



Salesforce - Mitto App Installation User Manual

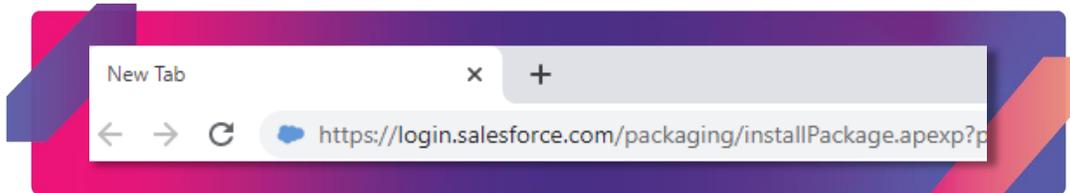
Table of Contents

PART 1 PACKAGE INSTALLATION.....	2
PART 2 SET UP CALLBACK	4
PART 3 PROVIDE ACCESS TO USERS	10
PART 4 SET UP OPTION FOR SENDING SMS	10
PART 5 CREATE SMS TEMPLATES	15
PART 6 SMS CREATION BY OBJECT	16
PART 7 SMS RECORDS	18
PART 8 SMS DELIVERY REPORTS.....	19
PART 9 SMS OPT-OUT	19

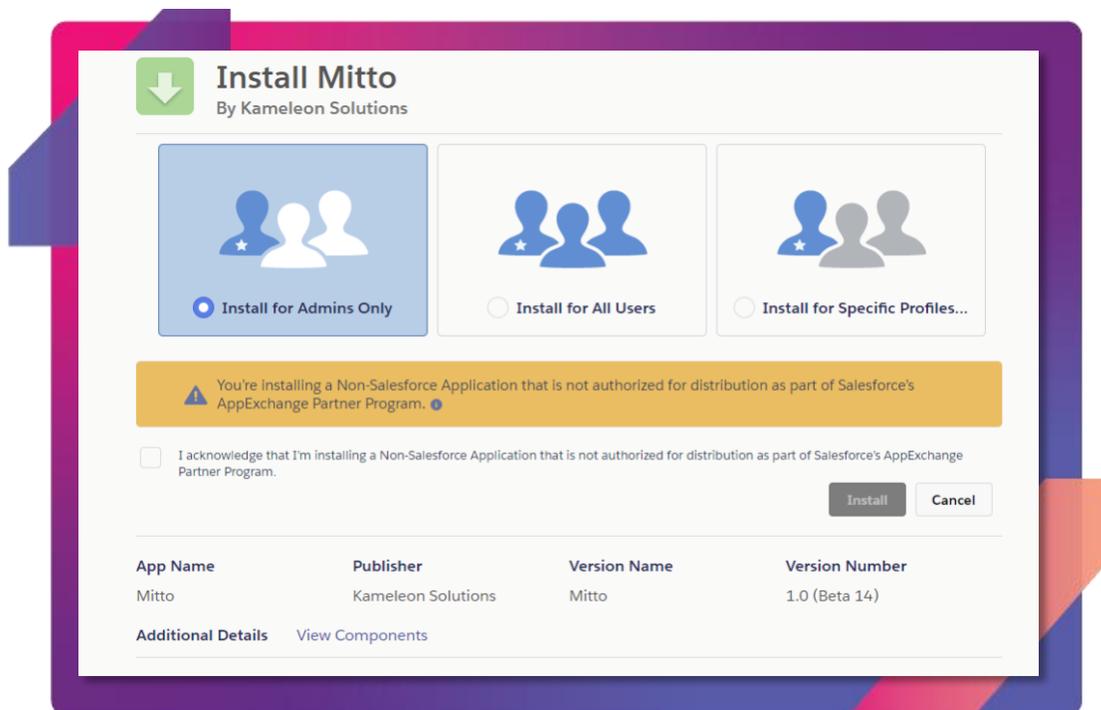
PART 1

PACKAGE INSTALLATION

1. You will receive a link from your Mitto Account Manager. Copy the link into your browser tab.

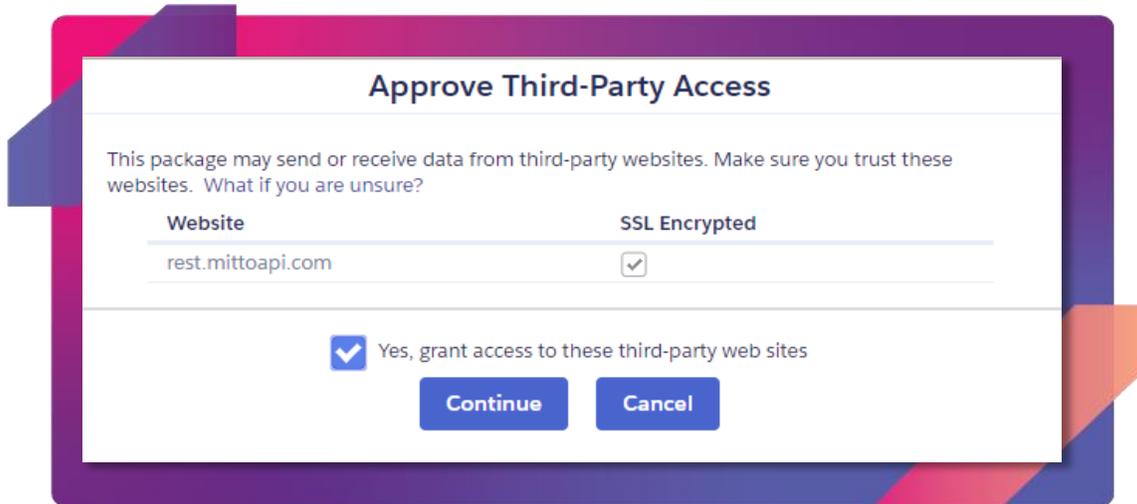


2. Log in to your Salesforce instance if you are not already logged in.
3. Select one of the options for profiles. We recommend using installation for admins only so you can expand access to each individual user using this permission set Mitto User Access.

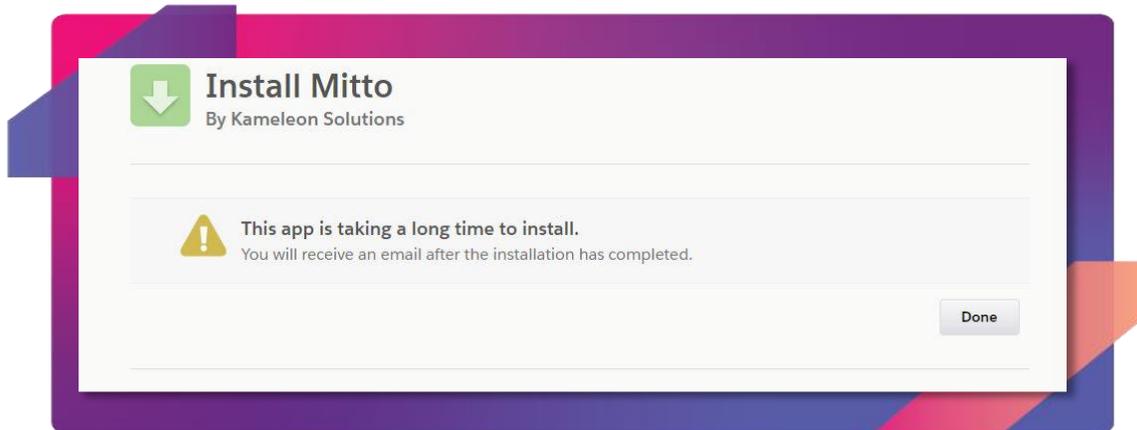


4. Select the checkbox that you acknowledge installing a Non Salesforce Application.
5. Click Install.

6. Select the checkbox to grant access to the website.



7. Click Continue.
8. If you get the message that it takes too long for the app to be installed, click Done and you will receive an email once the app is installed.



