moglisms™

INTELLIGENT TEXT MESSAGING

2020 USER GUIDE

VERSION 4.0

LAST UPDATED: MAY 1ST, 2020

TABLE OF CONTENTS

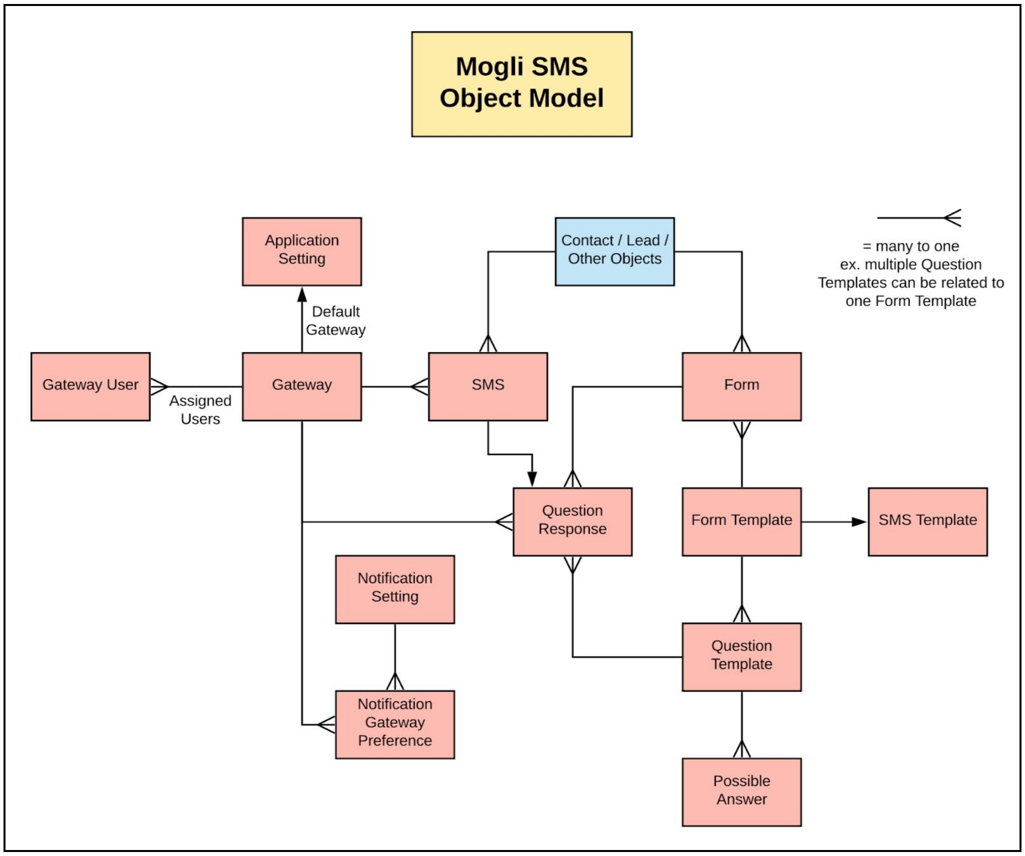
MOGLI-SPEAK

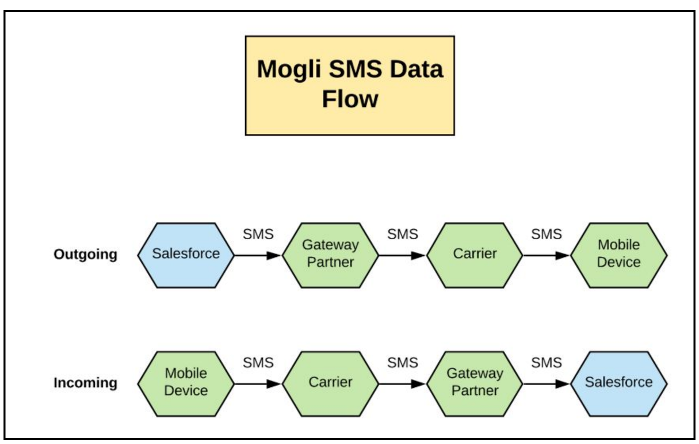
YOUR GO-TO GLOSSARY OF OUR LANGUAGE
(PLEASE ALSO SEE OUR IN-APP GUIDANCE PROMPTS IN YOUR PRODUCTION ORG ON VERSIONS 4.16 AND ABOVE)

