Vonage Conversations for Salesforce

Admin & Developer Guide

Release Notes - v3.7.1

Fixes:

- Prevent duplicate messages submission from the "Send" button due to double-clicks.

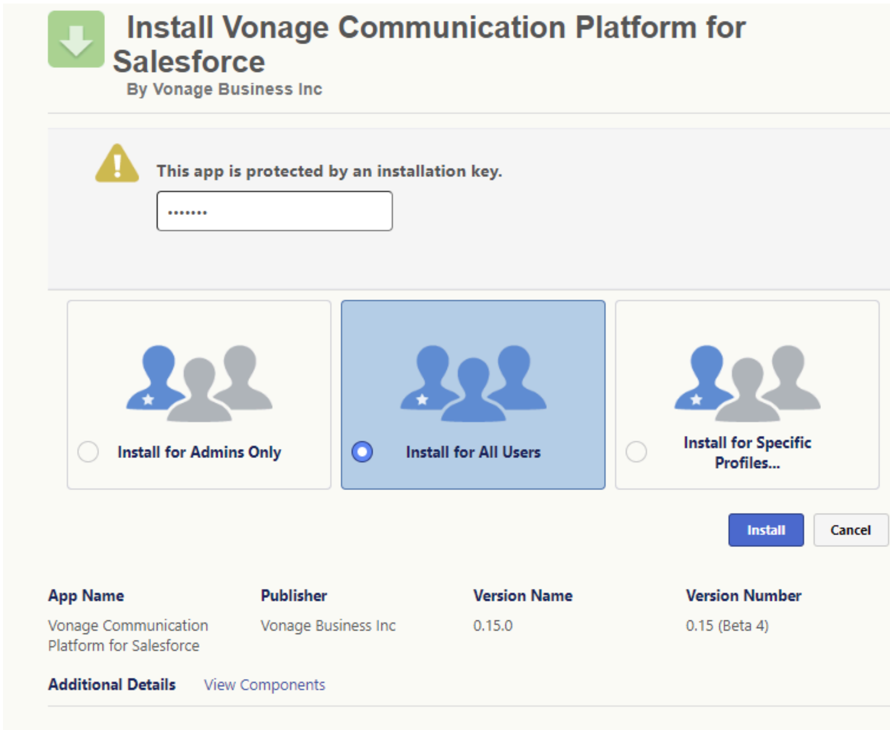
Pre-Requisites

1. A Vonage account with your `api-key`.
2. To use WhatsApp, your external account should be configured and approved for use with Vonage; if you are a managed customer, you can follow this guide, or if you are non-managed you can follow our self-service guide.
3. Note: MMS messaging is only available in the US & Canada. To use images, your LVN must be a USA/CA number that is approved for 10 DLC.
4. For RCS onboarding support, please connect with your Vonage account manager or point of contact.

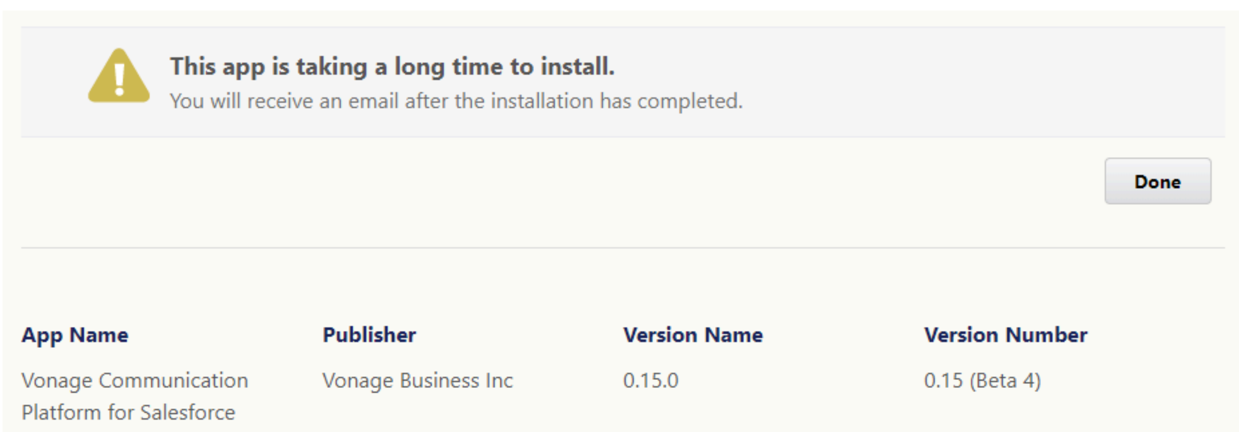
Deployment

To install the package, you will need the deployment URL and installation key. These will be provided by your Vonage point of contact.

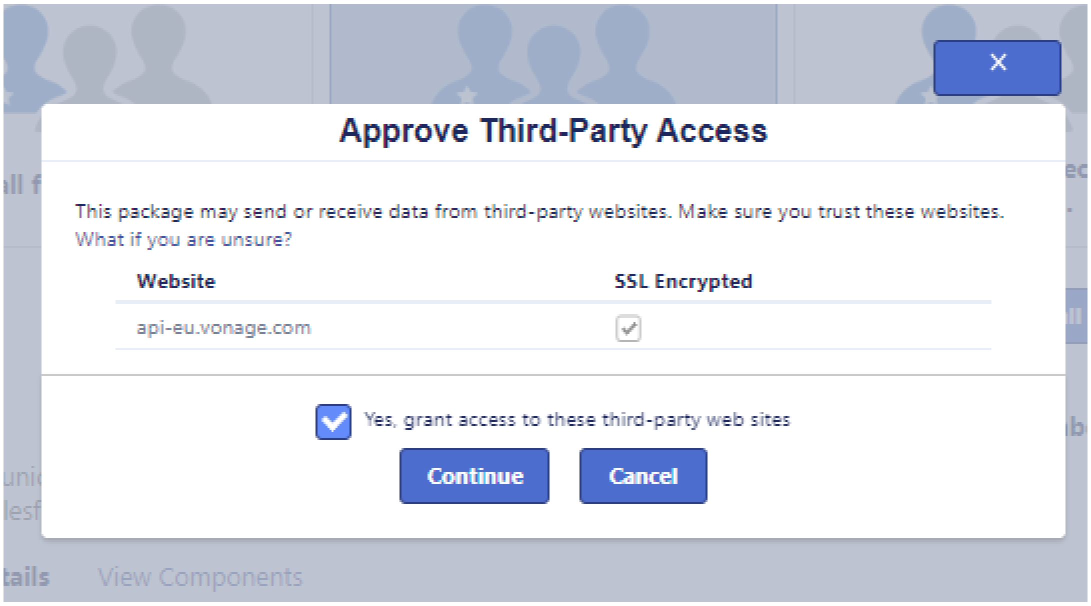
First, go to the deployment URL and login to your Salesforce organization. You will see this screen:



Select the group that you want to install the package for, and enter the installation key provided. The warning below may appear. If it does, select "Done" and wait for the package deployment to complete.

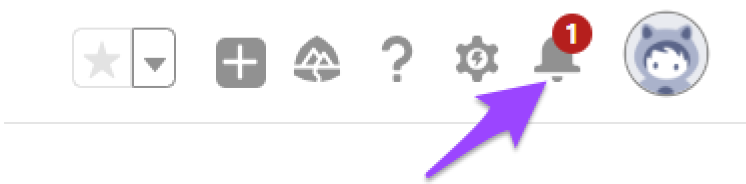


Should the following window popup, please grant access, as the URL is used by the package to access Vonage services:

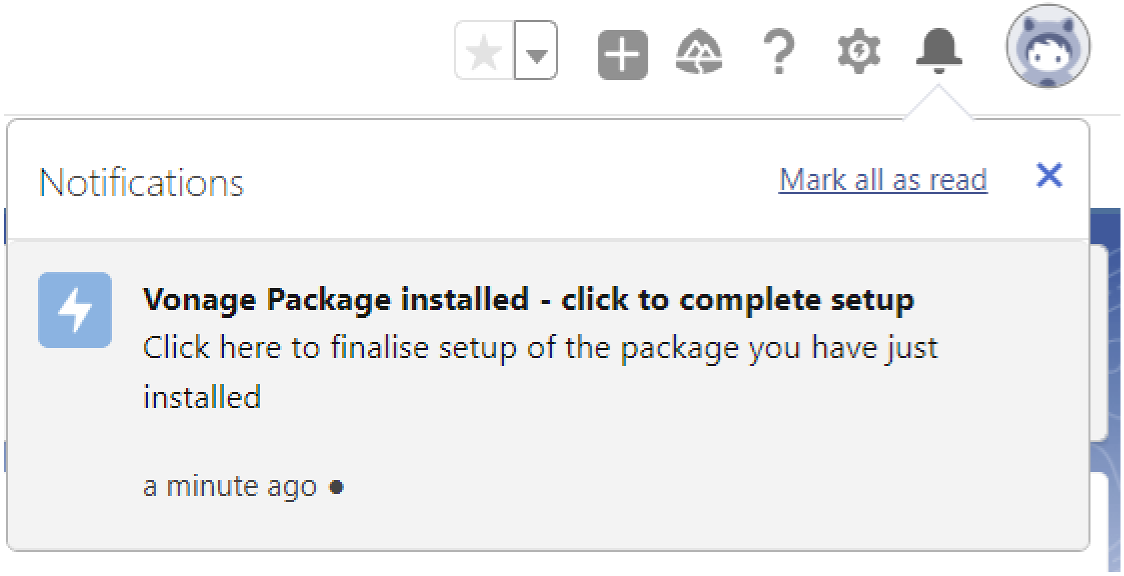


First Time Deployment

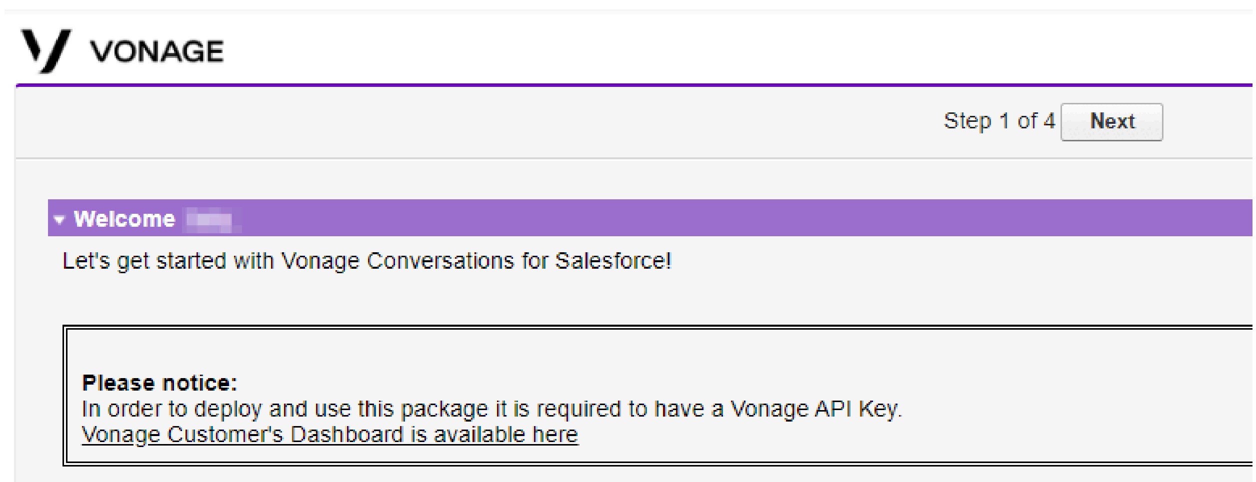
Once the initial deployment is done, the ‘Bell Notification’ will indicate a new message:



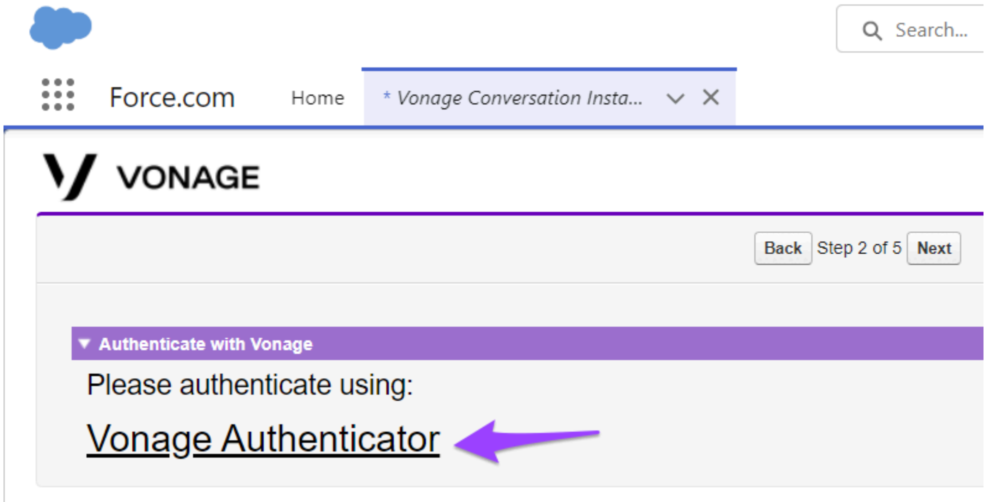
Select the link in the message to complete the setup:



Click ‘Next’ to start the deployment process:

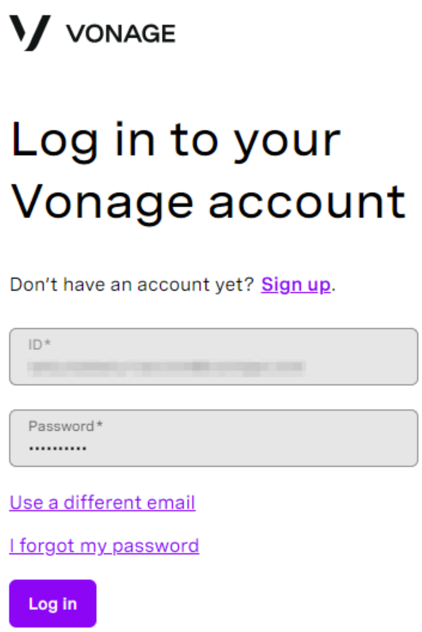


For Step 2, click the link to authenticate with Vonage - please ensure that you are logged-off from any other Salesforce ORG while completing this process:

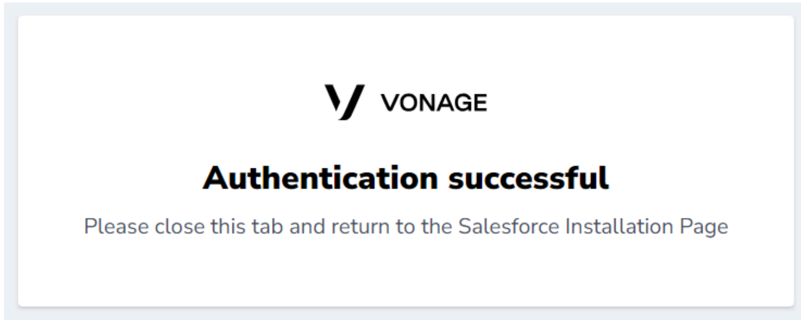


Failure to complete the authentication will cause errors in later stages of the wizard.

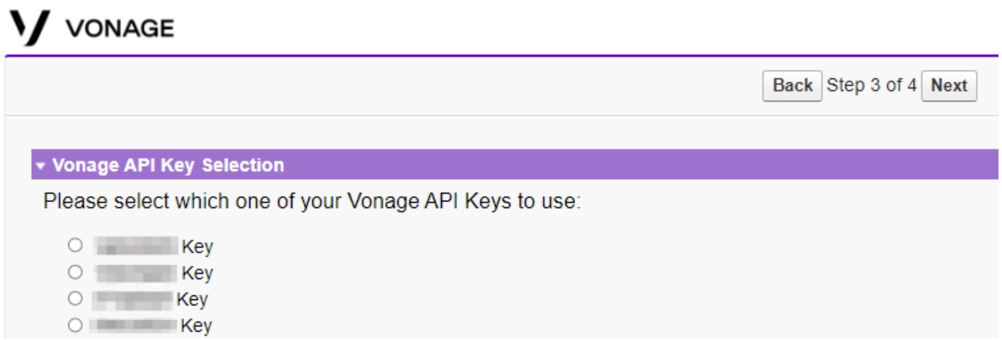
Next, you will be taken to the Vonage customer dashboard to login:



Once authentication is completed, you will see this confirmation and can return to Salesforce:

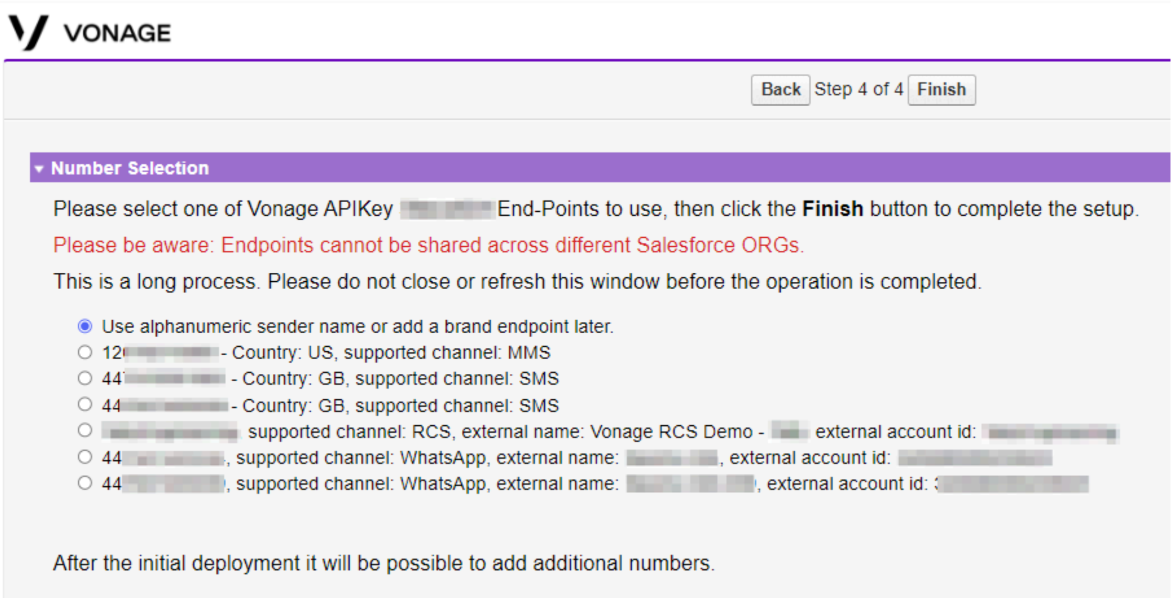


In step 3, select the API key you want to use:

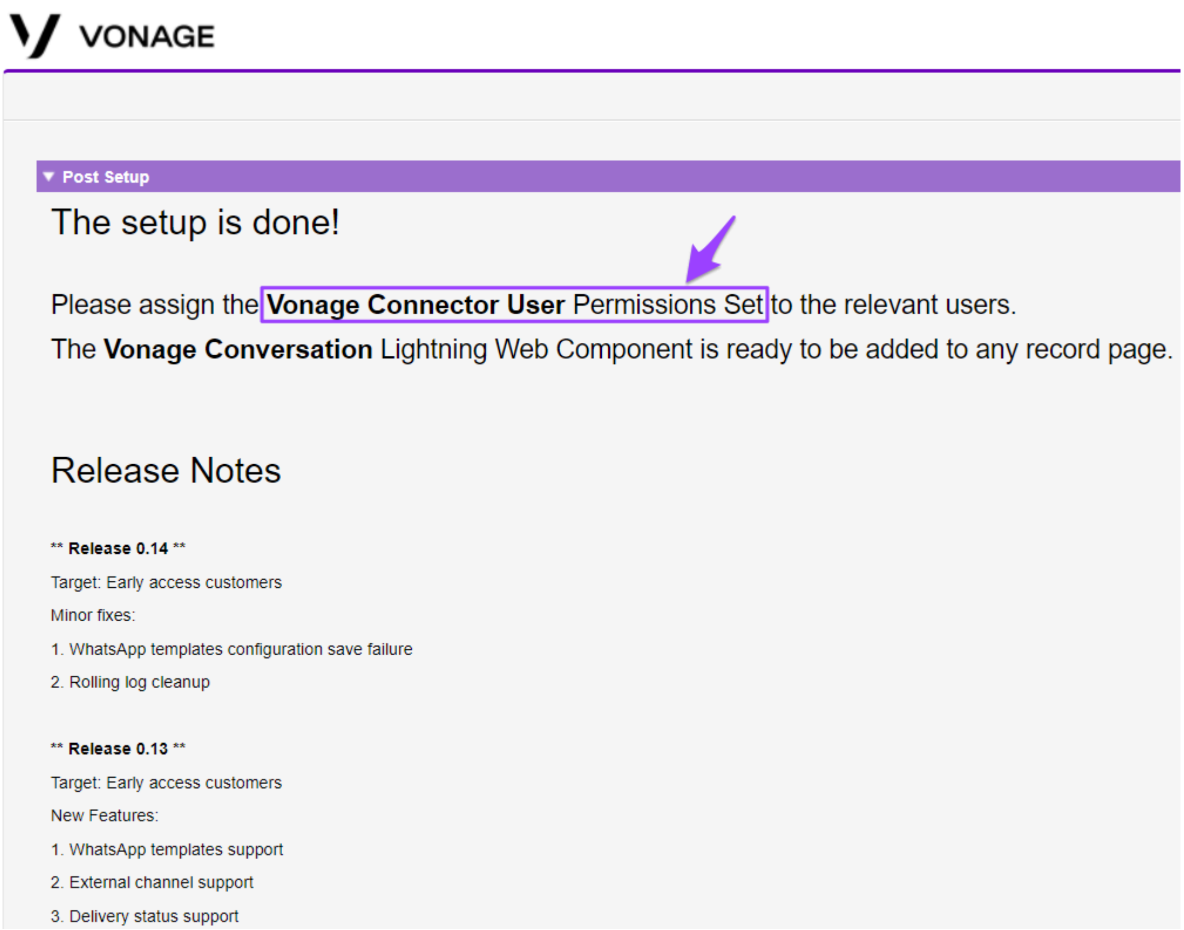


The final step will allow you to select one of the following options:

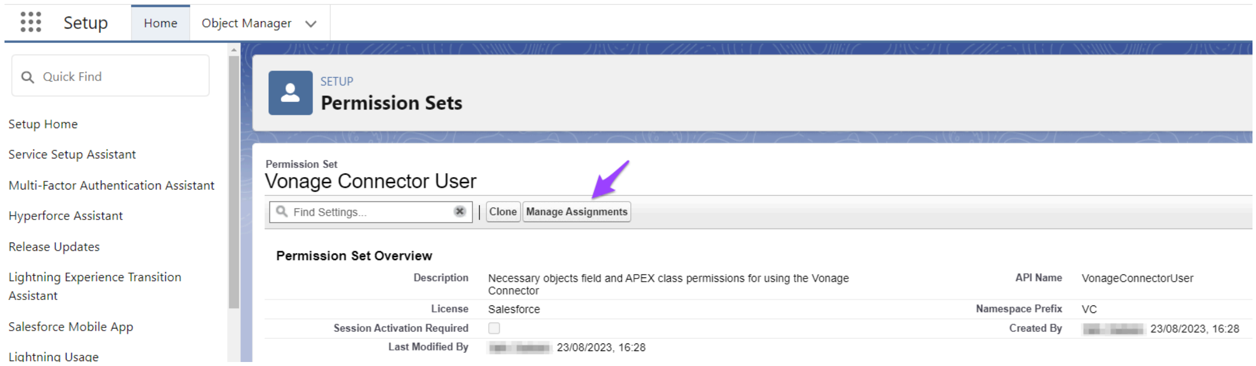
- The default option is to continue without selecting any endpoint. Later, using the Admin application you can add your Brand or select any of your available numbers and external accounts.
- Alternatively, select one of the numbers or external accounts associated with the selected Vonage API Key.



Once this is complete, setup is done and you will see the following message:



The next step is to set the permissions for which users can use the Vonage package. To do this, navigate to 'Permission Sets', then select 'Vonage Connector User' and click Manage Assignments:



Assign the permission set to the agents you want to use the Vonage package to complete deployment.

The next section will explain how to add the UI widget to a record page.

Upgrade from any version pre-v1.0 (GA)

Upgrade from 0.7.0

Version 0.7.0 can be upgraded only to version 0.8.0. An attempt to upgrade from 0.7.0 to any other version will fail, and the package will not be upgraded.

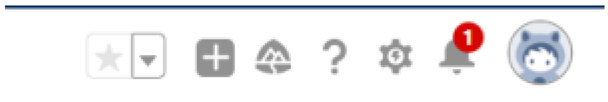
In order to upgrade to 0.8.0, please follow the steps as described here:

- While upgrading from 0.7.0 the admin should follow the exact same steps as described on the "Deployment on an empty ORG" section.
- While choosing api-key and LVN, the customer can use the same api-key and LVN they used during the 0.7.0 deployment.
- Should they choose another api-key and/or other LVN, the previously configured LVN will not be connected to the org any longer.
- This limitation and process is specific to the upgrade from 0.7.0 to 0.8.0 and will be different for future upgrades from 0.8.0.

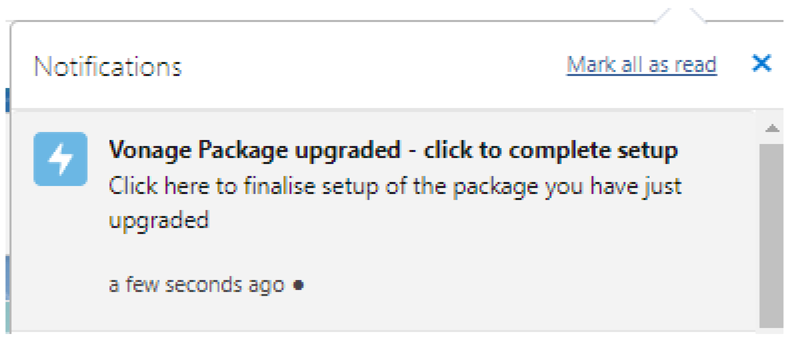
Upgrade from 0.8.0 and any other pre-GA version

Version 0.8.0 and any later pre-GA can be upgraded only to version 1.0.0 (GA). An attempt to upgrade from pre-GA to any other version will fail, and the results will be unpredictable.

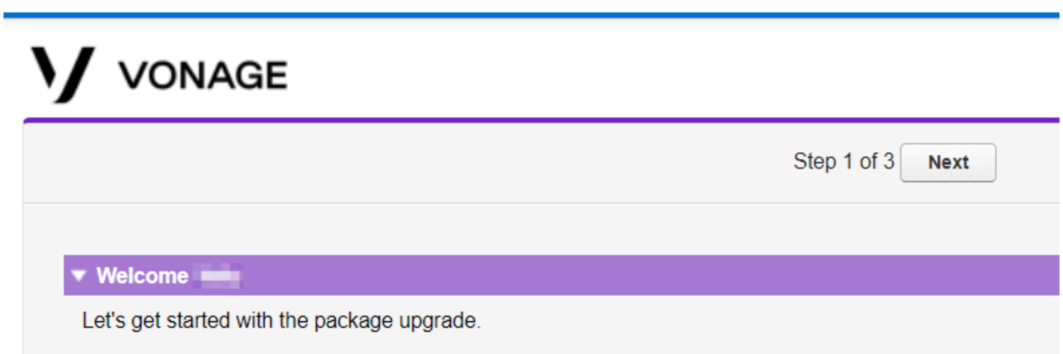
While upgrading from 0.8.0 or any later version, the "Bell Notification" will indicate a new message:



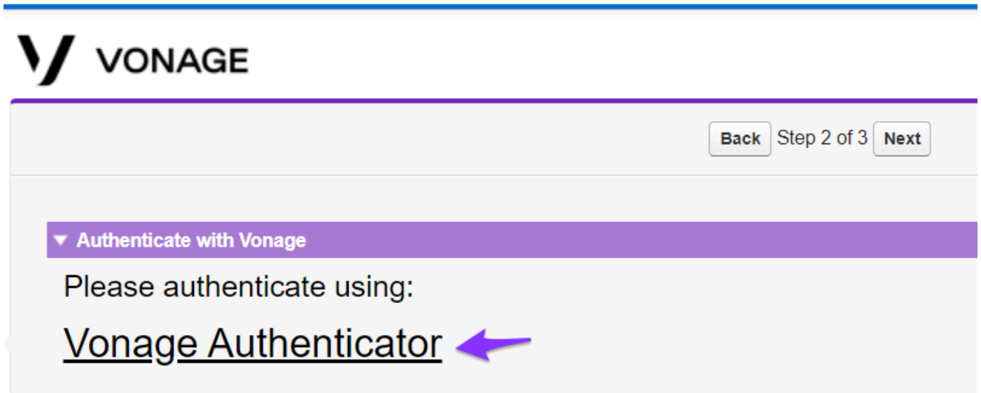
Please select the link in the message:



Start the upgrade process:

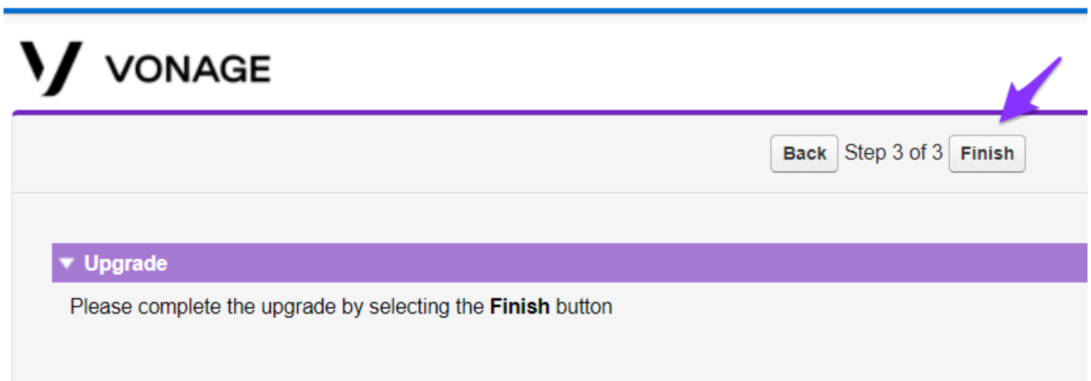


While on Step 2 - make sure to be logged-off from any other Salesforce ORG

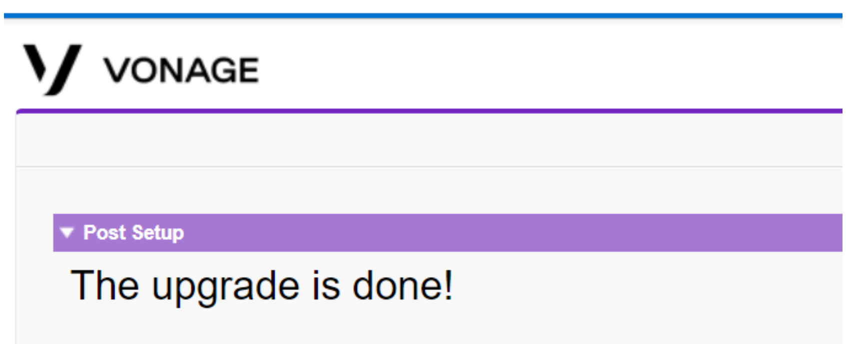


Failure to complete the successful authentication will cause errors on later stages of the wizard.

After the authentication completion select "Finish" to complete the upgrade

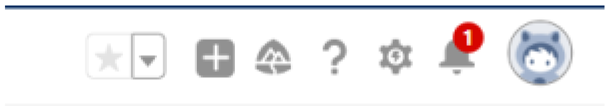


The upgrade was completed successfully:

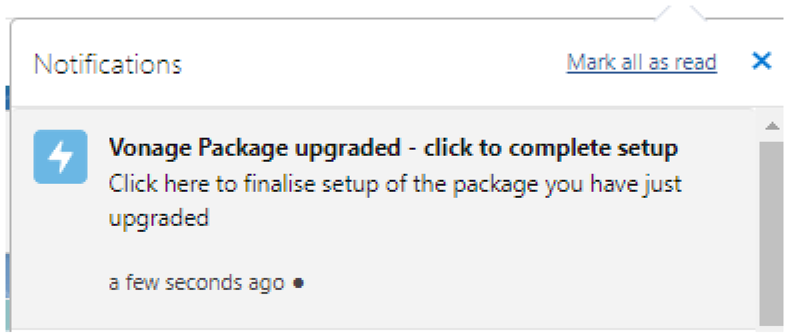


Upgrade from 1.0.0 (GA) or later

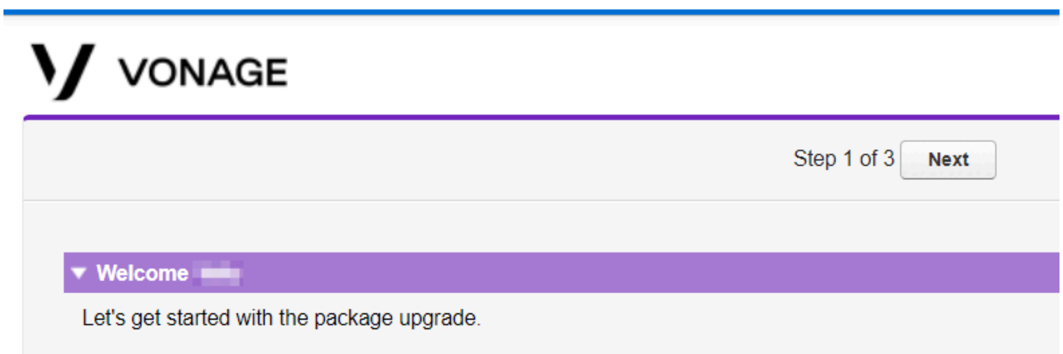
While upgrading from 0.8.0 or any later version, the "Bell Notification" will indicate a new message:



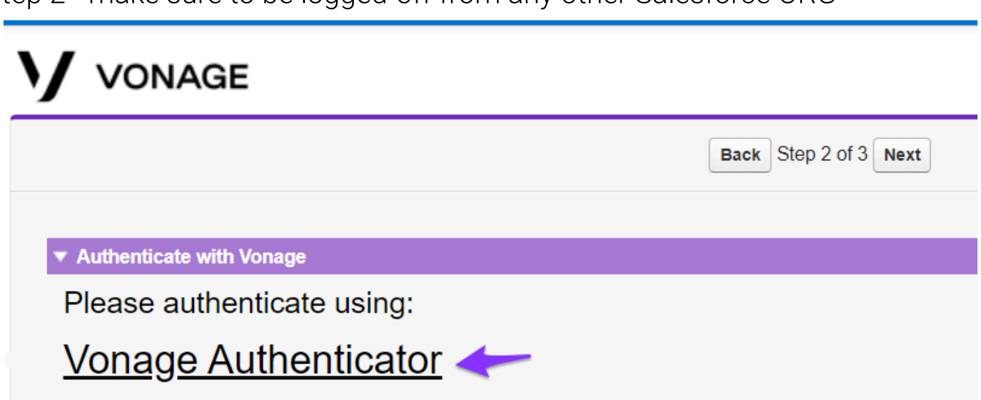
Please select the link in the message:



Start the upgrade process:

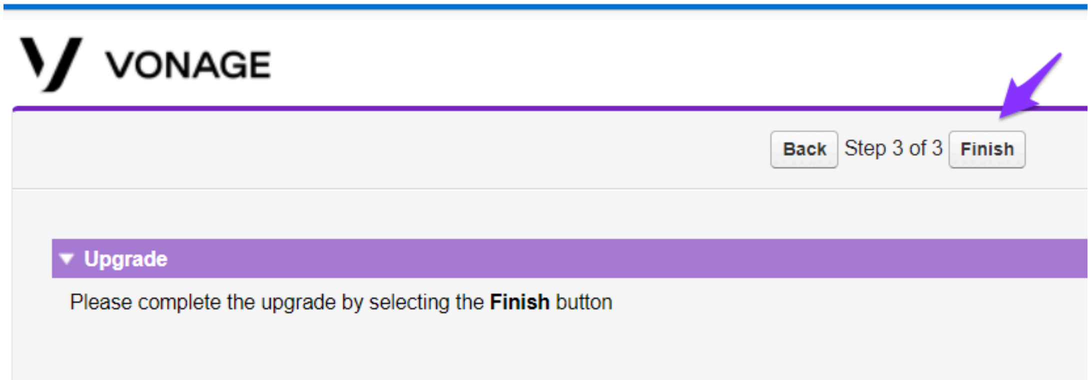


While on Step 2 - make sure to be logged-off from any other Salesforce ORG

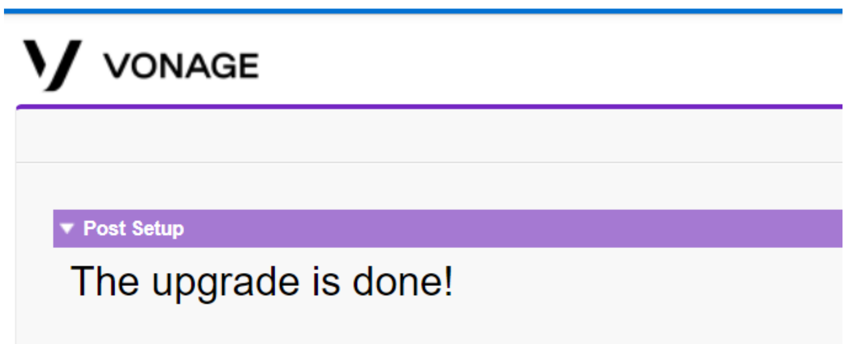


Failure to complete the successful authentication will cause errors on later stages of the wizard.

