there]]`.
Continue is greyed out	Choose a destination type and list (or object, list and number field), write a message, and check it is under 10 parts.

You can download the list of skipped records, with the reason for each, from the Prepared Messages table.

Questions

We're here to help you every step of the way.

Please email **support@bulksms.com** or visit **www.bulksms.com** for other contact options.

Please be sure to mention **your username** and that you are using the **Integration Gateway for a Salesforce integration**.

EMAIL SUPPORT

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