ANONYMOUS LEADS *OPTIONAL VARIATION on LEAD records*	When someone sends an incoming text to one of your Gateways (outbound phone numbers), if Mogli cannot find a Contact or Lead with a matching Mogli Number, a Lead entitled *Anonymous Lead from Mogli* will be created.
APPLICATION SETTINGS *TAB*	Where Admins can go to configure Contact and Lead merge fields, configure Anonymous Lead functionality, assign users to certain Gateways, and set up a global Default Gateway.
ASYNC TASKS *CUSTOM OBJECT*	Stores records which allow bulk sends to be delivered in batches.
BULK SMS *TAB/FUNCTIONALITY*	Send a message to multiple recipients at the same time. Send directly to a Campaign, or to Contacts and Leads associated with other Standard or Custom Objects.
CARRIER/MESSAGING PARTNER	An SMS provider that supplies Mogli SMS with messaging capabilities. Also, the provider who hosts your recipients' mobile capabilities.
CONVERSATION VIEW *LIGHTNING COMPONENT available on all Standard and Custom Objects*	A visually interactive display of your last 300 incoming and outgoing messages to and from a particular Contact, Lead, or other standard or custom object (including 1:1 conversations, bulk messages, scheduled messages, and automated conversations)
DEFAULT GATEWAY *CUSTOM FIELD*	The phone number a Contact, Lead or other record most often receives their text messages from. (Optional to populate)
FORM *CUSTOM OBJECT*	The record which stores the questions and responses to a survey or automated conversation (Form Template) you've created.
FORM TEMPLATE *CUSTOM OBJECT*	Allows you to create linear or branching automated conversations and surveys. When someone finishes a survey, a Form record is created which stores information containing all questions and responses.
GATEWAY *CUSTOM OBJECT*	Your outbound phone numbers - the numbers from which your Contacts and Leads may receive text messages. Gateways are configured with our messaging partner.
INTELLIGENT ROUTING *OPTIONAL ADD-ON FEATURE*	Our short code workaround. Provides speedy delivery of bulk messages by spreading traffic over a bank of phone numbers. Mogli chooses the best phone number from which to send the message according to the

	recipient's country code, area code, or previous phone numbers. *Still want a short code? We support those, too.*
MERGE FIELD *SALESFORCE VARIABLE*	A variable you can pull into 1:1 conversations, bulk messages, or SMS Templates that populates a value from any Standard or Custom field.
MOGLI AVATAR URL *CUSTOM FIELD*	(In Lightning only) The field containing a URL of an image to be associated with a Contact or Lead within Conversation View. If left blank, the Contact or Lead's initials will display in its place.
MOGLI NUMBER *CUSTOM FIELD*	The reformatted Mobile number that is auto-populated by a workflow from the value in the Mobile field. It is a unique identifier for each Contact or Lead. The workflow removes spaces, parentheses, and dashes from the Mobile field, reformatting it like this: +12223334444.
MOGLI OPT-OUT *CUSTOM FIELD*	The checkbox on a Contact or Lead record identifying whether the Contact or Lead has provided opt-in consent. When checked, Conversation View is disabled for the Contact or Lead, and users will no longer be able to send them a message.
MOGLI NOTIFICATIONS *LIGHTNING COMPONENT in the UTILITY BAR*	Allows users to be notified by a blinking component and an audible chime for incoming texts matching their specified criteria.
QUERY STRING *CUSTOM FIELD on the FORM TEMPLATE record*	The unique inbound keyword you specify that initiates an automated conversation or survey. Ex. - Text REVIEW to 555-666-7777 to rate Mogli Theater's performance of 'SMS Side Story.' 'REVIEW' is the query string.
NOTIFICATION SETTINGS *TAB*	The tab where all notification preferences live for each user.
QUESTION TEMPLATE *CUSTOM OBJECT*	The record which stores a script of all potential questions/statements in your Form Template.
QUESTION RESPONSE *CUSTOM OBJECT on the FORM record*	The record which stores a Contact or Lead's responses to specific questions from a survey or automated conversation (Form Template), putting responses in context so that you can report, dashboard, and run automations off of specific answers.
SETUP MOGLISMS *TAB/BATCH PROCESS*	The tab to set how often the Mogli batch process runs, which can be set anywhere from 1-10 minutes. When the batch runs, incoming SMS records will be associated with Standard and Custom Objects. Confirm the length of your batch process by going to Setup > Scheduled Jobs.
SMS TEMPLATE *CUSTOM OBJECT*	Canned messages you can create ahead of time, readily available from a drop-down menu in Conversation View or Bulk SMS. They can initiate an outbound survey or automated conversation. Alternatively, they can simply be sent by themselves to quickly share a single message. For every Form Template, an SMS Template must be created.

MOGLI SCHEMA





OBTAINING CONSENT

DEFINITELY ASK FIRST

Just because you've got a mobile number doesn't immediately give you the green light to text away.

HOW TO SECURE CONSENT

A FEW HELPFUL WAYS TO ETHICALLY SECURE OPT-IN.

