

Vonage Conversations for Salesforce

Agent Guide

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Sending Messages from the UI

Sending an SMS or WhatsApp Message

To send a message, navigate to the record for the recipient of that message. You will see this UI on the page:

Vonage Communication Platform


David Monaco



07-Oct-2024



David Monaco
Hello, I would like to book a car service. Reg: AA12XYZ
08:43 



Thank you, will 21st July 8am be suitable for you?
08:44  

To: From:

Powered by:  **VONAGE**
Part of Ericsson

1. First, choose the brand endpoint you want to use to send the message using the drop down. This is automatically populated with all of the different phone numbers that you can use, across all of the different channels.
 - a. For example, you may have one brand number for communications in the USA and another for communications within the UK. If the permissions have been enabled, you can use the drop down to choose between the numbers; if not, the default number will be selected.

2. Next, choose the phone number that you want to send the message to; the drop down is automatically populated with all phone numbers associated with that record.
3. You can attach an image to the message using the 'Attach' button; see the [next section](#) for more information. You can also choose to use a predefined template for your message by selecting the 'Template' button - the list of available options will change depending on the selected endpoint.
4. Once you've sent a message, you will be able to see it in the conversation history along with the channel used and the message delivery status. The name of the agent that sent the message will be shown, but you can also see it by hovering over the sender icon.

Sending a Message with a Resource

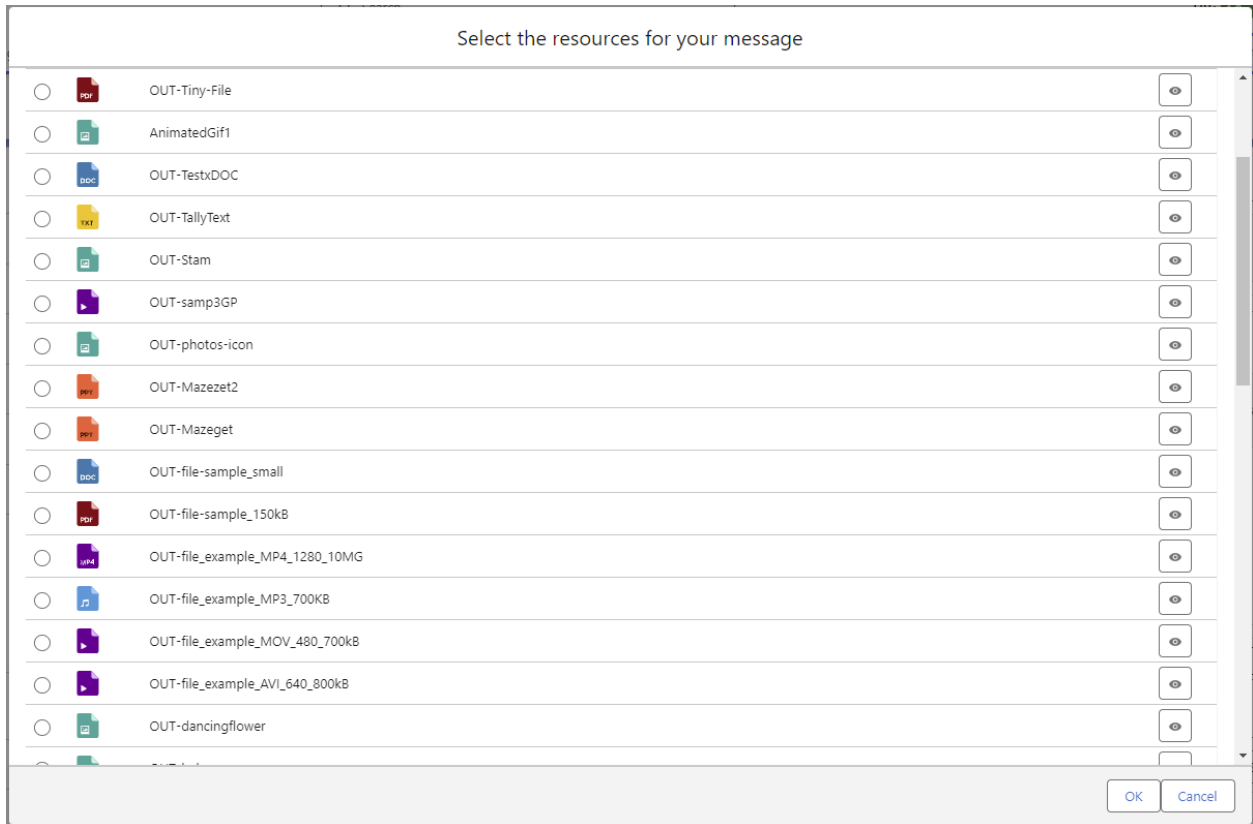
Note: MMS Images are only supported for USA or Canada numbers. The LVNs used must be approved for [10DLC](#).