After the authentication completion select "Finish" to complete the upgrade



The upgrade was completed successfully:

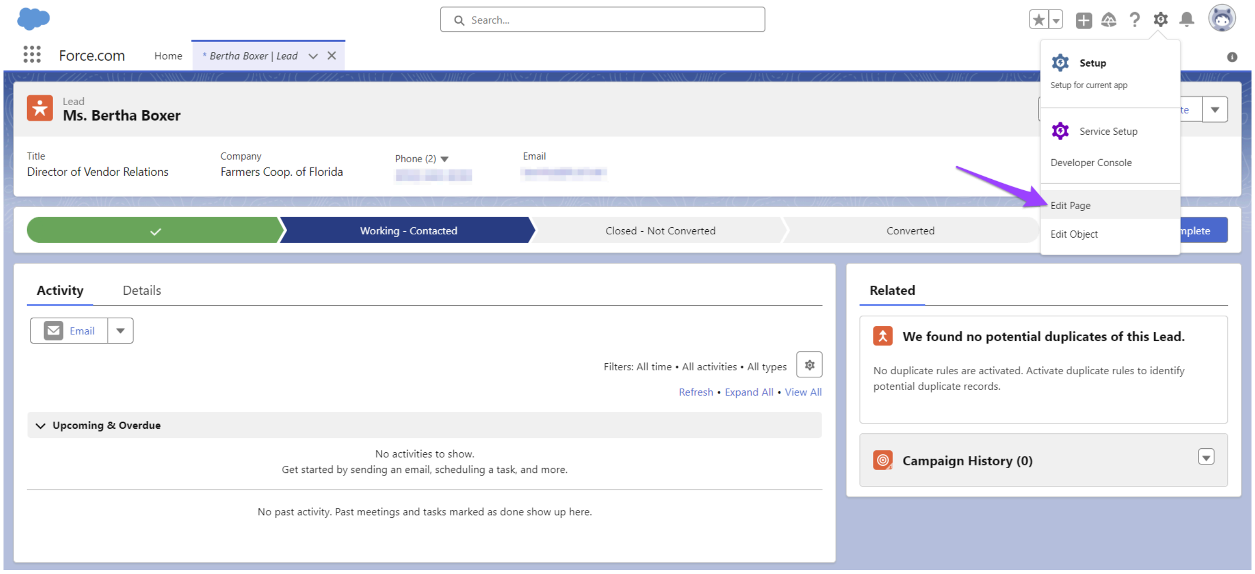


UI Setup

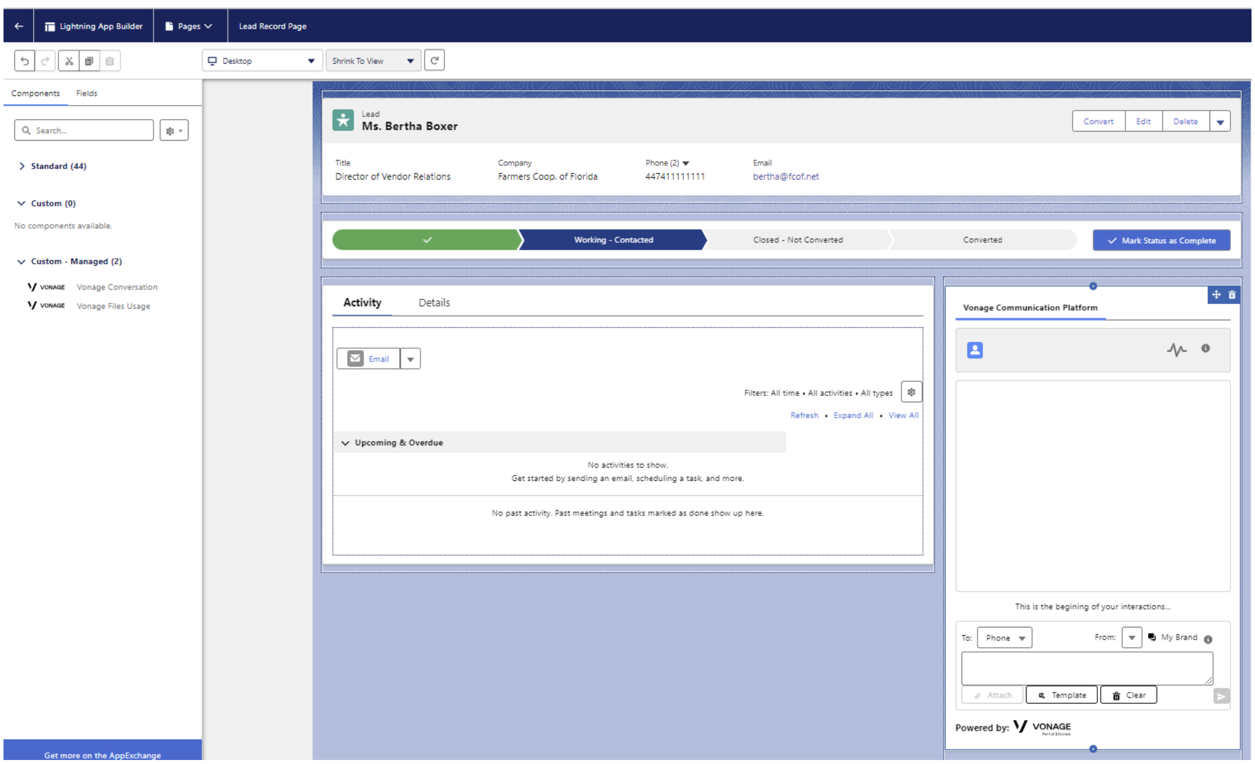
The UI Widget can be added to the record page of any standard SObject or custom SObject.

Add the widget to a standard sObject

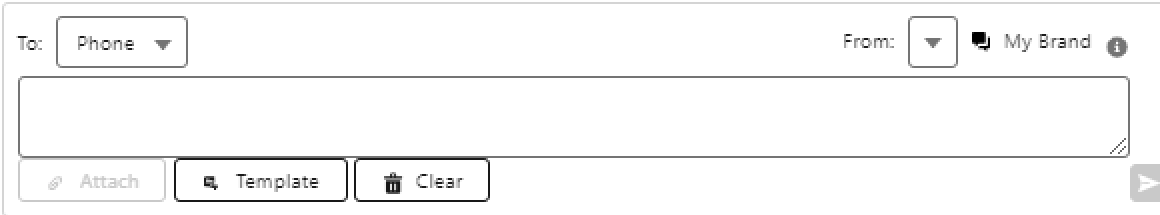
To add the widget to a standard sObject, go to the record page and select "edit page":



Drag the widget to the suitable place on the page using the components menu on the left. For example, editing the page for a lead would take you to this screen:

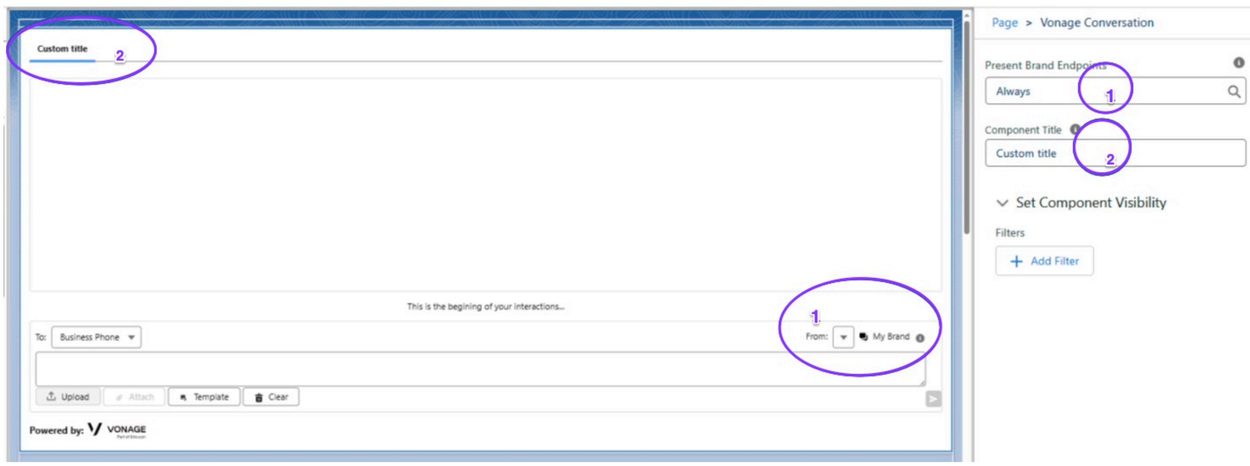


The widget will automatically identify all the populated "Phone" type fields in the record and will add them to the drop down to allow the agent to select which number to send messages to:



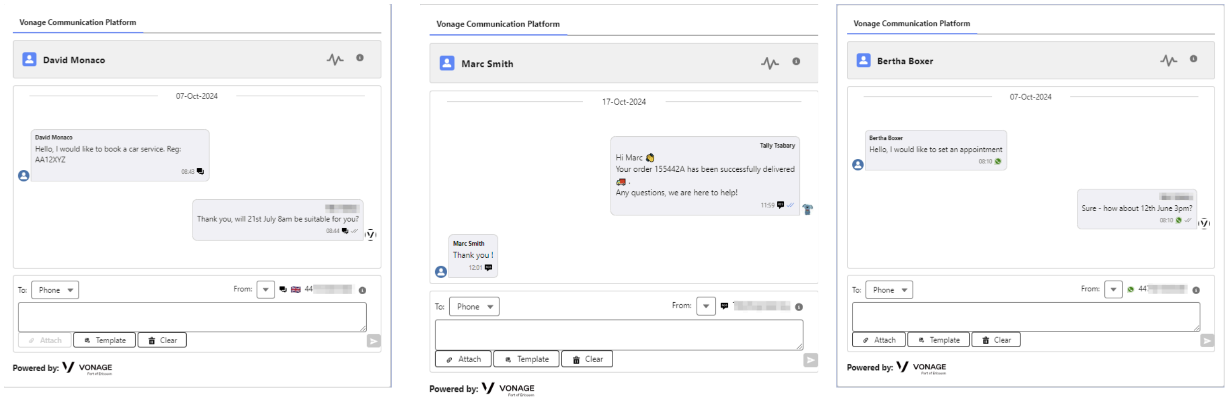
Note that the drop down uses the field label and not the phone number itself in order to allow the admin to hide the original phone numbers if they wish to do so.

When adding the widget, there are some optional customization options:



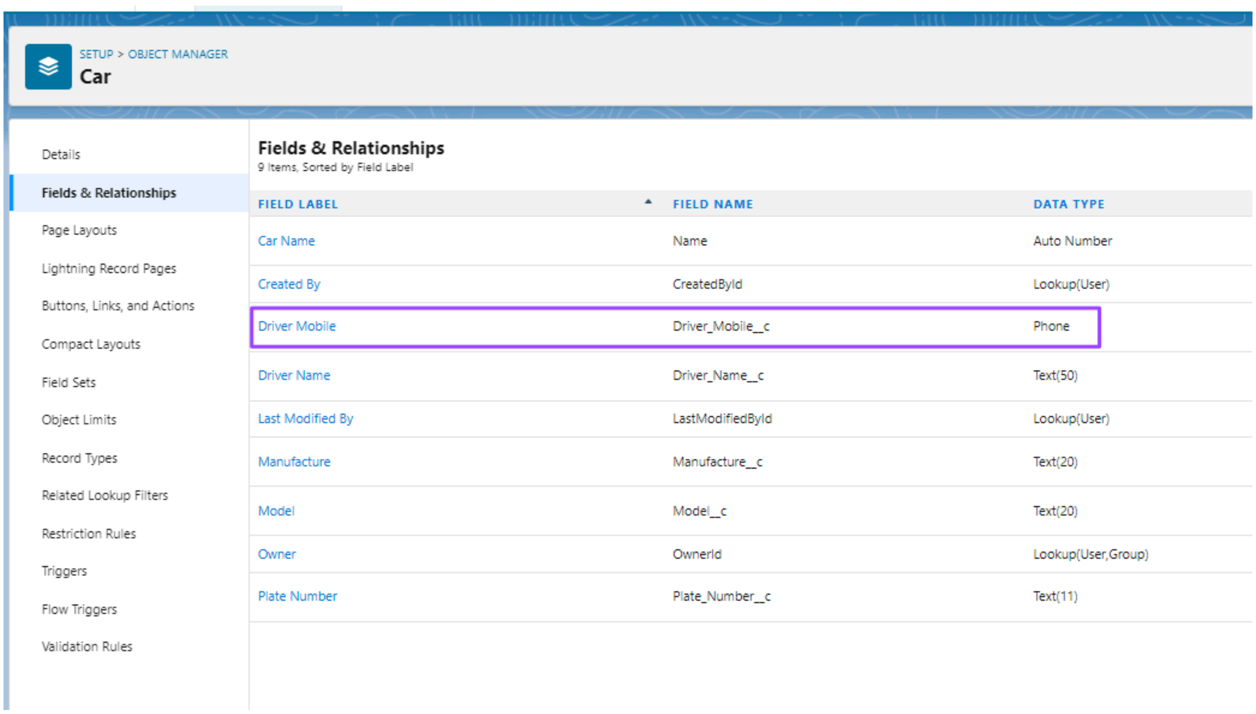
1. Allow the Agent to select the "From" phone number. The default is "Always".
2. Set a customized title to the UI widget. The default is "Vonage Conversation".

Finally, save to activate the widget on the record page. The agents with the Vonage permissions set assigned will be able to see the widget and start sending messages:



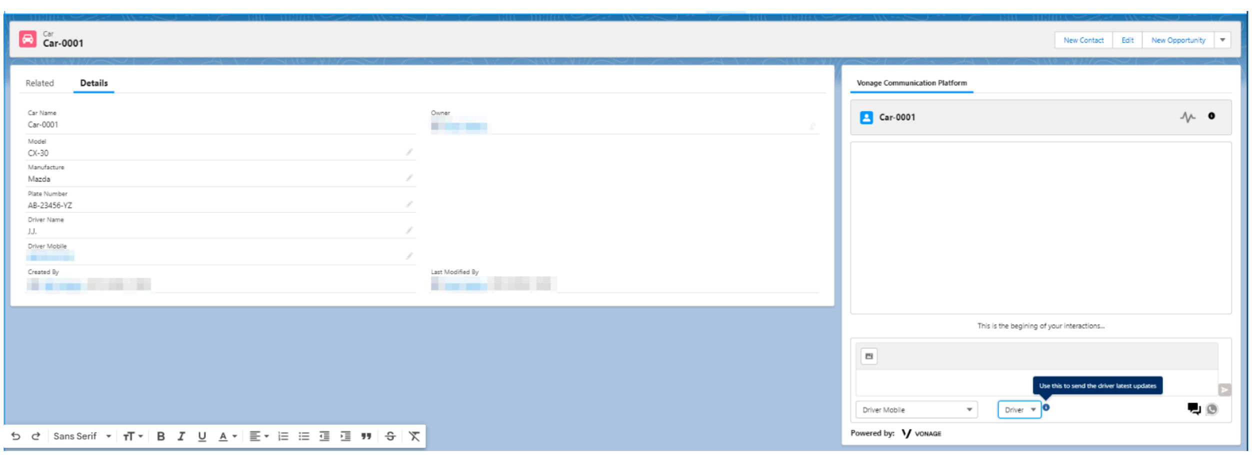
Add the widget to a custom sObject

In this example, we'll add the UI to a custom sObject named `Car__c`. The sObject must include at least one field of type "Phone", such as 'Driver Mobile' here:



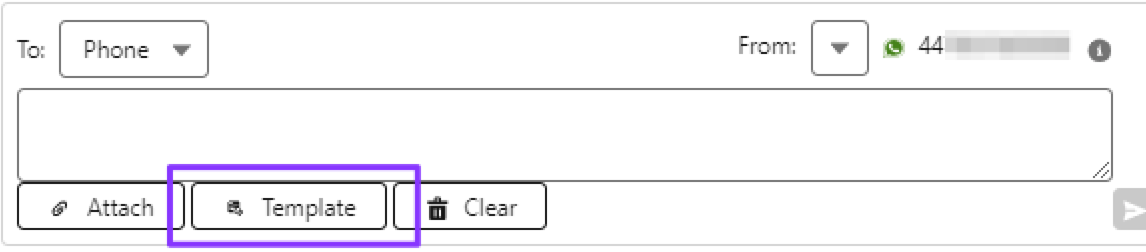
The `VC_Interaction__c` sObject should also contain a field that has a lookup relationship with the `Car__c` sObject:

Once that's in place, it is possible to add the widget to the `Car__c` record page:

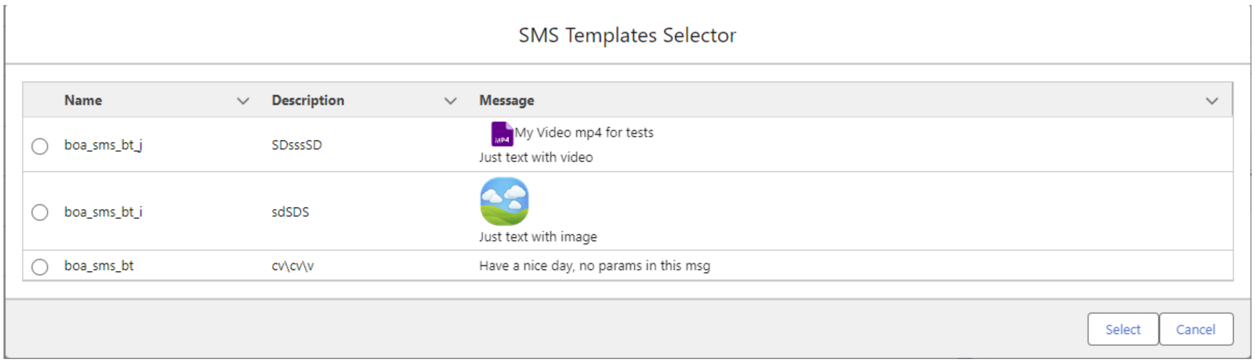


Working with Templates in the UI Widget

From CSF v1.6 onwards, a 'Template' button has been added to the Agent's UI Widget:



When clicked, the Agent is presented with a list of available SMS templates:



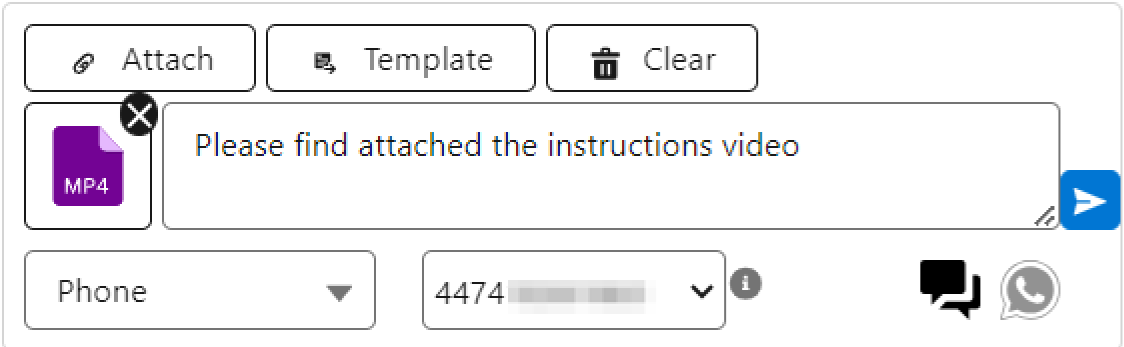
Only active templates are available. For each specific record page, the list of available templates will include only the templates that are configured with elements from the context record.

For example:

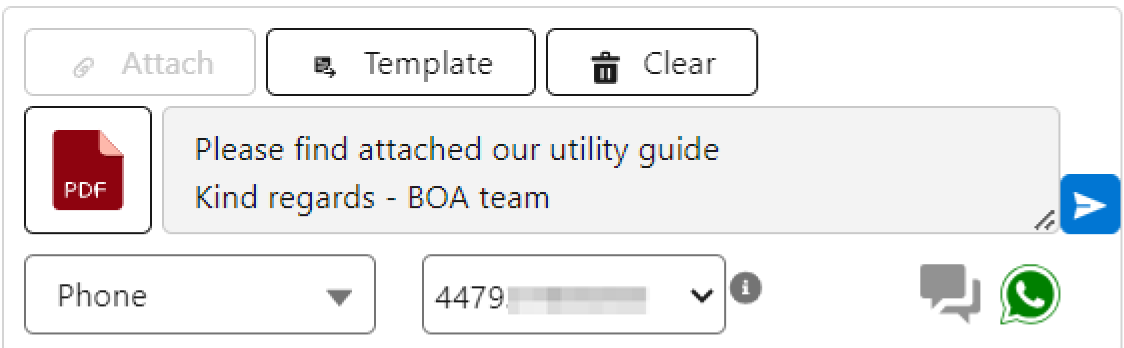
- Assuming there are two active templates, `hello-new-lead` and `Status-update` configured like this:
    - Template `hello-new-lead` includes mapping to the `Lead.FirstName` and `Lead.LastName` fields.
    - Template `Status-update` includes mapping to the `Case.Number` field.
- Then:
    - While working with the Leads record pages, the UI will present only the `hello-new-lead` template.
    - While working with the Cases record pages, the UI will present only the `Status-update` template.

The selected template will be presented to the Agent:

SMS Template

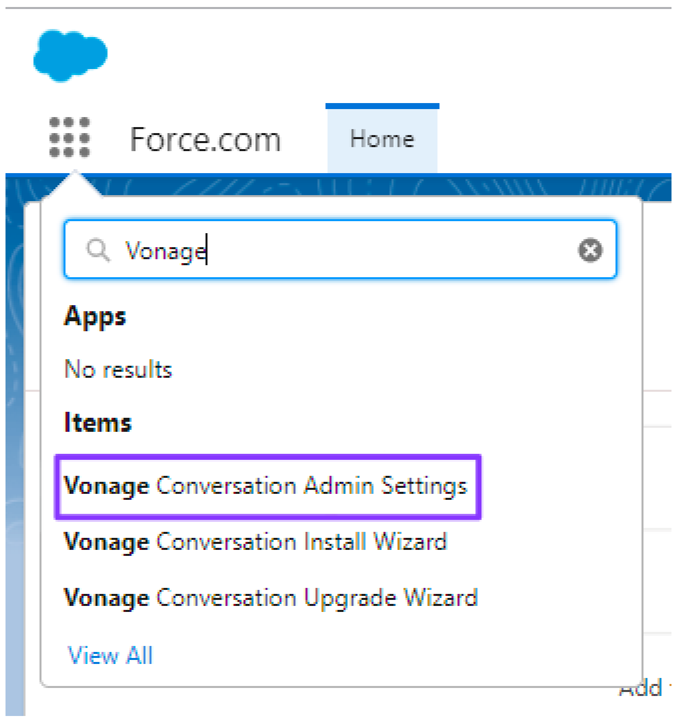


WhatsApp Template



Admin Configuration Page

The Admin Configuration Page allows the ORG Admin to perform a number of configuration and monitoring actions. To access the page, search Vonage to find the 'Vonage Conversation Admin Settings':

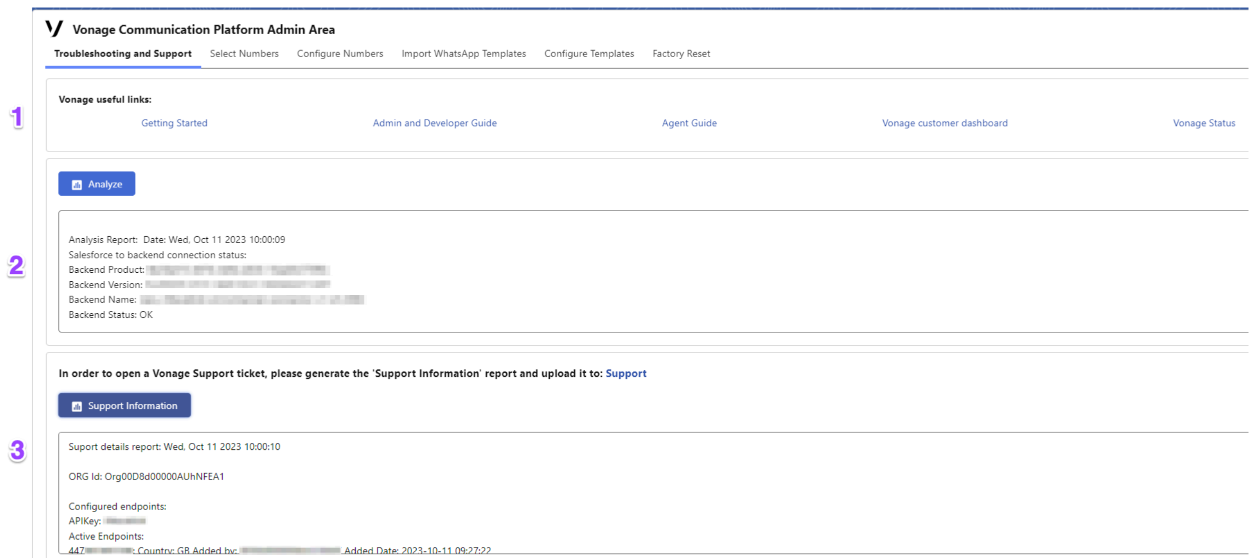


The page includes 7 tabs:

1. Troubleshooting and Support - Check the backend connectivity status, fetch logs, and see shortcuts to the Vonage documentation, status page and customer dashboard.
2. Brand Endpoints - Manage numbers, external accounts, and brand names.
3. Import WhatsApp Templates - Import approved WhatsApp templates from Facebook.
4. SMS/MMS Templates Composer - Create and configure SMS templates, including dynamic parameter values fetched from Salesforce data.
5. Configure Templates - Configure the WhatsApp Templates so the dynamic parameters' values are fetched from Salesforce data.

6. Setup and Configuration - Configure incoming file names, enable/disable the sending of incoming files in outgoing messages in other interactions, and configure mobile and system notifications.
7. Factory Reset - Reset all configurations to initial state.

Troubleshooting and Support



Vonage Useful links

Links to the Vonage documentation, status page and customer dashboard.

Analyze

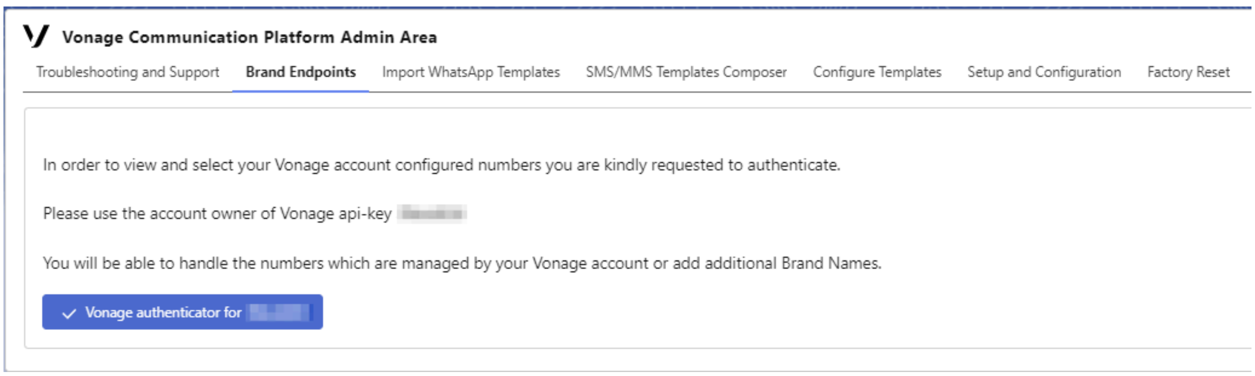
Clicking the 'Analyze' button will fetch the latest status of the connection between the ORG and the Vonage backend connector. You will see the name of the backend connector instance, along with the backend status. This information can be used for further communications with Vonage support in case of connectivity issues - any tickets raised should be under the category 'Using Conversations for Salesforce'.

Support Information

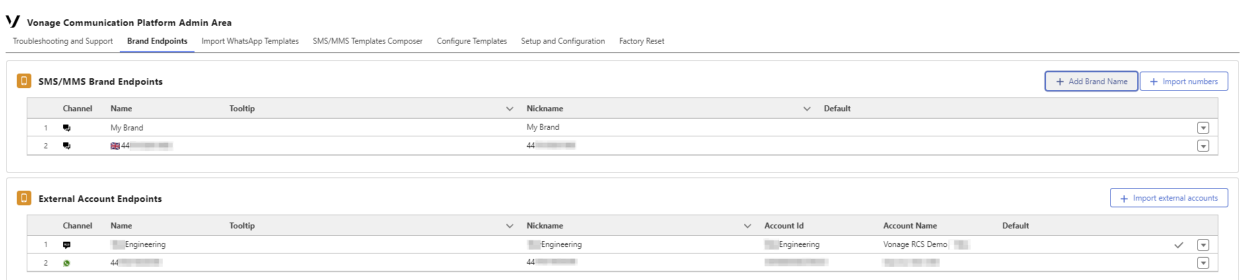
Clicking the 'Support Information' button will fetch the latest connection status, current configuration details and logs in one report. This information can be used for troubleshooting and further communications with the Vonage [support team](#) - any tickets raised should be under the category ‘Using Conversations for Salesforce’.

Brand Endpoints

This section requires additional authentication at the Vonage Customer Dashboard:



Once authenticated, you can manage your organization’s numbers, external accounts, and brand names:



The default Brand Endpoint

There can only be one default number at a time. The first Brand Endpoint to be added to the org is set as the default, however any Brand Endpoint can be nominated as the "Default" using the action button on the right of the table. The default endpoint will be the first shown on the Agent's UI "From" list when there are no previous interactions.

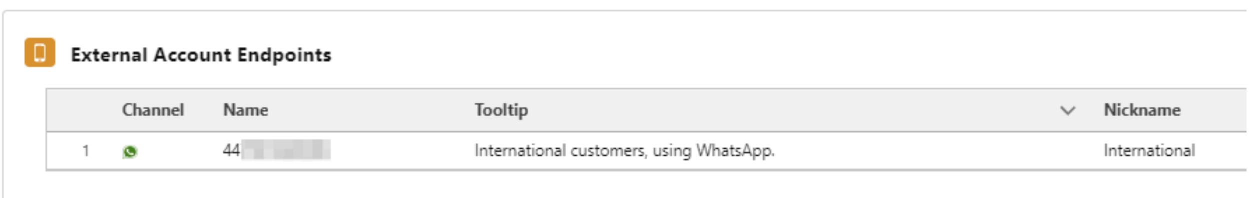
Please refer to the [Agent Number Allocation](#) section in Setup and Configuration for further details regarding the allocation of specific endpoints per agent.

Brand Endpoint nickname and tooltip

The admin can assign a nickname and/or tooltip to each Brand Endpoint, using in-line edit of the above table.

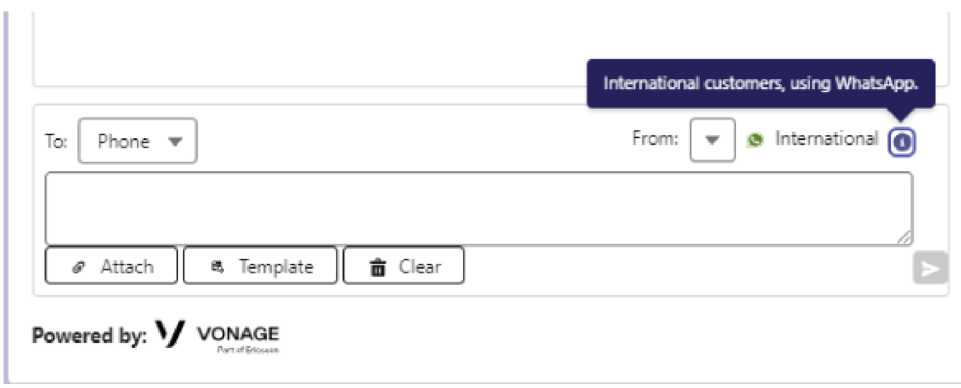
- **Nickname**: This determines the company's Brand Endpoint name as it is presented on the agent's UI. The default nickname is identical to the Brand Endpoint name.
- **Tooltip**: The Tooltip presented on the UI while selecting a specific Brand Endpoint. It is recommended to set the tooltip with some description of the specific endpoint usage. The default tooltip is empty.