DISCLAIMER: WE KNOW OUR STUFF, BUT WE STRONGLY SUGGEST RUNNING YOUR METHOD BY YOUR PREFERRED LEGAL COUNSEL. ULTIMATELY, IT IS YOUR RESPONSIBILITY TO ENSURE YOU HAVE CONSENT BEFORE SENDING MESSAGES. PLEASE NOTE THAT IT'S ILLEGAL TO ASK FOR AN OPT-IN BY SENDING A TEXT MESSAGE TO A NUMBER THAT HAS NOT YET OPTED-IN.

- Ask for consent anywhere that you're asking for other information, such as an intake form, application, online form, email, phone, or website. For Example: "Check this box to subscribe to text messages from us. You can expect to receive 3-4 messages per month and can opt-out at any time by texting the word STOP."
- Create a Call to Action with a Form Template (secure a double opt-in)
    - You can link a Query String (keyword) to a Form Template. For example: *Text in the word INFO to 555-555-5555 for more information on our program*. When someone texts the word INFO to that number, that constitutes the initial opt-in. We can then respond with *Would you like to receive SMS from us? Please respond with YES or NO.* If they respond with 'YES', you now have a double opt-in. We recommend obtaining a double opt-in whenever possible.
    - Let people know how often they can expect to receive texts from you, and provide information on how they can opt-out at any time by texting the words: STOP, QUIT, UNSUBSCRIBE, OPT OUT, or CANCEL.

WHAT ABOUT OPTING OUT?

- If you've offered the opt-in and someone hasn't responded, consider that an opt-out. It's good practice not to reach out via text message unless someone has distinctly given consent.
- If someone initially opted-in and then wants to opt-out, they can do so by texting in the words STOP, QUIT, UNSUBSCRIBE, OPT OUT, or CANCEL. They will receive an automated message from our carrier confirming that they've been opted out, while giving them the option of opting back in by texting in the words START, YES or UNSTOP. Even if a user attempts to send another message to that person from the number they've opted out of, the message will be undelivered.

MORE ON OBTAINING CONSENT

- Text messages are enforced by the TCPA (Telephone Consumer Protection Act). Please **click here** for the latest in TCPA Compliance (provided by FDIC.gov).
- Text messages sent to those who have not yet provided consent may result in a $500 fine per text message violation.
- When asking for opt-in, be specific and provide more information than you feel is necessary, such as the name of your organization, the nature of content, the approximate number of text messages to be sent, and specific opt-out instructions.
- Include a notification of potential charges incurred by receiving the text messages.
- Don't solely rely on oral consent. It's always best to secure documented opt-in.
- Unsolicited messaging is the chief concern of consumers, as they worry that the information provided via SMS won't be useful or relevant.

SAMPLE OPT-IN (TO BE ASKED VIA ONLINE, EMAIL, OR PAPER FORM)

"Would you like to opt-in to receiving text messages from Mogli Technologies? You can expect to receive 2-4 messages per month on tips and best practices. Standard messaging and data rates apply. Opt out at any time by texting the word STOP."

ADMIN TIP: To ensure compliance, run a mass upsert with Data Loader that checks the Mogli Opt Out checkbox. This way, users will be unable to text your Contacts and Leads until they've opted in. Further, you can create a Process Builder which will automatically uncheck the Mogli Opt Out checkbox when someone texts in the word START, SUBSCRIBE, OPT IN, or any other keywords you choose. Visit our **AUTOMATIONS** section for step-by-step instructions on how to build the Mogli Opt Out/In Process Builder automation.

THE MOGLI OPT-OUT CHECKBOX

- When someone opts-out, you can manually check the Mogli Opt-Out box on their record which will automatically disable Conversation View. This lets users know that the Contact or Lead has chosen not to receive messages from any of your Gateways.
- Alternatively, we can run an automation to automatically check that box when someone texts the word STOP, QUIT, UNSUBSCRIBE, OPT OUT or CANCEL. (See the **AUTOMATIONS** section for a how-to with Process Builder)
- If a Contact or Lead has texts STOP, QUIT, UNSUBSCRIBE, OPT OUT or CANCEL, our messaging partner will prevent all attempted outgoing messages from being delivered. You'll notice that the Status of any attempted outgoing SMS records will indicate failure.

RESPONSE RATE

TRUSTY GUIDELINES FOR GROWING HEALTHY RELATIONSHIPS THROUGH TEXT

BUILD RELATIONSHIPS THROUGH TRUST

- Send and schedule text messages during business hours of your recipient's timezone (M-F, 9A-5P)
- Periodically confirm that text messages are a preferred method of communication
- Take opt-outs seriously
- Respond promptly to incoming text messages
- Ensure that your team adopts proper spelling and grammar etiquette
- Listen and respond accordingly, as recipients can become frustrated if they feel unheard
- Use complete sentences

CREATE VALUE

- Understand the perspective of your recipient and only send them relevant information in an appropriate tone
- Preferences change over time, so keep a pulse on the cadence of your relationship so that you can adapt
- When utilizing bulk messages for promotions, get your recipients excited, promote urgency, and provide instructions
- Use branded URL shortening, like Rebrandly