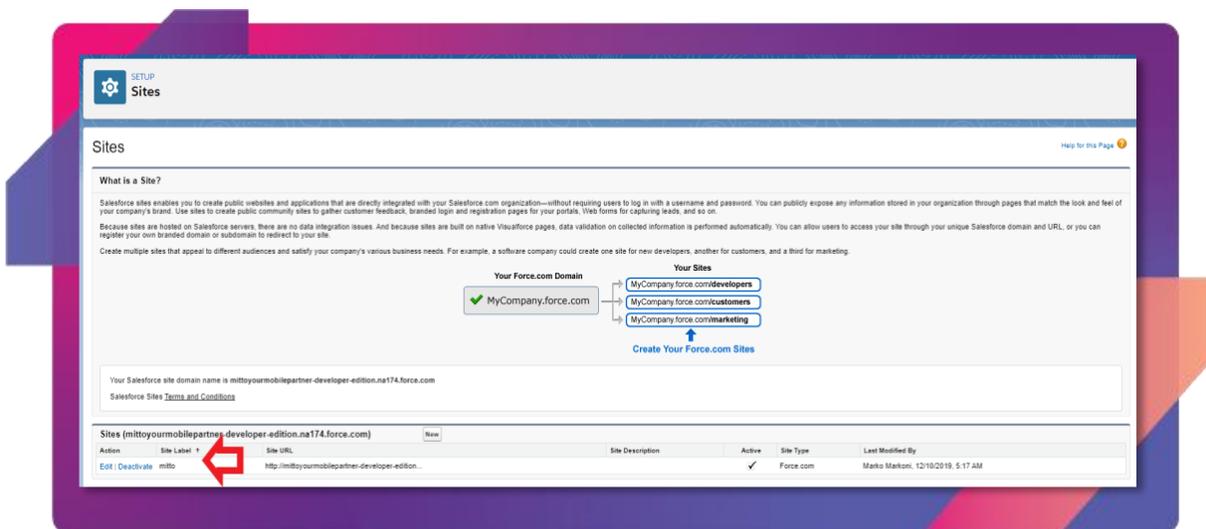
SET UP CALLBACK

Prerequisite:

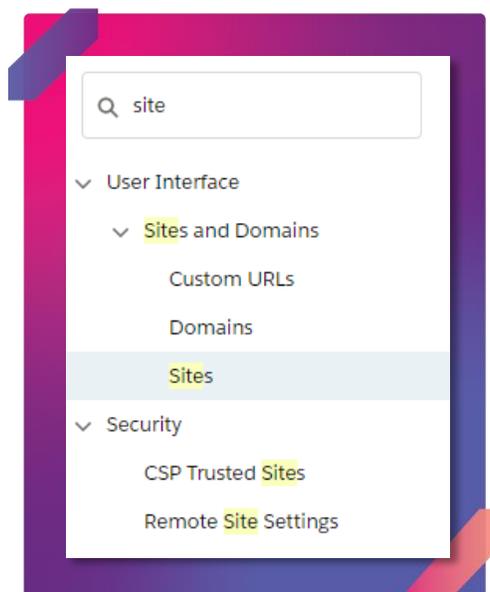
your organization must have at least one Salesforce site.
See Step 1 for more details.

Steps:

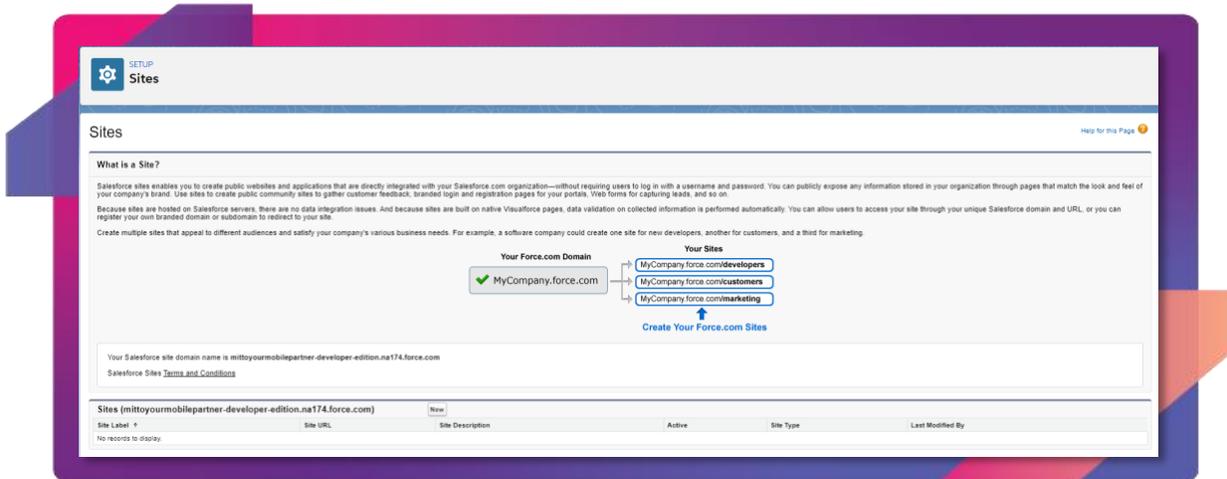
1. Select an existing Salesforce site. If you do not have any Salesforce site or you want to create a new one for this app follow these steps. We recommend using a new site especially tailored to Mitto SMS. Otherwise, go to Step 2.



1.1. Navigate to Sites in Setup.



1.2. Click New to create a new site. If you do not have a company domain you will have to specify it before creating any new Salesforce sites.



1.3. Provide details for your new Salesforce site.

Site Label	mitto
Site Name	mitto
Site Contact	Your admin or someone with admin rights
Default Record Owner	Your admin or someone with admin rights
Active	Select this field. You can activate the site later if you like
Active Site Home Page	UnderConstruction
Inactive Site Home Page	InMaintenance
Site Template	Site Template
Default Web Address	mitto

***leave other fields with their default values

Save Cancel

Site Label

Site Name

Site Description

Site Contact

Default Record Owner

Default Web Address

Active

Active Site Home Page (Preview)

Inactive Site Home Page (Preview)

Site Template

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class

Enable Feeds

Clickjack Protection Level

Require Secure Connections (HTTPS)

Lightning Features for Guest Users

Upgrade all requests to HTTPS

Enable Content Sniffing Protection

Enable Browser Cross Site Scripting Protection

Referrer URL Protection

Guest Access to the Support API

Save Cancel

2. Click Public Access Settings.

Site Details
mitto

[Back to List Sites](#)