For example, this nickname and tooltip:


External Account Endpoints

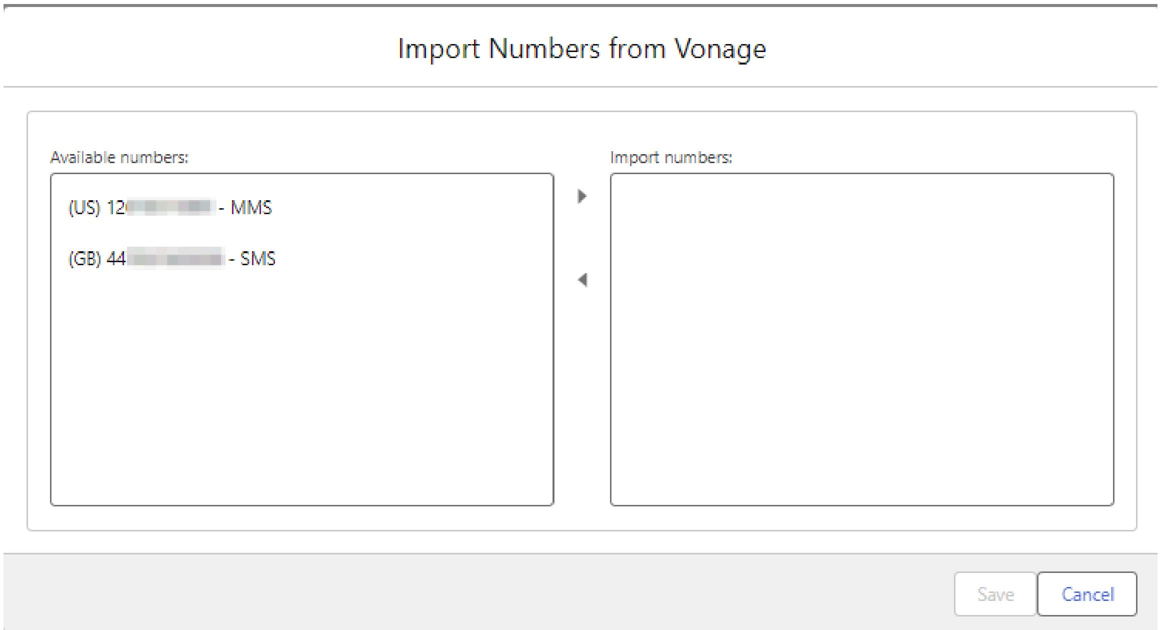
	Channel	Name	Tooltip	Nickname
1		44	International customers, using WhatsApp.	International

Will show on the Agent's UI like this:



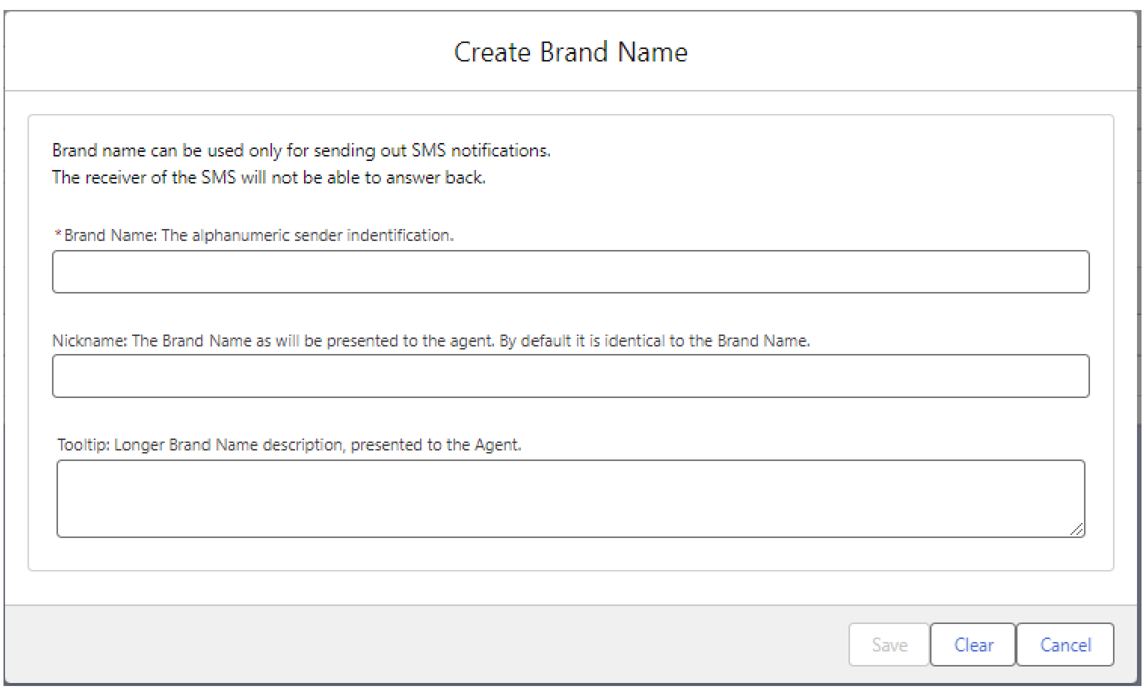
Import numbers / Import external accounts

Use the "Import" buttons to configure additional Brand Endpoints:



Configure Brand Names

The Brand name is only used when sending SMS messages. Select the "Add Brand Name" button, fill-in the details and select "Save":



Removing a Brand Endpoint

Any Brand Endpoint, that is not the default endpoint, can be removed using the Actions on the table's right most column.

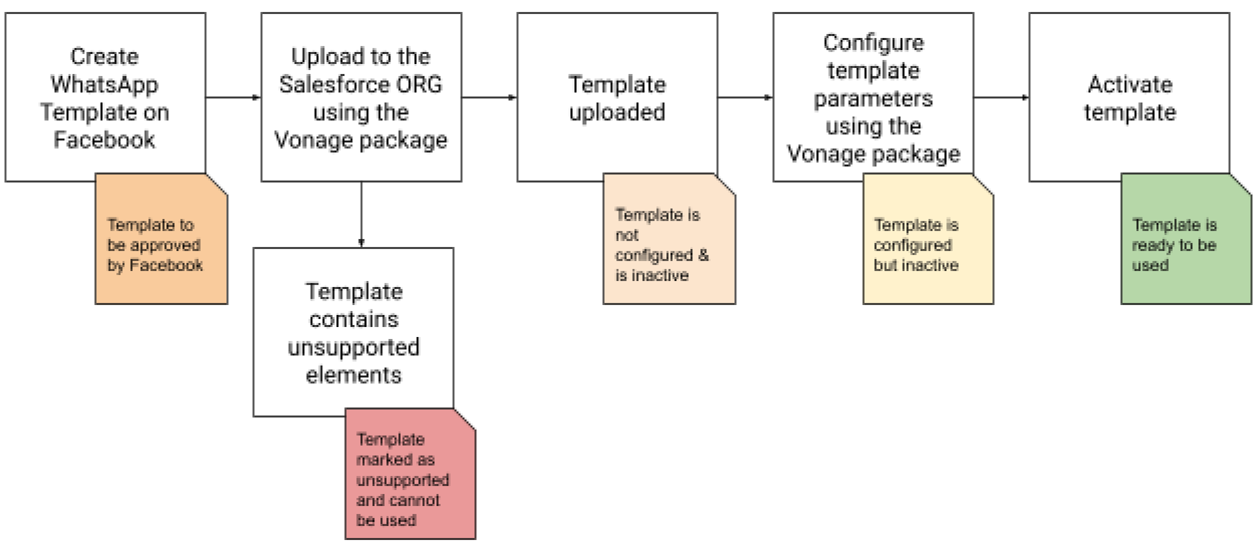
Import WhatsApp Templates

In order to use WhatsApp templates, your Vonage account and LVN must be configured for WhatsApp through the Vonage customer dashboard.

WhatsApp templates are required to start a business-initiated conversation, for example shipping updates, appointment reminders, alerts, and more. Message templates are the only type of message that can be sent to customers who have not initiated a conversation with you, or have not sent a message in an existing conversation within the last 24 hours.

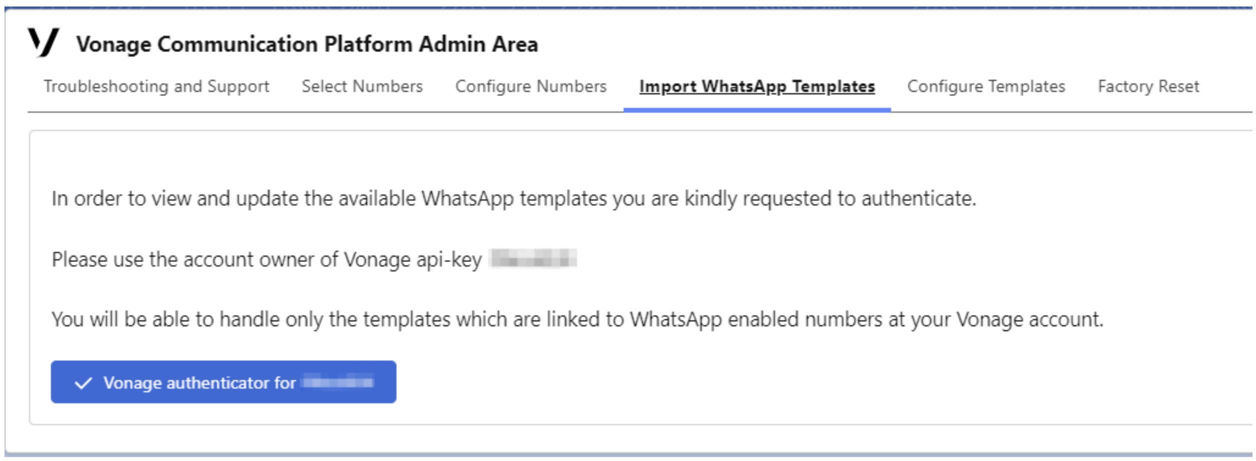
Templates are created through the Facebook Business Manager and must be approved by Facebook before use. Take a look at [Facebook's documentation] for more information.

The process of configuring and using WhatsApp Templates in Salesforce is as follows:

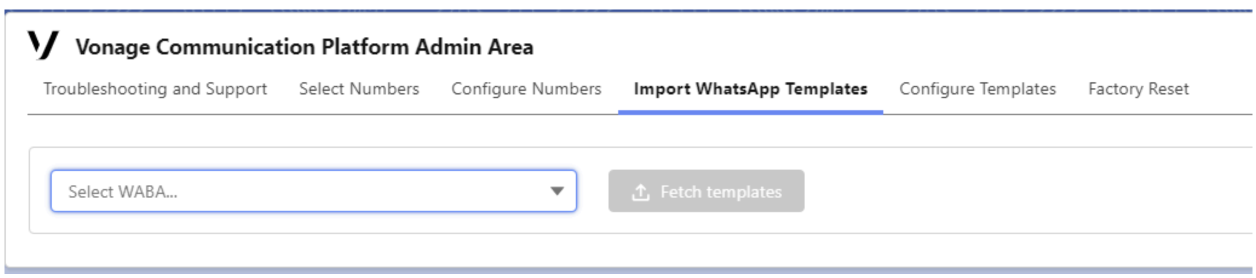


WhatsApp Template usage is also supported for Flow and APEX. Please refer to WhatsApp Templates Usage section for further details and examples regarding the templates usage, once they are imported, configured and activated.

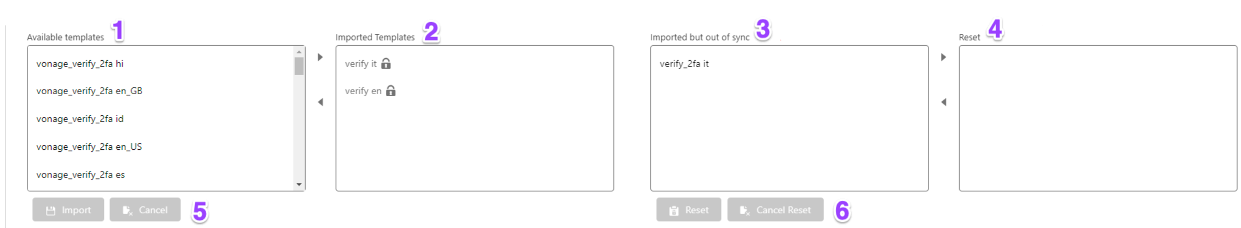
Once the WhatsApp Templates have been created and approved by Facebook, go to the 'Import WhatsApp Templates' tab and authenticate with Vonage:



Once authenticated, select the relevant WABA (WhatsApp Business Account) and click 'Fetch Templates':



The screen will now populate with the available templates:



The templates are shown in 3 different sections according to their category: Authentication, Marketing, or Utility. In this example, there are only Authentication templates.

1. **Available templates** - a list of WhatsApp approved templates for that category which are not available in the ORG.
2. **Imported templates** - a list of templates which are already available to the ORG. To remove already imported templates, please refer to Configure Templates.
3. **Imported but out of sync** - a list of templates which were already imported into the ORG, but were later changed on Facebook, and therefore need to be reset to reflect the latest changes.
4. **Reset** - a list of templates that are selected for reset.

Import selected templates

Use the arrows to add/remove templates from "Available Templates" (1) to "Imported Templates" (2). Select the "Import" button (5) to complete the process. The imported templates will then be marked with the lock sign.

Reset out of sync templates

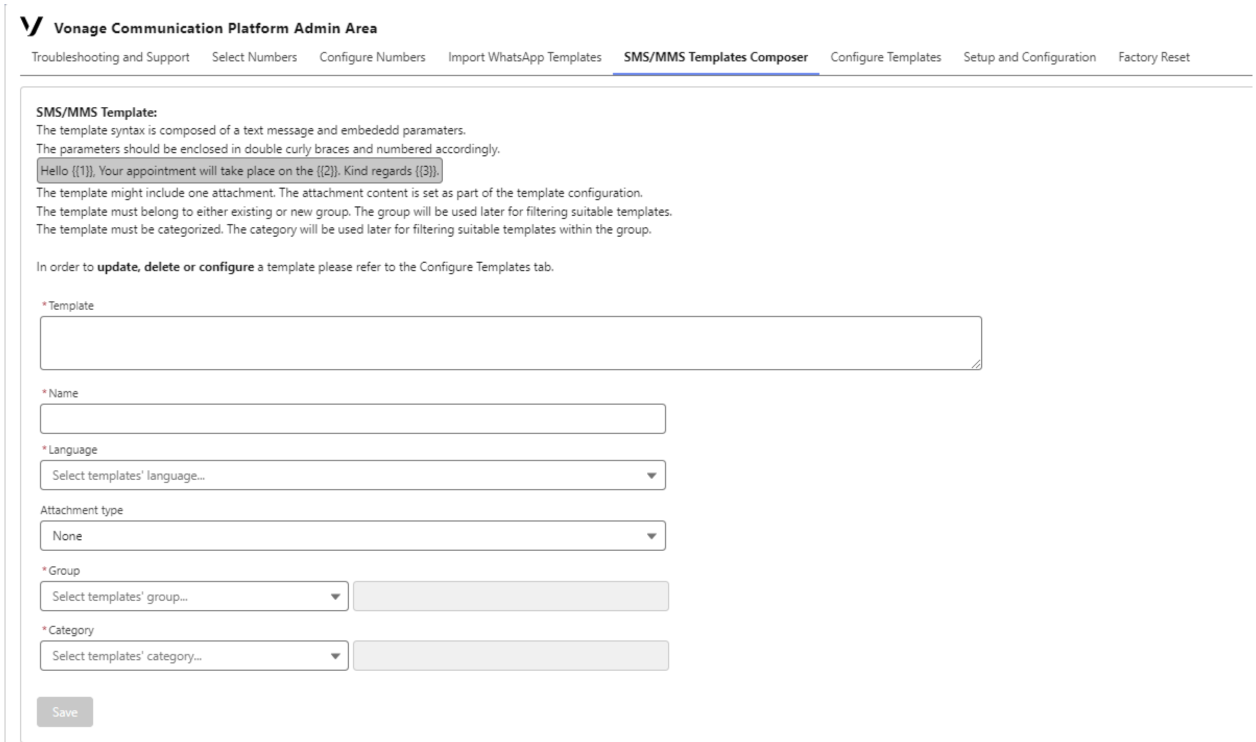
Use the arrows to add/remove templates from "Imported but out of sync" (3) to "Reset" (4) and select the "Reset" (6) button to import the template again. All of the template’s current configuration will be deleted.

The template will then be shown in the "Imported Templates" (2) section.

SMS / MMS Templates Composer

SMS/MMS templates are composed of a body, one optional attachment, and a language, group and category.

Once a template is created, it can be configured, updated or deleted using the Configure Templates tab.



Name, group and category

The template name, group and category are mandatory. The group and category fields are used to help organize the templates by subjects and topics as required by your organization.

It is possible to create a new group by selecting the "Create New Group" at the dropdown, or add the template to an already existing group.

Template unique identifier

A template's unique identifier is the concatenation of the template name, language and group, for example `myTemplateName_en_myGroup`.

Template body and attachment

The template syntax is composed of a text message and optional embedded parameters. The parameters should be enclosed in double curly braces and numbered accordingly; parameter configuration is done on the Configure Templates tab. For example:

```
Hello {{1}}, Your appointment will take place on the {{2}}. Kind
regards {{3}}.
```

The template's attachment type is optional, and the supported attachment types are Image or Video. If used, the attachment value configuration is done on the Configure Templates tab.

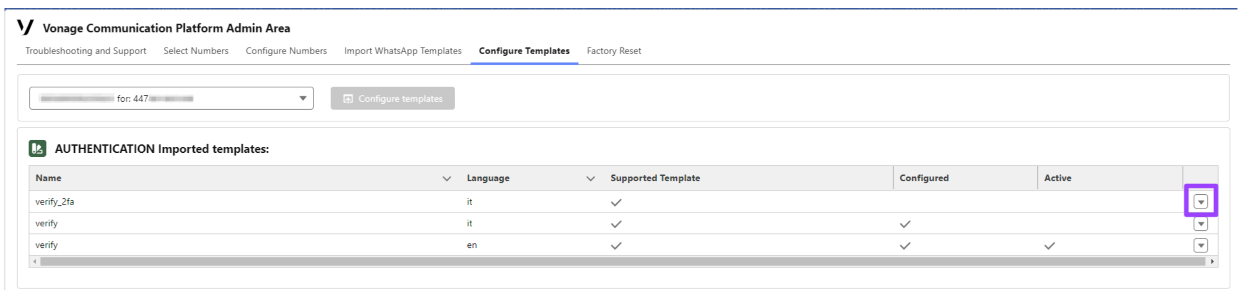
Language

The template language parameter is mandatory.

Please notice that the language is not enforced by the package but used as part of the unique identifier of the template, providing a convenient naming mechanism for the same message in several languages. It is the user's responsibility to select the suitable template.

Configure Templates

This tab is used to manage all created or imported templates for both SMS/MMS and WhatsApp..

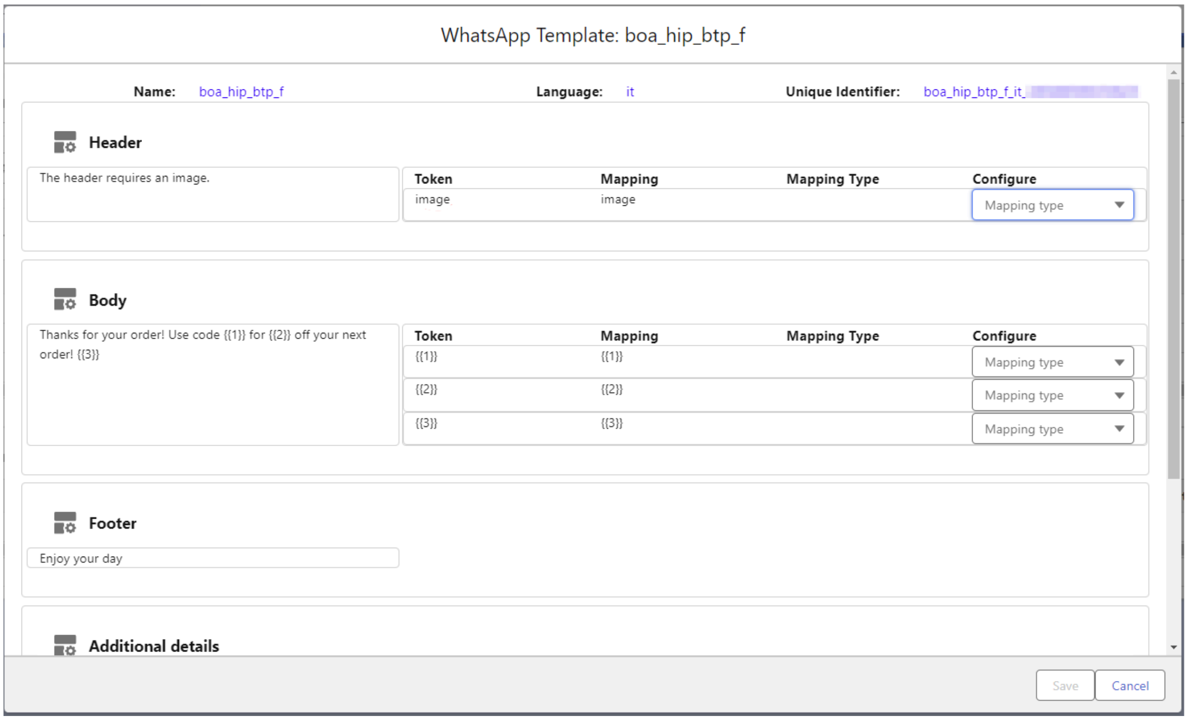


The drop down menu on the right side of each line will present the suitable actions based on the current template status. The available actions are:

Preview	View the original template definition as it was imported from Facebook or created in the SMS/MMS Composer.
Delete	Remove the template and its configuration from the ORG.
Configure	Configure the template and map its parameters to Salesforce data. The template can only be configured if it is supported.
Activate/Deactivate	Activate/deactivate the template for use. A template can only be set to active if it has been configured.
Edit	SMS/MMS templates can be edited here. WhatsApp templates can only be updated via the Facebook interface.
View unsupported reasons	Shows the sections in the template that are unsupported. This action is only available when the template is not marked as supported. The elements that are not currently supported are: ● Headers of type Document or Video ● Dynamic Buttons

Configure the Template Parameters

Choosing 'Configure' from the list of actions will show the following screen:



A template can contain a Header, Body, and Footer - all of the template's available parts will be shown here.

The "Configure" drop down will present the list of potential mappings depending on the section type and format:

Header

Currently, the supported Header parameter types are text, image, video, and document.

- Text parameters are shown in the message as "{{x}}", and can be mapped in the same way as the Body Parameters.
- Image parameters can be mapped in two ways:
  - **Record field -** Select an SObject and one of its fields. The content of the field should be a ContentDocumentId (For example: `0698d00000CDuQUAA1`) which relates to an image that is managed through "Files".
  - **Constant image -** Select an image via the pop-up to attach to the message header.

- Video and Document parameters can be mapped in the same way as images; for Videos, you would use ‘Constant Video, whereas for Documents you would use ‘Constant Document’.

Body

Currently, only text parameters are supported in the Body. They are shown in the message "{{x}}" and can be mapped to any of the following:

- **Record field -** Select an sObject and one of its fields. The String representation of the value will be used. In order to use an sObject it must be linked in a lookup relationship with the `VC__Interaction__c sObject`.
- **Environment variable -** Can be one of: Current date, Current Time, Current date and time, Agent name.
- **Constant value -** Any constant string.
- **Custom -** The content of the `VC__Template_Custom_Field__c` of the relevant `VC__Interaction__c` record . Only one custom field is supported per interaction and template.
    - Mapping to a custom field is only suitable for templates which are used from a Flow or Apex code. If an agent attempts to use a such a template from the UI widget, the mapping result will be '[]'.

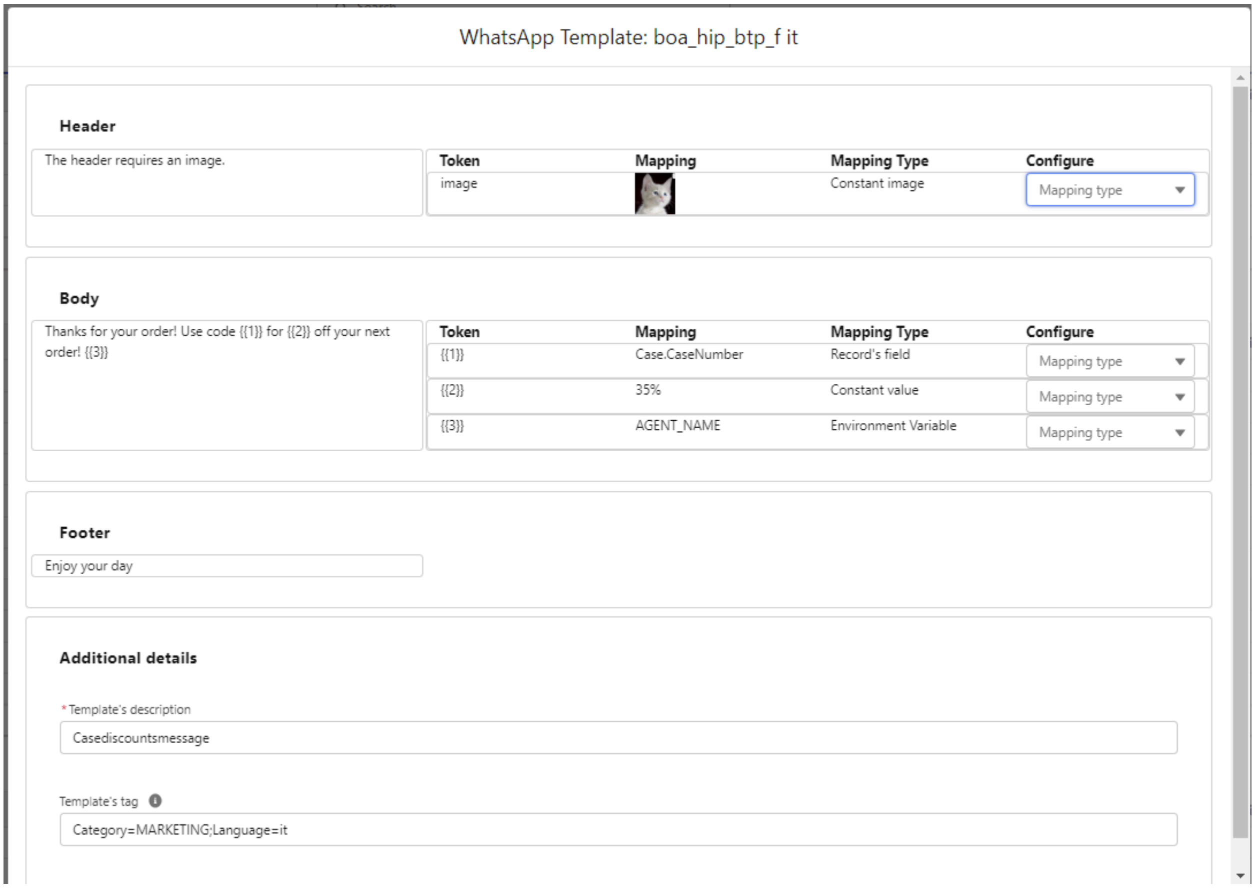
Footer

Can only contain text.

Additional Details

Each template configuration must include a template description.
The template configuration is also automatically populated with tags such as "Category=XXX;Language=YYY". Additional tags can be added to the list in the format “XXX=YYY”, all separated by a semi-colon, and are used to filter on templates later on.

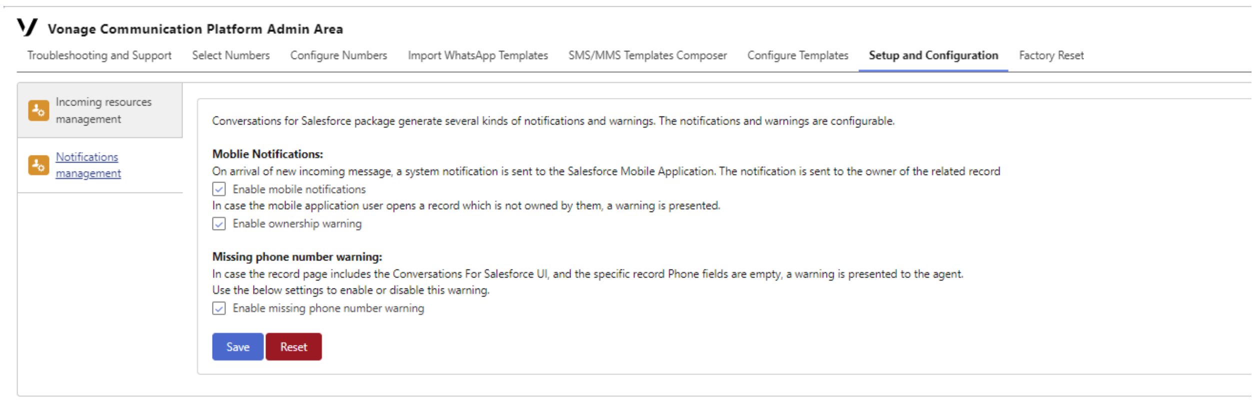
Configured Template Example



Setup and Configuration

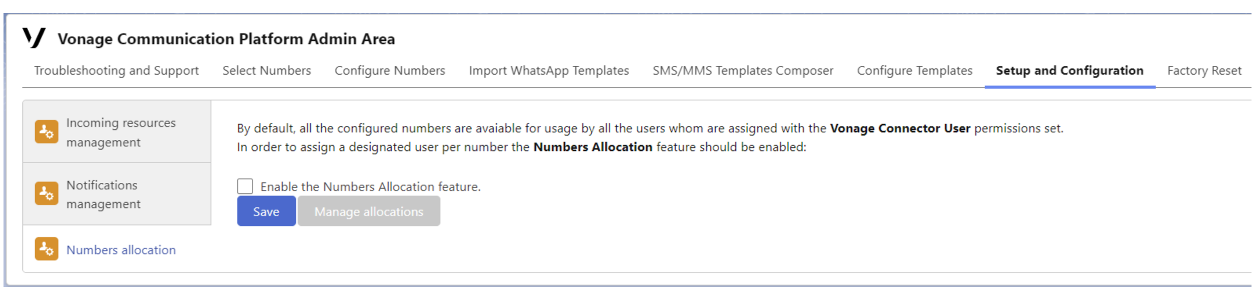
This section has three tabs:

- **Incoming Resources Management:** Configure the names of incoming files and images when they are stored in the Salesforce Files system, and enable/disable if an agent can use a file that came from an incoming message for new outgoing messages in other interactions.
- **Notifications Management:** Manage both system and mobile notifications.
- **Numbers Allocation:** Allocate specific numbers to agents.



Agent Number Allocation

This section allows you to allocate specific numbers for specific agents. This is an optional feature.



By default, all the numbers are available to all the agents which were assigned with the "Vonage Connector User" permissions set. For more information on this feature please refer to Configuring Number Allocation.

Factory Reset

Factory Reset provides the option to reset the package configuration to its initial state, or if there is a need to replace the originally selected account.

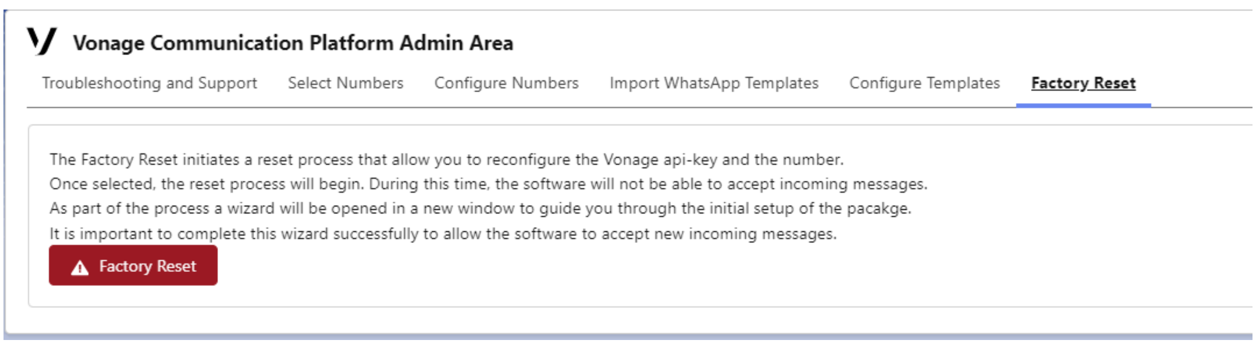
The reset process **deletes** the previously configured api-key and LVNs, including their nicknames, tooltips and brand name. The already existing messages and images are **not** deleted.

During this process the package will be inactive - incoming messages won't be accepted, and outbound messages will not be sent.

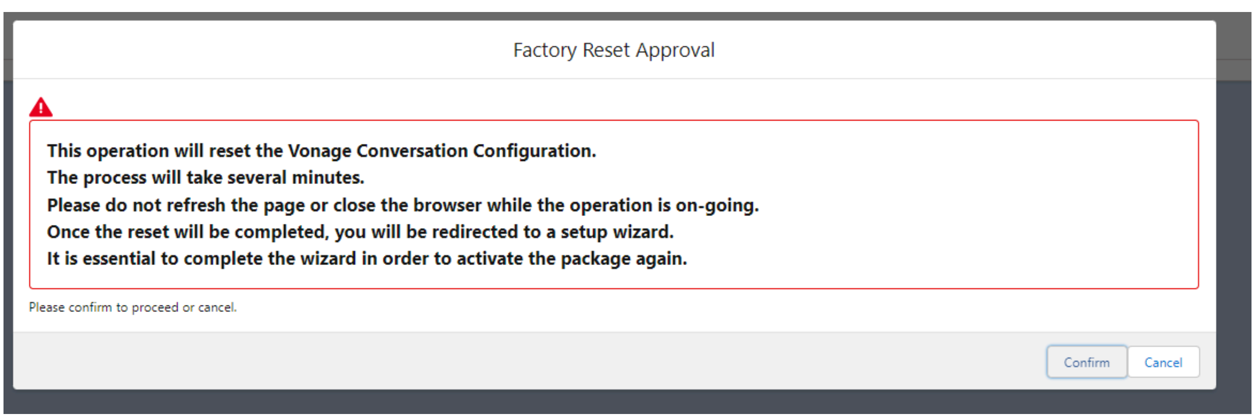
The reset is irreversible.

The reset process consists of 3 steps:

1. **Initiate**

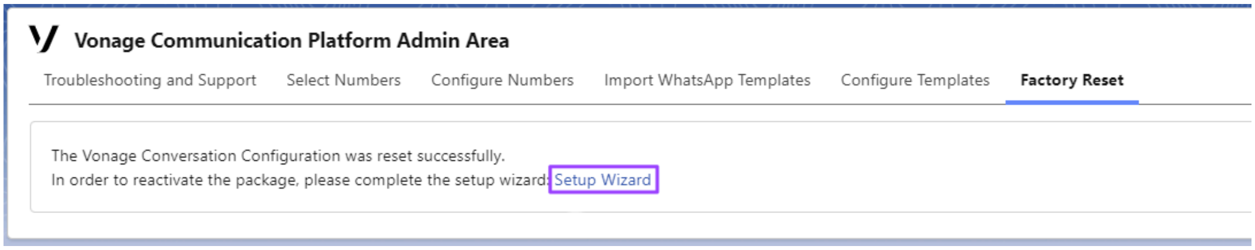


2. **Confirm**



3. **Reconfigure**

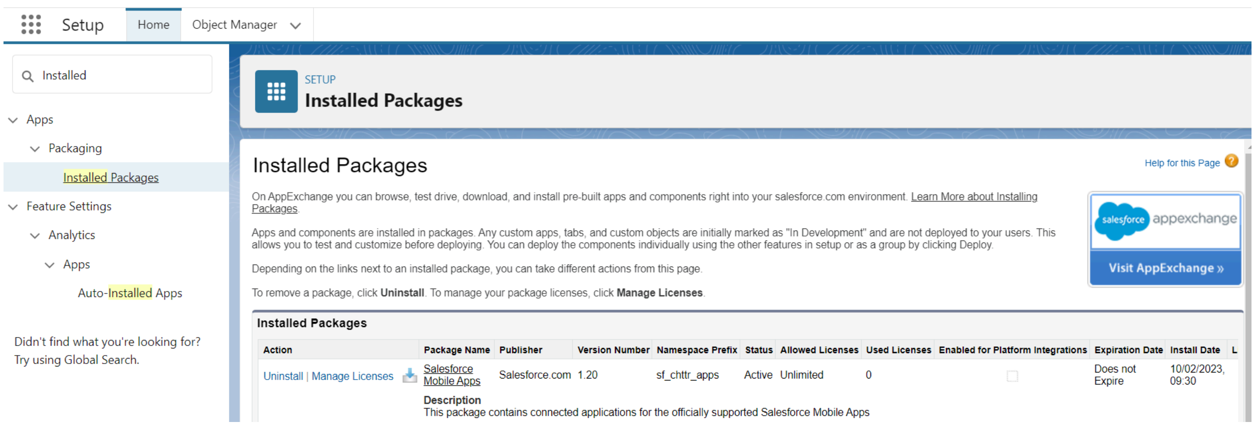
It is important to complete the reconfiguration wizard. The package will be inactive until the wizard is completed successfully.