USE HUMOR

- Be natural and friendly, as recipients are much more likely to engage when they feel they're talking to a person - not a robot
- Use Emojis where appropriate

ASK

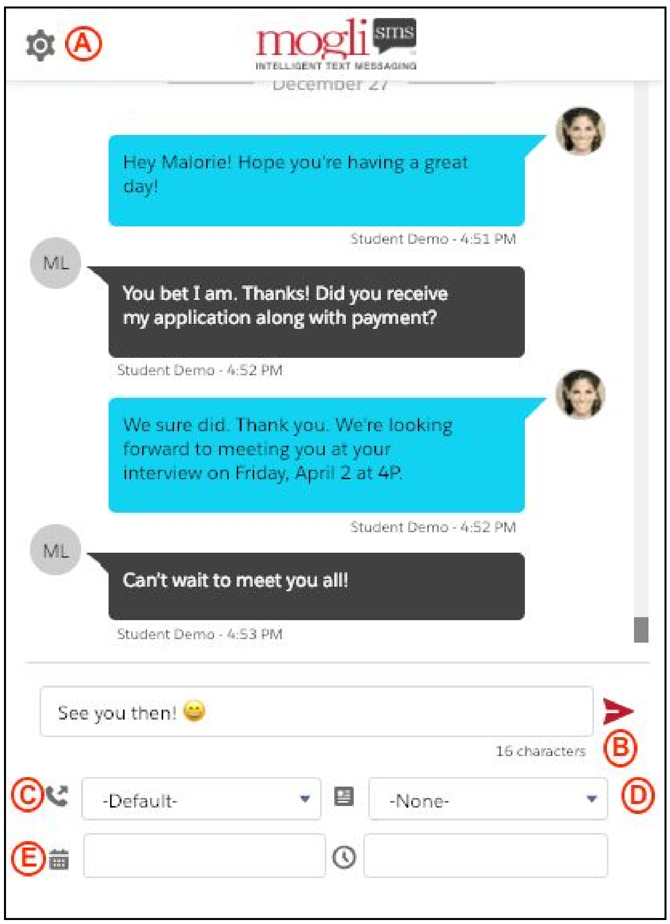
- Feedback from recipients is representative of their personal story, so connect, empathize, and respond
- Scan through previous messages and get a pulse on your relationship

1:1 CONVERSATIONS

GET TO KNOW YOUR CONSTITUENTS

The Conversation View component is available on Contact and Lead records, which is where users will conduct a back and forth text conversation in real time.

CONVERSATION VIEW



Conversation View Lightning Component

A. Settings Menu to customize Conversation View by filtering outgoing messages by user, or change the text and bubble color of any message you send to easily differentiate between users.
B. Character Counter
C. Gateway choice (Outbound phone number)
D. SMS Template
E. Schedule a message by date and time

BEFORE CONDUCTING 1:1 CONVERSATIONS...

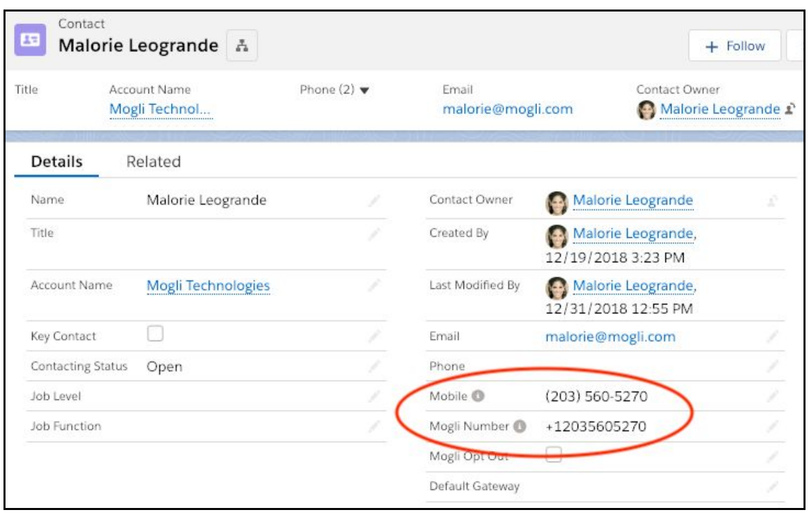
AFTER YOU'VE RECEIVED OPT-IN, A FEW THINGS MUST BE IN PLACE BEFORE BEGINNING.