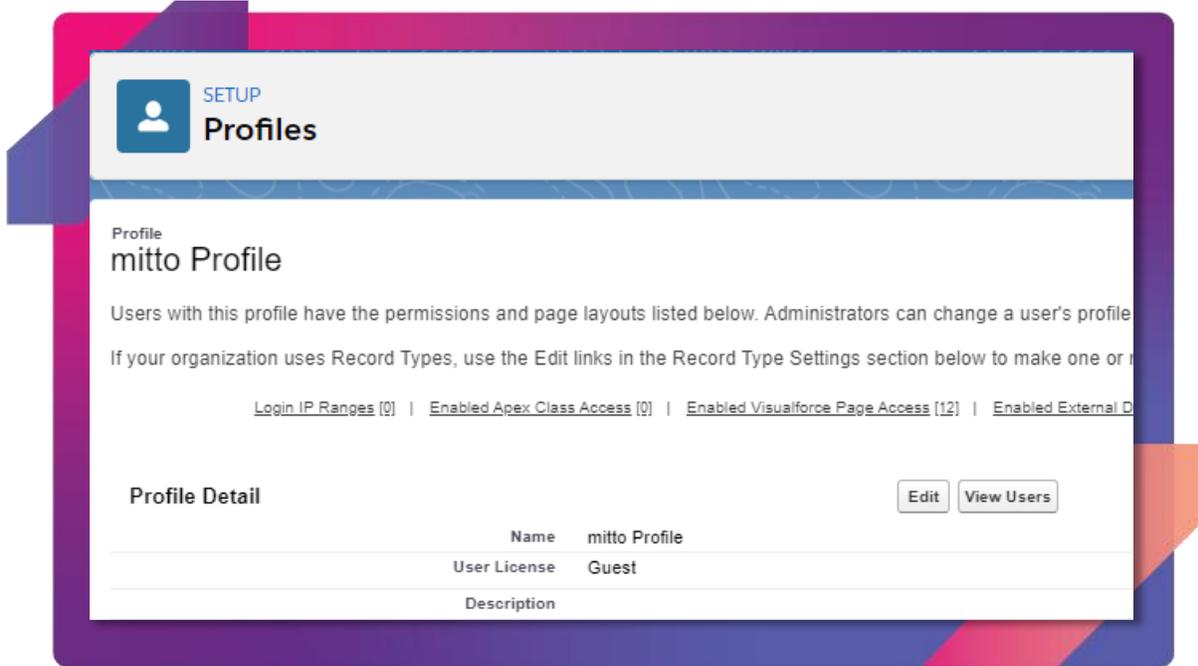
Site Detail

[Edit](#)
[Public Access Settings](#)
[Login Settings](#)
[URL Redirects](#)
[Deactivate](#)

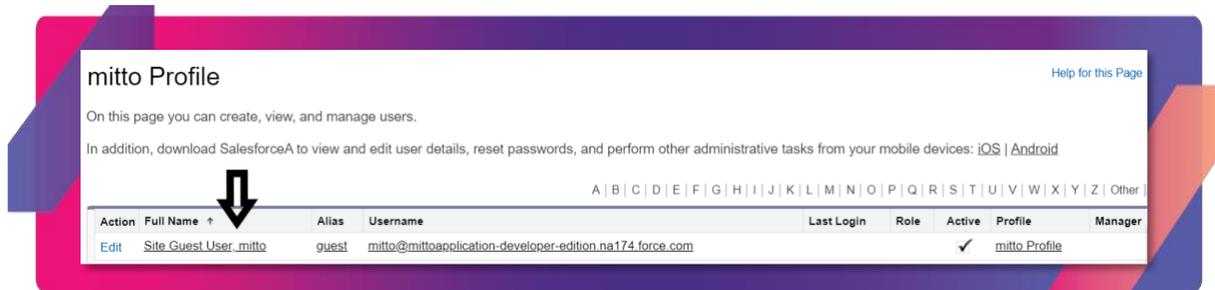
Site Label	mitto	Site Name	mitto
Site Description		Site Contact	
Active	<input checked="" type="checkbox"/>	Login	Not Allowed
Active Site Home Page	UnderConstruction (Preview)	Site Favorite Icon	
Inactive Site Home Page	InMaintenance (Preview)	Site Robots.txt	
Site Template	SiteTemplate (Preview)	Enable Feeds	<input type="checkbox"/>
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/>
Lightning Features for Guest Users	<input checked="" type="checkbox"/>	Upgrade all requests to HTTPS	<input checked="" type="checkbox"/>
Enable Content Sniffing Protection	<input checked="" type="checkbox"/>	Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/>
Referrer URL Protection	<input checked="" type="checkbox"/>	Guest Access to the Support API	<input type="checkbox"/>
Default Record Owner	<input type="text"/>	Created By	
		Last Modified By	

[Edit](#)
[Public Access Settings](#)
[Login Settings](#)
[URL Redirects](#)
[Deactivate](#)

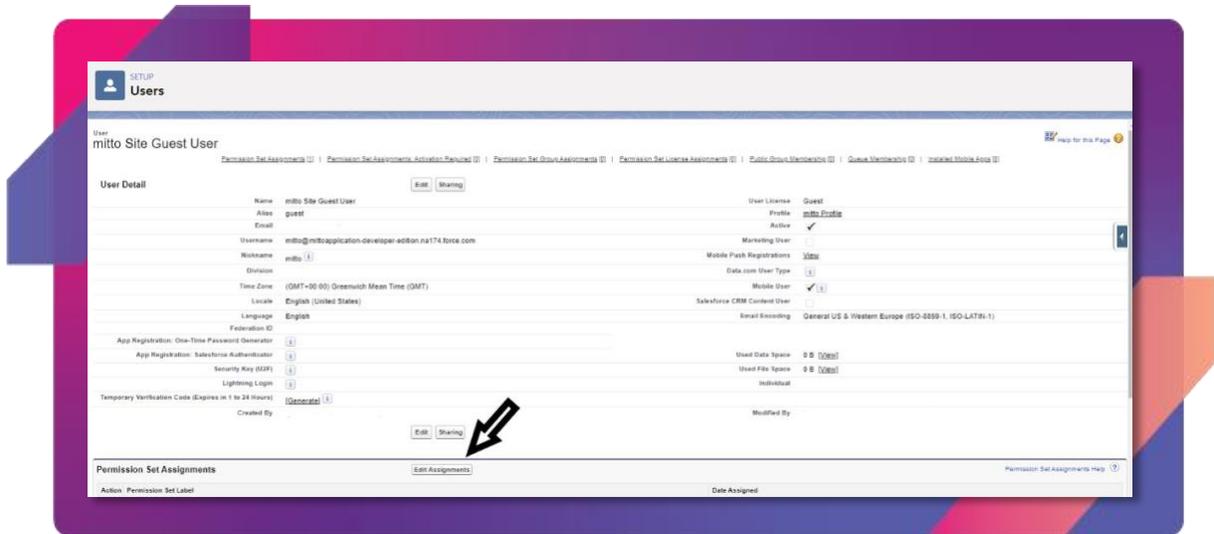
3. View Users or Assigned Users if your organization has Enhanced Profile User Interface enabled.



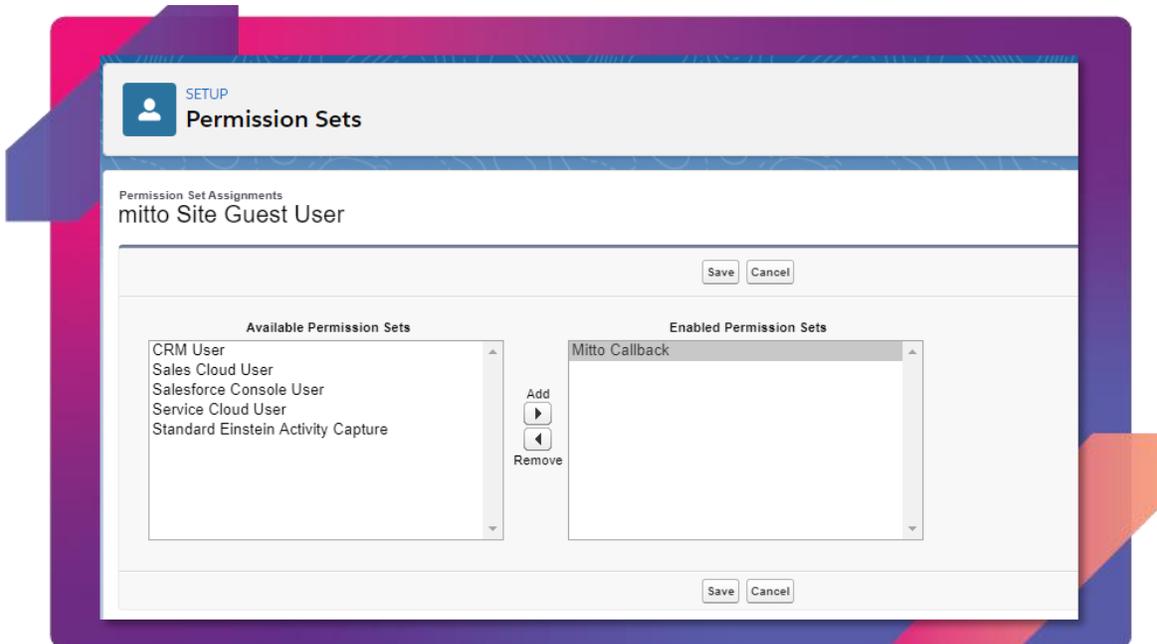
4. View Click Site Guest User. Salesforce generates a guest user for each site that you create.



