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.

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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

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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.

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

Follow the below steps to create a Workflow Automation -

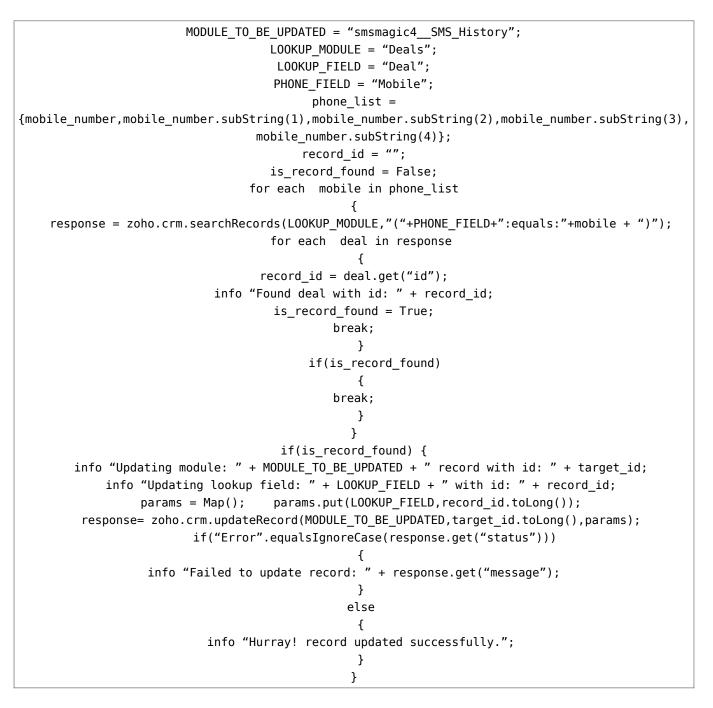
- Click on Setup > Automation > Workflow Rules
- Click on + Create Rule
- Select the Module SMS History.
- Enter a Rule Name and Description for the Custom Module for which you are creating the Lookup Workflow
- Click on the **Next** button

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- 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

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- 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



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

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