- The Mogli Number must be properly populated
- The Mogli Opt-Out checkbox must not be checked

CORRECTLY POPULATE THE MOGLI NUMBER

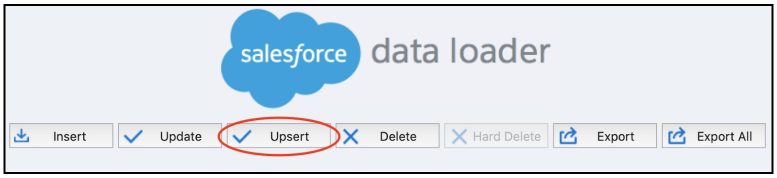
1. Ensure that the Mobile and Mogli Number fields are visible on your chosen Page Layout

2. Access an existing Contact or Lead and click Edit to modify their record
3. If there is a Mobile number listed, simply click Save. Otherwise, input the Mobile number, and Save
4. The workflow should have auto-populated the Mogli Number field into this format: +12223334444 (+, country code, area code, and phone number)
5. Notice the new value in the Mogli Number field:



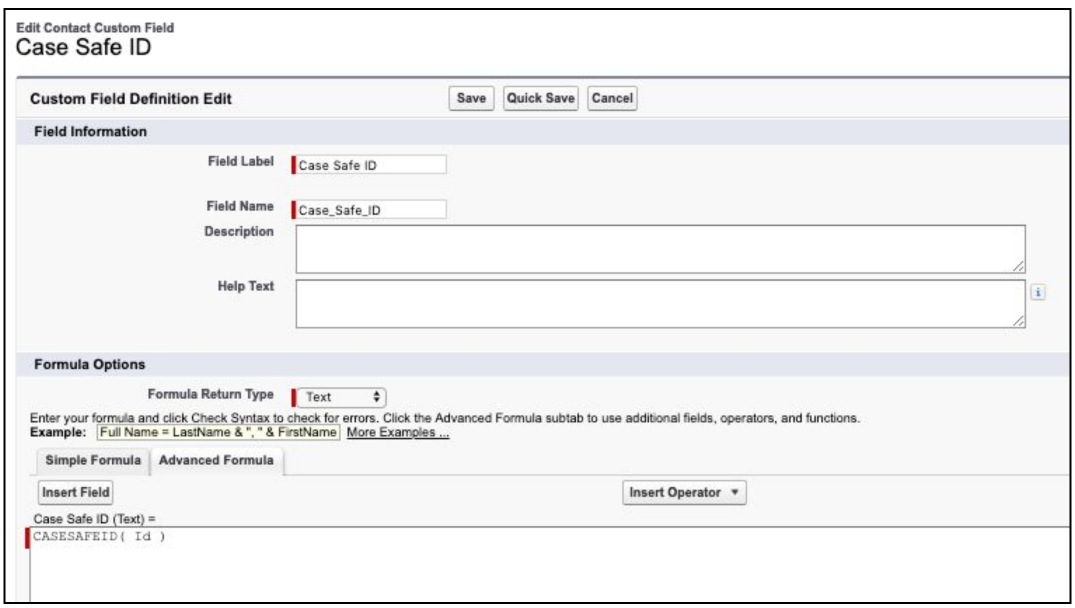
WATCH THIS 60-SECOND MOGLI MINUTE ON HOW THE MOGLI NUMBER WORKS

ADMIN TIP: If you have Contacts and Leads that need a Mogli Number populated, ensure that the Mobile field has the correct value on your Contact and Lead records. Then, run reports on Contacts and Leads with Case Safe Ids and use Data Loader to perform a mass Edit/Save (Upsert) to trigger the Mogli Number workflow.



1. Run a report of all Contact and Lead IDs (no other fields are required)
2. Export the report to CSV
3. Use Data Loader to upsert by matching the Case Safe IDs to the ID field of the Contact or Lead (this will not edit the record, but it will trigger the Mogli Number workflow to run)

ADMIN TIP: Need a Case Safe ID field? Create a custom formula field (type: Text) named Case Safe ID on Contact and Lead. Populate the field as follows:

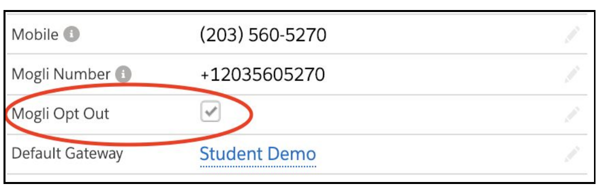


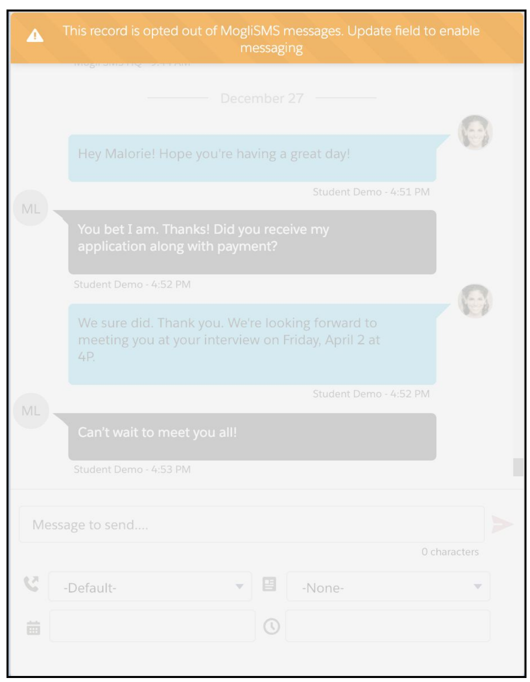
ADMIN TIP: If you import Mobile numbers that oftentimes have a '1' in the beginning, clone the Mogli Number workflow and replace the formula with the following:

```
IF(NOT(ISBLANK(TRIM(MobilePhone))), IF(BEGINS(MobilePhone, '1'), "+" & SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
MobilePhone,
"(",""),
")",""),
"-",""),
" ",""),
"+",""),
".",""), "+1" & SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
MobilePhone,
"(",""),
")",""),
"-",""),
" ",""),
"+",""),
".","")), '')
```

THE MOGLI OPT-OUT CHECKBOX MUST NOT BE CHECKED

If the Mogli Opt-Out box is checked, Conversation View will be unavailable and outgoing messages to the Contact or Lead will be undelivered:





Mogli Opt-Out box checked + Conversation View disabled

NOTE: If someone texts in STOP, or another opt-out keyword, you will not be able to send them a message from Mogli, even if the Mogli Opt Out checkbox is unchecked. Our messaging partner will register the opt-out and prevent subsequent message attempts from being delivered. If the Mogli Opt Out checkbox = TRUE, and you attempt to send to them as part of a Campaign, they will not be added as a recipient in your bulk send.

ADMIN TIP: SENDING TEXTS INTERNATIONALLY? Create a custom checkbox field for Contact and Lead records called “International Mobile Number.” Access and clone the existing Mogli Number workflow rules for both Contact and Lead entitled “WITH PLUS - onCreateEditWhenMobileNotNull.” For the cloned workflows, add a second line of criteria that International Mobile Number equals True. In your Field Update Detail, remove the 1 from the Formula Value, so that it looks like this:

```
"+"& SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(
SUBSTITUTE(MobilePhone , "(", ""),")",""),".", ""),"-",""),"  ",""),"+","")
```

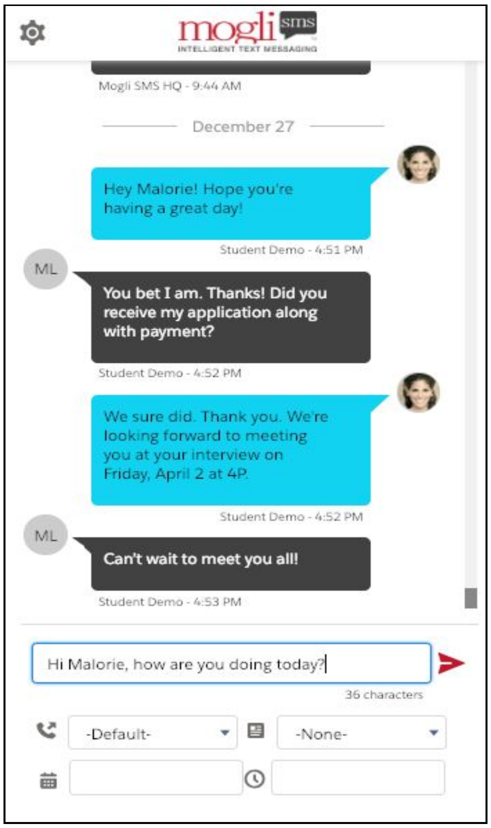
Activate both workflows. Now, whenever a Contact or Lead has the International Mobile Number checkbox checked, their Mogli Number will be reformatted, but will not include the “+1” at the beginning. **Be sure that the country code is listed in the Mobile field so that it transfers to the Mogli Number field.** For those Contacts and Leads who do not have the International Mobile Number checkbox checked, their Mogli Number field will be reformatted to include the “+1.”

NOTE: International texting is available on Elite and Enterprise Plans only. For more information on our WhatsApp functionality, see our **WHATSAPP** section.

CONDUCTING 1:1 CONVERSATIONS

CONDUCT A BASIC 1:1 CONVERSATION

1. Type directly in the message field
2. Hit Enter or click the red arrow to send
3. Your outgoing message will display immediately and incoming messages will display in real-time



IN CONVERSATION VIEW, YOU CAN:

- Select a Gateway from which to send the message
- Select an SMS Template
- Schedule a message
- Personalize your text and bubble color so that users can easily differentiate who contributed to the conversation
- Send outbound MMS (images and files)

NOTE: It's best practice to limit your messages to 160 characters or less. Most phones and carriers support up to 1600 characters, but we've found a higher response rate to shorter messages. When metering your messages, each message segment is 160 characters. If unicode is used, it reduces to 75 characters. For messages greater than 160 characters, you may be charged for an additional message segment. Most carriers will concatenate those messages so that it appears as a single message on the recipient's phone. However, some carriers do not concatenate and each message is delivered separately.