When sending messages, you can attach **one** resource by selecting the 'Attach' button in the bottom left:



The screenshot shows a messaging interface with a 'To:' field set to 'Phone' and a 'From:' field with a dropdown arrow. Below these fields is a large text input area. At the bottom of the input area, there are three buttons: 'Attach' (with a paperclip icon), 'Template' (with a document icon), and 'Clear' (with a trash can icon). The 'Attach' button is highlighted with a purple rectangular box. To the right of these buttons is a send button with a right-pointing arrow. At the bottom of the interface, it says 'Powered by: VONAGE Part of Ericsson'.

You will see a list of images that you are permitted to send. The icon on the left indicates what type of file that resource is, and you can preview the resource by clicking the eye icon on the right:



These resources are managed through the 'Files' section. Once selected the resource will be presented in the message editor, and once sent it will be shown in the conversation history:



Mobile Usage

Note: The following behavior is specific for the Salesforce Mobile Application.

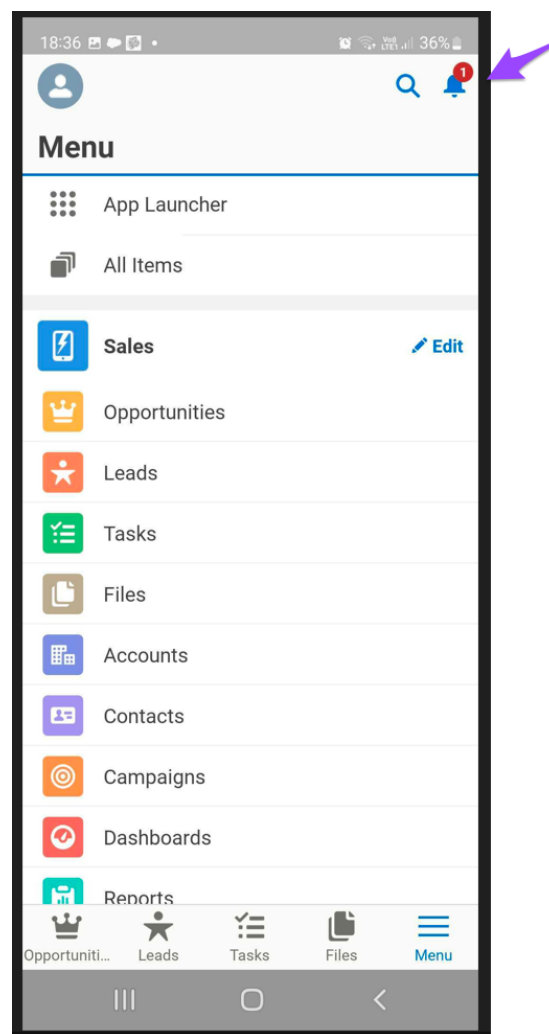
Managing Notifications

Mobile notifications can be managed in the Setup and Configuration tab of the Admin dashboard.