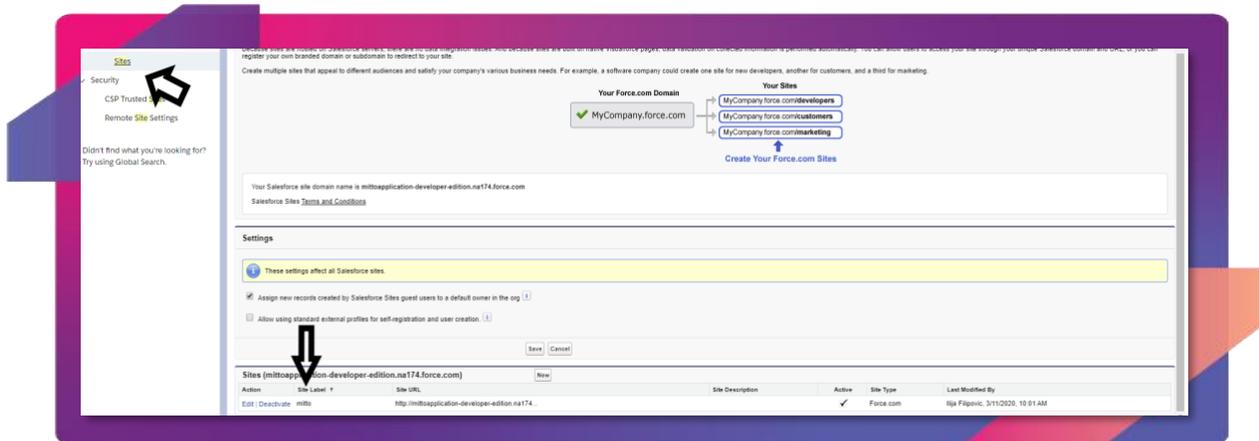
5. Click Edit Assignments in Permission Set Assignments section.



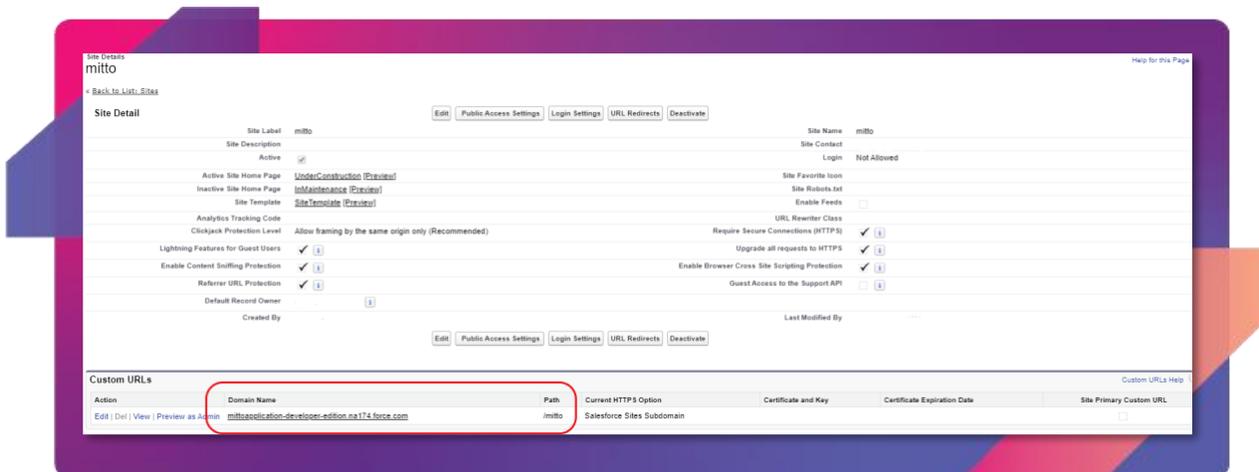
6. Enable Mitto Callback permission set and save it.



7. Navigate to the list of your Salesforce sites in Setup and click on the Site Label.



8. Copy your site's domain name and send it back to Mitto using your email. Consult your Account Manager for more details. In this example the parameter that needs to be sent to Mitto is mittoapplication-developer-edition.na174.force.com/mitto



PART 3

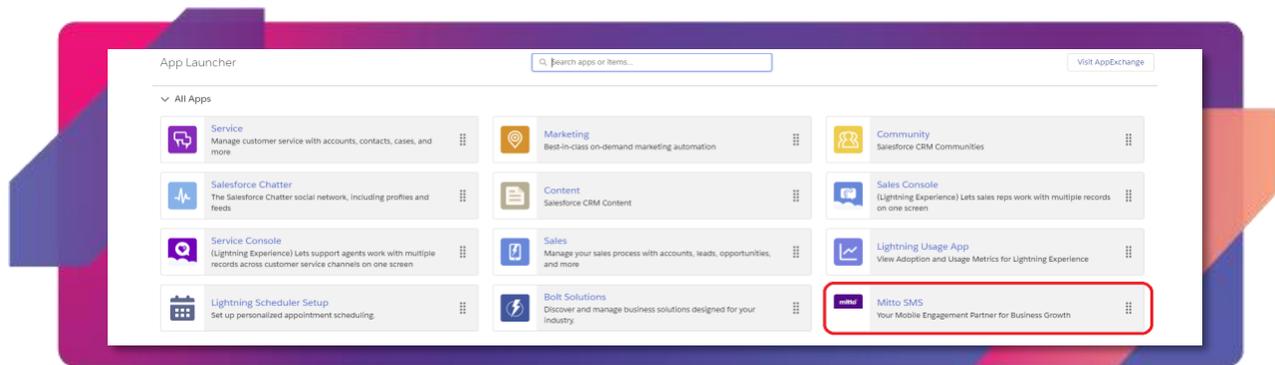
PROVIDE ACCESS TO USERS

The best way to provide access to other users without compromising access to your Mitto setup options is to assign each Salesforce user a pre-defined permission set Mitto User Access. If you would like to provide access to Mitto setup options then a separate permission set should be made or it can be done per profile.

