Overview

A clean tabular representation for all your messages. Track your incoming and outgoing messages in the SMS History module of SMS-Magic Interact Extension with ease.

In SMS History Module,

- Incoming/Outgoing messages can be identified by the entry in the ‘Direction’ column.
    - If the entry is IN, this message is an incoming message. The SMS History Name for an incoming message will also have IN prefixed before the SMS History Name.
    - If the entry is OUT, this message is an outgoing message. The SMS History Name for an outgoing message will also have OUT prefixed before the SMS History Name.
- SMS/MMS/WhatsApp messages can be identified by the entry in the ‘Type’ column
    - If the entry is SMS, the message sent/received is an SMS
    - If the entry is MMS, the message sent/received is an MMS
    - If the entry is WhatsApp, the message sent/received is a WhatsApp message.
- Media attachments can be seen in the Attachments section of the SMS History record. Click on the SMS History record with type MMS/WhatsApp, scroll down to Attachments section, to view the attached media file.
- Track the Sent Status and Delivery Status of your Outgoing messages

Module Lookup on SMS History

Incoming and Outgoing messages in SMS History get associated

with a relevant Lead/Contact record for which the mobile number of the recipient matches.

Notes:
If multiple Lead or Contact records have the same Mobile Number, there can be discrepancies in the association of Lead/Contact.
To associate SMS History records with a relevant Custom Module record, you can configure Custom Module Lookup on SMS History. Follow the steps below to configure Lookup for your required Custom Modules –

1. Create Lookup Field in SMS History Module layout

Create a Lookup field in SMS History for the custom module you wish to associate relevant SMS History records with. For the Deals module, we will create a lookup field – “Deal” in the standard layout of the SMS History module.

- Click on Setup > Customization > Modules and Fields
- Click on SMS History
- On Layouts tab, click on Standard
- Drag and Drop LookUp from the Left Panel to the SMS History Information Layout
- Enter Field Label as ‘Deal’
- Select Lookup Module as ‘Deals’ from dropdown
- Enter ‘SMS Deal History’ as the Related List Title
- Click on the Done button

Notes:
Make sure the API name for the lookup field is the same as lookup field name. To check the API Name of the lookup field, Click on Setup > Developer Space > APIs > API Names tab > SMS History.

2. Create Workflow that will perform the Lookup for the Custom Module.

Follow the below steps to create a Workflow Automation –

- Click on Setup > Automation > Workflow Rules
- Click on **+ Create Rule**
- Select the Module SMS History.
- Enter a Rule Name and Description for the Custom Module for which you are creating the Lookup Workflow
- Click on the **Next** button

3. Create a Workflow rule as shown in screenshot below –
    - WHEN – On a Record Action > Select Create
    - CONDITION – All SMS History
    - ACTION – Function > Write your own

4. Continue Creating a function with the steps below –
    - Enter **Function Name** – AssociateDeals i.e Associate<Custom_Module_Name>
    - Enter **Display Name** – Associate Deals i.e Associate <Custom_Module_Name>
    - Enter a Description(optional)
    - Click on the Next button
    - Copy and paste the below code in the Text Area

```
MODULE_TO_BE_UPDATED = “smsmagic4__SMS_History”;
LOOKUP_MODULE = “Deals”;
LOOKUP_FIELD = “Deal”;
PHONE_FIELD = “Mobile”;
phone_list =
{mobile_number,mobile_number.subString(1),mobile_number.subString(2),mobile_number.subString(3),
mobile_number.subString(4)};
record_id = “”;
is_record_found = False;
for each  mobile in phone_list
{
response = zoho.crm.searchRecords(LOOKUP_MODULE,”(“+PHONE_FIELD+”:equals:”+mobile + “)”);
for each  deal in response
{
record_id = deal.get(“id”);
info “Found deal with id: ” + record_id;
is_record_found = True;
break;
}
if(is_record_found)
{
break;
}
}
if(is_record_found) {
info “Updating module: ” + MODULE_TO_BE_UPDATED + ” record with id: ” + target_id;
info “Updating lookup field: ” + LOOKUP_FIELD + ” with id: ” + record_id;
params = Map();    params.put(LOOKUP_FIELD,record_id.toLong());
response= zoho.crm.updateRecord(MODULE_TO_BE_UPDATED,target_id.toLong(),params);
if(“Error”.equalsIgnoreCase(response.get(“status”)))
{
info “Failed to update record: ” + response.get(“message”);
}
else
{
info “Hurray! record updated successfully.”;
}
}
```

- Click on Edit Arguments above the text area
- Add the Function Arguments as seen in screenshot below –

- Click on the **Save** button
- Click on the **Save** button on the Function Editor

5. Click on the **Save** button to save the Workflow. The Workflow will be active by default.

For the Outgoing and Incoming messages, from/to this custom module, the Lookup workflow will associate a relevant Module

record to the SMS History record.

Notes:

- Mobile number is SMS History record should exactly match with mobile field value in Custom Module (e.g., Deal).
- Although this code takes care of country code, yet Mobile numbers in custom modules should not be formatted.