Vonage Communication Platform Admin Area
Troubleshooting and Support
Select Numbers
Configure Numbers
Import WhatsApp Templates
Configure Templates
Factory Reset
The Vonage Conversation Configuration was reset successfully.
In order to reactivate the package, please complete the setup wizard: Setup Wizard

Mobile Configuration

Verify the Salesforce Mobile Package is installed in your ORG

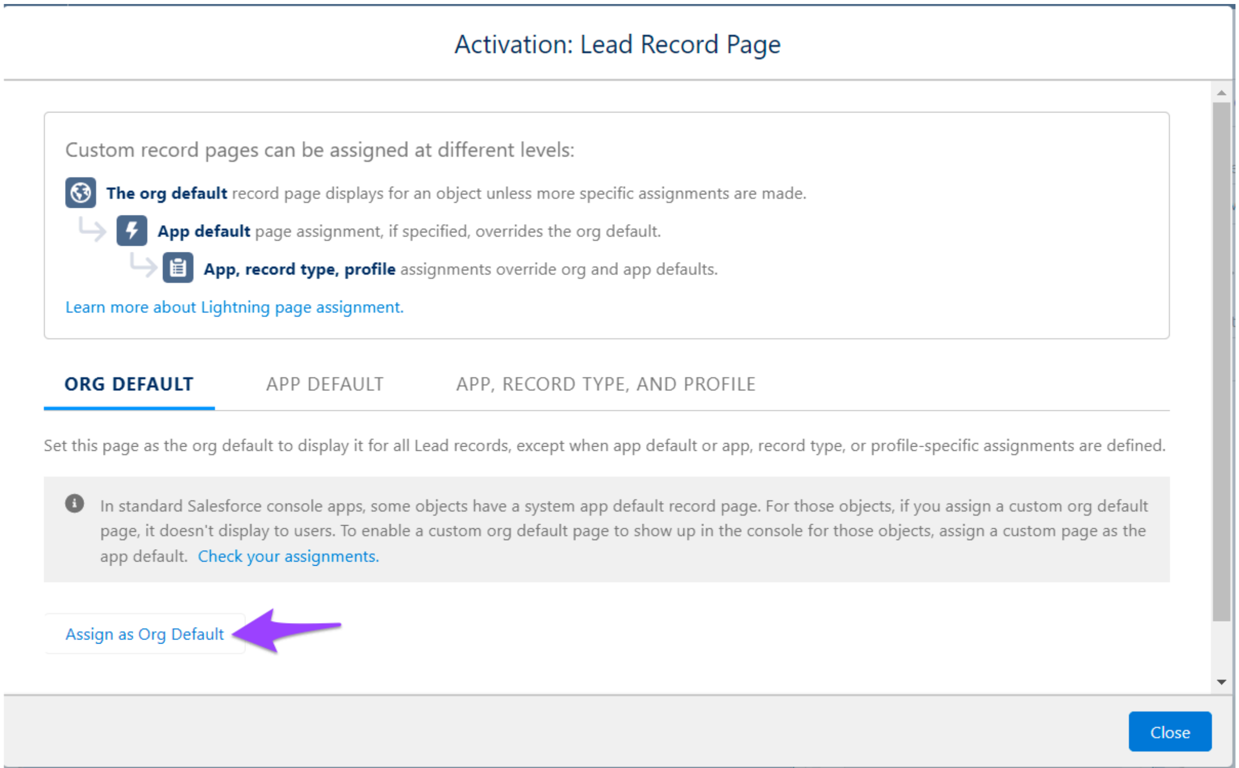
From Seup, find "Installed Packages"and check if the ‘Salesforce Mobile Apps’ package is installed for your organization:

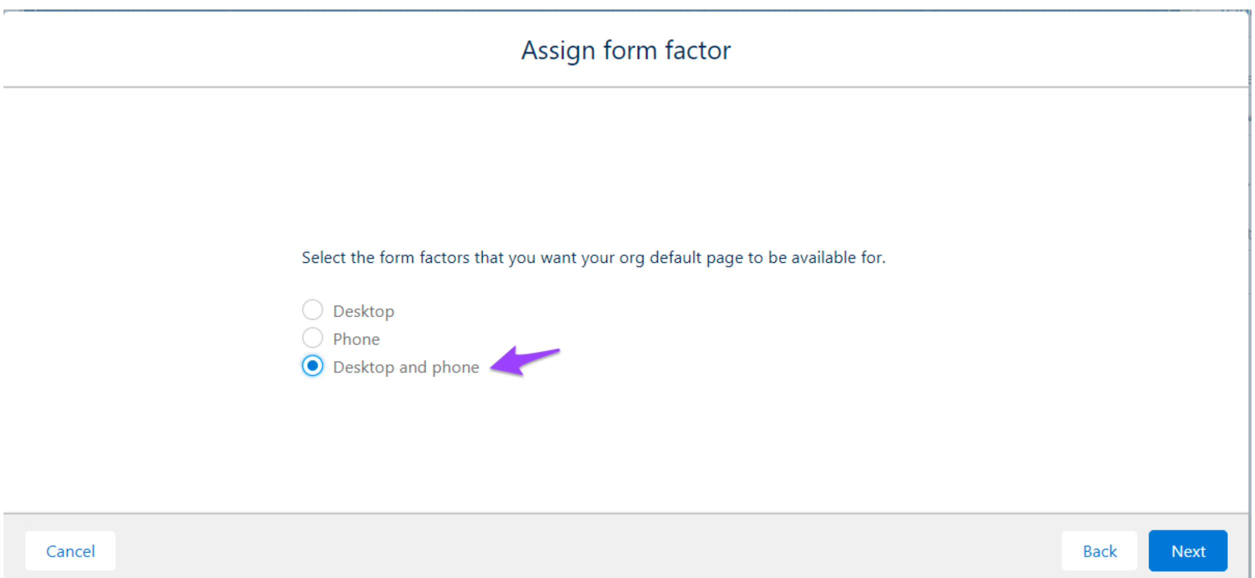


If it is not installed, work through the Salesforce documentation.

Activate the UI for Mobile

Verify that the UI component is activated for Mobile:



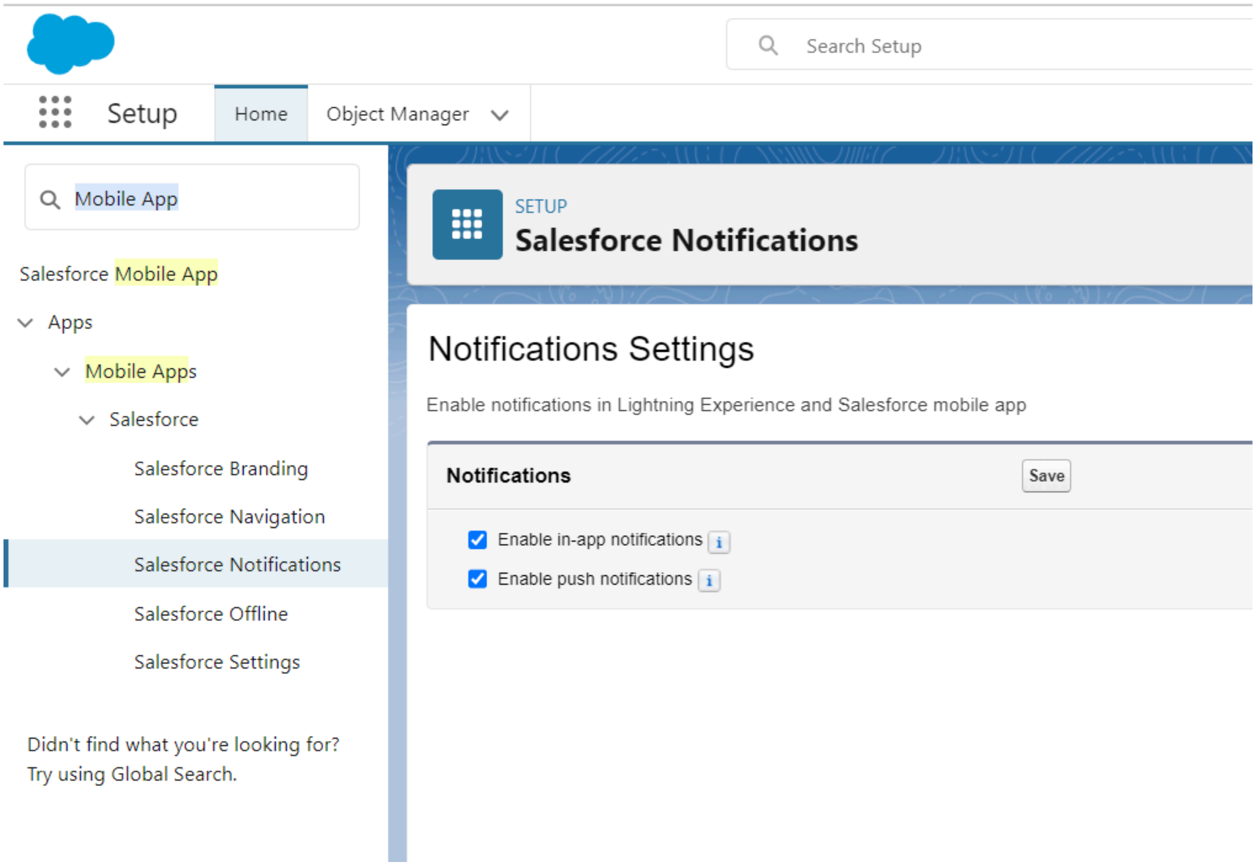


Verify the the ORG Mobile App notifications setup

From Setup, look for "Mobile Apps", then ensure both in-app and push notifications are set:

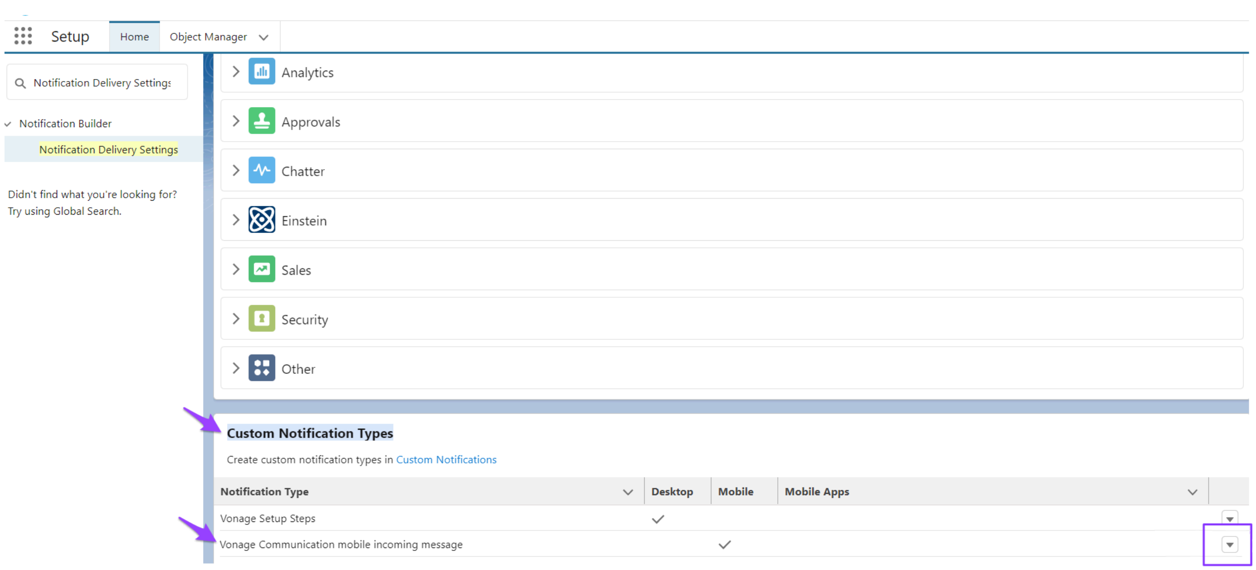
VONAGE
Part of Ericsson

salesforce

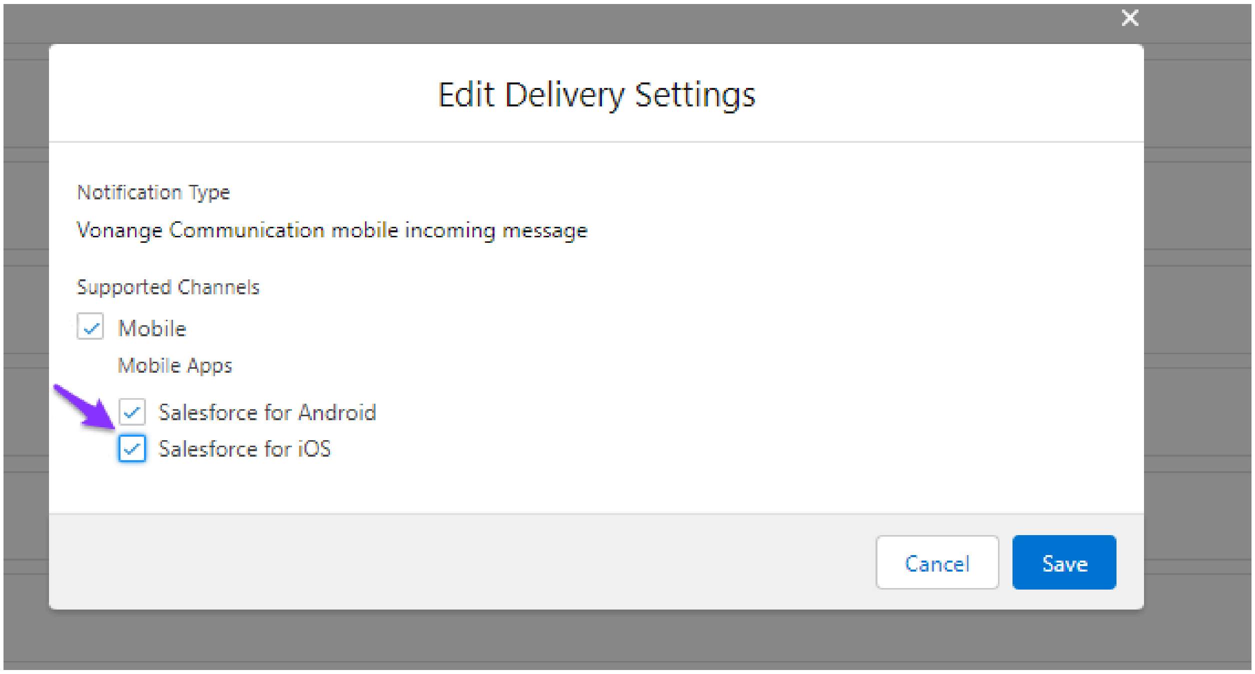


Verify the the ORG Notifications Delivery Settings

From Setup, find "Notification Delivery Settings" and scroll down to "Custom Notification Types":



Select the "Edit" option, and check both "Salesforce for Android" and "Salesforce for iOS":



After "Save" the Custom Notification Types" are set:

Resources Management

As of version 1.1, Vonage Conversations for Salesforce supports the sending and receiving of Resources, including:

- Images
  - For MMS: Images are supported only for USA or Canada numbers. The used LVNs must be [10DLC]() compliant.
  - For WhatsApp: Images are supported for all inbound and outbound messages.
- Video files
- Audio files
- Documents of type: .pdf, .doc, .docx, .ppt, .pptx, .txt

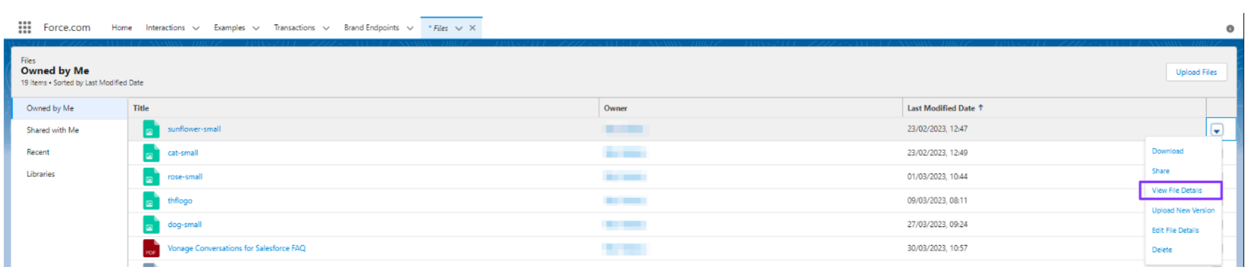
Incoming messages with a resource

An incoming message from a customer might include a resource. In this case, the resource is automatically uploaded to the "Files" with the following name pattern:

`incoming-[file-type] [file-name-if-applicable] [date]-[time]`

Resource Versioning

Any resource in the "Files" section can be updated and could include several versions. When looking at a specific resource's details, you can see the latest version, and the list of older versions at the File's Details:

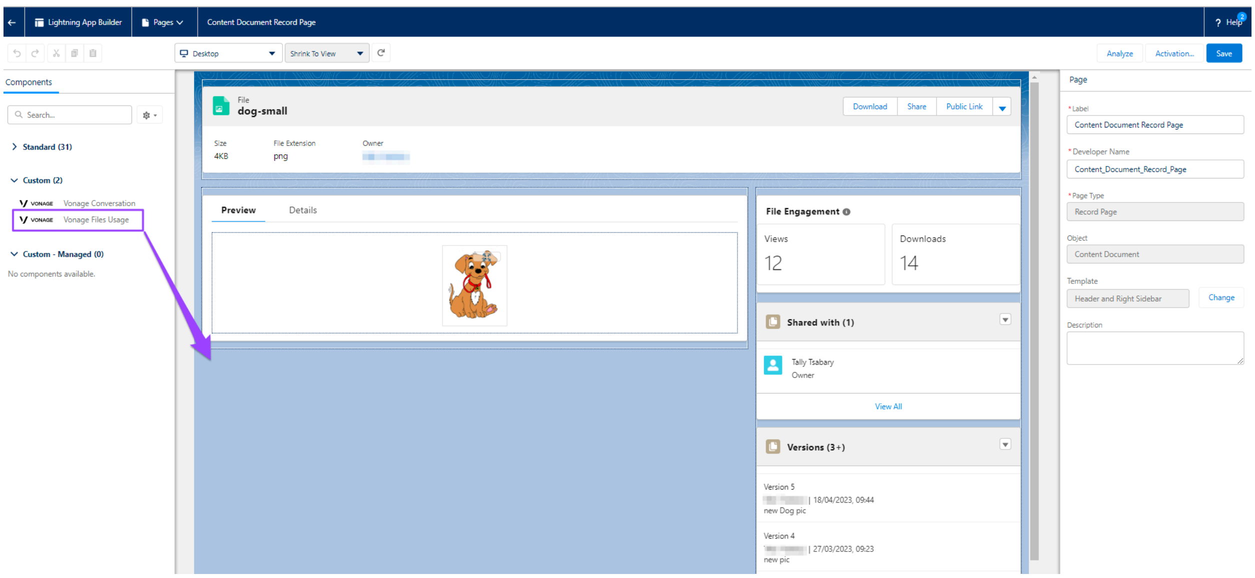


When sending out a new message, it will always use the latest version of the requested resource. It is impossible to send older versions.

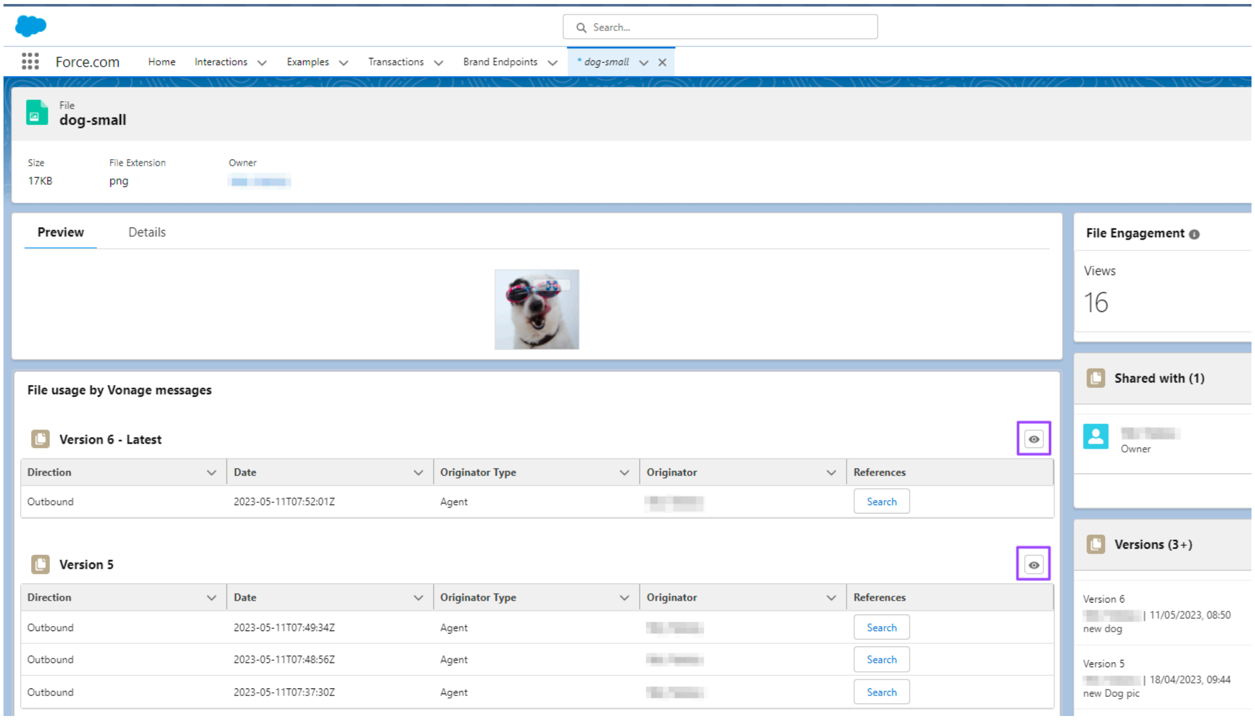
Monitoring Resource Usage

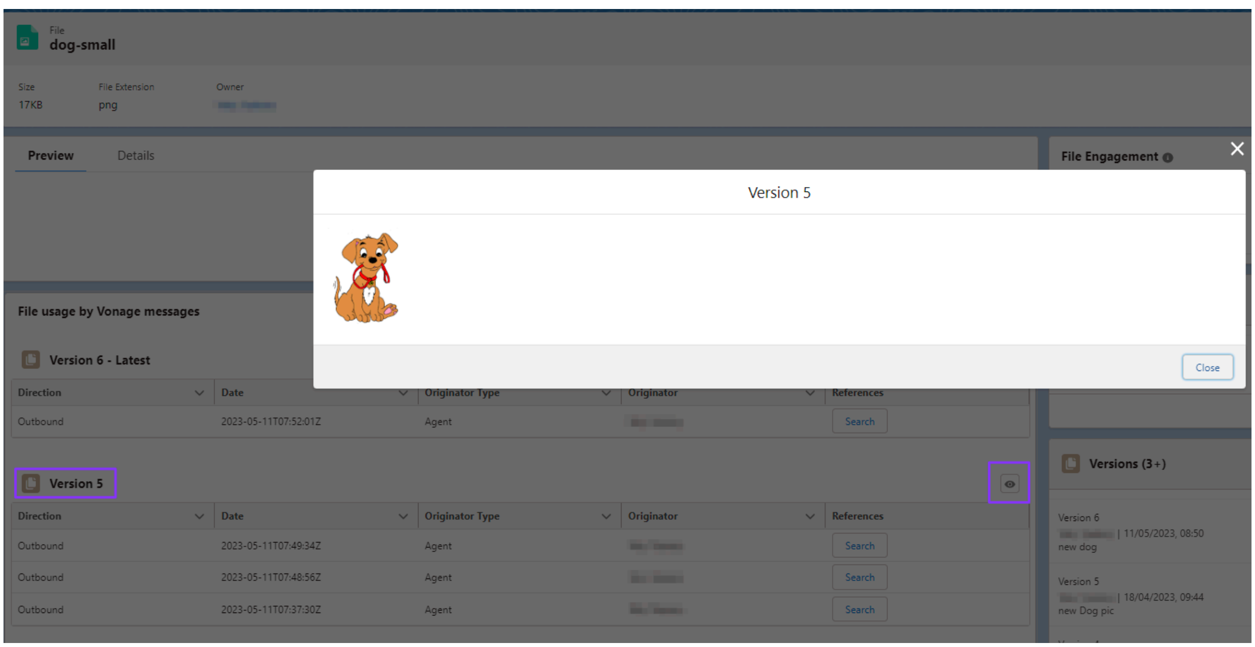
When looking at the conversation history, each message will include the specific version of the resource as it was used at the time of creating the message. In addition to this, you may need to search conversations for a specific version of a resource; for example, if the resource includes some Terms & Conditions, you may want to identify all of the conversations and messages that included a reference to that version.

The “Vonage Files Usage” UI component supports this monitoring. It can be added to the File details page by using the "Edit Page" button and dragging the widget to a suitable place on the page:

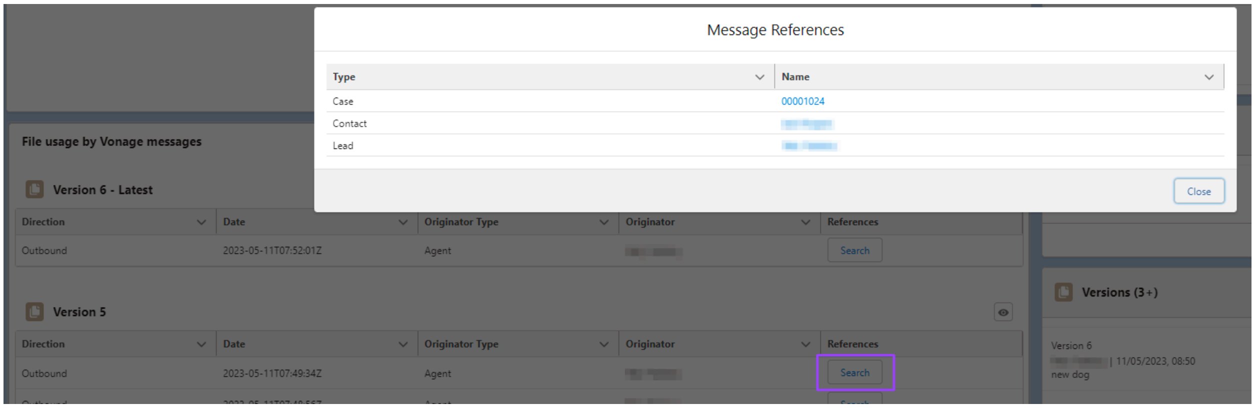


The added UI component shows each version of the resource, along with a list of all the conversations that used each version of that resource. By clicking the ‘Preview’ button on the right you can view that version to see what it looked like:



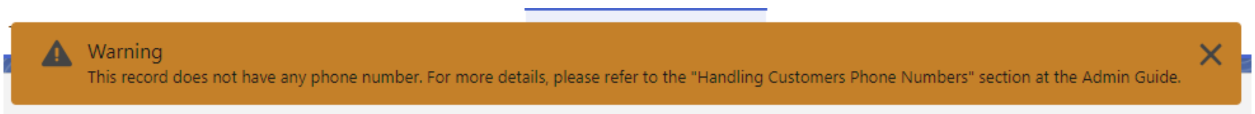


Selecting the "Search" button will present the list of messages that contain that version of the resource, and will provide a link to the specific conversation:


Message References
Type
Name
Case
00001024
Contact
Lead
Close
File usage by Vonage messages
Version 6 - Latest
Direction
Date
Originator Type
Originator
References
Outbound
2023-05-11T07:52:01Z
Agent
Search
Version 5
Direction
Date
Originator Type
Originator
References
Outbound
2023-05-11T07:49:34Z
Agent
Search
Versions (3+)
Version 6
| 11/05/2023, 08:50
new dog

Handling Customer's Phone Numbers

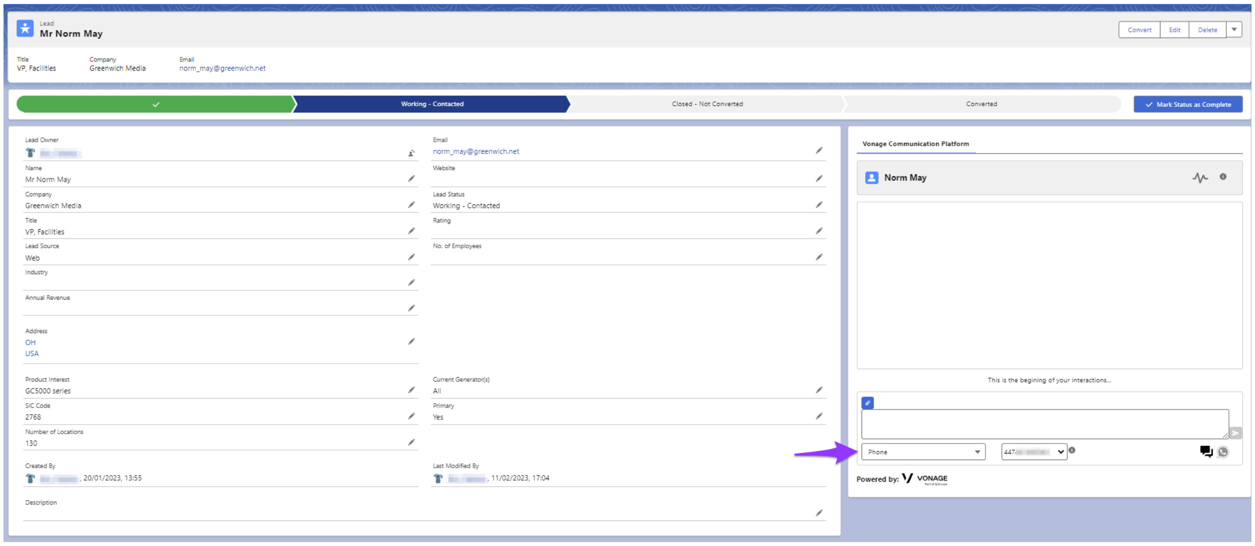
When adding the UI widget to a record page, the widget will search for all the available phone numbers in the record.
In case there are no available phone numbers the following message will be presented:



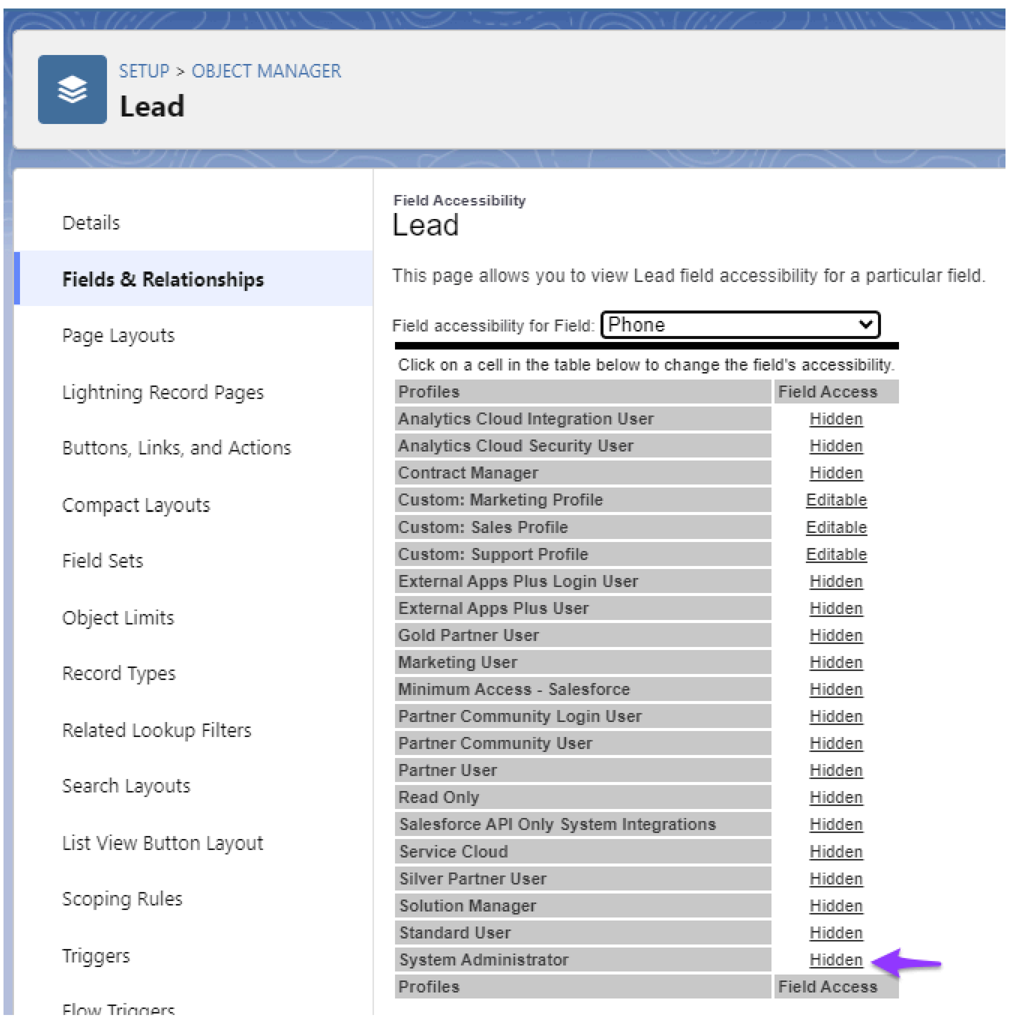
There are several potential reasons for this situation:

1. All the phone numbers of the specific record instance are not populated. In order to mitigate this situation either populate one of them or choose another record instance of this record type that includes a phone number.
2. The record does not include any field of type Phone. In order to mitigate this situation add a custom field of type Phone to the sObject.
3. The User does not have permissions to view any of the phone numbers of this record. In order to mitigate this situation, grant the user the permission to access the Phone fields.

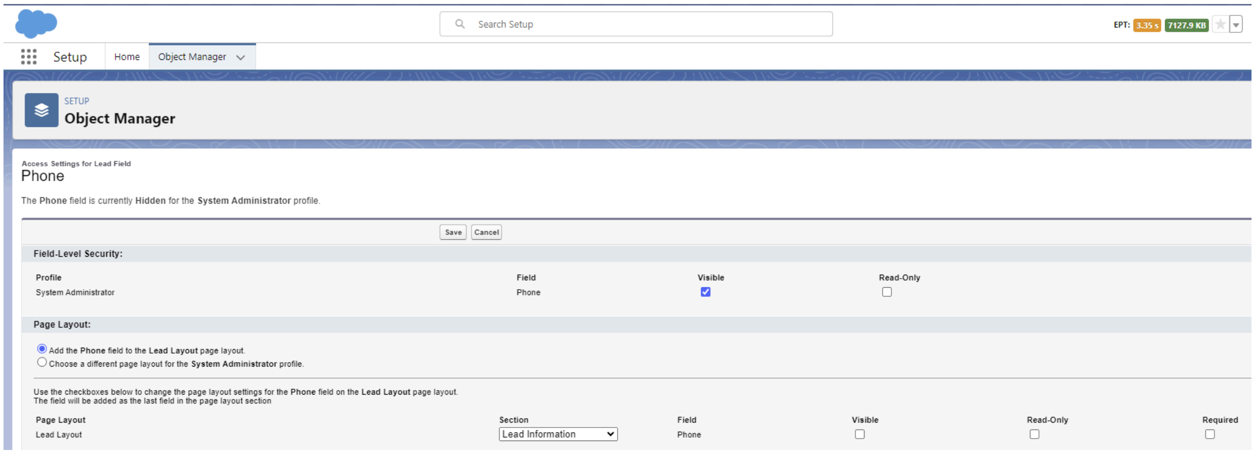
It is not mandatory to add the Phone field to the record layout; in that case, the Phone number is not exposed but still can be used by the widget. While presented in the widget, the number is hidden and the drop down includes only its label; the widget includes the Lead's phone on the drop-down, but the Phone itself is not presented as part of the Lead details:



The Phone definitions on the Lead sObject are:



Profiles	Field Access
Analytics Cloud Integration User	Hidden
Analytics Cloud Security User	Hidden
Contract Manager	Hidden
Custom: Marketing Profile	Editable
Custom: Sales Profile	Editable
Custom: Support Profile	Editable
External Apps Plus Login User	Hidden
External Apps Plus User	Hidden
Gold Partner User	Hidden
Marketing User	Hidden
Minimum Access - Salesforce	Hidden
Partner Community Login User	Hidden
Partner Community User	Hidden
Partner User	Hidden
Read Only	Hidden
Salesforce API Only System Integrations	Hidden
Service Cloud	Hidden
Silver Partner User	Hidden
Solution Manager	Hidden
Standard User	Hidden
System Administrator	Hidden
Profiles	Field Access



Numbers Allocation

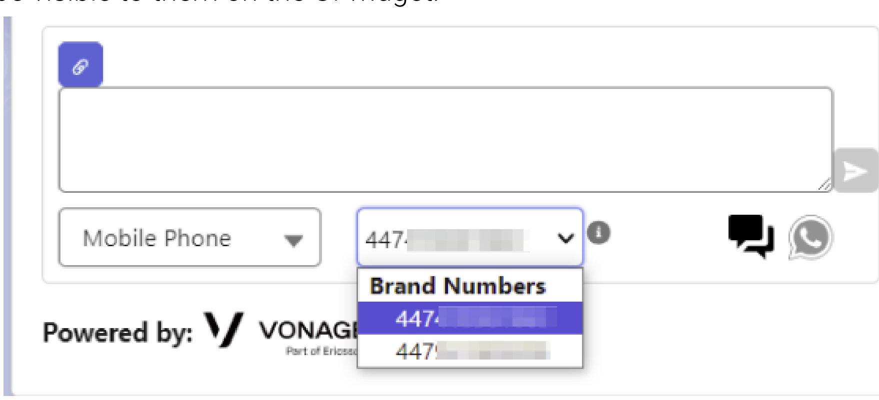
The correlation between agents and numbers is optional, and can be enabled/disabled from the Vonage Admin Settings application.