PART 4

SET UP OPTION FOR SENDING SMS

1. Navigate to your Mitto SMS app in App Menu.

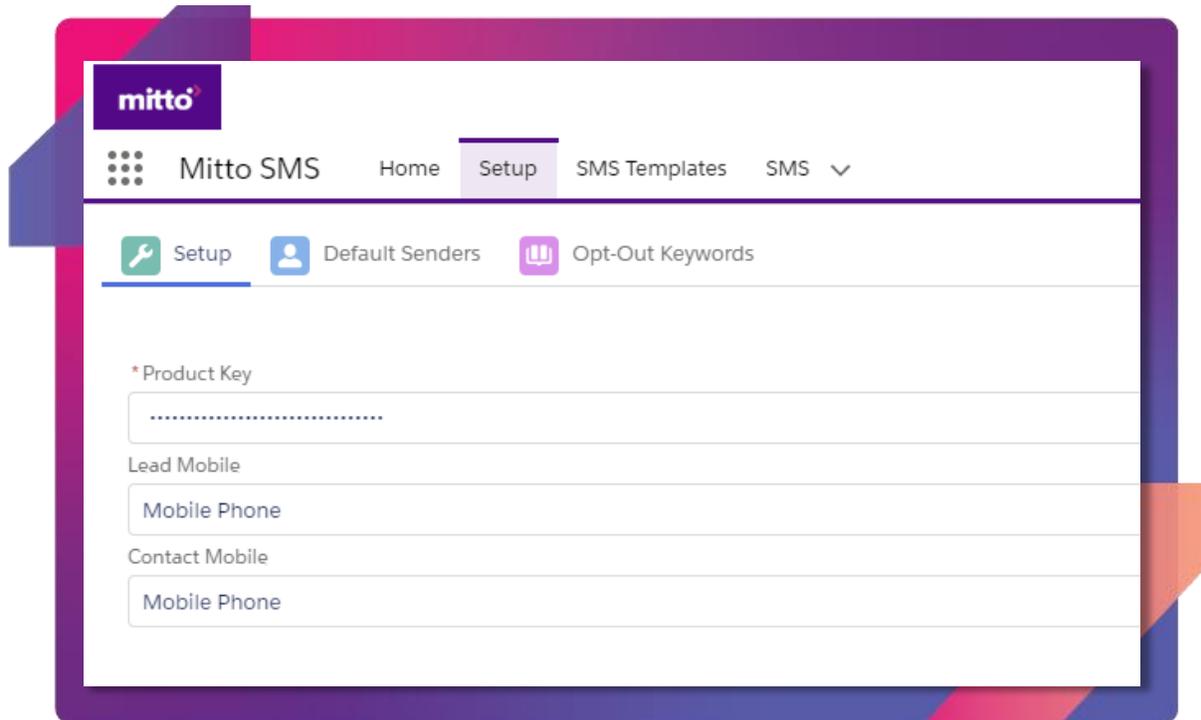


2. Specify details on your Setup page.

- 2.1. Setup tab (this tab will be visible to admins only if you chose to install for admin profiles only)

Provide mandatory details as follows in order to be able to send SMS:

- Product Key. Contact your Account Manager at Mitto. Enter the code. Administrators can see this code in Setup -> Custom Settings -> Mitto Configuration -> Manage -> Default
- Lead Mobile. Select one of the phone fields that contains mobile phone of your recipients.
- Contact Mobile. Select one of the phone fields that contains mobile phone of your recipients.

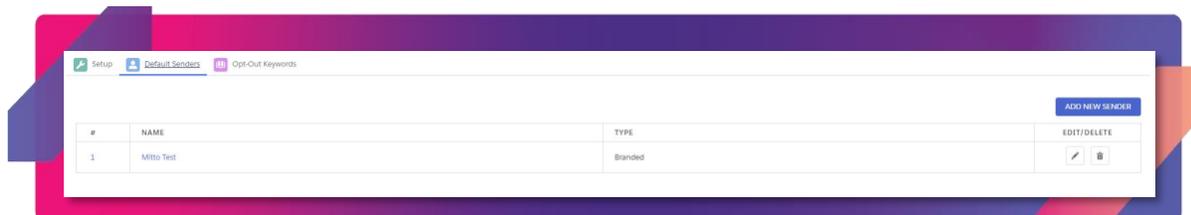


Default Senders tab (this tab will be visible to admins only if you chose to install for admin profiles only)

Default SenderIDs (“From” field displayed on mobile device) can be of two types. Consult your Account Manager at Mitto which option should you use:

- Numeric. The limit is 15 characters. (+44776543210)
- Branded. The limit for alphanumeric field type is 11 characters without spaces. (MITTO-SMS)

*if you want to setup the branded SenderID, registration might be needed, please contact your Account Manager in Mitto for the regulations and process.



New senders can be added by clicking the button Add New Sender.

Create New Default Sender

* Select Type
Branded

* Sender's Name

Cancel Save

2.2. Opt-Out Keywords tab (this tab will be visible to admins only if you chose to install for admin profiles only)

Opt-out keywords are not case sensitive.

#	VALUE	EDIT/DELETE
1	stop	

ADD NEW OPT-OUT KEYWORD

Create New Opt-Out Keyword

* Keyword value

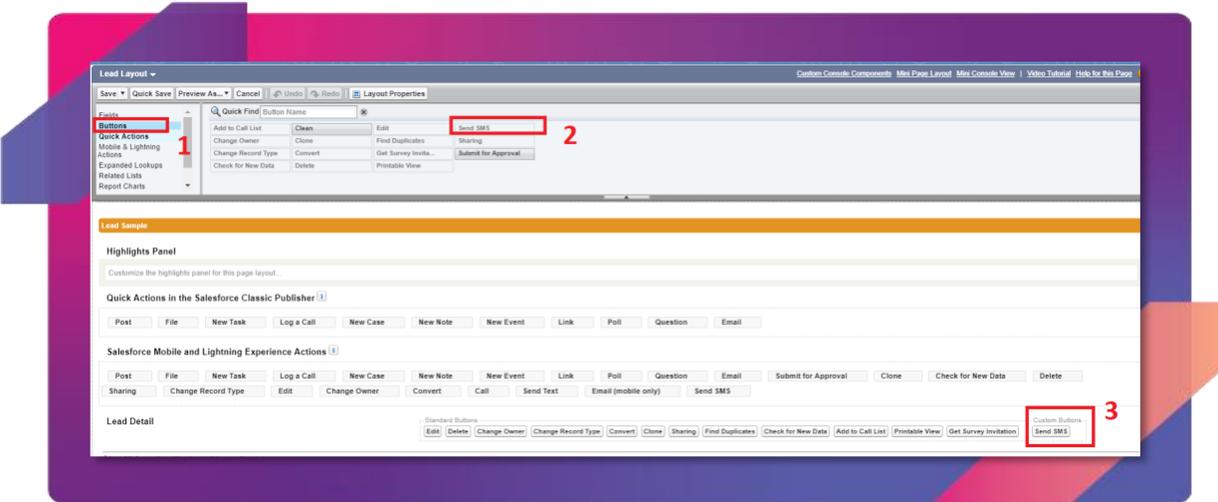
Cancel Save

3. Page Layouts Adjustment

Adjust your page layouts as follows. Repeat the steps for leads, contacts and campaigns. Please note that you do not need to make available to users both the quick action and the Mitto lightning component in Lightning. Choose the most convenient option for your users.

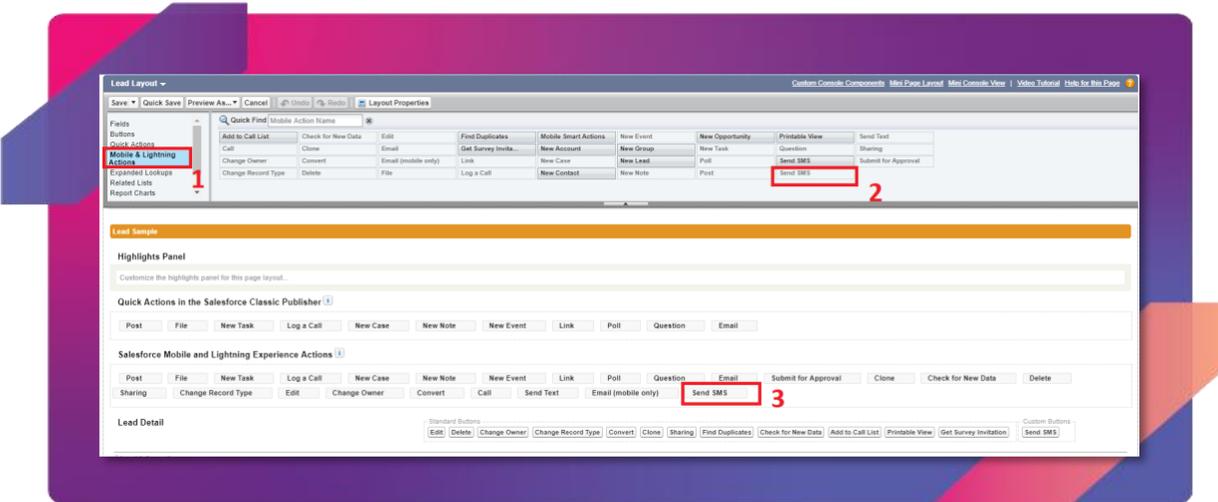
3.1. Classic.

