Sending Automated Messages for Customer Community Users

Scenario

In SMS Magic Converse (version 1.51 and later), every user needs to have an SMS Magic user license in order to send messages from the Salesforce Org.
When a record is created on the SMS history object, a check is first run to see if the SMS-Magic user license exists with the Created by user. If the license does not exist, a second check is run to see if the SMS history record owner possesses the SMS-Magic user license. If none of the record owners possess the license, an error message is displayed indicating that a license needs to be assigned to the user.

Who is a Guest User?

A guest user profile is designed to control public (unauthenticated) access to data, content, and objects in your community that doesn’t require authentication. Guest users have access to the public pages in your communities and portals. However, to allow guest users to view or submit data to a standard or custom object, modify the object’s permission in the community’s guest user profile.

Possible Causes

Guest users use a different portal to update the data in Salesforce. Any automation running on that data defines the

guest user as both the Created by and owner of the SMS History record. However, as the guest user does not have an SMS-Magic License, the message fails to go out.

Issue Resolution

Step 1 – Share the Salesforce user record with guest users with the help of Criteria based Sharing rule on the User object.

1. Under Setup, click Sharing Setting.
2. Select the Object User and then click New under User Sharing Rule.
3. Enter the following details:
    i. Rule Name: Enter the name to the sharing rule
    ii. Select your rule type: Select Based on criteria as the rule type
    iii. Select the details of the user(s) you wish to share in the criteria:
        - First Name: First name of SMS-magic user licenses (Salesforce license User); and
        - Last name: Last name of SMS-magic user licenses (Salesforce license User)
4. Select the user(s) you wish to share the license with: Share it with the group of Guest user license (Group Name – All Community Portal users)
5. Select the level of access for the users: **Read Only**
6. Click **Save**

Step 2– Once the sharing rule is created, open the Flows and update the following details:

1. In the Flows Action, create a record on the SMS history object.
2. In the Owner ID is equal to User field, select the name of the SMS-Magic user license which was shared with

guest user licenses in the Sharing rule.

3. If the client is using the Converse App task, then instead of creating an action in the Flows, create an SMS history record.
4. In the automation, update the Owner ID field value with the Name of the SMS- Magic user license which was shared with guest user licenses in the Sharing rule.
5. When the Guest user updates the record in Salesforce, the Flows is called.
6. It updates the ownership of the SMS history record to the user who has an SMS-Magic user license and sends out the message successfully.

Step 3 –

If you are using 1.68 or above versions, assign an org-wide license to your org. With this, you do not need to individually assign licenses to external users.