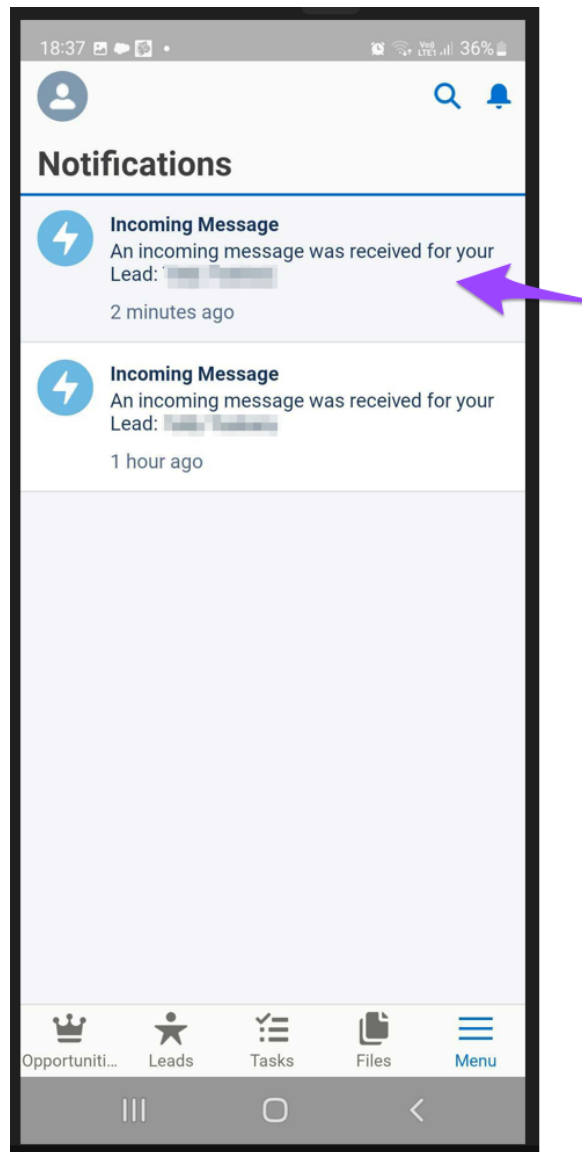
Incoming Messages

Each incoming message is connected to one or more records; this can be a Lead, Case, Account, Contact, Opportunity or Custom Object. Each of the related records has an owner; all the owners of a record will get a notification to their mobile about a new incoming message.

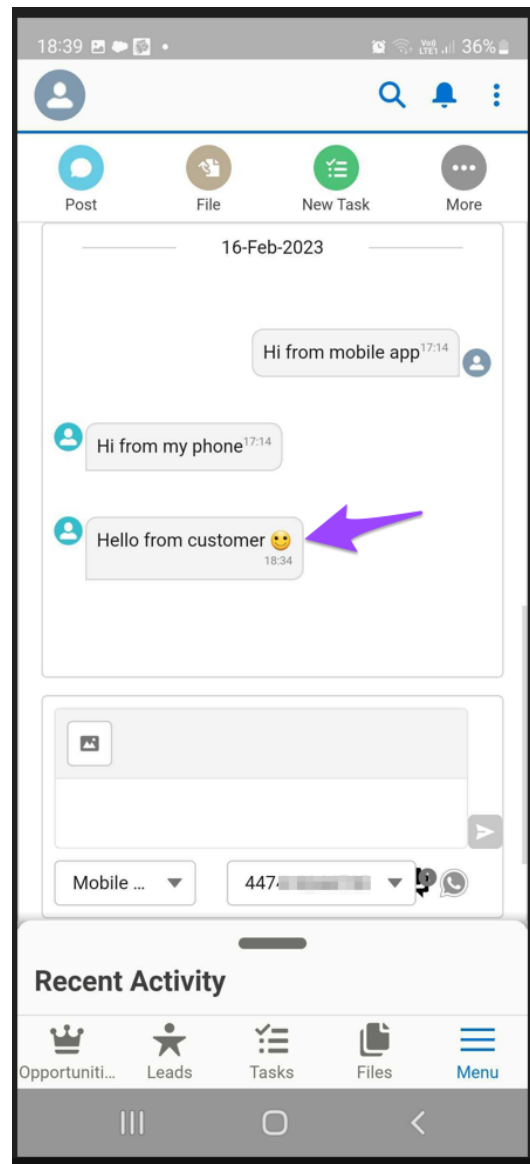
The notification looks like this:



When selecting the "Bell", the following message is presented:

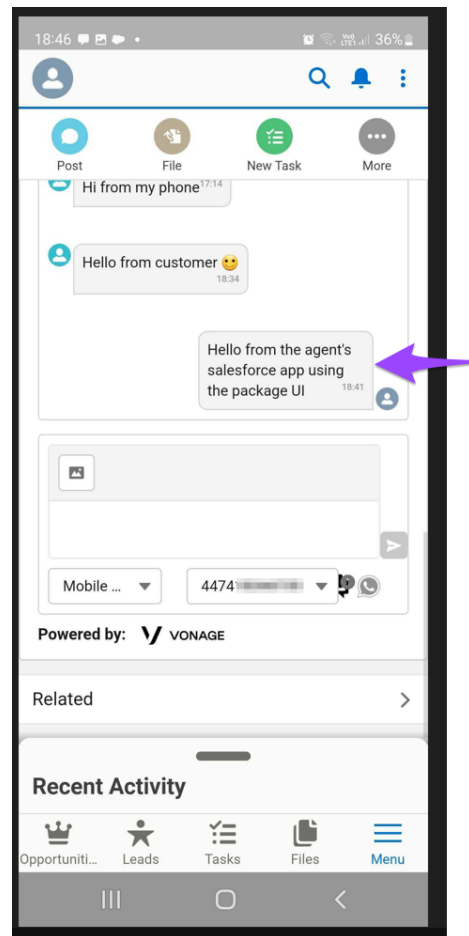


While selecting the relevant message, the agent is redirected to the updated record and the conversation is refreshed with the latest incoming message:



Outgoing Messages

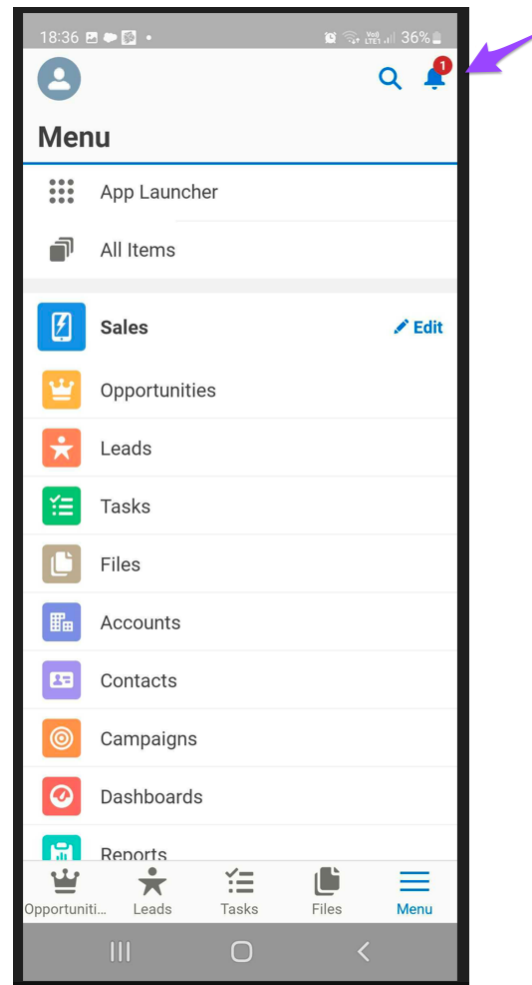
When the agent is sending an outbound message from the Mobile Salesforce App, the conversation is refreshed automatically with their message without any notification:



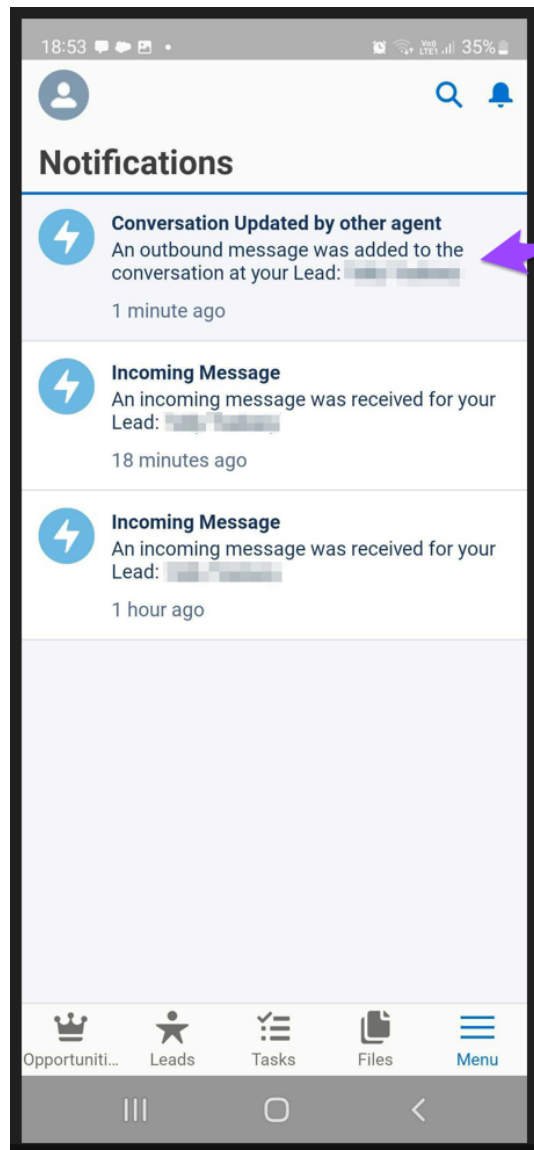
Outgoing Messages from Other Agents

As the same record can be watched and sometimes handled by several agents, another agent that is not the owner of the record could also send an outbound message to the customer. In this case, the record owner will get a notification to their mobile about the new outgoing message from the other agent.