Add the Send SMS button to your layouts.

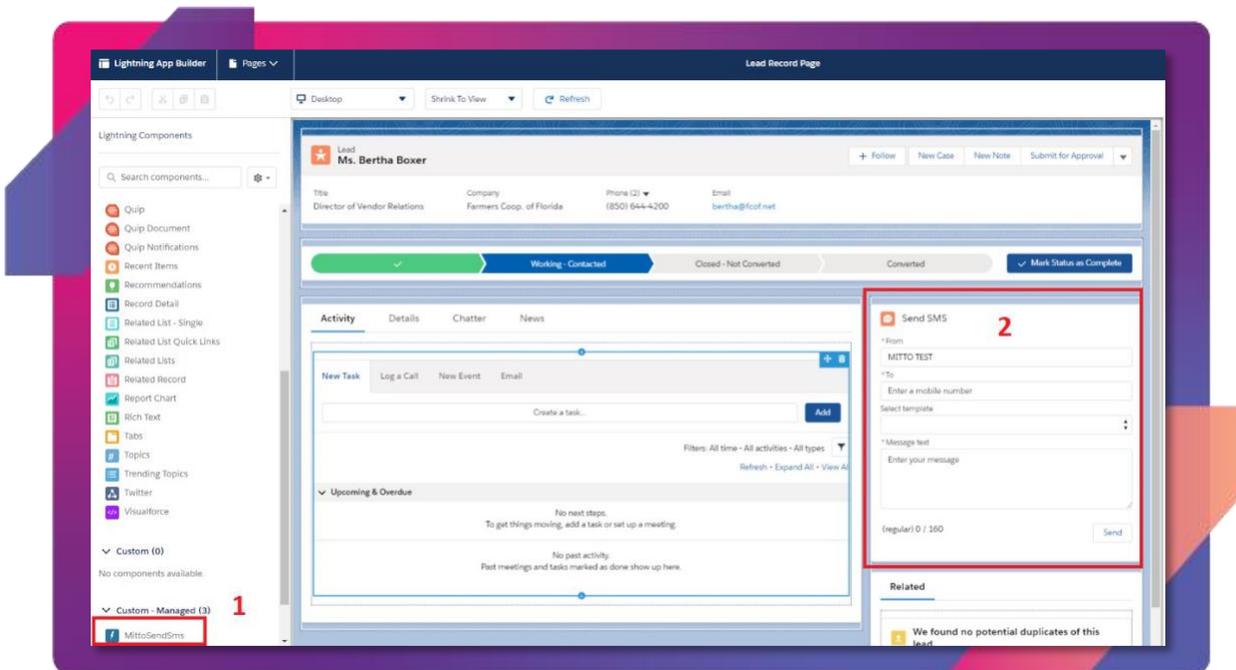


3.2. Lightning

Add the Send SMS Mobile & Lightning Actions to your layouts.



Add the **MittoSendSMS** lightning component to your lightning record pages.

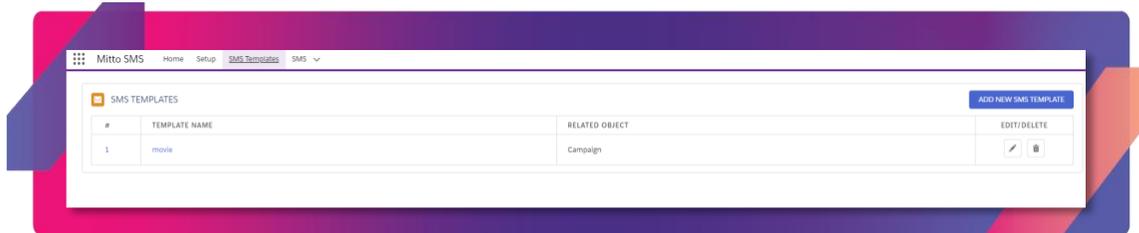


Add the SMS related list to leads, contacts and campaigns.

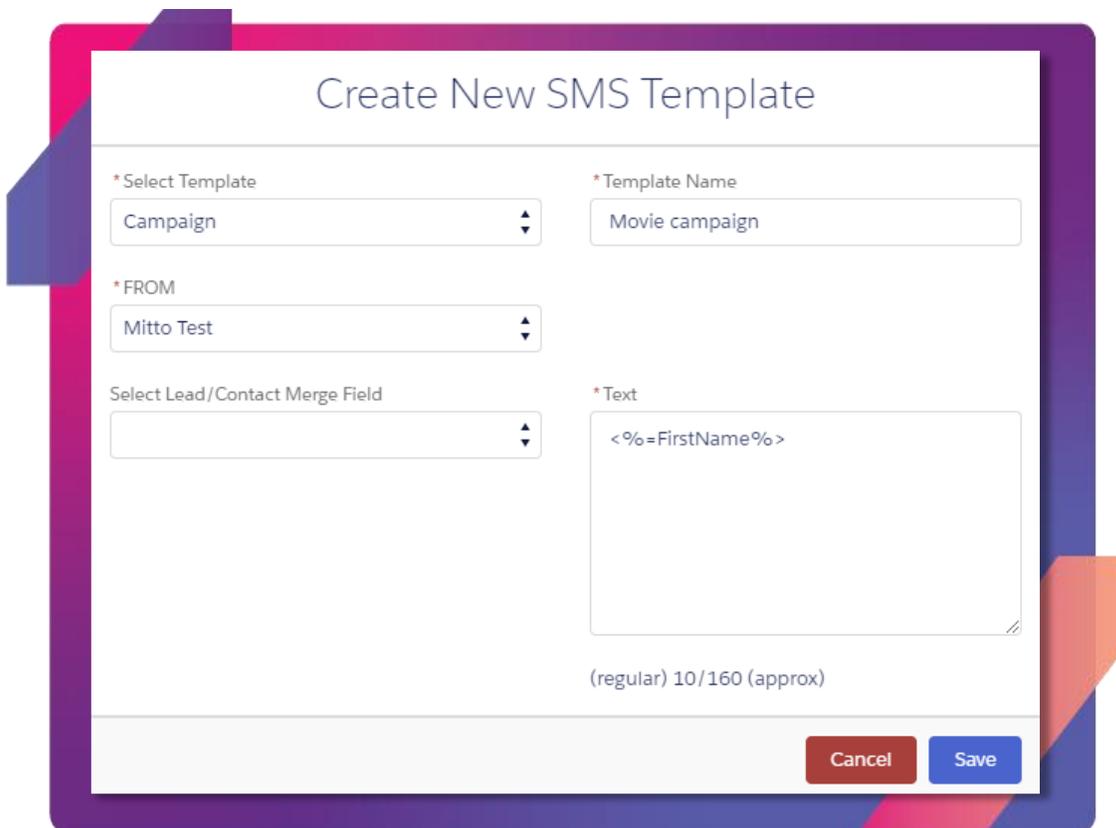
PART 5

CREATE SMS TEMPLATES

You may create SMS templates for leads, contacts or campaigns. If you would like to personalize your message use merge fields inside the template. Campaign templates can use merge fields that are applicable to both contacts and leads as campaign members.



At the bottom of each template the number of characters is calculated. It can be either Regular or Unicode. If a template has a personalization string it will show approximate number. For instance, FirstName takes 10 characters in this calculation. The real number of characters can be different when such template is used for sending SMS.