(OPTIONAL) SELECT A GATEWAY FROM WHICH TO SEND THE MESSAGE

If you would like to select a specific Gateway to send the message, select the drop-down in the field with this icon: If the chosen value in the picklist field is -Default-, the text will be sent from the phone number as listed within the Default Gateway field on the Contact or Lead record. If there is no value in the Default Gateway field, and -Default- is selected, the message will send from the Global Default Gateway as specified in Application Settings

(OPTIONAL) SEND AN SMS TEMPLATE

Choose an SMS Template by selecting it from the drop-down in the field with this icon:

(OPTIONAL) SCHEDULE A MESSAGE

Schedule your message by entering the date and time your message is to be delivered in the fields with the and icons.

(OPTIONAL) ASSIGN A MOGLI AVATAR

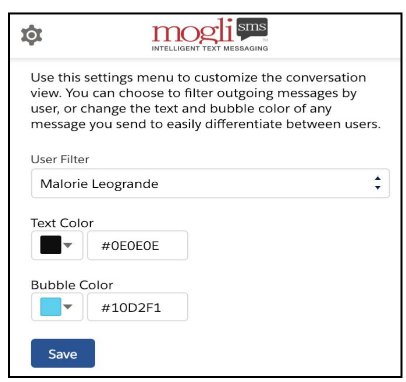
By Default, incoming messages from Contacts and Leads will display in Conversation View alongside a bubble containing their initials. You may replace the initials with an image:

1. Right-click your chosen image
2. Select the following option depending on your browser:
    a. Chrome and Safari - Copy Image Address
    b. Firefox - Copy Image Location
    c. Microsoft Edge - Copy Link
    d. Internet Explorer - Properties > select the URL to the right of the "address" heading and press Ctrl + C
3. Paste the URL in the Mogli Avatar URL field
4. Save and refresh the Contact or Lead record

WATCH THIS 60-SECOND MOGLI MINUTE ON HOW CONVERSATION VIEW WORKS

(OPTIONAL) PERSONALIZE BUBBLE AND TEXT COLORS FOR YOUR OUTGOING MESSAGES

1. Click the icon in the upper left corner of Conversation View
2. Select yourself as user in the user Filter drop-down menu
3. Choose your Text and Bubble colors and Save

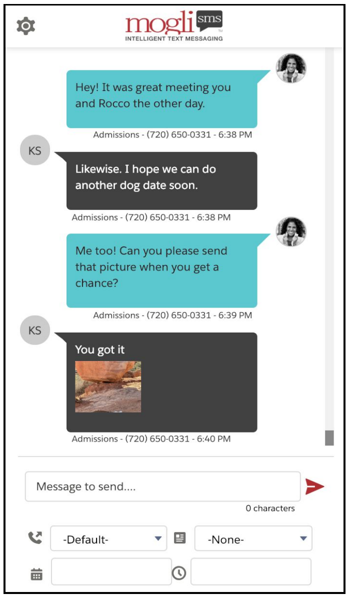


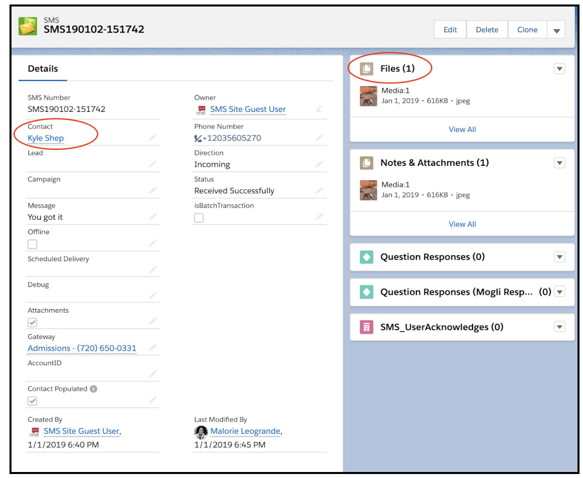
ADMIN TIP: You may configure text and bubble colors for your users in two ways:

1. Login as a user and select colors on their behalf
2. From Setup > Custom Settings > Choose "Manage" next to user Colors. From here, you can create new bubble and text color relationships for your users. (Utilize this helpful hex code finder)

MMS (IMAGES AND FILES)

MMS may be accessed inside of Conversation View. When clicking the thumbnail, a new window opens where you can view and download the image attached to the SMS record.