While disabled, all agents can use all numbers. When enabled, it is possible to assign agents with numbers, and recommended to designate an agent to each of the available numbers.

Definitions

Global Default Number
Global default number is configured at the **"Configure Numbers"** section. Usually it will be the number that was used during the initial deployment of the package.

Allowed number
Each available number can be assigned for one or many agents to use. All the agent's allowed numbers will be visible to them on the UI widget:



Designated agent

Each of the available numbers can be assigned to zero or one designated agents. The designated agent will be the owner of newly created records for incoming messages from new customers.

For example, an inbound message is automatically connected to all the records that already include the caller's phone number. In the case there is no such record, the inbound message is not connected to any record/sObject.

To mitigate this, you can create a flow that generates a record including, case, opportunity, lead or any other standard object or custom object. As the new record is created by a Flow, by default its owner will be one of the system admins (depending on the specific org configuration).

Some organizations would like to set the owner of this newly created record to a specific person, based on the dialed-in number, this is the designated agent.

Please refer to BOT Development : Automatic processing and answering for incoming messages, where a Flow template for handling this use case is available.

Outbound messages from the UI

The UI includes a drop-down list of potential numbers to use as the "From" of the outbound message. When the Number's Allocation feature is disabled, the list of numbers at the dropdown list would be:

- The last used number in the conversation.
- The general default number as configured in the "Configure Numbers" section in the Admin dashboard.
- Any other available numbers.

When the Numbers' Allocation feature is enabled, the list of numbers at the dropdown depends on the conversation status:

- If the conversation is ongoing, the agent would see:
    - The last number that was used at the conversation, whether it is assigned to the agent or not.
    - The numbers which this agent is designated for.
    - The other optional numbers which are available for the agent.

The global default number is not presented, unless it is specifically assigned to this agent. If this agent is not assigned with any number, the list will include only the last number used at the conversation.

- If it is a new conversation, the agent would see:
  - One of the numbers which this agent is designated for.
  - The rest of the numbers which this agent is designated for.
  - The other optional numbers which are available for the specific agent.

If any of the above lists include at least one number, the global default number is not presented, unless it is specifically assigned to this agent. If the agent is not assigned to any number, the drop-down list will include the global default number.

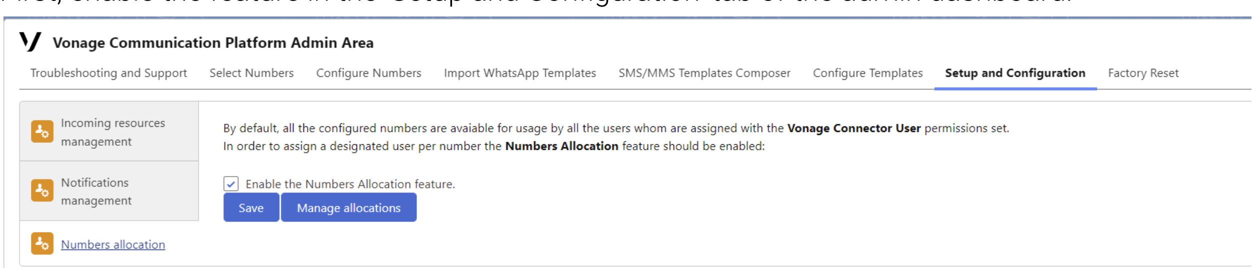
- If a new message is added to the conversation, directed to a brand endpoint which is not on the agent list:
  - The new Brand Endpoint will be added to the dropdown list of this user for this session, i.e. It won't be added permanently to this agent assigned numbers.

Outbound messages from Flow/Apex

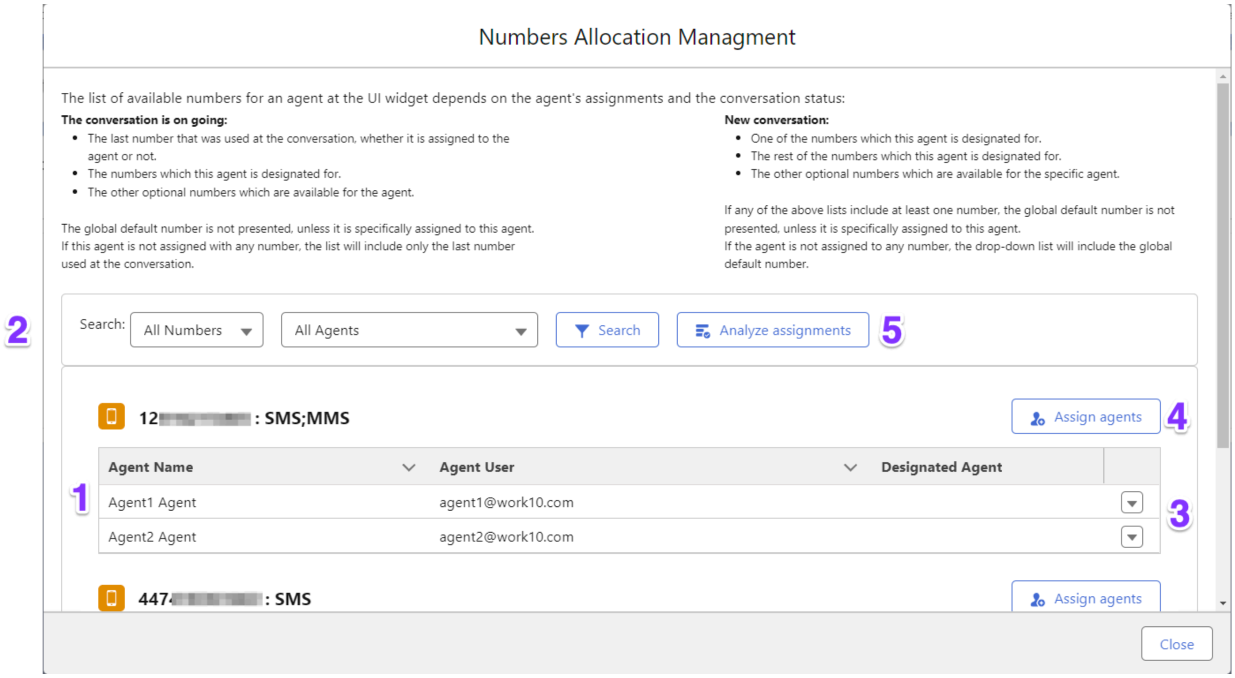
Sending an outbound message from a Flow or Apex code is done by creating an "Outbound Interaction" record. The record should include some mandatory fields, including the Brand Endpoint - this is the "From" number. The composer of the Flow/Apex code can use any of the available numbers as suitable for the required channel.

Configuring Number Allocation

First, enable the feature in the ‘Setup and Configuration’ tab of the admin dashboard:

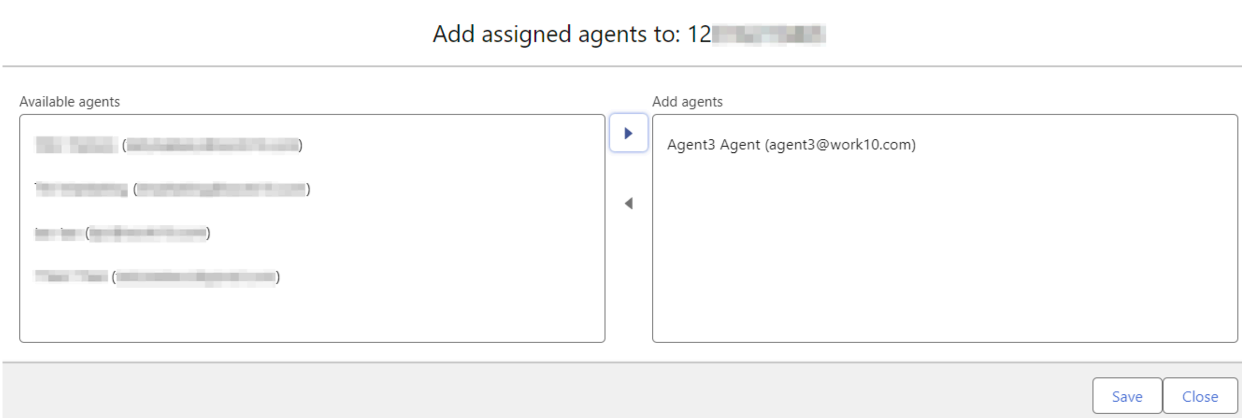


Then go to the ‘Manage Allocations’ application:

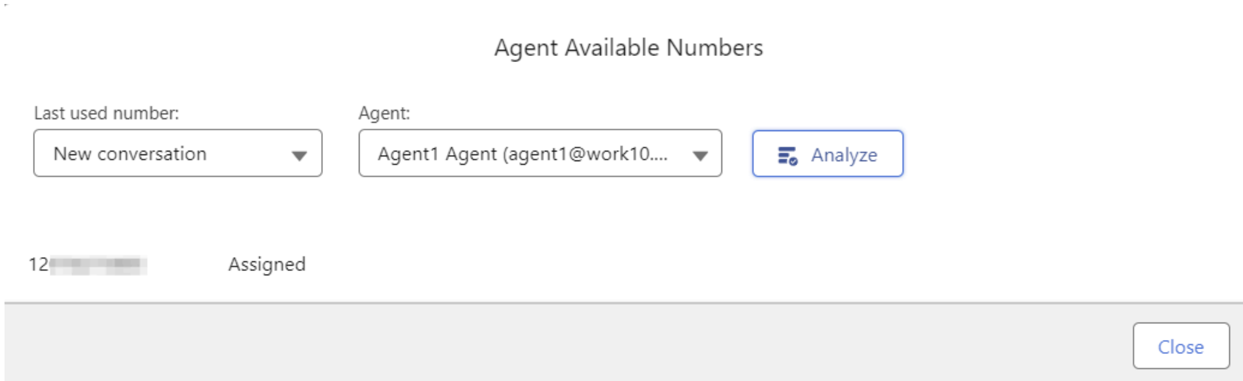


1. The list of all available numbers is presented. Each number section includes the list of assigned agents.
2. In order to filter the list, search the assignment based on the available numbers and the permitted agents. (Agents that were assigned with the Vonage Connector User permissions set).
3. Assigned agent can be removed or appointed as designated using the specific line actions:

4. In order to assign agents for the specific number use the corresponding "Assign agents" button



5. In order to verify what would be the agent available list of numbers at the UI widget use the "Analyze assignments" button



Select the conversation last used number, and the agent. use the "Analyze" button to get the list of numbers as will be available for this agent at the UI widget.

Flow Development

Vonage Conversations for Salesforce can also be used to send and receive messages without using the UI. The package can be used by APEX code or by Flow for sending outbound messages or building BOTs to automatically process and respond to incoming messages.

Outbound messages

Every time that an outbound `VC_Interaction__c` record is created it is sent automatically.

Create an Outbound `VC_Interaction__c` record

The important fields are:

API Name	Description	Valid values
`VC__Brand_Endpoint__c`	The LVN from which the message is sent	A configured LVN number, OR the Brand Name.
`VC__Channel__c`	The type of message (SMS, MMS, WHatsApp)	SMS is currently the only supported value.

VC__Content_Text__c	The message text	
VC__Direction__c	The direction of the message. Valid values are Inbound or Outbound	For sending out a message always use "Outbound"
VC__Interaction_Media__c	The type of media that is used.	Always use "Text"
VC__Interaction_Originator__c	Free text, to add details about the sender. This information is not sent with the outbound message but can be used later by the package for monitoring.	It is our recommendation to populate this field with the identifier of the process which created the message. For example, if it was created by a flow - use here the flow name.
VC__Interaction_Originator_Type__c	The type of process which created this message. Valid values are: Customer, Bot, Agent, Agent Assist	Customer is the value for Inbound messages. Bot is the recommended value for messages created by flow or apex. Agent is the value for all the outbound messages sent from the UI widget. Agent Assist is not supported yet
VC__Party_Endpoint__c	The phone number of the customer being contacted by the brand.	International phone number

VC__Thread__c	The Thread which owns this Interaction.	In case there is no existing Thread, it can be created using VC__Thread__c (All the VC__Thread__c fields are optional.)

Correlate an interaction to a record (Lead, Case, Opportunity, Account, Contact) or custom sObject

It may be required to link Outbound messages to a specific record.
The VC__Interaction__c sObject already includes the following lookup fields:

- VC__Account__c
- VC__Case__c
- VC__Contact__c
- VC__Lead__c
- VC__Opportunity__c

In the case that the correlation is required for an sObject the VC__Interaction__c should be enhanced with the relevant lookup custom field.

Inbound messages

Every time that an inbound message is received, a VC_Interaction__c record is created.
As part of the record creation there is an attempt to automatically link it to previous messages which arrived from the same number.

Automatic Correlation to other sObjects

When an inbound message is received, the package is searching for the Party-Endpoint (the "from") in all the available Phone fields of the sObjects which has lookup relationship with the VC__Interaction__c sObject.
If such Phone exists already the specific record is linked to the newly created VC__Interaction__c record.

This feature allow linking all the messages related to a case, or lead etc to be linked as a conversation.

> **Note:** The Case sObject does not include Phone fields of its own. It is linked to the "Contact" Phone fields. Should it be required to automatically link the `VC__Interaction__c` record to a Case, it is required to have a suitable "Phone" type custom field on the Case sObject

Platform Events

On every record creation a platform event is published: `VC__InteractionEvent__e`
Please notice that the event is published for Inbound AND Outbound records.
`VC__InteractionEvent__e` content
The event fields are:

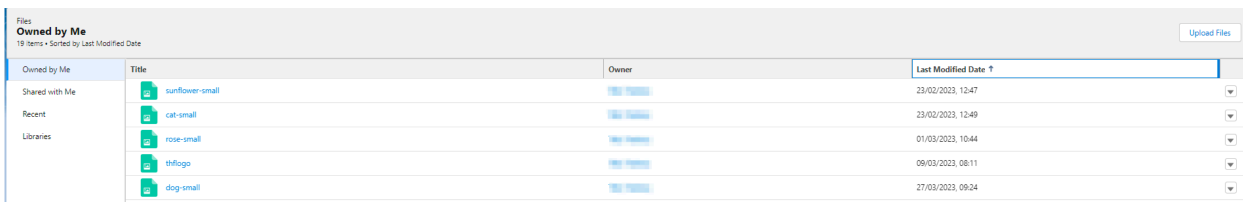
API Name	Description
`VC__Event_Type__c`	Event Type identifies the nature of the event. InteractionCreated : A new Interaction record was created. Internal : An internal event, to be used only by the package.
`VC__Interaction_Direction__c`	In case of Interaction related events, this field shows the Interaction direction: Inbound or Outbound.
`VC__Interaction_Record_Type__c`	Relevant for Interaction related events. This field include the specific record type of the Interaction. For now it is always Interaction
`VC__InteractionId__c`	The Interaction Id in Salesforce. - The Id of the created `VC__Interaction__c` record.
`VC__Internal_Data__c`	Relevant only for "Internal" event. For internal usage only.

Sending a message with a resource from Flow

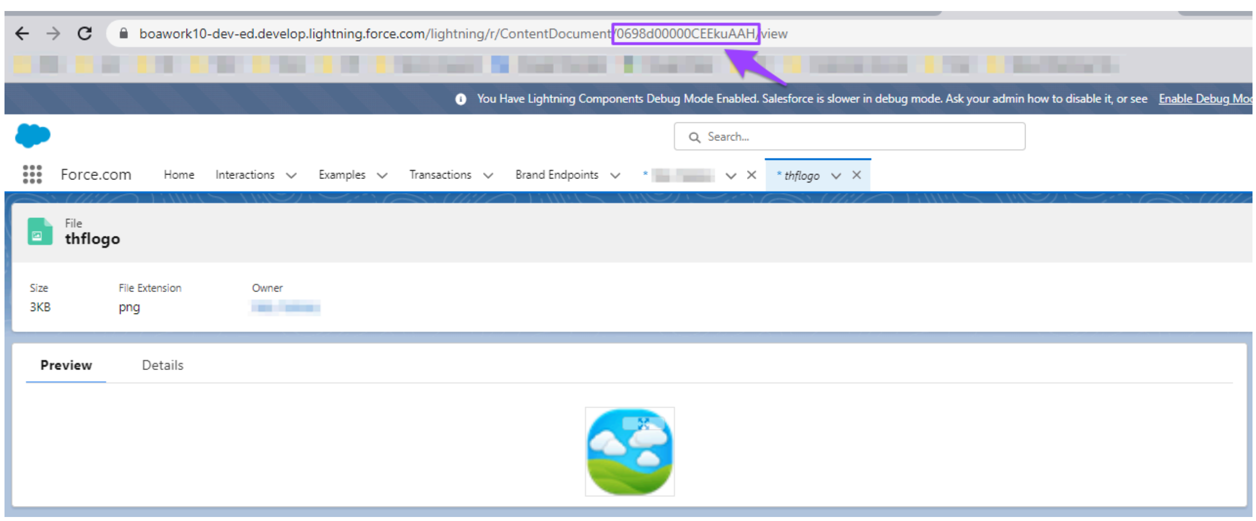
In order to send a message from Flow use Create Record element and insert an outbound message.

In order to attach a resource to the message set the resource ID as resource:

The outbound message can include only the latest version of a resource.
All resources are managed in the "Files" Application:



The specific resource id is available at the URL:



Working with WhatsApp Templates

When creating an outbound interaction the following points should be considered:

The template must be supported, configured and active.

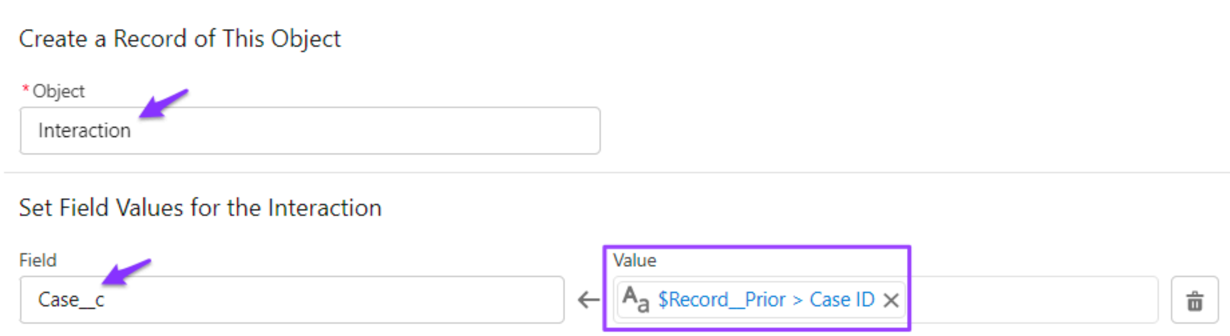
If the template mapping include references to other sObject and field - a specific record instance of the relevant object should be set at the created `VC__Interaction__c`.

For example:

If the mapping for a particular parameter was:

Token	Mapping	Mapping Type	Configure
{{1}}	Case.CaseNumber	Record's field	Mapping type

Then the VC__Interaction__c should include the specific Case record to use:



The `VC__Interaction__c` record must include the template's unique identifier. The template unique identifier is:

`[template name]_[template language]_[template id]`

The `VC__Interaction__c.Content_Text__c` **must stay empty**. During the send out of the interaction the expected message content will be calculated based on the mapping and will be added automatically to the record.

The `VC__Interaction__c.Channel__c` should be set to WhatsApp

When a template based message is sent out the following internal steps are performed:

1. Fetch the requested template and its configured mapping.
2. Find out the mapping result for each of the templates parts based on the specific `VC__Interaction__c` record values and related other record values.
3. Build the expected message as will be presented to the recipient.
4. Send the message to Vonage backend.

The message will be available at the UI as any other outbound message.

External channel support

External channel can be used in order to integrate other messages providers/consumers as part of the package managed conversations, via Flow, APEX, and the UI (Limited usage)

The `VC__Intercation__c.External_Channel__c` can be populated with any string value to sign it is an interaction which is related to external provider.

When this value is present the `VC__Intercation__c.Channel__c` value **is ignored**.

An outbound message which include `VC__Intercation__c.External_Channel__c` will not be sent to Vonage backend, but will be created and presented at the UI. Such message status will be set to "Diverted to external channel".

An inbound message which include `VC__Intercation__c.External_Channel__c` will be presented in the UI.

While using the UI to send outbound message, its external channel value will be set to the same value as the last message on the conversation. Meaning: If the last message (inbound or outbound) include an external channel value - that same value will be set at the newly created outbound message.

It is impossible to initiate an outbound message from the UI to an external channel without first receiving an inbound message from this external channel. This limit applies ONLY to the UI. It is possible to initiate conversation on external channel from Flow or APEX without first receiving an inbound message from this external channel.

BOT Development - Automatic Message Processing

BOTs can be developed very easily using the Salesforce Flow infrastructure. As the creation of any interaction is published by Platform Event, we can use the `Platform Event–Triggered` Flow in order to build a BOT.

The package includes several example BOTS based on Flow templates:

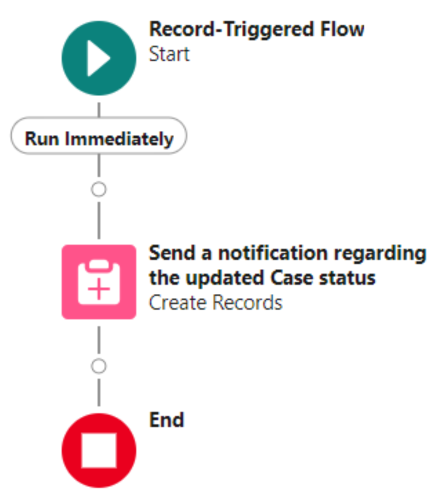
Flow Template	Feature
Vonage WhatsApp Notification Example	Send a WhatsApp message using a WhatsApp template.
Vonage SMS Notification Example	Send an SMS message using an SMS template.
Vonage Handle Incoming Message Example	Create a new Lead record based on incoming messages from an unknown customer. Assign the new Lead to the designated agent.
Vonage Send Automatic Response Example	Accept and incoming message and response back based on its content

All of the provided flow templates are deactivated. In order to use one, please copy it and amend it to the specific org needs.

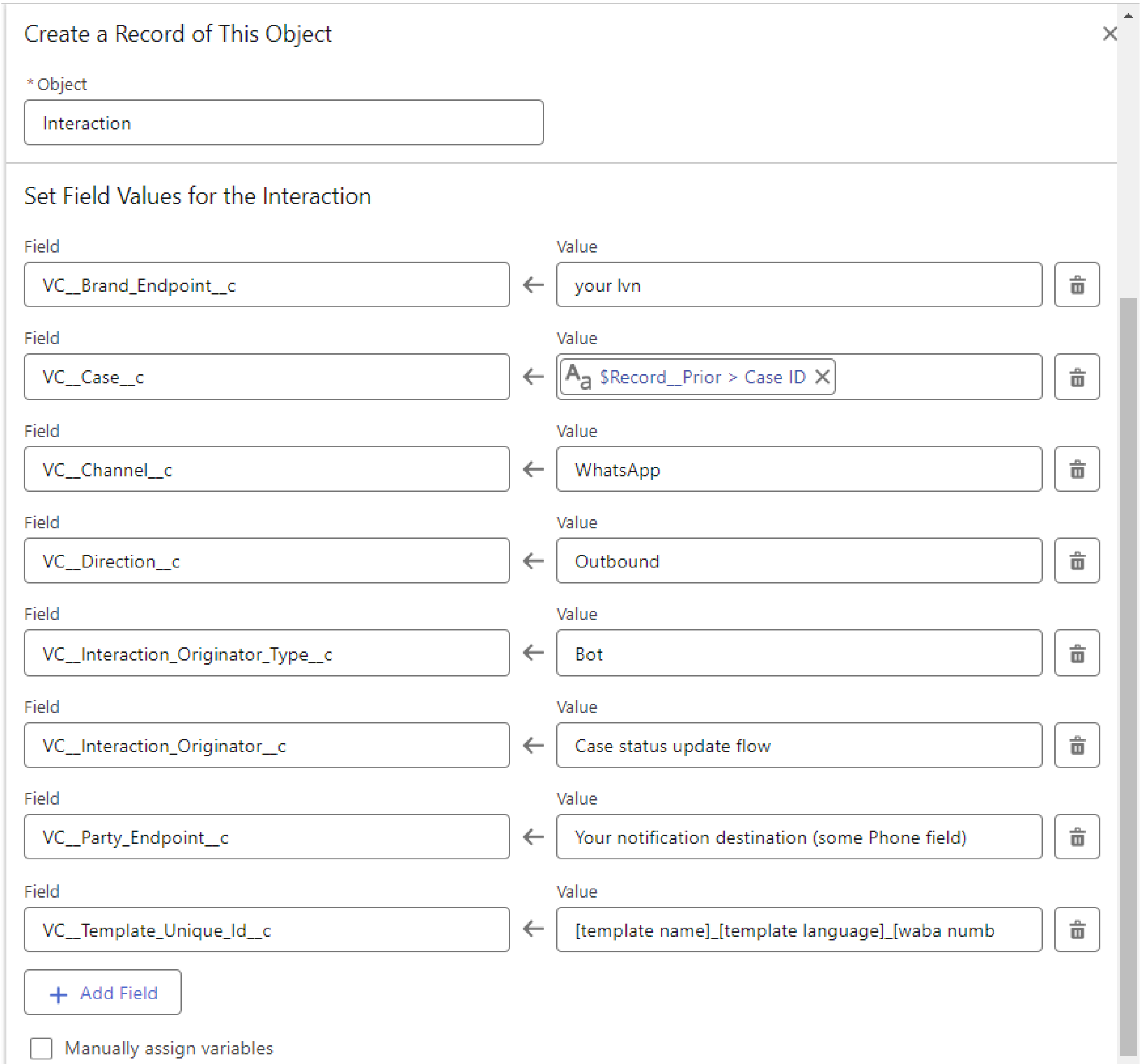
Vonage WhatsApp Notification Example

Use case: Send a WhatsApp message regarding Case status change.

The flow: The Flow is activated when a Case's status has changed. On any status change the Flow will send a notification using a WhatsApp template:



Notification configuration example:



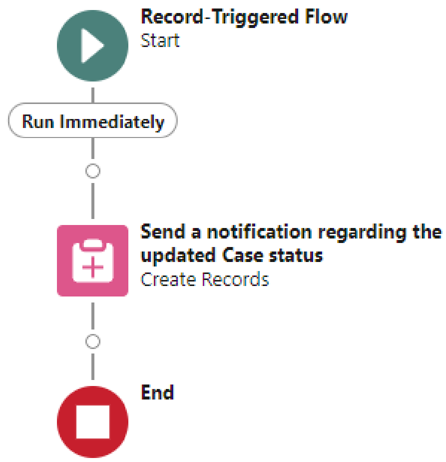
Fill in the relevant details as presented above. For more details regarding the WhatsApp templates usage please refer to [Working with WhatsApp Templates](#).

Here, `VC__Template_Unique_Id__c` will be a combination of three values, the name of the template you want to use, the language it uses, and your WABA number. For example, if the template name is `example name`, its language is `EN_US`, and your WABA is `12346`, then the required value would be `example name_EN_US_123456`.

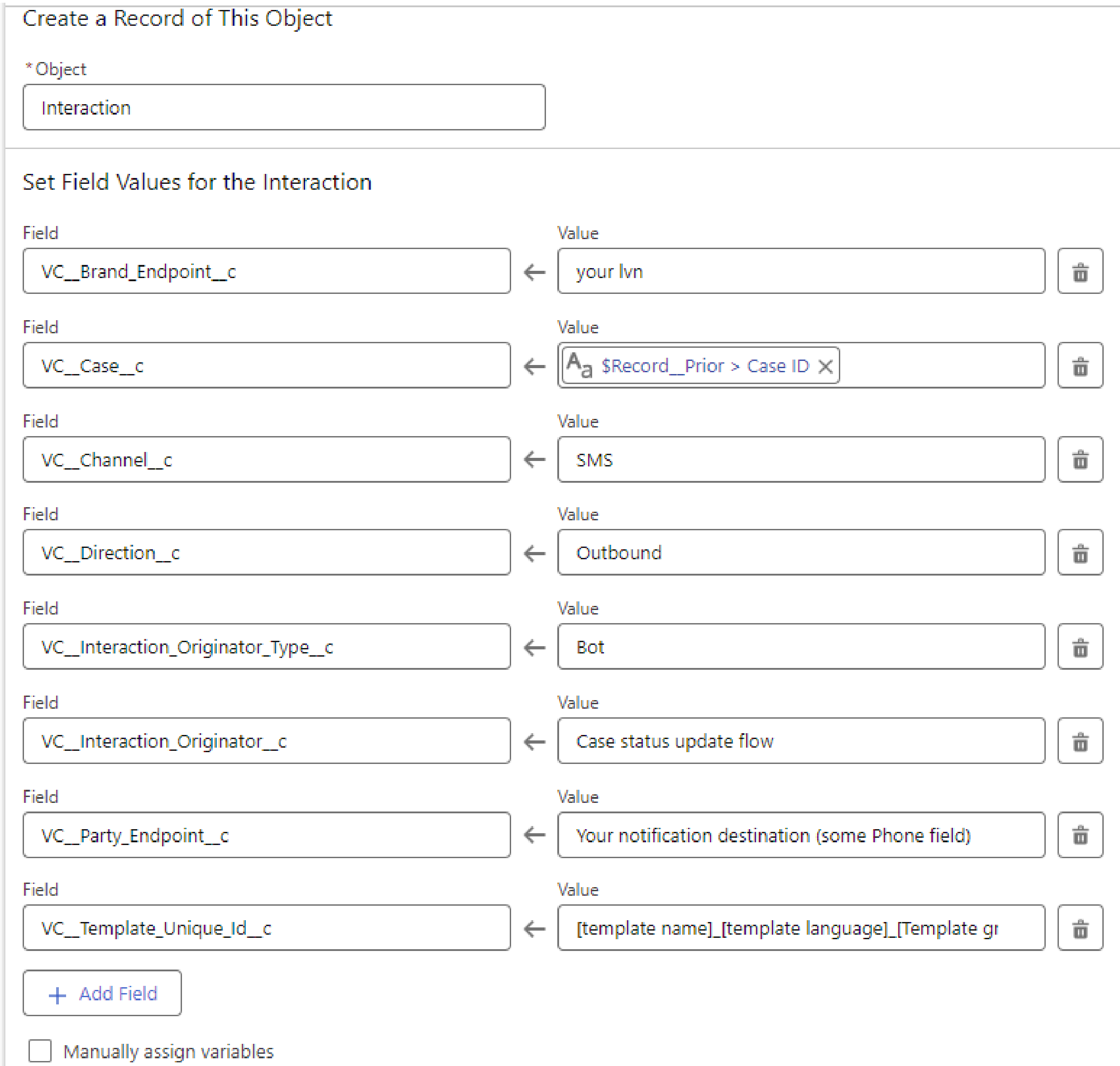
Vonage SMS Notification Example

Use case: Send an SMS message regarding Case status change.

The flow: The Flow is activated when a Case's status has changed. On any status change the Flow will send a notification using an SMS template:



Notification configuration example:



Fill in the relevant details as presented above. For more details regarding the SMS templates usage please refer to SMS/MMS Templates Composer.

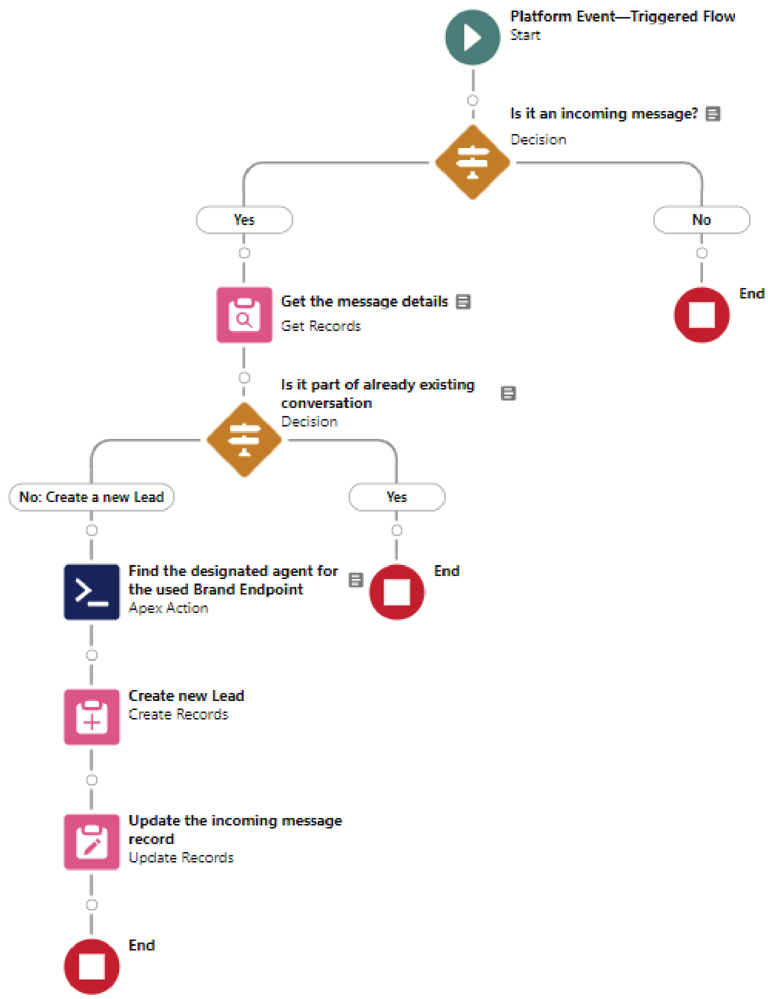
Here, `VC__Template_Unique_Id__c` will be a combination of three values, the name of the template you want to use, the language it uses, and the template's group.
For example, if the template name is `example name`, its language is `EN_US`, and the group is `Online Sales`, then the required value would be `example name_EN_US_Online Sales`.

Vonage Handle Incoming Message Example

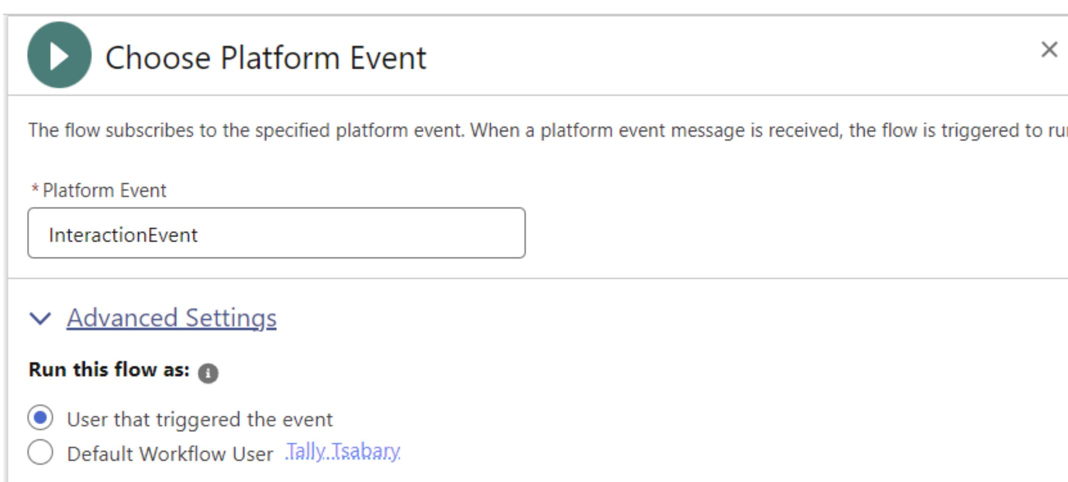
Use case: Create a new Lead record based on an incoming message from an unknown customer. Assign the new Lead to the designated agent.

