Send Automated SMS

Issue Scenario

User needs to know how to send Automated SMS.

Solution

1. Create a process builder to send an automated SMS when a new task is created or edited to meet certain criteria. The XML configuration needs to be created on the Object on which you are creating the task. You can refer to the following link for steps to create the XML configuration: http://www.screen-magic.com/configure-sms-automation-using-workflow-rules/

The following procedure assumes that the automated SMS will be sent when the task is created on leads object and the XML configuration is also created on lead.
2.Select "Task" as the object.

3.Under **Start the process** select **Start only when the record is created** option.

4.Enter the criteria as per your requirement. In the screenshot shown below, the criteria is defined as "task subject should not be SMS Notification" and the task should be related to Leads object.

5.Save the criteria.

6.Enter the immediate action as **Create a record.**

7.Under **Record Type** select **Task** .

8.Enter the following field values for creating the task record.

Field	Description
Description	Enter the XML configuration that you have created in order to send out the automated SMS. The configuration needs to be created on the Object on which the task will be related to. In this case, the configuration is created on Leads object.
Priority	Set the priority of the task as per your requirement.
Status	Enter the status as completed if you would like the task to be added to the Activity History related list. Otherwise, set any other value if you would like the task to be added to Open activities related list.
Subject	Enter the subject as SMS Notification
Related To Id	It should be the task What ID.
Name Id	Set the Name Id as task Who Id.

9.On completion, you can send an Automated SMS on task creation.