A screenshot of the 'Create New SMS Template' form. The form contains several fields:

- * Select Template:** A dropdown menu with 'Campaign' selected.
- * Template Name:** A text input field containing 'Movie campaign'.
- * FROM:** A dropdown menu with 'Mitto Test' selected.
- Select Lead/Contact Merge Field:** An empty dropdown menu.
- * Text:** A large text area containing the merge field code '<%=FirstName%>'. Below the text area, it shows '(regular) 10/160 (approx)'. There is a small icon in the bottom right corner of the text area.

At the bottom right of the form, there are two buttons: 'Cancel' (red) and 'Save' (blue).

SMS CREATION BY OBJECT

SMS records can be created in several ways.

1. Leads

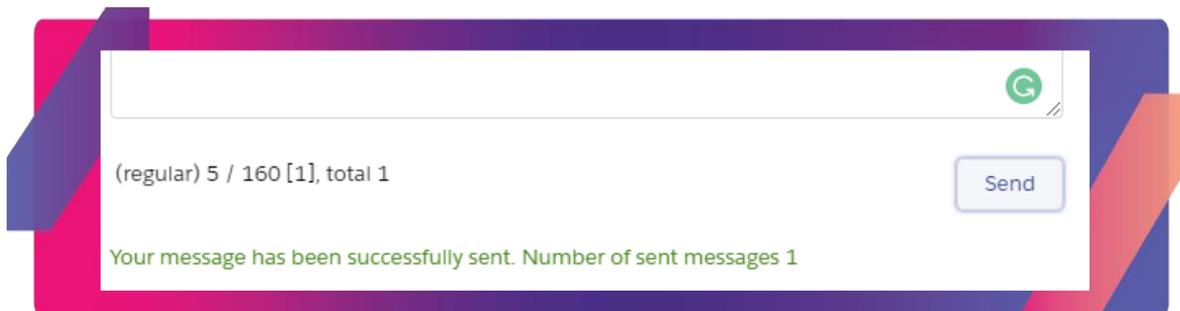
Send SMS directly from a single lead record. You may use lead templates. At the bottom of the component you may see the counter.



The screenshot shows a 'Send SMS' form with the following fields and elements:

- * From:** A dropdown menu with 'Mitto Test' selected.
- * To:** A text input field containing a greyed-out placeholder.
- Select template:** A dropdown menu.
- * Message text:** A text area containing the word 'hello'.
- Character count:** '(regular) 5 / 160 [1], total 1' located at the bottom left of the form.
- Send button:** A button labeled 'Send' at the bottom right.
- Green checkmark icon:** A small green circular icon with a white checkmark, located in the bottom right corner of the message text area.

After clicking the button Send, there will be a message saying how many messages have been sent actually.



The screenshot shows the 'Send SMS' form after the 'Send' button has been clicked. The message text area is now empty, and a success message is displayed at the bottom:

Your message has been successfully sent. Number of sent messages 1

The character count '(regular) 5 / 160 [1], total 1' and the 'Send' button are still visible.

2. Contacts

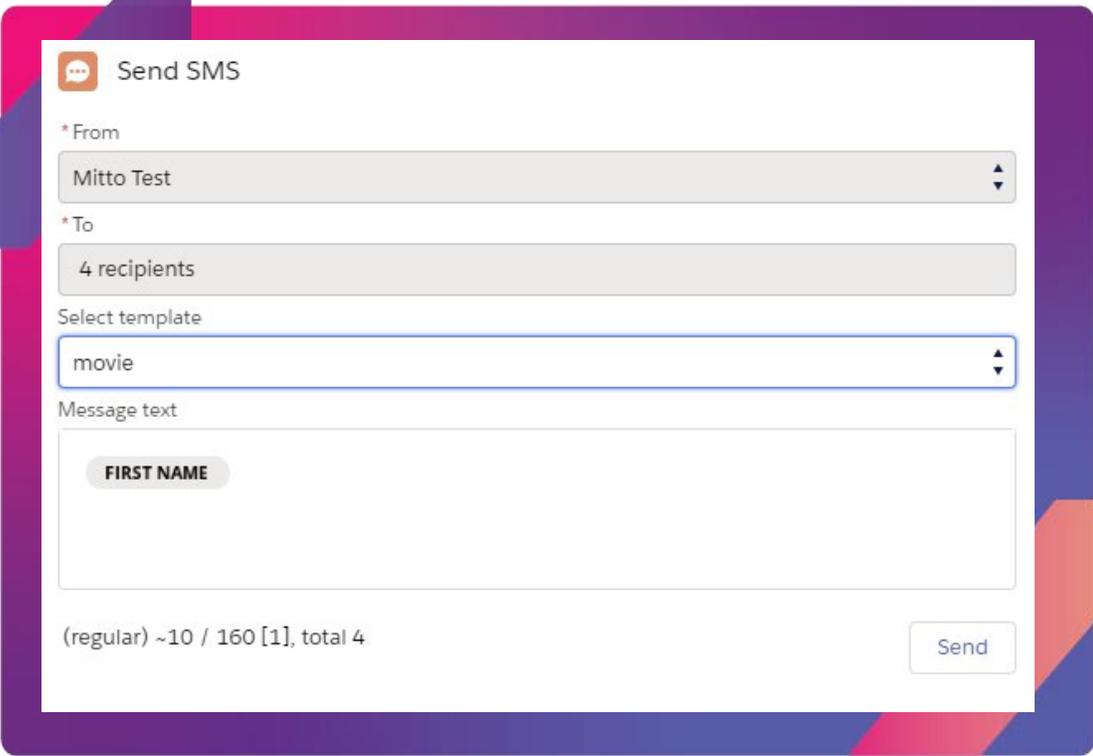
The same rules apply here as for leads.

3. Campaigns

Send SMS to all campaign members of a campaign. Navigate to a campaign record page. You may see the number of recipients. Please note the number of recipients may be less than the number of campaign members if some of your campaign members are missing value in the corresponding mobile phone field or they are marked as sms opt-out. Such campaign members cannot receive any SMS. Therefore, they are not counted against recipients of your campaign.

The counter shows the number of characters followed by the limit of one SMS. This is further followed by the number of SMS in squared brackets. The final figure shows the total number of messages that should be sent.*

*** please note that the actual number of messages can be different due to the personalization string. In the example below (screenshot) some campaign members may have their first name 15 characters long although this string assumes that it is 10 characters by default. That may increase the number of messages. Consult your Account Manager at Mitto for more details.**

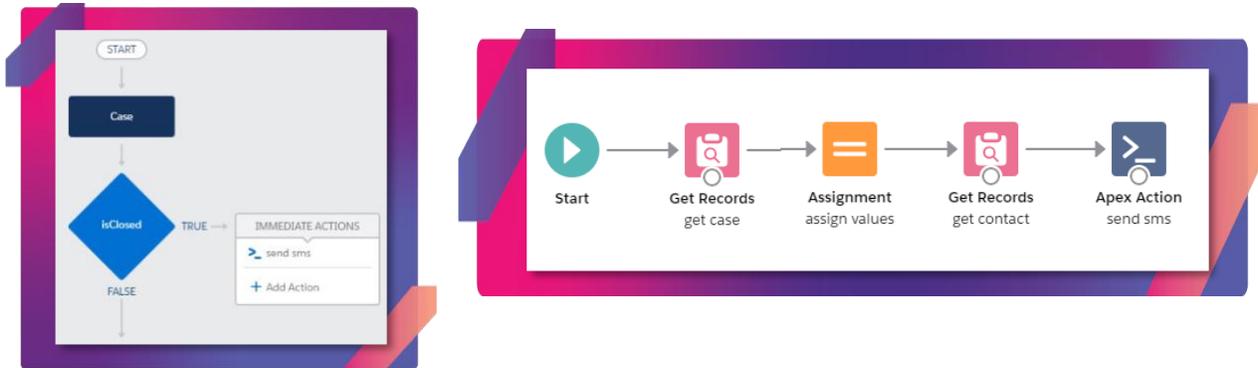


The screenshot displays a 'Send SMS' form with the following elements:

- From:** A dropdown menu showing 'Mitto Test'.
- To:** A field showing '4 recipients'.
- Select template:** A dropdown menu showing 'movie'.
- Message text:** A text area containing the placeholder 'FIRST NAME'.
- Character count:** '(regular) ~10 / 160 [1], total 4'.
- Send button:** A button labeled 'Send'.