The flow: The Flow is activated when a new SMS/WhatsApp message is created in org.If it is an outbound message, the flow ends. If it is an inbound message, the flow will do the following:

- Fetch the message details.
- If the message is from a known customer, the flow ends. In this case, the message is already linked to the record (Lead or Case etc) which includes the caller phone number.
- If the message is from an unknown customer, its status is "Create Party".
- A new record should be created for that customer. In this case it is a Lead, but each org can decide what type of record they would like to create, or not to create any record at all.
- The newly created record can be owned by the default owner of the flow, a specific user, or queue. Also, it can be assigned to the designated agent for the called number. For more details regarding designated agents please refer to Numbers Allocation.
- The example flow assigns the new Lead record to the designated agent. In order to find the designated agent, the Flow is using a dedicated Apex Action: Find the designated agent for the used Brand Endpoint
- Once the new Lead record is created, the incoming message should be updated: First it needs to be linked to the newly created Lead, so it will be part of the conversation on this Lead. Second, the message status should be updated.

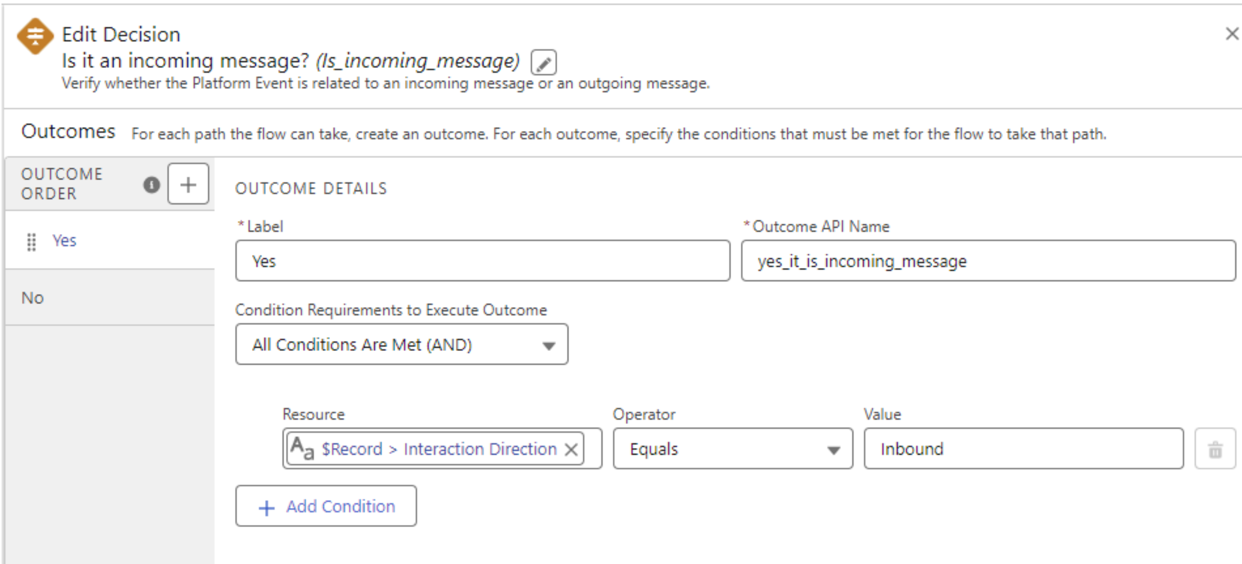


The platform event trigger for initiating the Flow:



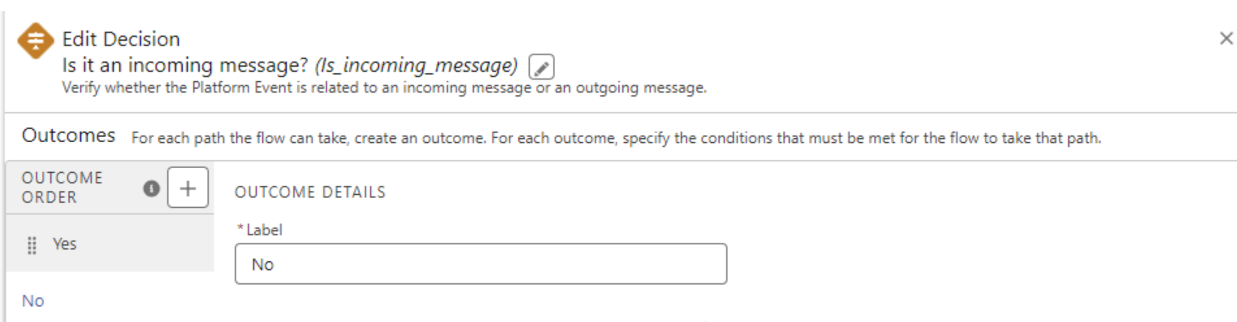
Is it an incoming message?

For the "Yes" section:

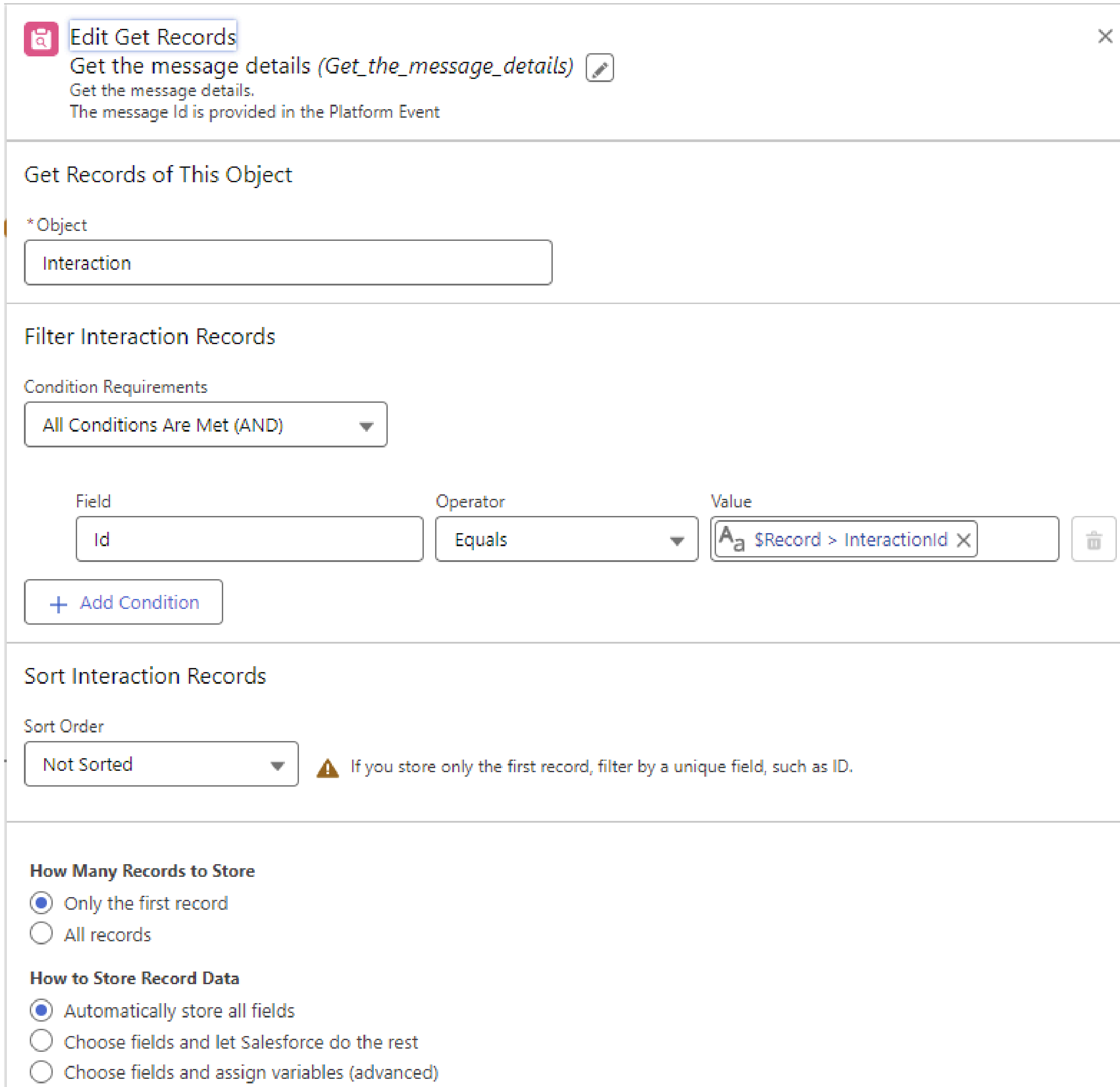


Note: While copying the template to your own Flow, make sure that the relevant field names are updated properly to reflect the package name space.

For the "No" section:

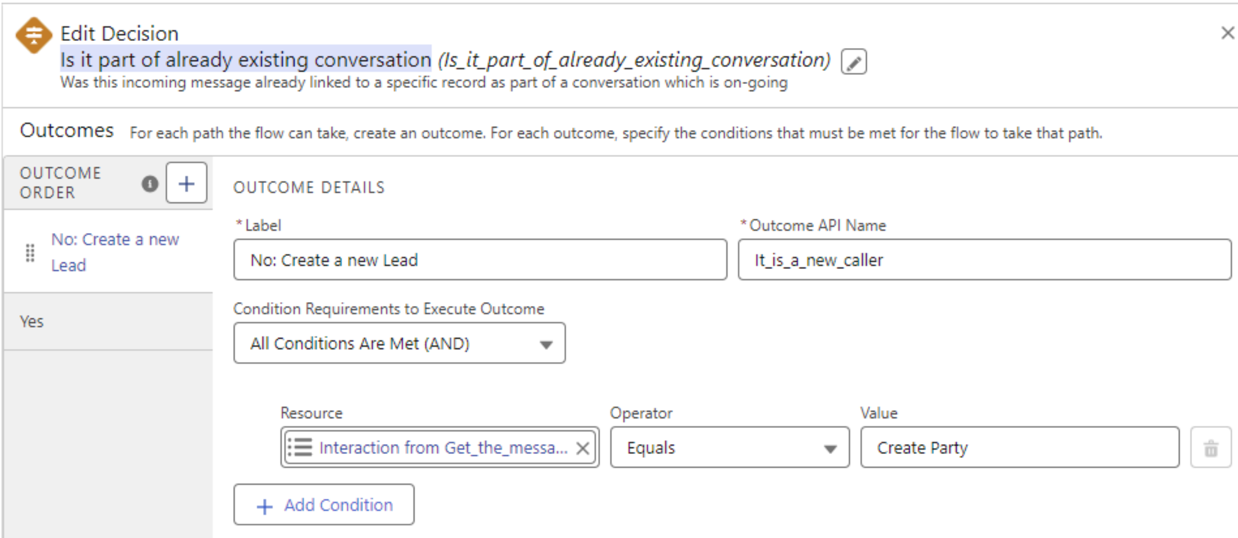


Get Message Details:

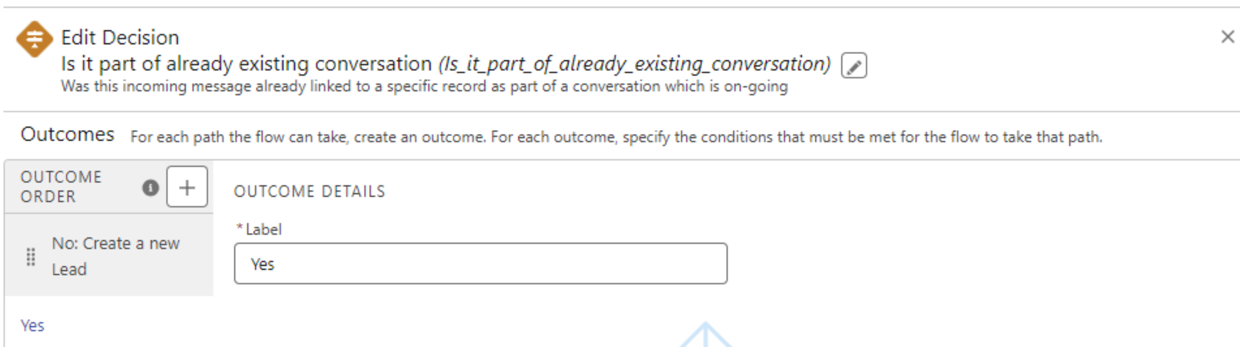


Is it part of an existing conversation?

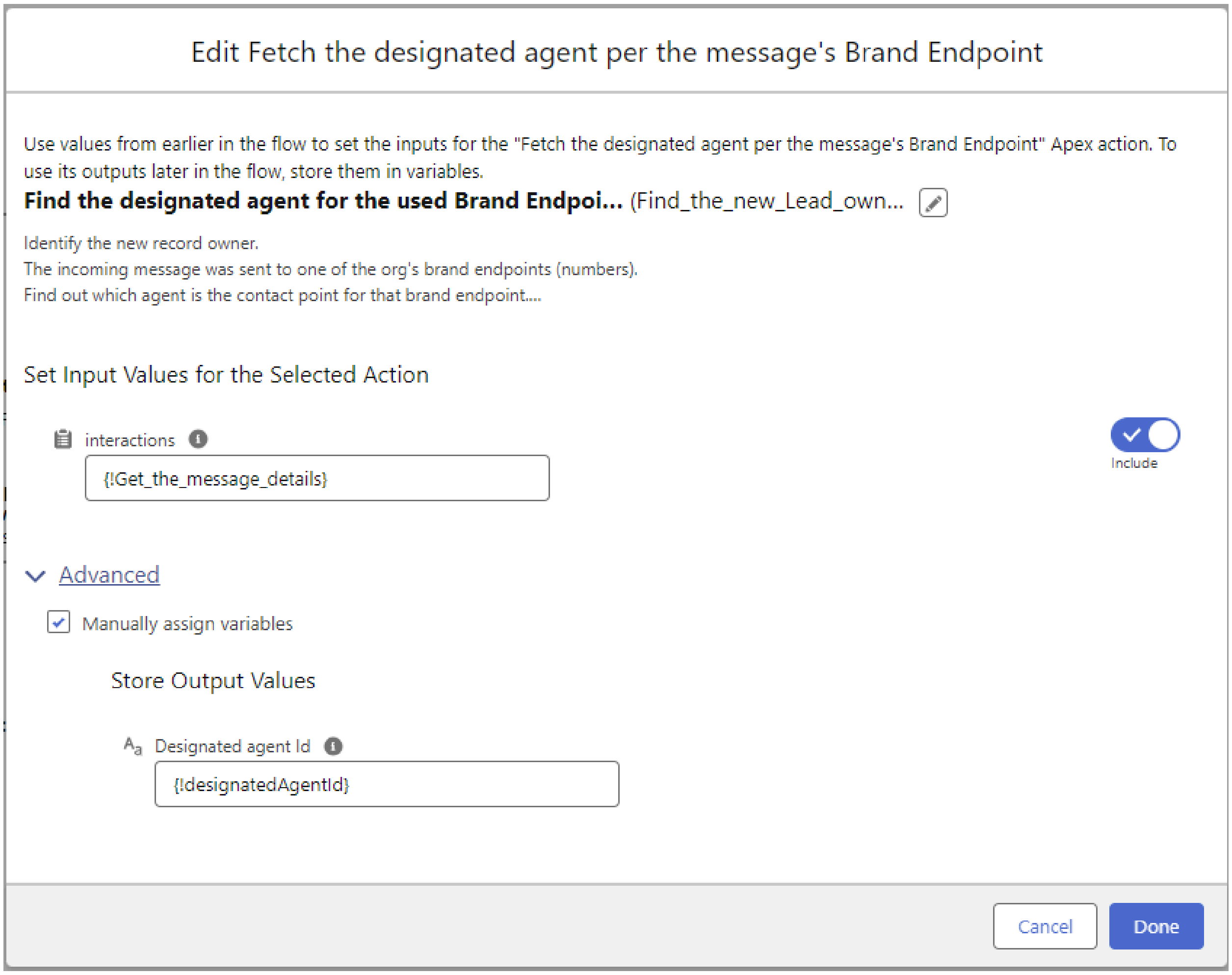
For the "No" section:



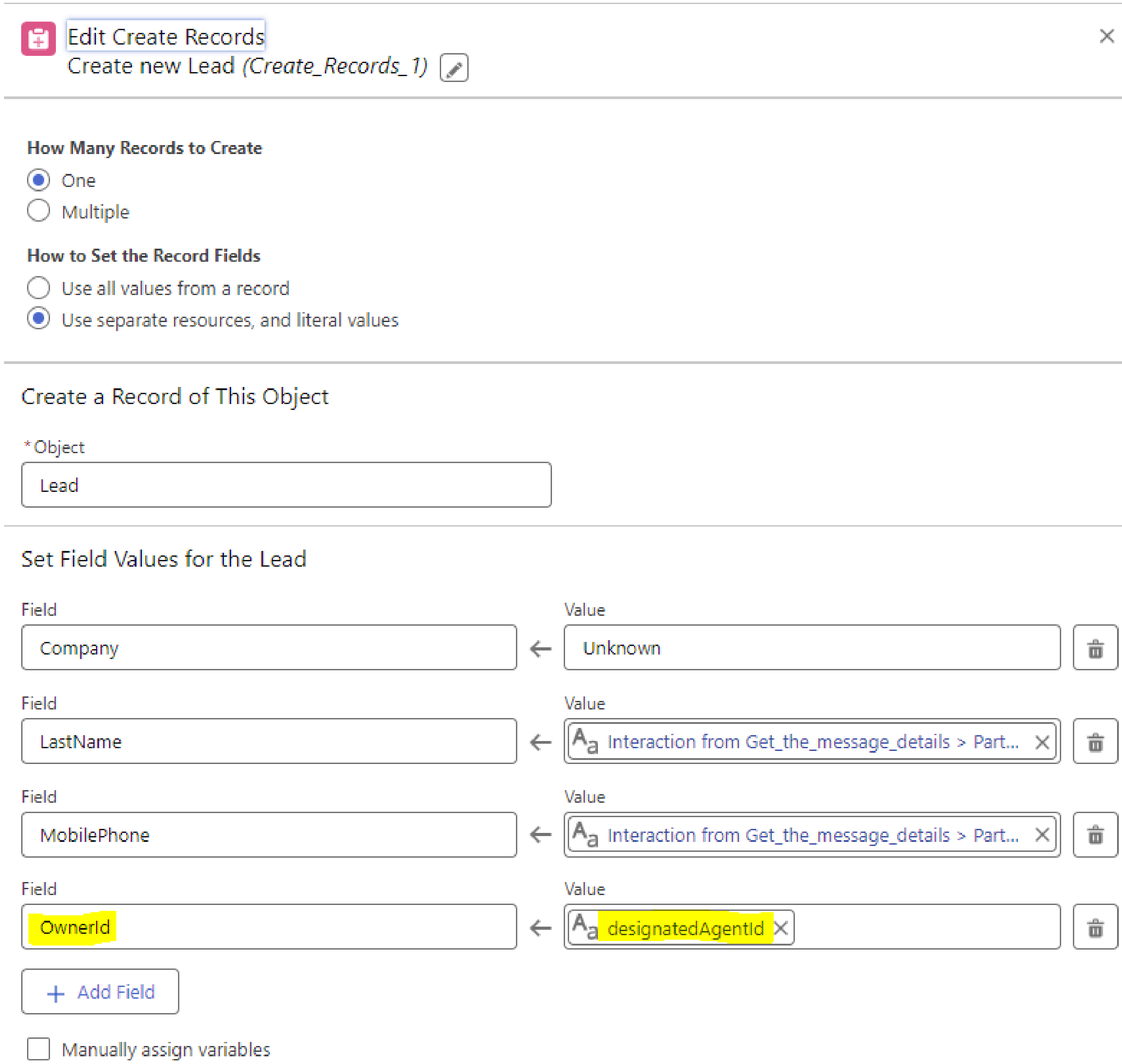
For the "Yes" section:



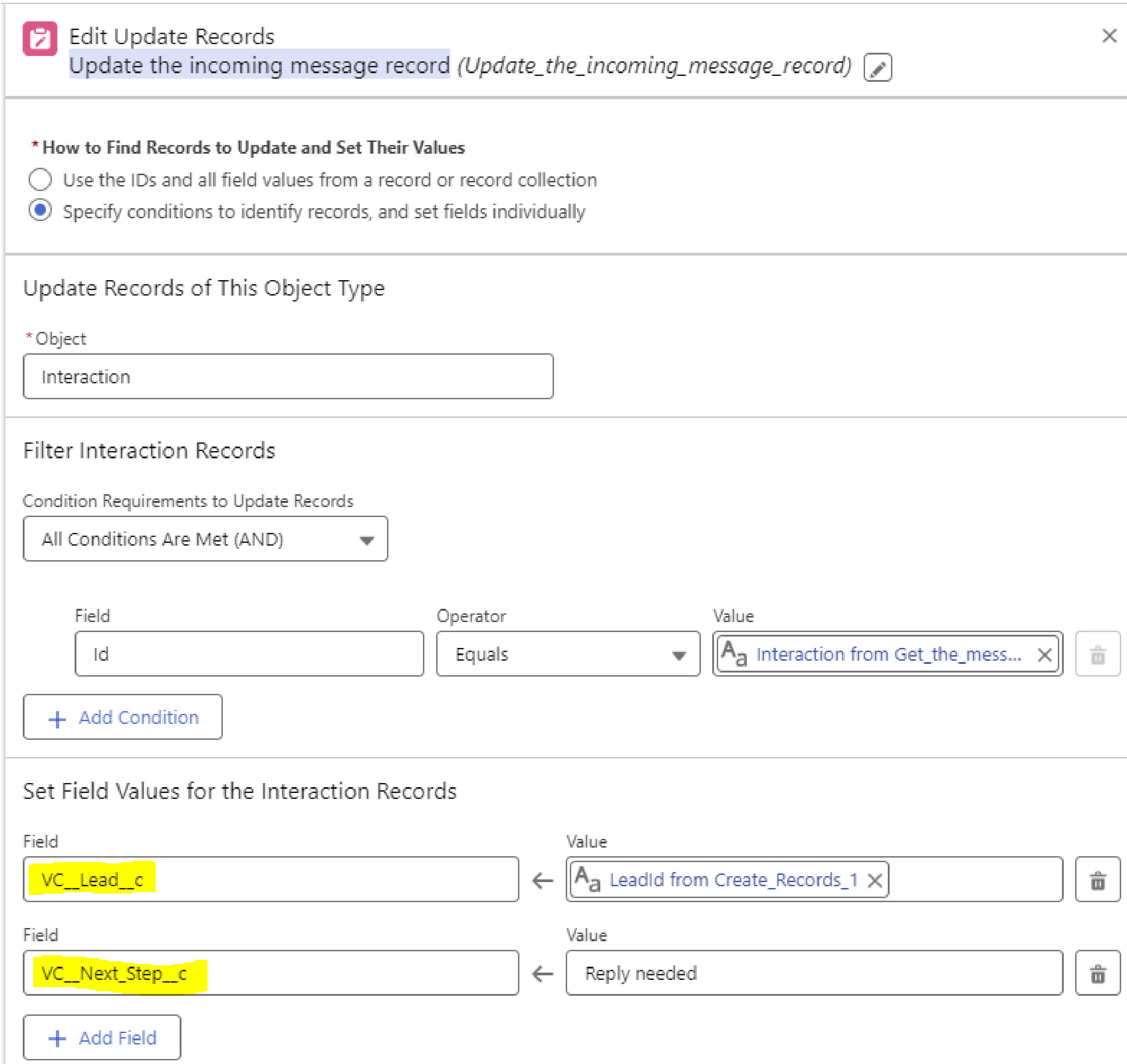
Find the designated agent:



Create New Lead:



Update Incoming Message record:



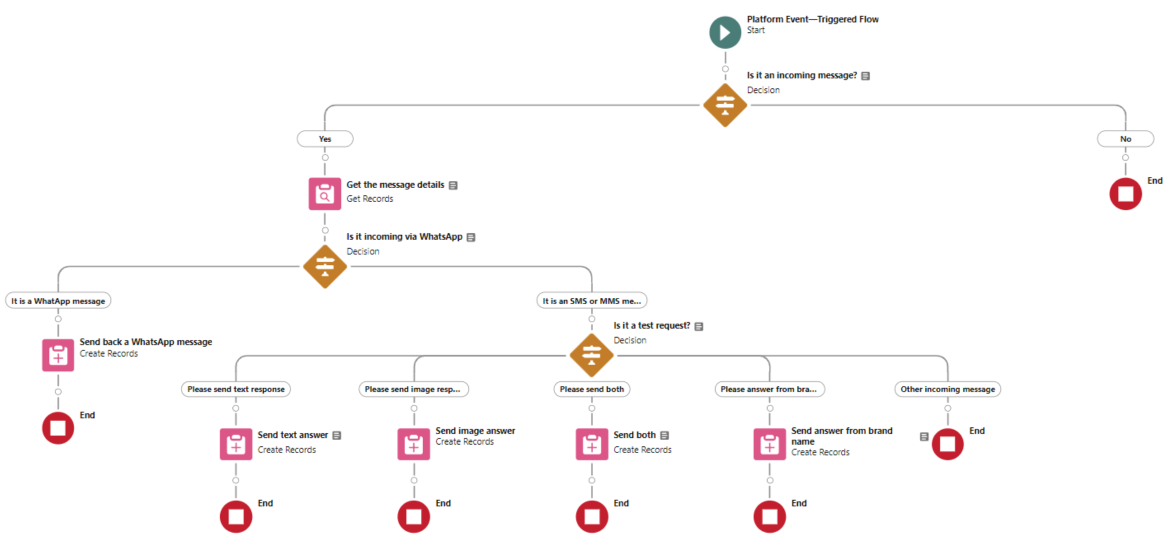
Note: The `VC_Next_Step__c` can be any value, it is up to the specific org to decide what are the following steps after a new record was created.

Vonage Send Automatic Response Example

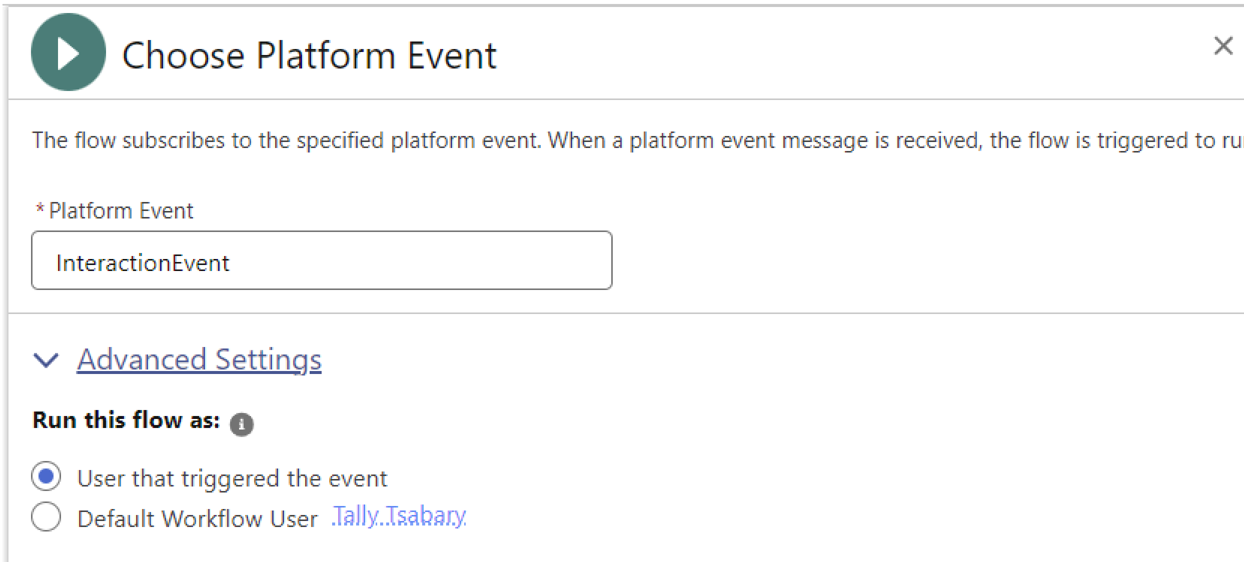
Use case: Send an automatic response, based on the incoming message content and channel.

The flow: The Flow is activated when a new SMS/WhatsApp message is created in org. If it is an outbound message, the flow ends. If it is an inbound message, the flow will do the following:

- Fetch the message details.
- If the message is from a known customer, the flow ends. In this case, the message is already linked to the record (Lead or Case etc) which includes the caller phone number.
- If it is a WhatsApp message - send a response via WhatsApp.
- If it is an SMS message - check the message content. In this example, we respond to messages which include a specific phrase, and ignore any other message.
- Based on the phrase used in the message, a suitable SMS response is sent back.

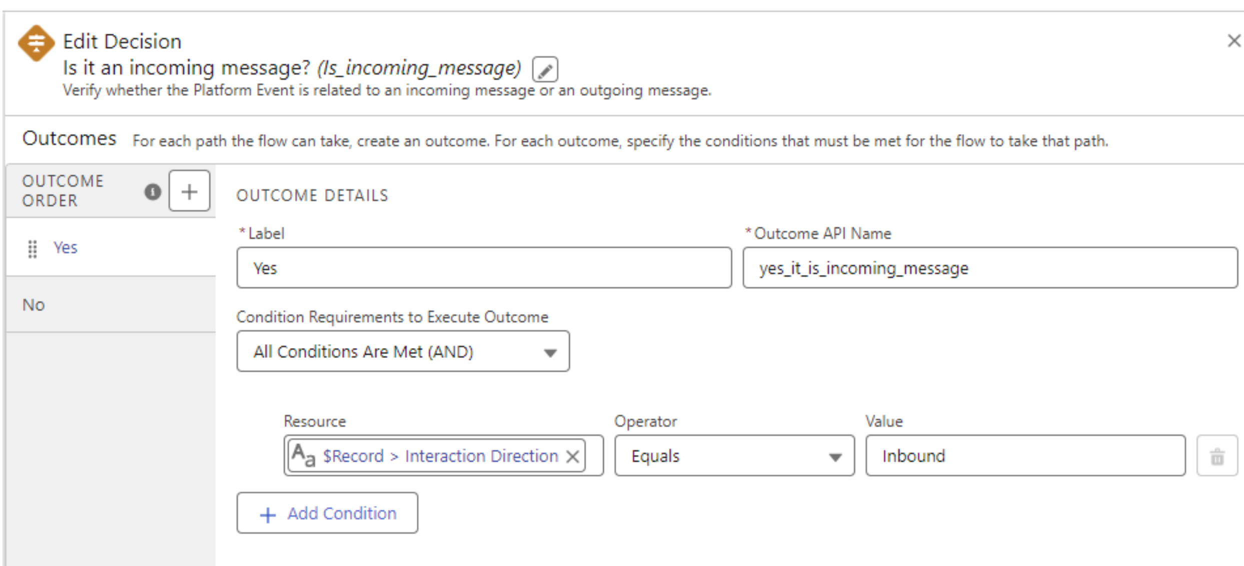


The platform event trigger for initiating the Flow:



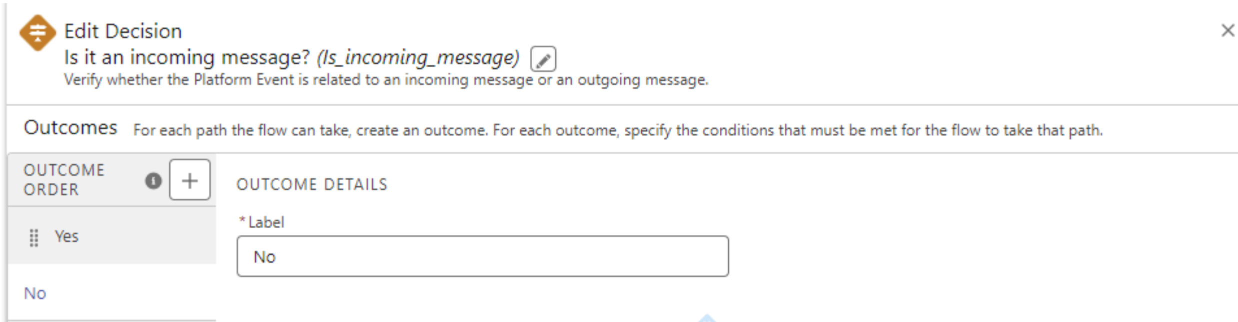
Is it an incoming message?

For the "Yes" section:

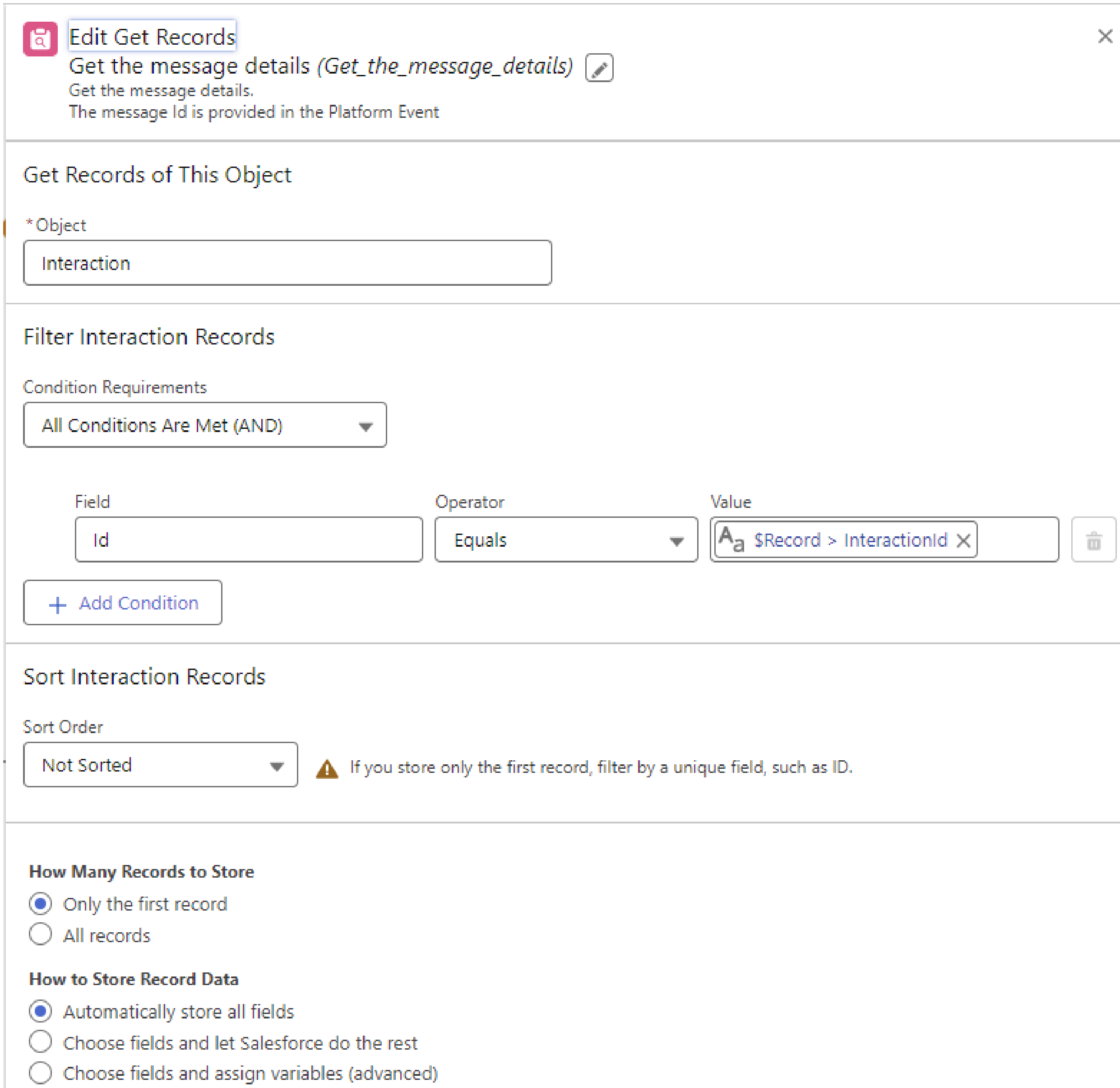


Note: While copying the template to your own Flow, make sure that the relevant field names are updated to reflect the package name space.

