

Configure Objects to Send and Receive Messages

SMS-Magic Converse supports messaging from all standard and custom objects. You can choose who you want to message and from which objects. Message objects configuration allows you to configure Salesforce objects from which you can send SMS. You can select one or more phone number fields to send messages to. We support up to 7 mobile phone fields per object. You can configure any number of message objects. This configuration allows you to use phone number fields from the same message object as well related objects, which will save your efforts to create extra formulae fields on the message object. For example, you can configure the Case object but can use mobile fields from the Accounts object.

Message objects configuration would automatically generate buttons, Visualforce pages, and Lightning components, which can be used to configure the messaging interfaces on your object page & search layouts. For more information about configuring the message objects, see [Configure Objects to Send and Receive Messages](#).

SMS-Magic Converse provides a simple configuration to set up messaging on different objects:-

1. **Person Objects** (Lead, Contact, Person, Account, Student, Candidate, etc.) – Person Object has a mobile field which can be used to trigger directly message to persons. For example, you can trigger SMS to leads on the change in status during the account manager assignment.
2. **Business Objects** (Cases, Opportunity, etc.) – Business objects have a direct relationship with a specific person. For example, a contact related to a Case or a contact that is related to an Opportunity such as, you

want to send Case alerts to a contact.

3. **Junction Objects** (Course Allocation, Job Application, Loan Application, etc.) – Junction objects have a relationship to person and information objects together. For example, Job Application (Junction Object) is an application to a Job (Information Object) by a Candidate (Person Object).
4. **Information Objects** – Unrelated (Job, Course, Product, etc.) Information Objects with no association with a person. For example, Product. You might want to run a campaign promoting Product with a list of Leads.

Who you want to SMS?	In What Situation?	What's Message Content?	How to Set up?
Person Object	Lead, Contact, Account, Student, etc.	Custom text or custom text with merge fields from Person Object field.	MOC Configuration to create visualforce pages and lookups. Use Converse Templates for further creation of templates.
Business Object	Cases, Opportunity, Campaigns, etc.	Custom text or Custom text with merge fields from Business Object and its parent object fields.	MOC Configuration to create Visualforce pages and lookups. Use Converse Templates for further creation of templates.

Junction Object	Course Allocation, Job Application, Loan Application, etc.	Custom text or Custom text with merge fields from Person/Business object and information object fields etc.	MOC Configuration to create Visualforce pages and lookups. Use Converse templates for the creation of templates.
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Create and Configure Send SMS and Bulk SMS Buttons on Object Page and List View Layouts

Send SMS buttons work on record detail pages in Salesforce and allow you to send SMS by clicking on the button (Lead or Contact if it's a Person Object or associated record like Cases, as per the MoC Configuration). It sends SMS to the Mobile field associated with the button and also gives the capability to use a template with merge fields from associated objects.

Send Bulk SMS on list view layout gives you the capability to select multiple records and send SMS to those records. You can compose a new SMS or choose a single template with merge fields from associated objects to send to all the recipients.

You can create Send SMS and Bulk SMS buttons and associate these buttons to Visualforce pages generated in the configuration of message objects. For more information about setting up SMS buttons on page layout, search layout, and so

on, see [Configure SMS Button](#).

Configure Converse Inbox on Page Layouts

Converse Inbox (available with Grow): You can get notified about incoming messages from multiple places when you use Converse Inbox. Converse Inbox shows a list of all SMS Conversations and prompts or alerts on a new message, in a single list inside Salesforce very much like an email Inbox.

- Alerts you of new incoming SMS
- Shows list of all (My) Unread and New Conversations

Notification (available with Start) – This shows a list of all unread incoming messages and gives you the capability to reply to incomings. You can configure this component on your utility bar in the lightning or Classic version. The Notification:

- Alerts you of new incoming SMS
- Shows list of all (My) Unread and New messages

It is a compact version of the Converse Desk with minimal functionality focusing on reading and replying to the unread and new messages. For Salesforce Lightning, you can configure the Converse Inbox in the Lightning Utility Bar, and for Salesforce Classic, you can set it up in the Classic Side Panel.

You can configure the Inbox on your Utility bar in lightning or Classic side Panel in Classic version. To add Converse Inbox to Salesforce Classic and Salesforce Lightning, see [Configure Converse Inbox](#).