4. Custom Processes

You may integrate functionality of sending SMS into your process builders, flows or APEX triggers. All you need is to call an APEX action called Mitto Send SMS (api: apex-mitto__SendSMSHelper) and provide values to its variables. See two examples below.



PART 7

SMS RECORDS

All created SMS can be found under the SMS tab. You may add SMS records as a related list to leads, contacts and campaigns.

There is All list view that can be used out-of-the-box. You may add list views on your own.

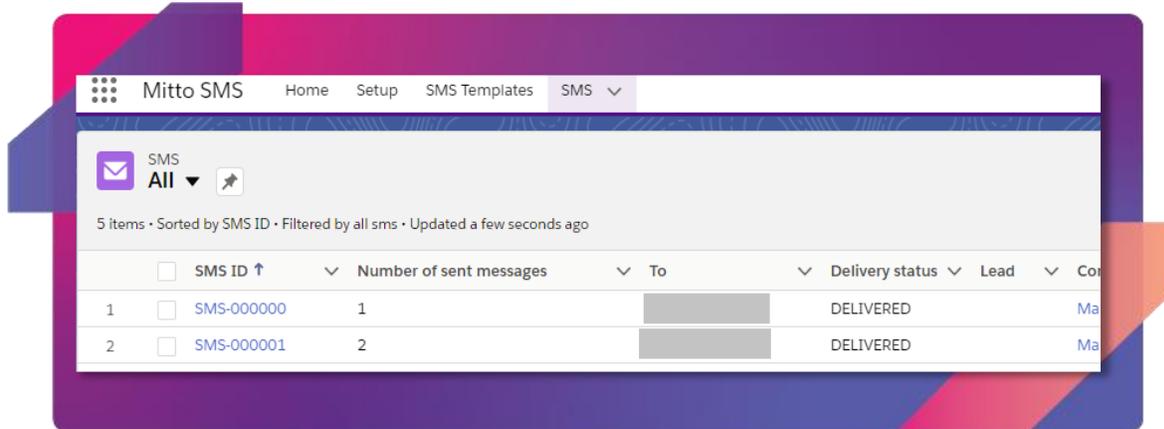
<input type="checkbox"/>	SMS ID ↑	Number of sent messages	To	Delivery status	Lead	Contact
<input type="checkbox"/>	SMS-000000	1		DELIVERED		Ma
<input type="checkbox"/>	SMS-000001	2		DELIVERED		Ma

SMS records contain the most important details such as: leads, contacts and/or campaigns they are related to. The message itself with the actual number of messages sent per SMS record.

PART 8

SMS DELIVERY REPORTS

Each SMS record will be updated with changes in their status. Configure SMS page layout by adding a SMS Delivery updates related list. Please note that you must have a callback option enabled and set up for your organization.



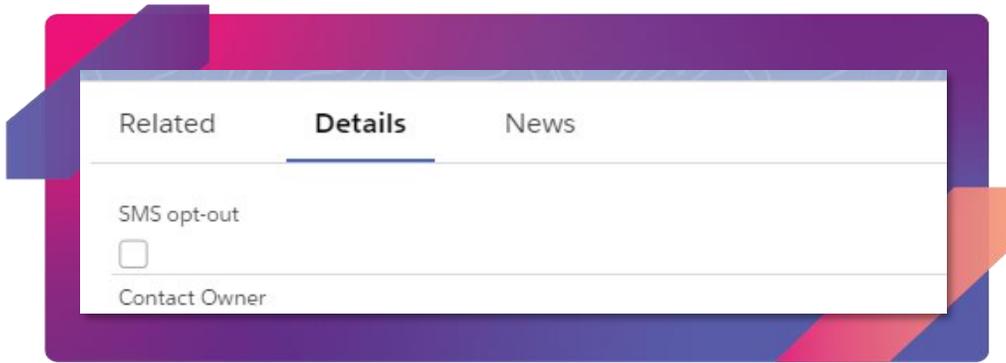
PART 9

SMS OPT-OUT

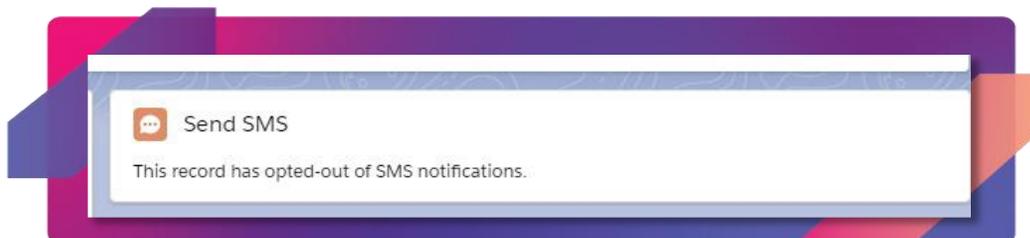
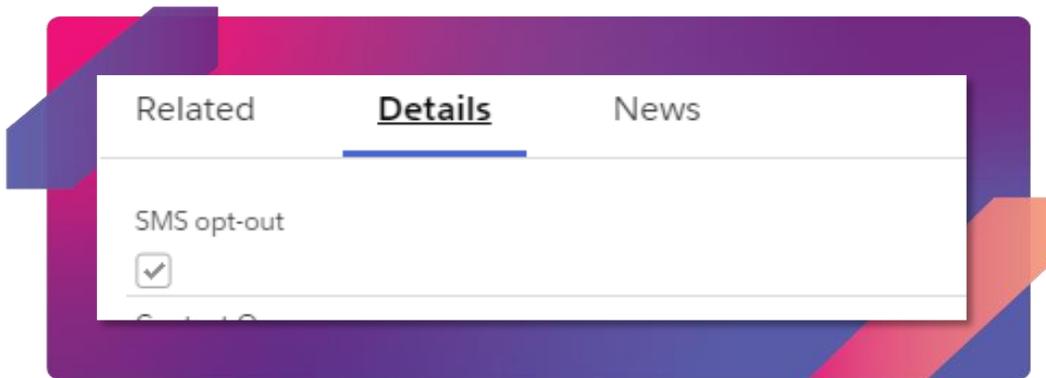
First, specify Opt-Out Keywords under the Setup tab. Second, add SMS opt-out to leads and contact page layouts. Make sure who should be able to edit this field.



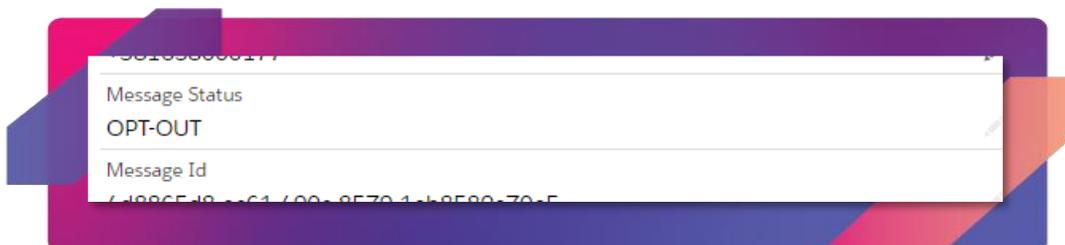
When someone opt outs, this SMS opt-out checkbox will be selected. This lead/contact will not be able to receive any messages. You may manually deselect this checkbox if you want these leads/contacts to receive messages.



The SMS component will be disabled when someone opts out.



Opt-out messages are stored like any other SMS records. They are distinguished by Message Status. It shows: OPT-OUT.



mitto[›]