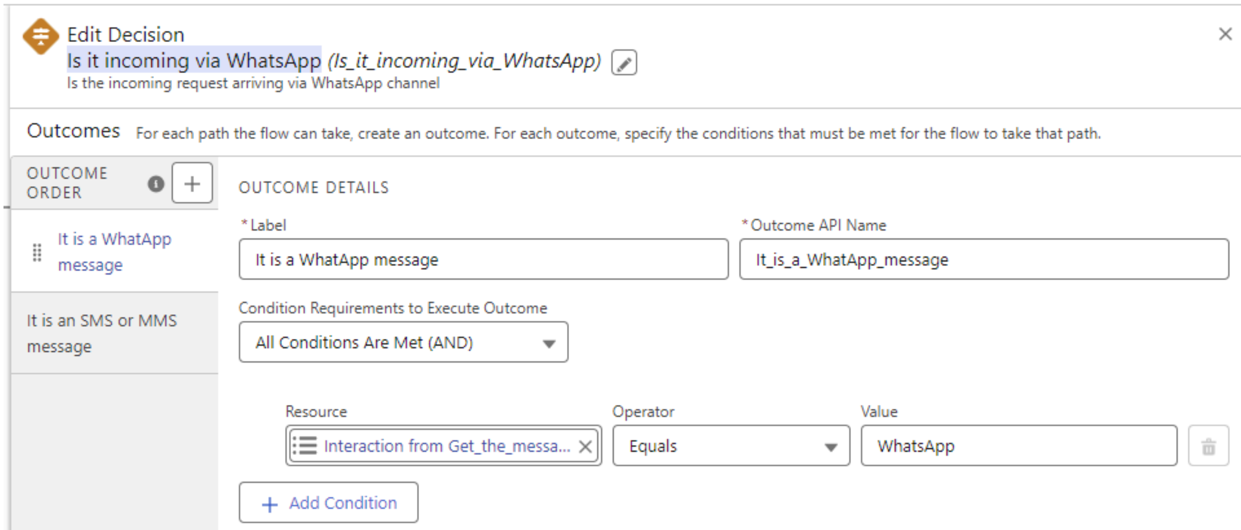
For the "No" section:



Get the message details:

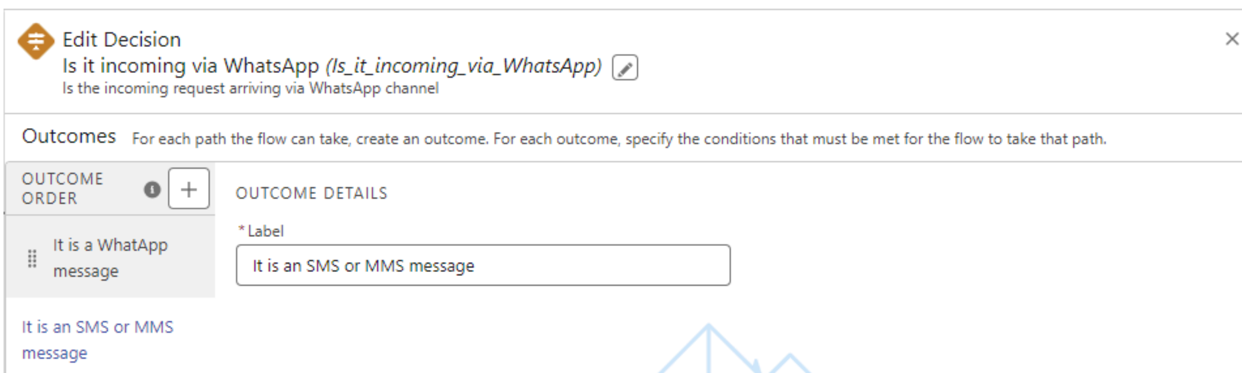


Is the message incoming via WhatsApp?

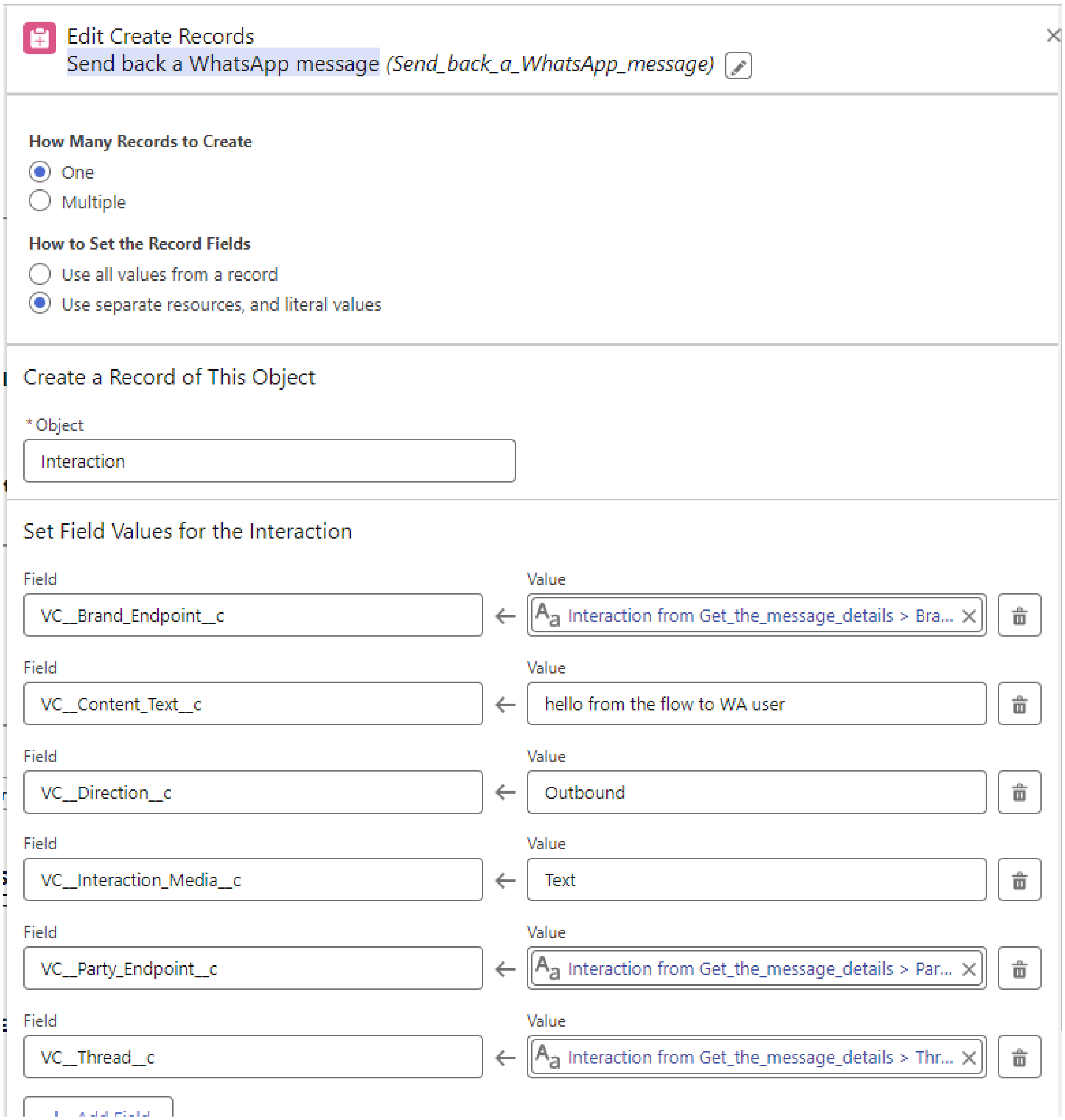


Note: The Resource name is: `{!Get_the_message_details.VC__Channel__c}`

Is the message incoming via SMS/MMS?

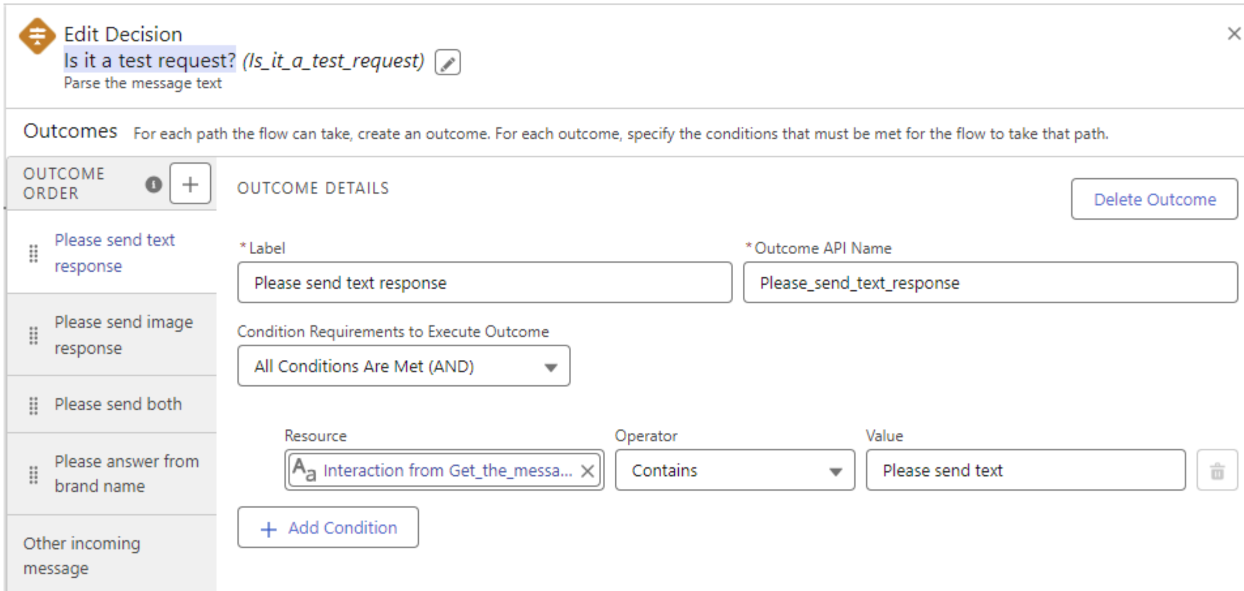


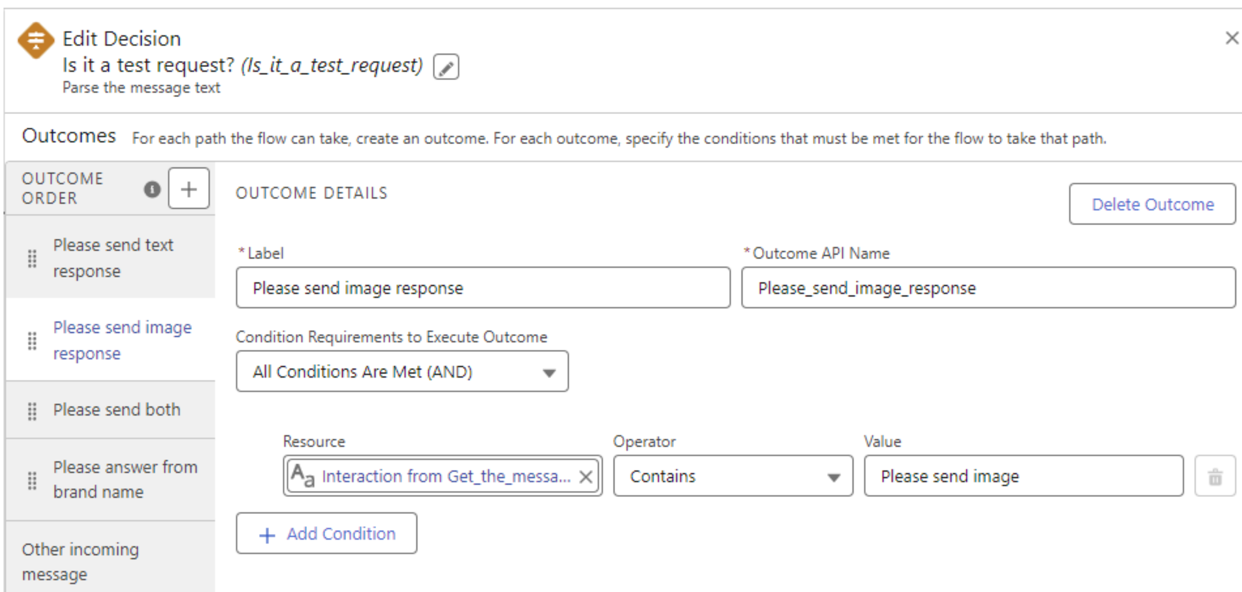
Send back a WhatsApp message



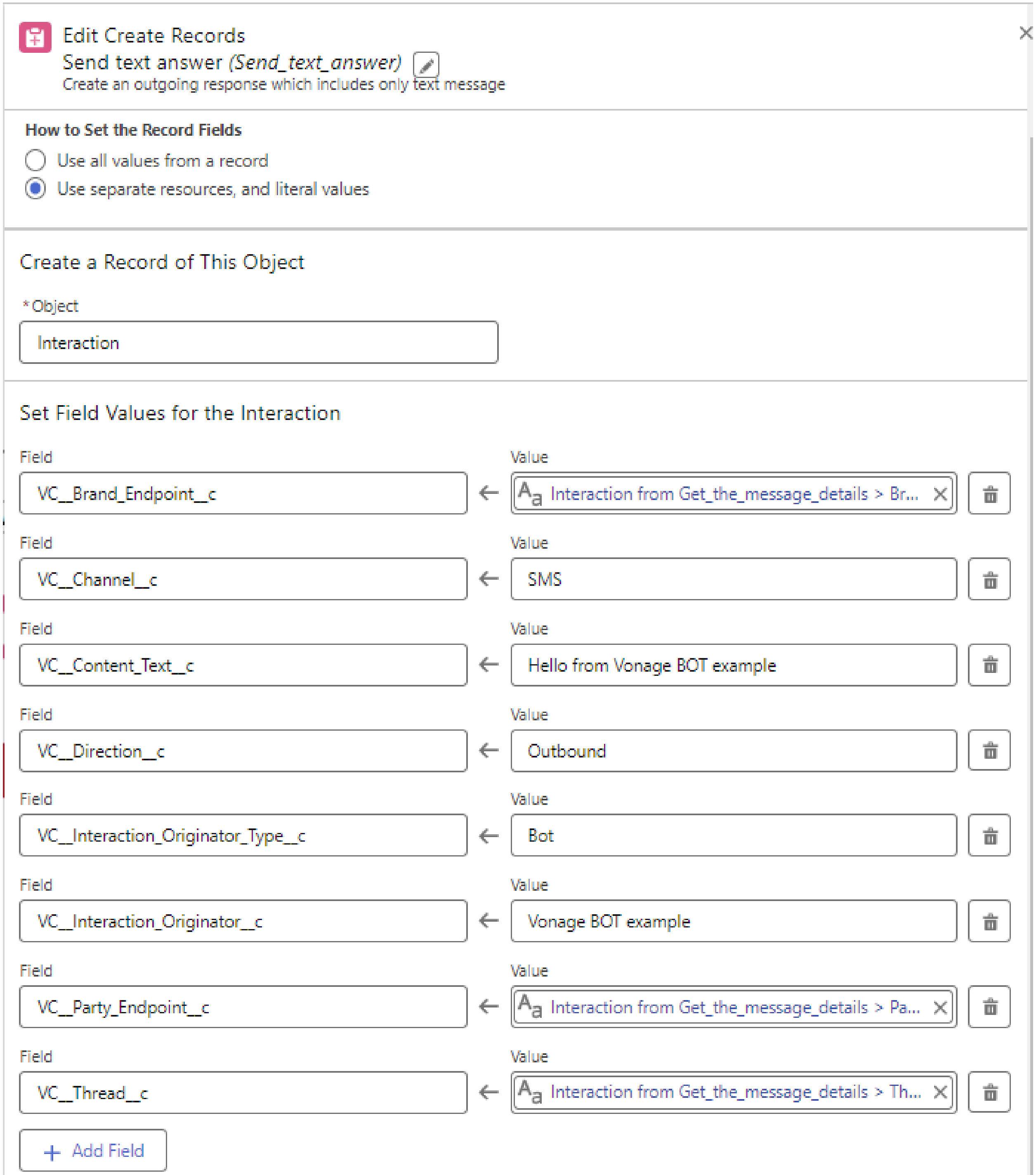
Is it a test request?

Filtering the Flow for different types of responses based on the message content. The message content (the Resource field) is: `{!Get_the_message_details.VC__Content_Text__c}`

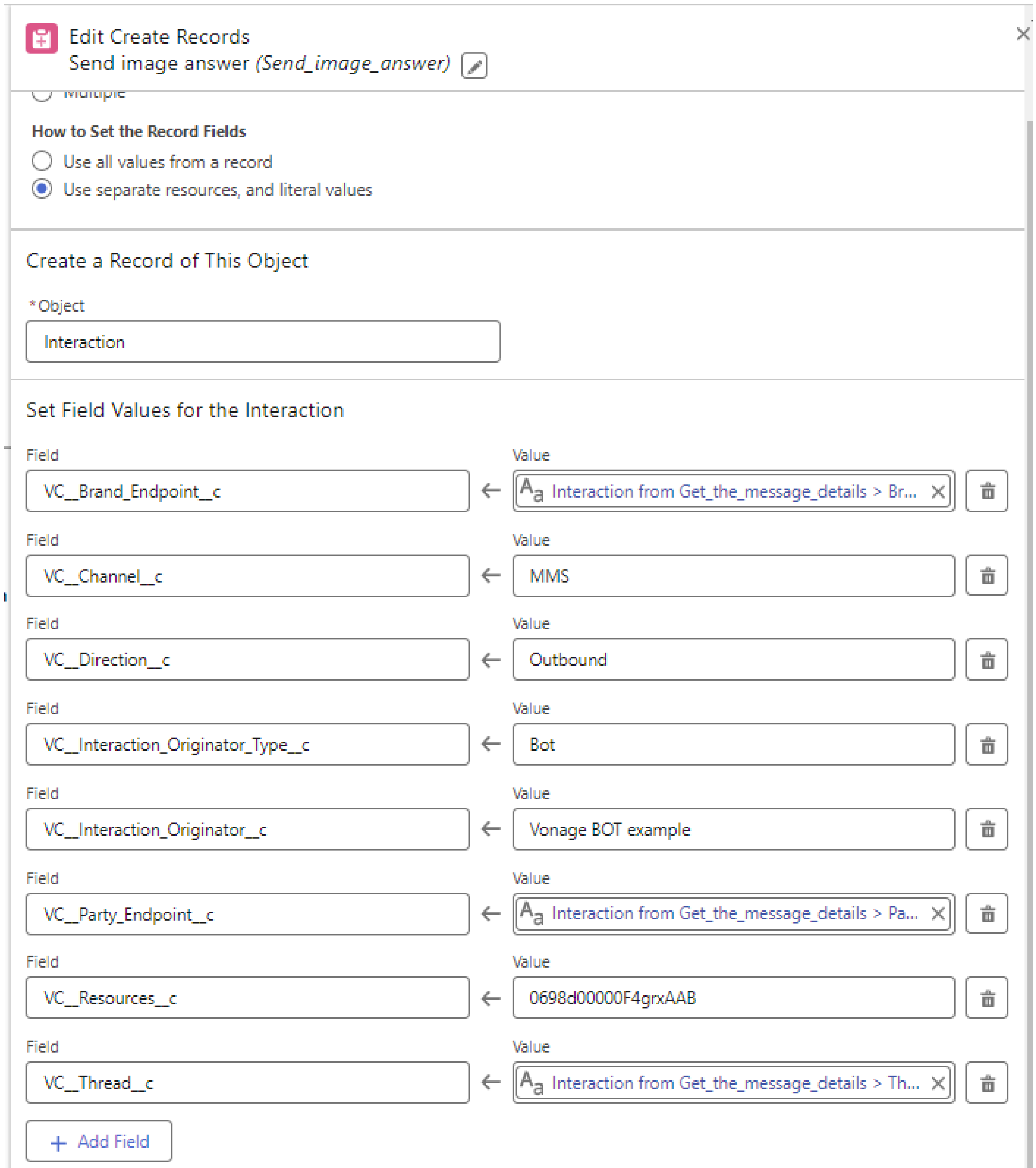

Edit Decision
Is it a test request? (Is_it_a_test_request)
Parse the message text
Outcomes
For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
OUTCOME ORDER
Please send text response
Please send image response
Please send both
Please answer from brand name
Other incoming message
OUTCOME DETAILS
Delete Outcome
*Label
Please send text response
*Outcome API Name
Please_send_text_response
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
Resource
Interaction from Get_the_messa...
Operator
Contains
Value
Please send text
Add Condition


Edit Decision
Is it a test request? (Is_it_a_test_request)
Parse the message text
Outcomes
For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
OUTCOME ORDER
Please send text response
Please send image response
Please send both
Please answer from brand name
Other incoming message
OUTCOME DETAILS
Delete Outcome
*Label
Please send image response
*Outcome API Name
Please_send_image_response
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
Resource
Interaction from Get_the_messa...
Operator
Contains
Value
Please send image
Add Condition

Send text response



Send image response



Note: MMS images are only supported in the USA and Canada. The `VC__Resources__c` value is the record Id of the ContentDocument that includes the image, which can be found in the Files app.

RCS Support

Vonage Conversations for Salesforce support for RCS is currently in **Alpha.** For RCS onboarding support, please connect with your Vonage account manager or point of contact.

Please note:

- **Supported RCS types:** Currently, we only provide the capability for sending text and images via RCS.
- **RCS Geographical Coverage**: RCS messaging is supported in Germany, UK as well as 10+ other countries across across EMEA, North America and South America. If you wish to use RCS messaging in countries not specifically listed, please contact Sales.
- **Disclaimer**: RCS Support capability will vary based on support by carrier network and device of users.

Conversations Management and Omni Channel

The Vonage Conversation feature provides a configurable tool for managing conversations.

A conversation includes a set of inbound and outbound messages. The conversation will be related to a specific record of a standard or custom object.

Each conversation has a "start time", "end time", status, list of related messages and related record(s).

Conversation features

- Party Endpoint. The phone to be used for communicating with the client. It is possible to add as many customized Phone fields.
- Party Name. The name to be associated with the client involved in this conversation.
- Start time.
- End time (set when the conversation is declared as ended).
- The related records (Case, Lead,.. etc), or custom sObject.
- List of all the messages in this conversation. The Conversation is the "Parent", the messages (Interaction__c) are the "Children" in a lookup relationship.
- Life cycle status. Unrestricted picklist, including one mandatory value" "Completed". The rest of the values can be decided by the org admin as suitable for their business.
- The reason for the current status.
- Last status change timestamp.

Conversation life cycle / status

Conversation has a life-cycle which is controlled by the `Conversation_Status__c` and the provided Template Flows.

The default life cycle/status:

- **In-progress:** The conversation is on-going.
- **Waiting:** The conversation is waiting for a customer response. The agent can set the conversation status to "Waiting" to indicate they are waiting for the customer. When the customer sends a new message, the status is updated to "In-progress".
- **Completed:** The conversation has ended. A "completed" Conversation cannot be re-opened. A Conversation is marked as "Completed" by the Agent.

Customizing the Conversation life cycle / status

Customers might need a different set of status values, or a different life-cycle. Status values can be added and removed as needed for the specific organization, and it is the organization's responsibility to handle the transitions of status according to the Conversation life cycle.

The package mandates one value only, which is "Completed" - that should be the status for ended conversations.

Conversation assignment to an agent

Agents are assigned to conversations they need to handle. The Conversation assignment can be done in one of two ways:

- **Using Salesforce Queue, Omni-Channel and capabilities based routing**
    - The ORG admin will need to configure a Queue and the Omni-Channel as per Salesforce instructions.
    - They will then need to set the record routing rules based on their business requirements and the conversation status.
    - Once a conversation is assigned to an Agent, it will appear in their Omni-Channel side bar.

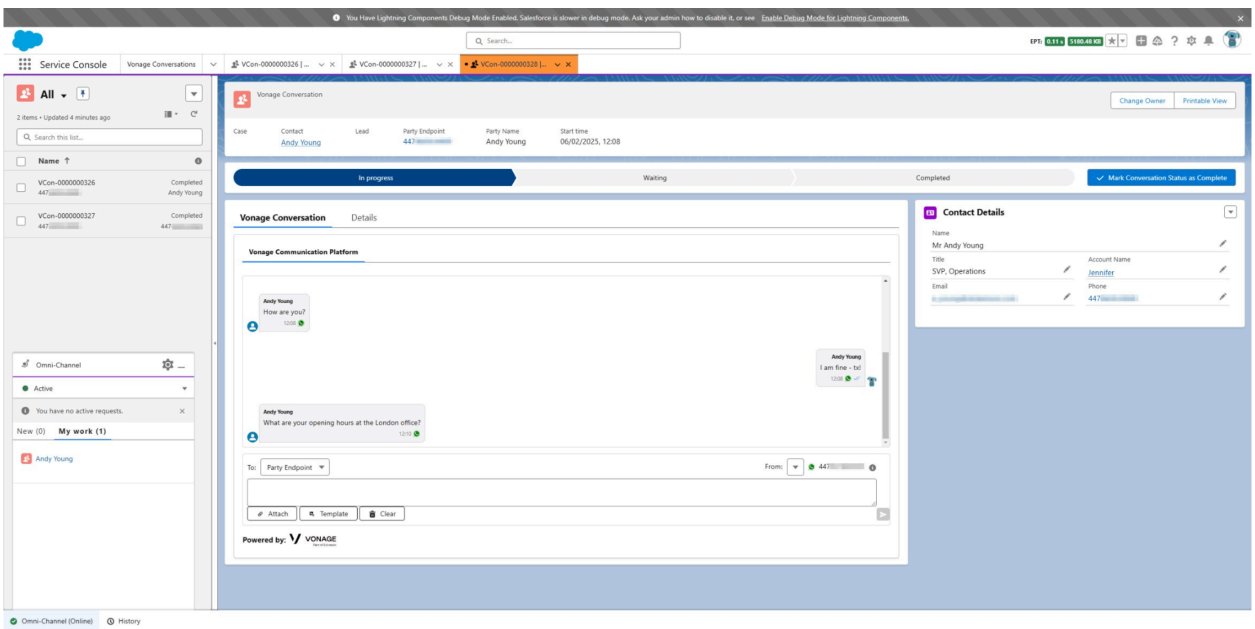
- **Using the sales console or service console:** listing all the available Conversations, and changing the Conversation owner to the suitable agent. This is an option if you do not want to use Omni-Channel.
    - "Conversations" will be added to the console as described on the configuration steps later in this document.

- The admin can add as many filters as needed based on the conversation Status or initial owner.
- **Using a Tab**, listing all the available Conversations, and changing the Conversation owner to the suitable agent. This is an option if you do not want to use Omni-Channel.
    - The "Conversations" Tab will be added to the package.
    - The admin can add as many filters as needed based on the conversation Status or initial owner.

The Agent UI

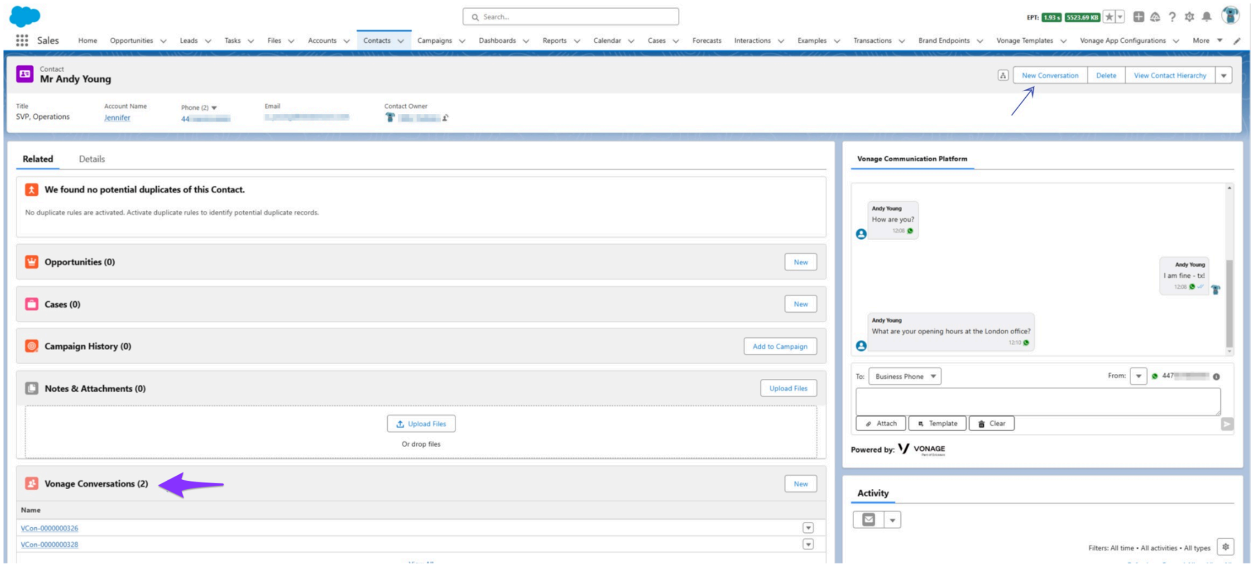
Once the agent is the owner of a Conversation they can use its record page. The Conversation record page will include the UI widget that presents the live Conversation.

Additional details are shown regarding the Conversation, such as its related records (Lead, Case, Account, etc), start time, status, status change time stamp, status change reason, etc.



The agent can send and receive messages, which will be presented in the UI widget. Every message is added to the currently live Conversation.

The agent will be able to close a Conversation by marking is as "Completed" using the Path element, and can open a new Conversation if all the related conversations are completed:



WhatsApp / SMS Templates

The template configuration can include references to sObject fields, for example: `Lead.Name` . The UI widget will allow the agent to select a template from a list of all the templates that are suitable for all its related records.

When the Context is a Conversation record, the mapping of the template will be done with the related records of the Conversation. *This is a benefit of using the Conversation, as fields from several records can be used in one template.*

Linking incoming messages to a Conversation

When an inbound message is received, an Interaction record is created.

As part of the Interaction record creation, the package will determine if there is already a live Conversation with the originating Phone number. It will also identify if there are other types of records that include that number (like Lead, Case, Account, custom object, etc).

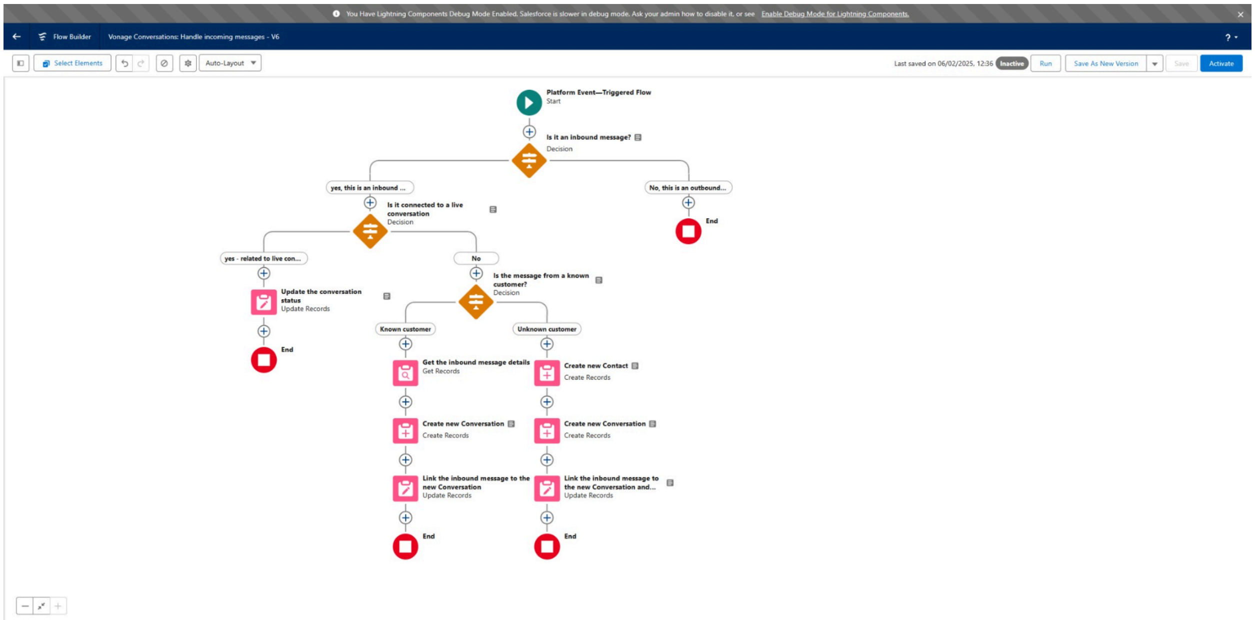
If such a Phone number exists, the specific record is linked to the newly created Interaction record. The Interaction record includes a field named `next-step`. If there was a match to an already existing record the value will be `null`. If no match found the value would be `Create Party`.

In this version, this event will be enhanced to include additional details:

- Was this interaction linked to a live Conversation?
- If it was linked to a live Conversation, provide its Salesforce record ID.

- The `Next_Step` value of the Interaction.

The package includes a Template flow to handle this logic. The flow can be used as is, or customized as explained in [Conversation configuration and settings](#).



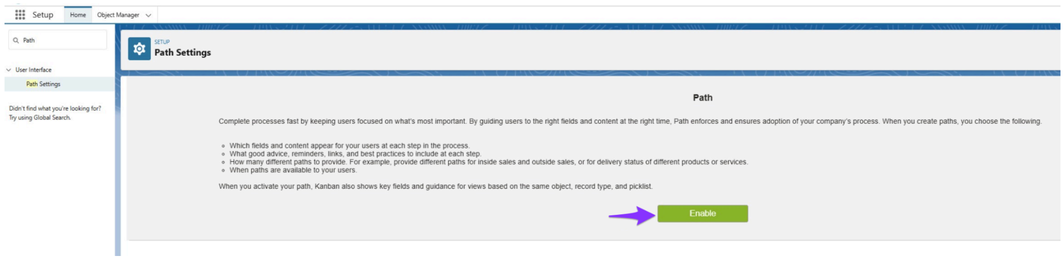
Outbound Notifications

Outbound notifications are messages sent from a Bot (Flow or Apex); the organization can decide whether a specific notification should be part of a Conversation or not.

- If the notification is not related to any Conversation, it can be sent without populating the link to a Conversation record. Such a message will appear in the Agent UI, but will not be included in the Conversation.
- If the notification should initiate a new Conversation it is the admin's responsibility to "Complete" all the currently live conversations related to the record.

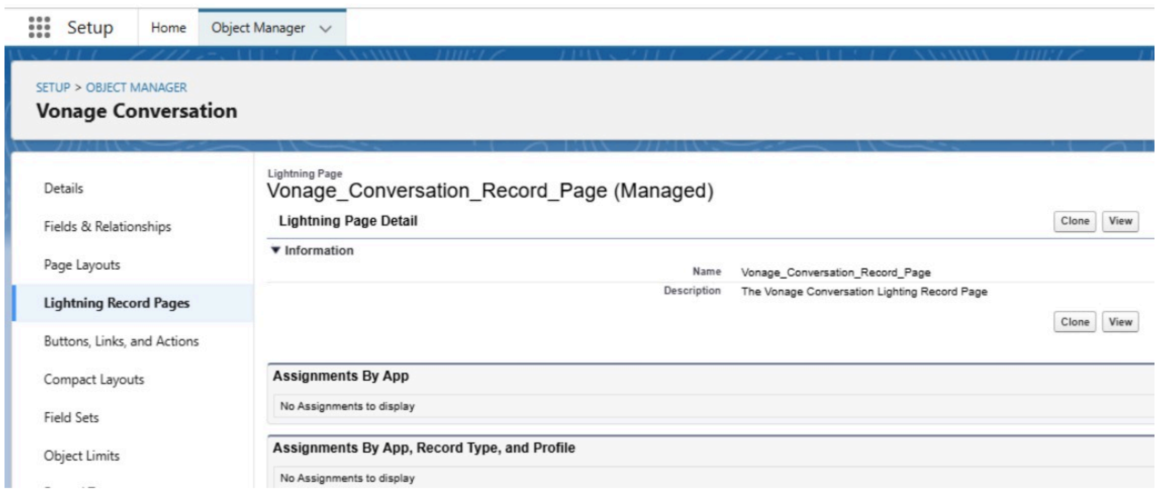
Conversation configuration and settings

Enable the Path feature for your ORG

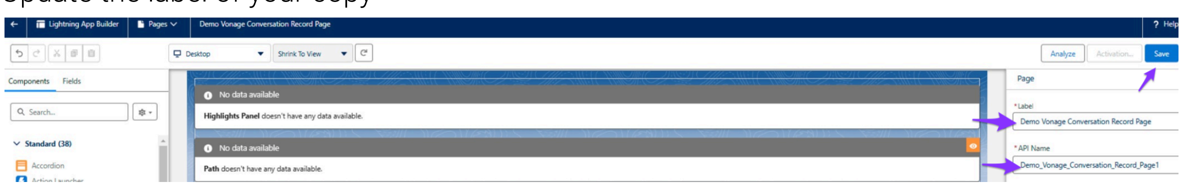


Configure the Vonage_Conversation__c record page

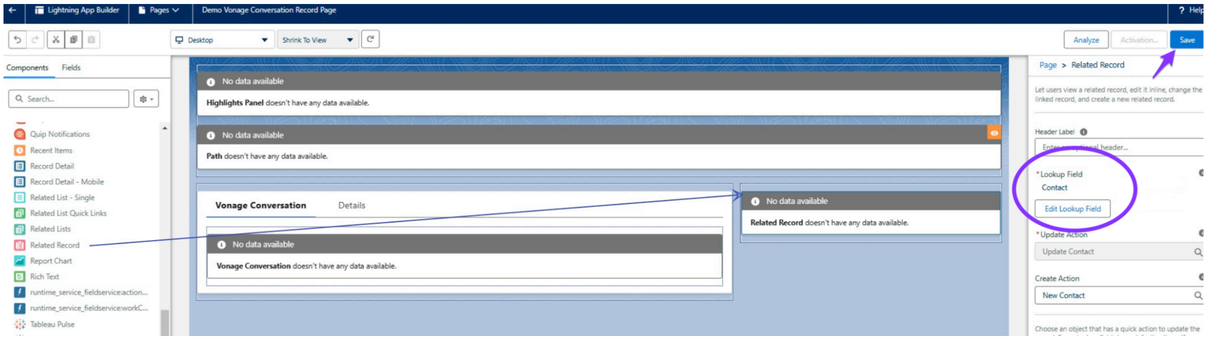
1. Clone the Lightning Record page named: `Vonage_Conversation_Record_Page`.

