Storing Data

Once you complete the SMS-Magic Converse Setup, the data gets stored in the following locations:

You will require Subscriber Access to Customer’s Org to access the Setup pages.

Registration and Remote Settings – SMS Magic URL Setting

Remote URL: Stores the Server Location defined in the Registration and Remote Site Settings Page.

Server location needs to be modified during migration from US server to EU server. For more details, refer to Server Location Moving from US to EU under the Known Issues section.

SMS Magic Security Setting	
API Key	Stores API key generated once the registration is completed
Application Key	Stores the key that is generated once the registration is completed
IsRegistered	This should be enabled for all completed registrations.

Compliance – Global Settings

Compliance Type: Stores the type of compliance that has been configured in SMS-Magic Converse Settings. This value can be cleared to help users reset their compliance.

If Compliance type is changed, it is recommended to change the Message Objects (MOC) that have been configured as well.
It is also recommended that you check the impact on all Visualforce pages generated as part of the MOC and change them as required

User Management

Once you register, an OAuth user is created. Subsequently, all information entered in the Portal billing account will be automatically synced with Salesforce. For example, if 5 licenses are added in the Billing account, the same number should be displayed in the User Management interface under Available licenses.

Setup Page	Data Stored in Page
License Management Edit	
Name	Stores the License Name being displayed to users.
Standard	Stores the number of available licenses being displayed to users.

Currently Standard type License is the only available type.
The number of licenses displayed here will be the same as the one shown on the User Management UI.
The number of licenses entered in the User Management UI should be the same as the one available in the Portal.
Any discrepancy in number of available licenses in the two interfaces may lead to issues at the time of billing.
License Object: The license object has a user lookup which points to a user field. If this user record field is active only then will the User Management interface display the relevant users. Therefore, the User Management page in the UI displays data that corresponds only to active users with a license. If you are unable to view the correct number of user records, check to see if all users are active.

Status: Stores all user records that are being included in the User Management section.

Message Object Configuration	

Unrelated Object Config	
Standard Fields/ Custom Fields and Relationships	Stores all details of Information Objects configured in MOC.
Sender ID & Assignment	
SMS Sender ID	
Custom Fields	Stores all information on Sender ID
Sender ID Profile Map	
Custom Fields and Relationship	Stores all information on the default Sender ID and the user/Profiles they have been assigned to.
Permission Management	
Global Settings	

Use Single Message Object	This is configured from the backend. It helps you define where you wish to push the information to. So, if you select SMS History once, it indicates that you wish to store both incoming and outgoing in the same object.This should be done only once the OAuth has been set up successfully or else the data will not be synced to Salesforce.Check to ensure that this field is selected. If it is not selected then Converse Settings will display only partial data. If Converse Flow does not display incoming messages, a possible reason may be that the Use Single Message Object checkbox is not selected indicating that SMS History does not act as the single object where all incoming messages will be stored along with outgoing.
Enable Incoming Notification	This field should be enabled in order to receive notifications for Incoming message
Can Setup App	This field needs to be selected in order to allow user to work on Converse App
Default Email Notification Template	Stores the Template ID of the Email Template.
Task subject	Stores the Subject of the workflow task that will trigger the action.
Max SMS Text length	Stores the character limit for sending SMS.

Allow to send message as Record Owner	Enables record owner’s Sender ID to be used for sending messages.The record owner indicates the owner of the primary object of the conversation. For example, if primary object of the conversation is a contact, then it would be the owner of that contact owner.Select this value to make it available in the Sender ID drop-down list in the Conversation Composer in Converse Desk.When we select this value, we are selecting the criteria for sending out the message. Once selected, the following checks are performed:a.The owner of this record is checkedb.The default sender value of that person is checked.If there are no matching values for either of the checks then the message fails.
Check Readiness	
If you have created a picklist field with 3-4 values, during upgrade you may wish to add few more values to the field. However, Salesforce does not permit an automatic upgrade of the values. Therefore, this tab is provided to help you manually select the picklist value that you wish to add during version upgrades.	