

Lookup not functioning as expected

Scenario

Incoming SMS does not look up to the right record in versions 1.50 and above.

Possible Causes

When an incoming SMS is not getting attached/related to/looked up to the correct records, for example – Lead, Contact or any other custom or standard object, then, it can be due to the following reasons –

- The MOC is not created properly. The phone field used is not storing the mobile number
- The field used in the MOC is not valid or does not exist
- You have used a text field or a formula field for the phone value in the MOC and due to this our query doesn't work correctly. Please make sure that you use a phone type field in the MOC.
- The OAuth user does not have access to the SMS-Magic Objects. OAuth user needs to have proper access to SMS Magic Components. You can either assign our permission set and grant additional access through profile or directly check and grant access to all components through the profile level.
- The OAuth user does not have access to the record on which the mobile number is stored.
- The mobile phone contains a prefix such as 00 or 07 and thus causes issues with the lookup since the incoming number does not have this prefix.
- There are multiple occurrences of the mobile number on various records.

- Portal lookup flag is enabled. This flag was used in older versions where customer stored numbers in multiple formats.

Field Does not Exist and **Incorrect Lookup** has similar possible causes as mentioned above.

Incoming Does not Sync

Scenario

Incoming SMS are not being pushed to Salesforce.

Possible Causes

Following are the reasons due to which incoming SMS are not being pushed to Salesforce –

- The Push to SF flag is not marked as true for the inbound number
- The OAuth or Web Service is not enabled for the Account
- The OAuth user or Web Service user is set for the Account, does not have the necessary access to SMS-Magic Objects on Salesforce.
- There are automation rules set on the Object where Incoming SMS records are stored. These automation rules are not configured correctly due to which it fails and rolls back the process of pushing the incoming SMS from Portal to Salesforce.
- The OAuth user is Inactive.

Record Owner Notification is not working

Scenario

Notification is not sent to Record owner when an Incoming SMS is received.

Possible Causes

- Incoming SMS owner is not assigned as the OAuth user (the user with whose access the incoming SMS is being pushed to the CRM)
- The related Contact/Lead/or any other record does not have the mobile number stored in recognized formats – (xxx) xxx-xxxx or 1xxxxxxxxx (where “1” is the country code)
- The related record owner does not have access to the fields of incoming SMS object.

Issue Resolution

If the owner of the incoming SMS is added correctly and even then the owner does not receive a notification, check to ensure that the email notification is not being caught in the spam filters of the user's Inbox.