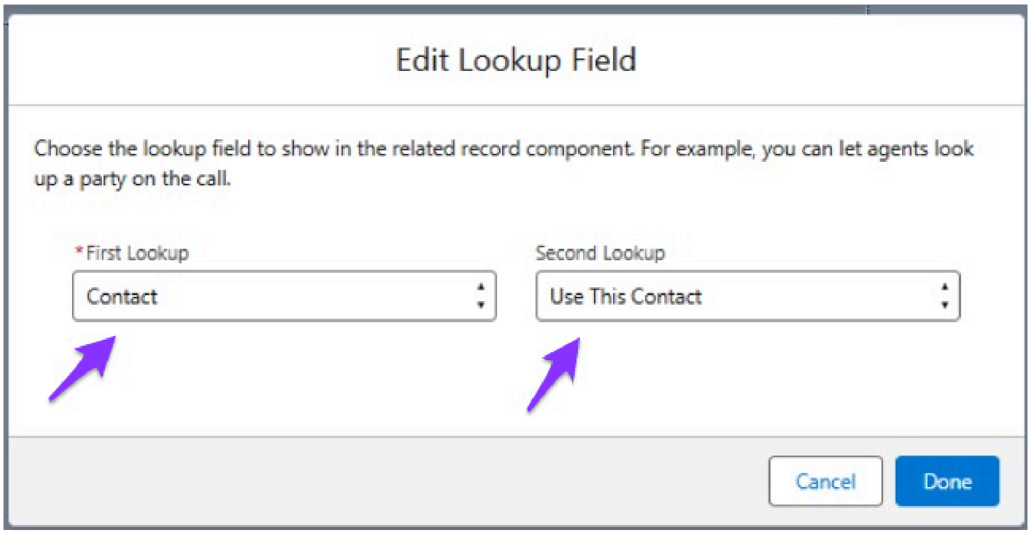


2. Update the label of your copy

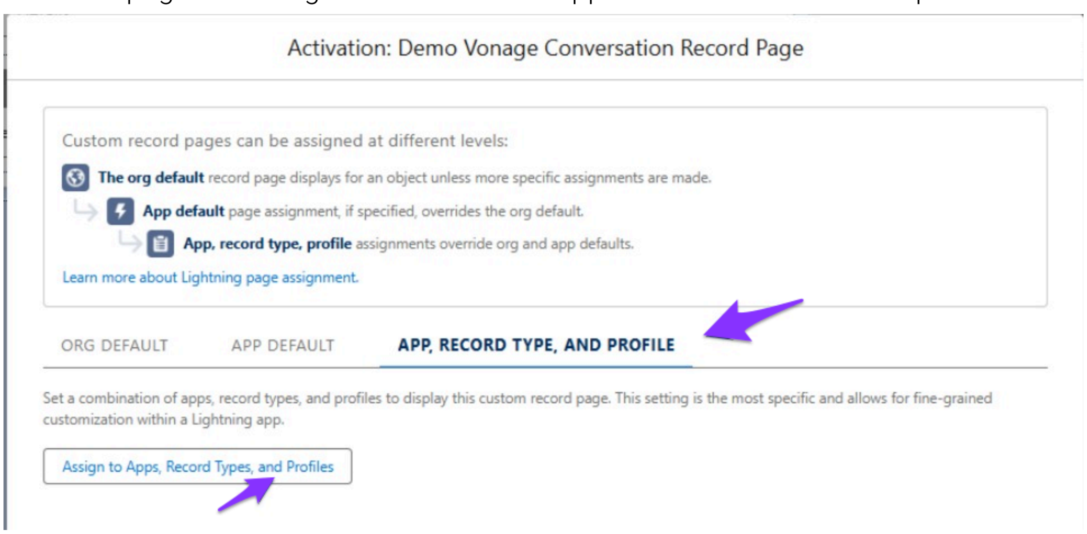


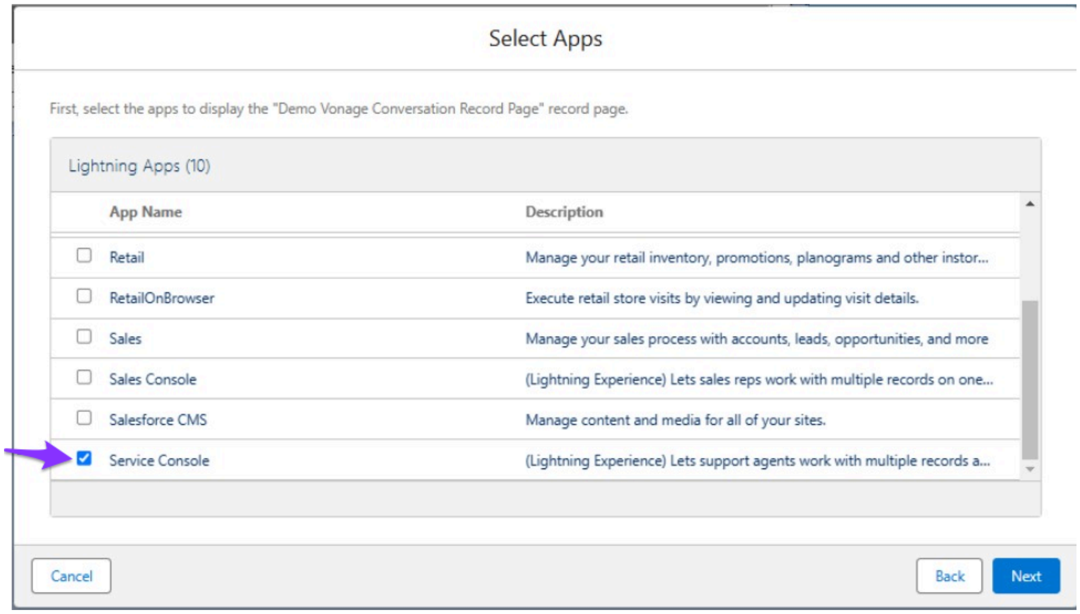
3. It is recommended to enhance the page and add related records like Contact, or any other sObject that the Conversation is related to:

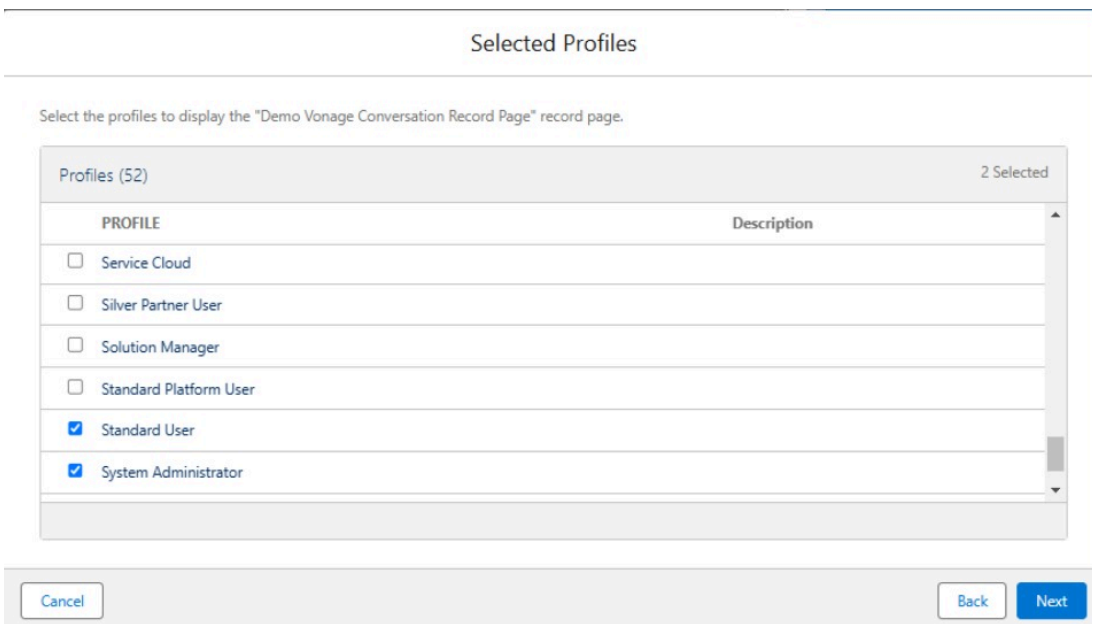




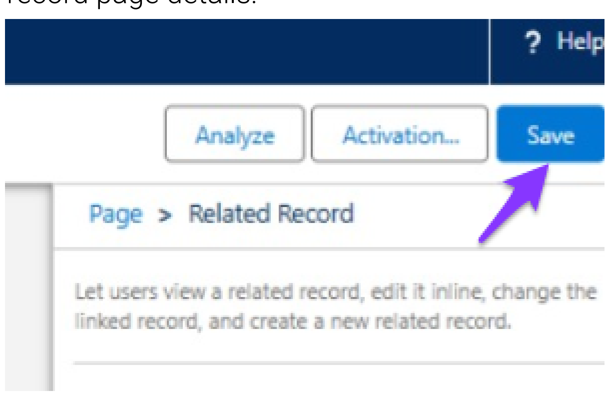
4. Activate the page and assign it to the relevant application and the relevant profiles:







5. Save the Customized record page details:



6. **Please note: do not to remove the Path component from your page**

Using the Sales or Service Consoles without Omni-Channel (Optional)

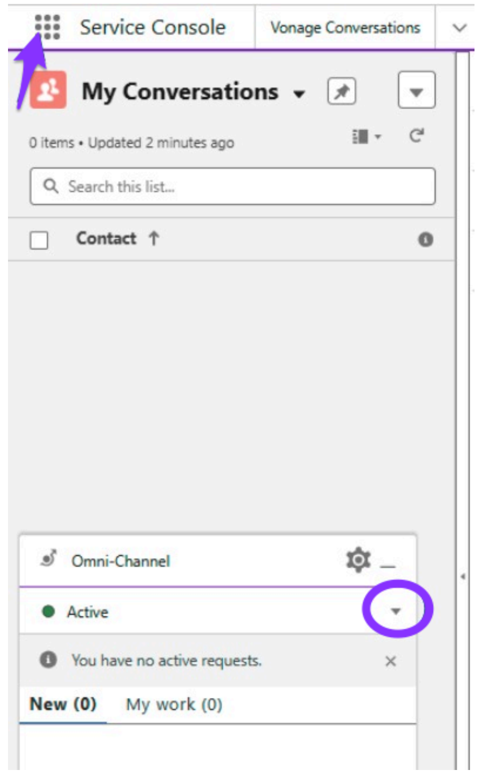
1. To configure a Queue or identify a designated user:
    a. Incoming messages are matched to live conversations or create new conversation based on a configurable Flow template as described later in this document.
    b. When an incoming message cannot be matched to any live conversation a new conversation is created.
    c. For best practices, it is recommended to assign the conversation to some "service user" or to a Queue.
    d. Do not assign it to a specific human at your org, as if they leave the company, the Flow will fail if the user is deleted.
2. In this document we will use a Queue for this purpose.
3. Configure the Sales/Service Console to use the Conversation
4. It is advisable to define a queue or some "service user" to accept all the new incoming messages that create a new Person Account

Using the Console with Omni-Channel (Optional)

1. Configure a Queue to handle the `VC__Vonage_Conversation__c sObject`.
2. Configure Salesforce' Omni-Channel and link it to the Queue.
3. Configure the Service Console (or any other preferred application) to use the Omni-Channel.

Login to the Omni-Channel

Open the Service Console and login to the Omni-Channel:



Flow Template to handle incoming messages with Vonage Conversations

The package includes a Flow template demonstrating how to handle incoming messages, **Vonage Conversations: Handle incoming messages**.

The Flow is triggered by the Platform Event :"InteractionEvent"
The event includes the following details:

- `VC__InteractionId__c`: The newly created Interaction ID
- `VC__Interaction_Direction__c`: Inbound or Outbound
- `VC__Next_Step__c`: Set to 'Null' if the caller number was found in any of the Salesforce related records; 'Create Party' in case the caller was not identified.
- `VC__Related_Conversation__c`: 'Null' if not related to any live conversation, otherwise set to the related live conversation ID.
- `VC__Party_Endpoint__c`: The caller identifier (phone number /WhatsApp ID / RCS ID)

<u>The Flow handles only the inbound messages:</u>

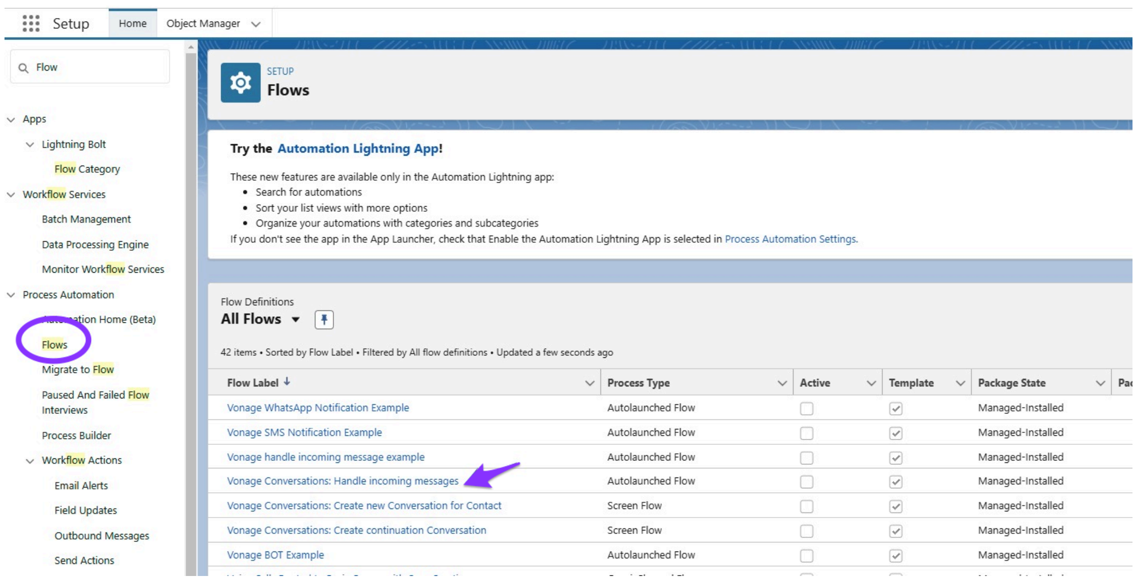
- If the inbound message is connected to a live conversation, update the conversation status to "In Progress", and end the flow.

- If the inbound message is from an unknown customer, create a new Contact (this part can be amended to suit the specific Org needs), and create a new Conversation with the new Contact. End the flow.
- If the inbound message is from a known customer but there is no live conversation with them, create a new conversation. End the flow.

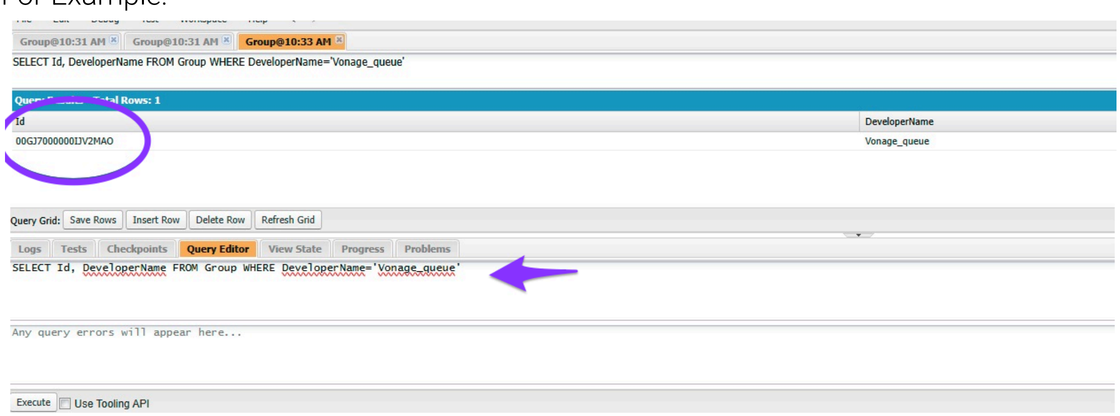
Whenever a new Conversation is created, it should be assigned to the Omni Channel Queue.

Configuring the Flow

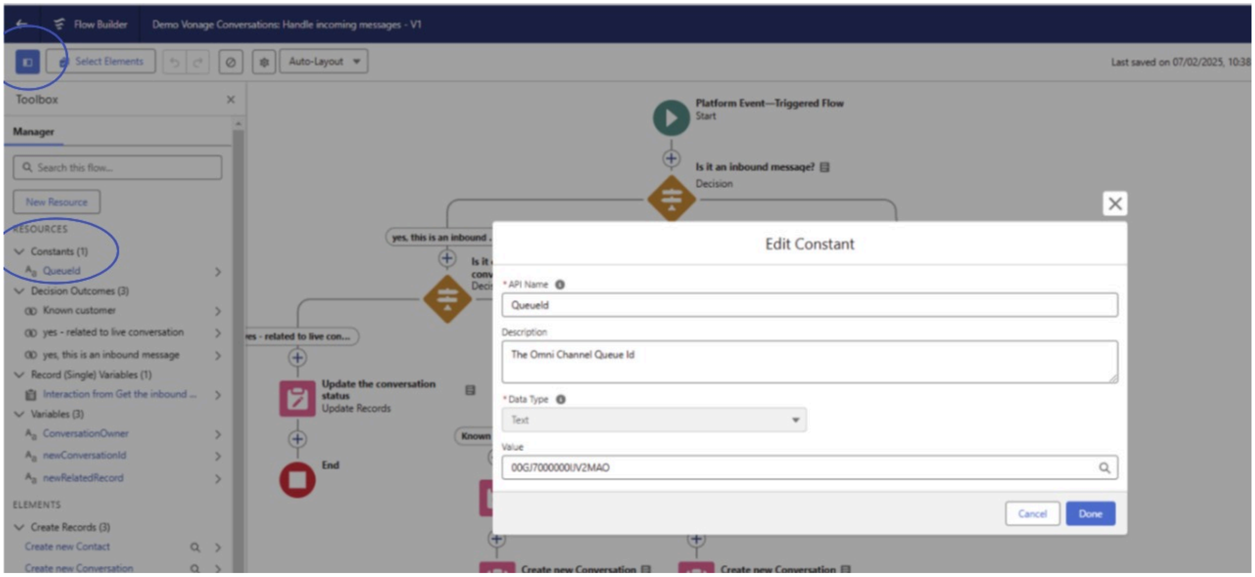
1. Use the **Vonage Conversations: Handle incoming messages** flow template.



2. Create your own copy of the Flow.
3. For Omni-channel usage: Find the Queue "ID" (Your Omni-Channel Queue) by using the Developer Console and execute the following query:
   `SELECT Id, DeveloperName FROM Group WHERE DeveloperName='[your configured queue name]'`
   For Example:



4. In the flow editor, edit the Constant named "QueueId" to the specific QueueId for your Omni Channel



5. Save and Activate the Flow.

Configure the Flow to handle the open a new Conversation from earlier "Completed" Conversation

Activate the Flow: **Vonage Conversations: Create continuation Conversation.**

Configure the Contact record page to include a new action that allow the Agent to start a new Conversation

We'll use the Contact as an example for the record that the Conversation is related to.

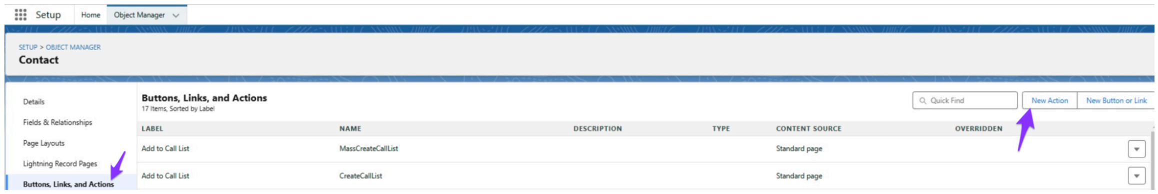
1. Activate the Flow: **Vonage Conversations: Create new Conversation for Contact**, or create your own version to match the specific record you would prefer to use.

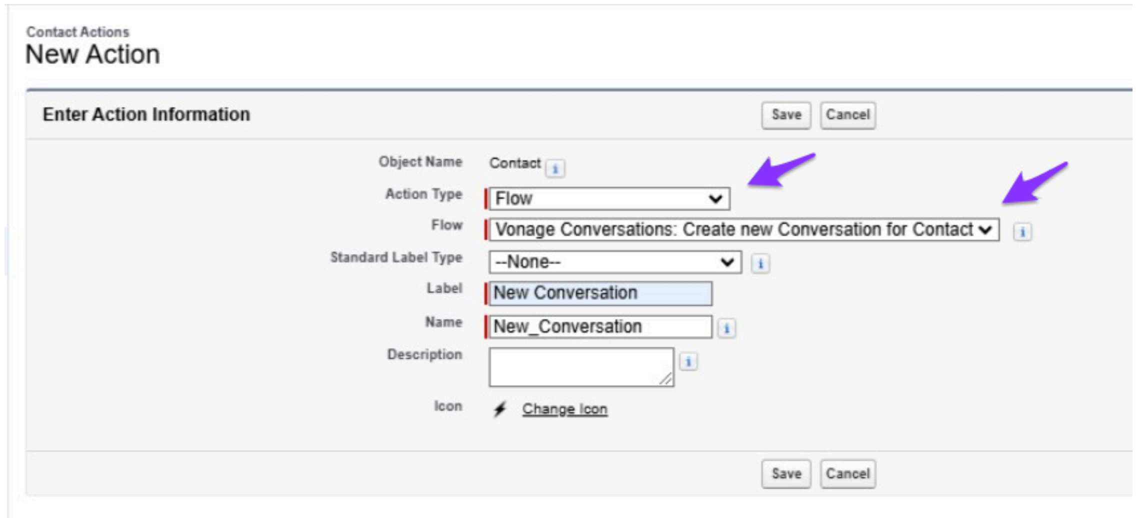
Flow Definitions
All Flows

43 items • Sorted by Last Modified Date • Filtered by All flow definitions • Updated a few seconds ago

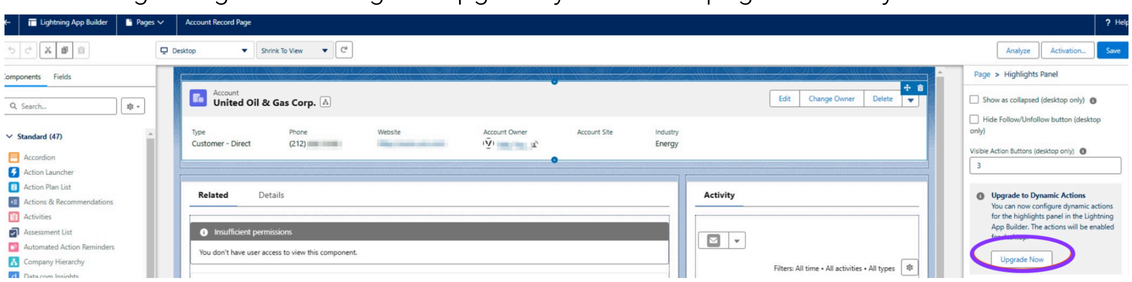
Flow Label	Process Type	Active	Template	Package State
Vonage Conversations: Create new Conversation for Contact	Screen Flow	✓	✓	Managed-Installed
Vonage Conversations: Create continuation Conversation	Screen Flow	✓	✓	Managed-Installed
Demo Vonage Conversations: Handle incoming messages	Autolaunched Flow	✓		Unmanaged

2. From the Object manager: Select the Contact sObject (or any other sObject you want to link with the Conversation). Select "New Action":



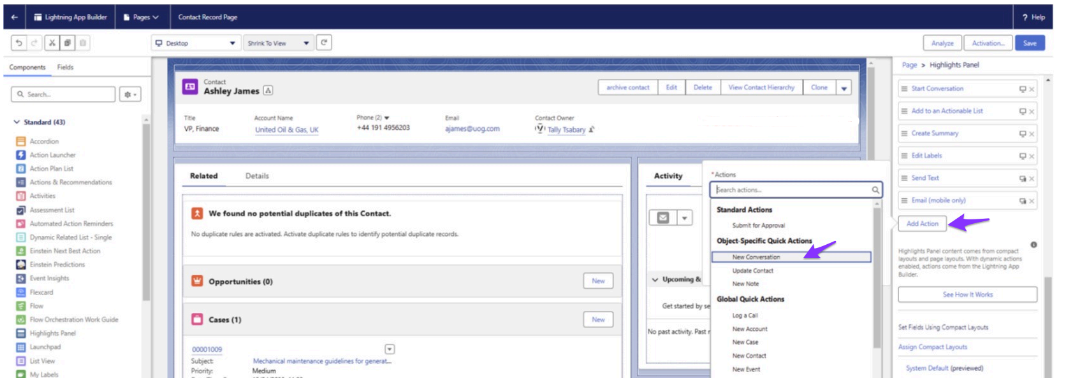


3. Edit the Contact's Lightning Record Page to include the new Action. It might be required to create a Lightning Record Page or upgrade your record page to use Dynamic Actions:

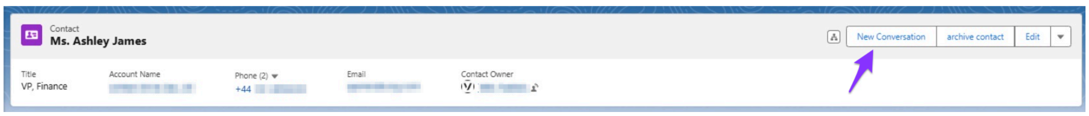


Once upgraded:

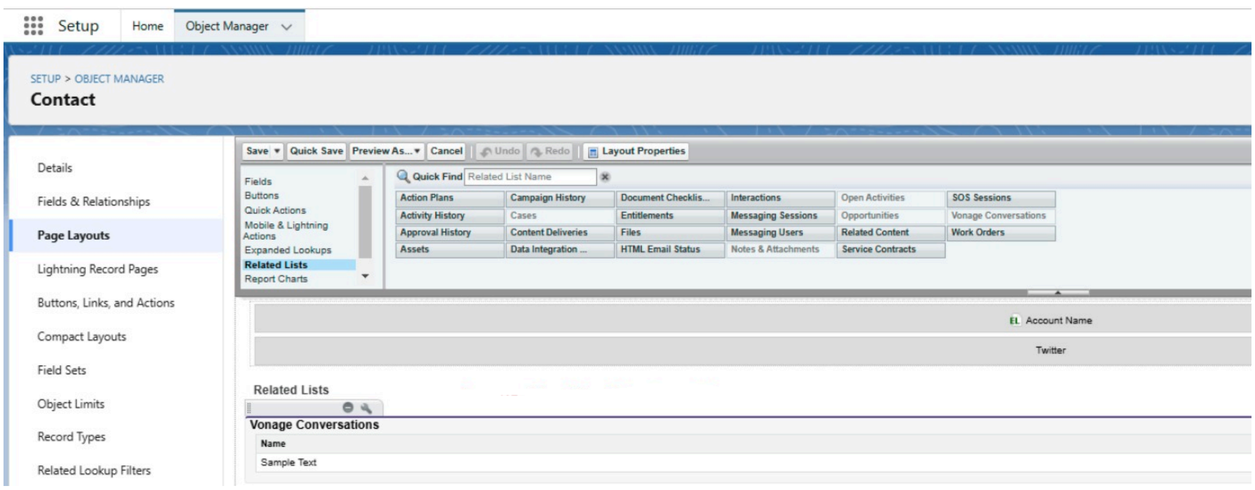
1. Select the Contact's highlight panel.
2. Select "Add Action" button.
3. Select the action created on the previous step.
4. Select the "Done" button to add the new Action.
5. Select the "Save" button.
6. Exit the App Builder.



7. The new button was added to the Contact record page:



8. Add the Conversations Related list to the Contact page layout. *Make sure to remove the "New" button.*



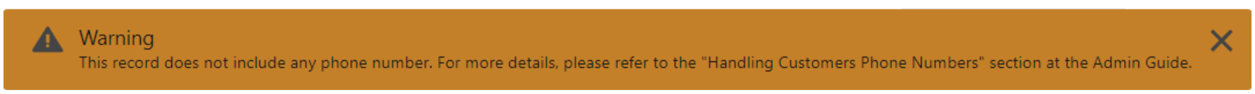
9. The setup is complete - you can now handle conversations via the Omni-Channel.

Troubleshooting / Known Issues

1. MMS Images are only supported in the USA and Canada.
2. Any message can only include one resource (i.e. image, audio, video, file).
3. For MMS: When using images in the message, it is impossible to use Brand name in the from field. Only an LVN can be used with an image.
4. In order to send and receive messages for a USA LVN, it must be configured as part of 10DLC.
5. When a customer sends a file as an attachment (via the Documents on their mobile) it will arrive at Vonage with the file name, and so we can present the file name in CSF. If they

send the file as an audio, video or image, the original name of the resource is not available. The name of that file in CSF will only include the file type and the arrival time stamp.

6. Files that are bigger than 6MB may fail to arrive due to a Heap Exception.
7. Outbound WhatsApp messages that have an audio file attached cannot include a caption.
8. In case the widget UI destination drop down is empty, please refer to Handling Customer's Phone Numbers.
9. As of mid December 2023 Version 1.0.0 (the initial GA) is unable to import new WhatsApp templates. This is due to a change on WhatsApp limits for the query response size. In order to mitigate this issue - please upgrade to version 1.1.0
10. For already imported WhatsApp templates which are marked as "unsupported" due to unsupported header types or buttons: in order to utilize the enhanced template support introduced in version 1.10 and later, please delete those templates and import them again. Templates which are already supported do not need any action, they will continue to work as before.
11. In case of upgrade: If the "Vonage Communication Platform Admin Area" was open before the upgrade - please close its tab and open it in a new tab in order to reload all the latest updates regarding the WhatsApp templates.
12. In the case that an sObject does not include its own PHONE fields and is instead using the Contact sObject fields: if there is a need to automatically link incoming interactions to a Case sObject, then a custom field of type PHONE should be added to the Case sObject, and this field should automatically get a copy of the PHONE field from the Contact.
13. In case that all the Phone fields of a specific record are null, the following warning will be presented. To disable this feature, please refer to Notifications Management.



14. UI widget: The order of the available numbers at the "From" dropdown list:
    a. By default, all the configured numbers will be available. The first number on the list is the one used in the latest message in the conversation, then the general default number as was configured at the "Configure Numbers" section, then the rest of the available numbers.
    b. In case the "Numbers Allocation" feature is enabled, please refer to the detailed explanation in the "Numbers Allocation" section.
15. Inactive Admins: While deploying the package, an internal token is generated based on the Admin Id. Should this Admin become inactive, a new Admin should be nominated. The new Admin should have access to the company's API-Key in Vonage customer dashboard. Once the new Admin gets access to the Vonage API-Key, they should do the "Factory Reset" to refresh the internal token. The ORG data is not affected by the Factory Reset: all previous data and configurations will remain as they were before the reset
16. On the Agent's UI: the selected template is not editable. WhatsApp templates are not editable as their structure and content was approved by WhatsApp.
17. RCS with emoticons: Some of the carriers will convert some of the emoticon to text instead of delivering it as an emoticon.

Previous Release Notes

Release Notes - v3.7

New Features:

- Filter templates based on the optional "UserGroup" tag.

Fixes:

- Support short codes when applicable.
- Remove "highlighted" Console tab for a conversation marked as Completed.

Release Notes - v3.6

New Features:

- Adds support for WhatsApp templates with Quick Response buttons

Release Notes - v3.5.1

New Features:

- Handle the matching on inbound messages to Case which is related to a Contact.

Release Notes - v3.3

Fixes:

- Fix the issue of refreshing the UI while working in the service console with standard sObjects.
- Filter out WhatsApp templates based on the WABA of the selected "from".

Release Notes - v3.2

Fixes:

- Fixed the issue of failing to send a conversation when the plus sign is attached to the number.

Release Notes - v3.1

Fixes:

- Amend the deployment and upgrade for encrypted Phone fields.
- Amend the record layout for the Omni Channel queue.

Release Notes - v3.0

New Features:

- Conversation management with Omni Channel.

- Handle proper isolation when the same Vonage API Key is used on different orgs with different numbers.

Release Notes - v2.0

New Features:

- RCS support (Alpha) for inbound and outbound messages. See the RCS Support section for more information.

Release Notes - v1.8

New features:

- Support Brand Name usage, without the need to acquire a number.
- Advanced WhatsApp templates support for the Agent's UI.
- Use images' thumbnail with zoom-in option whenever using images.

Bug fixes:

- Interaction's delivery status now includes a tooltip.
- Allowed SMS templates creation after upgrade from older versions.
- Support spaces in template's group name and category.
- Tone down the not-permitted error for users which allowed access to record but not to the package: Point from Fisher & Paykel regarding permissions sets.

Release Notes - v1.7

New features:

- WhatsApp templates support for the Agent's UI.
- Use images' thumbnail with zoom-in option whenever using images.

Bug fixes:

- UI Widget: Add tooltip with resource name to all resources which are not images.

Release Notes - v1.6

New features:

- SMS Templates available for agent usage.
- Clear Button added to the Agent UI.

<u>**Bug fixes at the UI widget:**</u>

- Improved resources handling in the Agent UI.

Release Notes - v1.5

<u>**New features:**</u>

- Support allocation of specific number(s) to agent(s).
- Additional Flow template, demonstrating how to handle incoming messages that create new records.

<u>**Bug fixes at the UI widget:**</u>

- Set the "From" default number to be the one used at the last message in the conversation.
- Show "loading" gif while downloading images into the conversation.

Release Notes - v1.4

What's New?

1. SMS Templates support for Flow and Apex.
2. Customization tab for controlling mobile notifications and warnings.

Release Notes - v1.3

What's New?

1. Updates to the UI of the widget to show message delivery status and the channel used.
2. A new tab in the Admin area to configure file names, along with enabling/disabling the ability to send incoming files from conversations as outgoing files in other interactions.

Release Notes - v1.1

What's New?

1. Added support for Video and Document header types in WhatsApp templates.
2. Added support for static URL buttons in WhatsApp templates.
3. File names are presented for both outgoing and incoming interaction for the end user and the agent.
4. Resources selector (the attach button on the Agent's UI) now includes an icon to indicate the resource type.
5. The "troubleshooting" section of the users' guide was enhanced.

Bug Fixes

1. Allow to link sObjects without owner field to the interaction (i.e. the User sObject).
2. Handle the case when PHONE/FAX fields are not accessible.