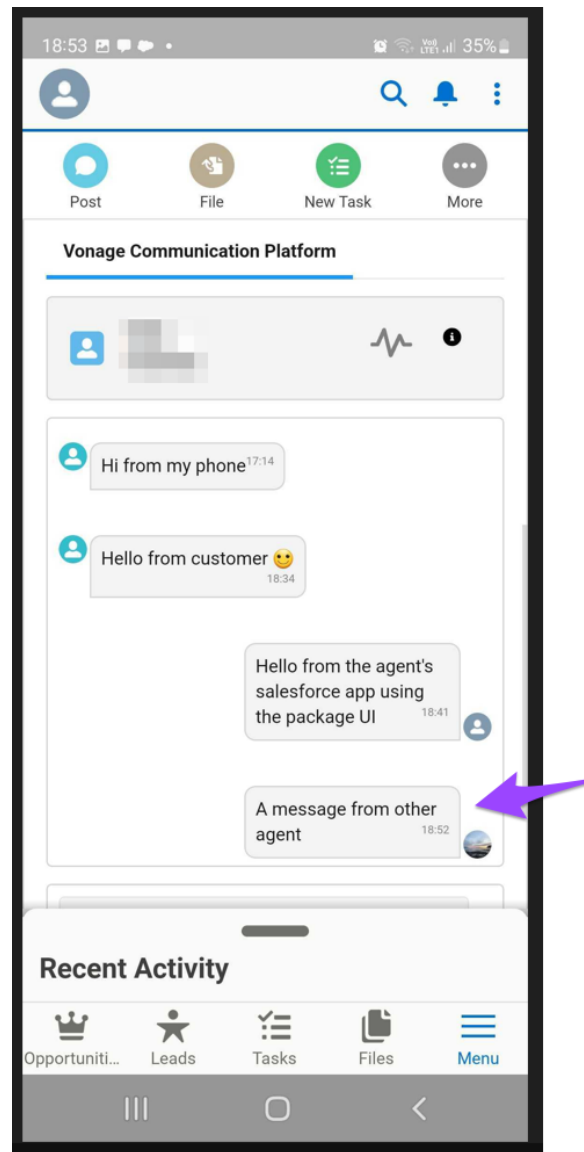
The notification looks like this:



When selecting the "Bell", the following message is presented:



While selecting the relevant message, the agent is redirected to the updated record and the conversation is refreshed with the latest incoming message:

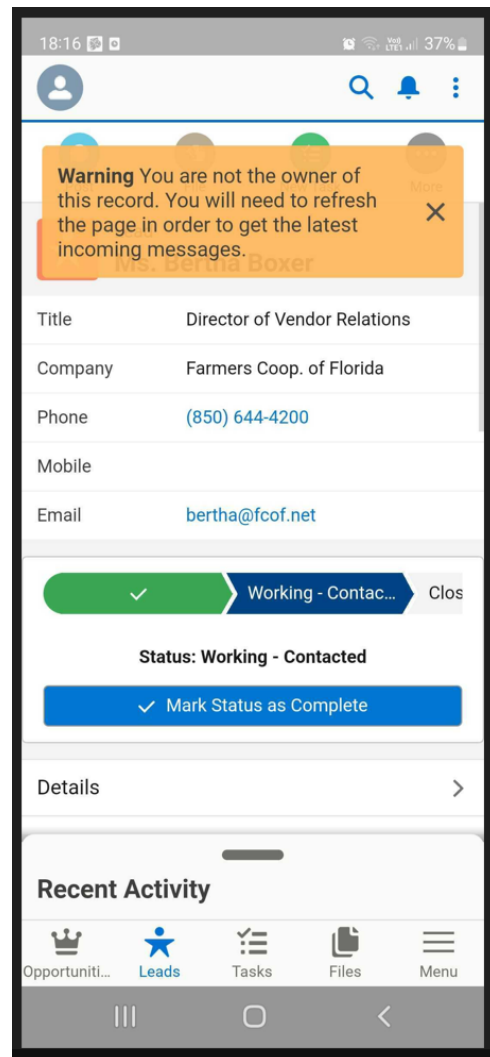


Notice that each agent has their own avatar, so it is easy to see that the two outbound messages were sent by two different agents.

Handling a record not owned by the agent on Mobile

As described above, the notifications regarding incoming messages are sent only to the mobile of the owner.

If the agent is handling a record which they do not own, they will be presented with a specific warning:



In order to see the incoming and outgoing messages, the agent will need to refresh .