An image attached in Conversation View; click on the image to go to the SMS record; the SMS record displays the Contact, along with attachments in Files

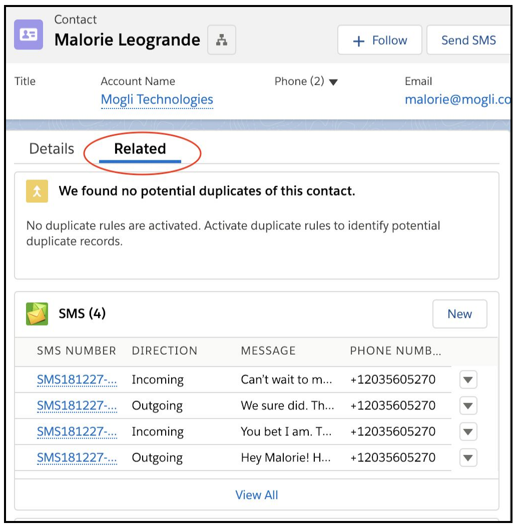
ADMIN TIP: Inbound MMS is not always supported when sent via a toll-free number.

INCOMING AND OUTGOING MESSAGE HISTORY

Conversation View will display the last 300 incoming and outgoing messages. Access complete SMS history by navigating to the SMS related list on their Contact or Lead record. For an org-wide history of SMS, go to the SMS tab and sort accordingly.

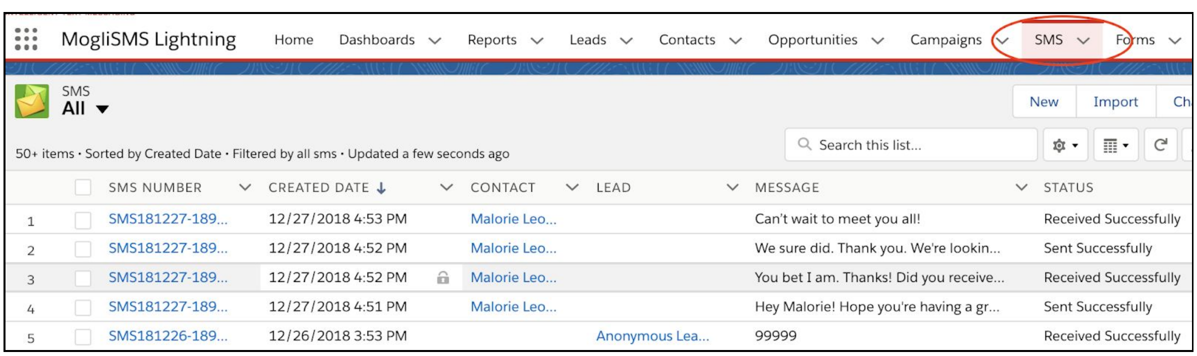
SMS RELATED LIST ON CONTACT AND LEAD RECORDS

On a Contact or Lead record, click the Related tab to view the SMS related list. This will display all incoming and outgoing messages between any users and the Contact or Lead:



SMS TAB

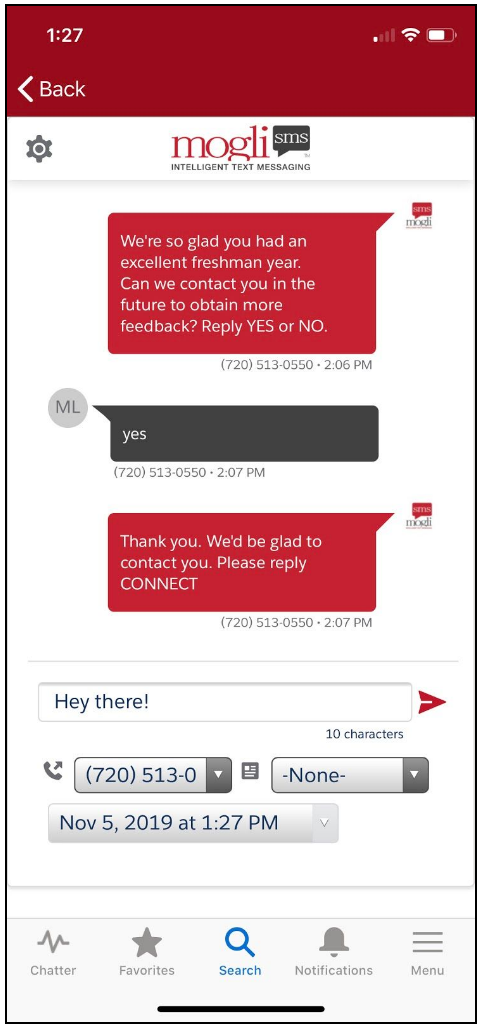
Go to the SMS tab for complete org-wide history of SMS activity:



THE SALESFORCE MOBILE APP

KEEP THE CONVERSATION GOING WHEN YOU'RE AWAY FROM YOUR DESK.

Mogli works seamlessly within the Salesforce mobile app.
It's easy to keep conducting your 1:1 Conversations and Bulk Messages while you're on the go.

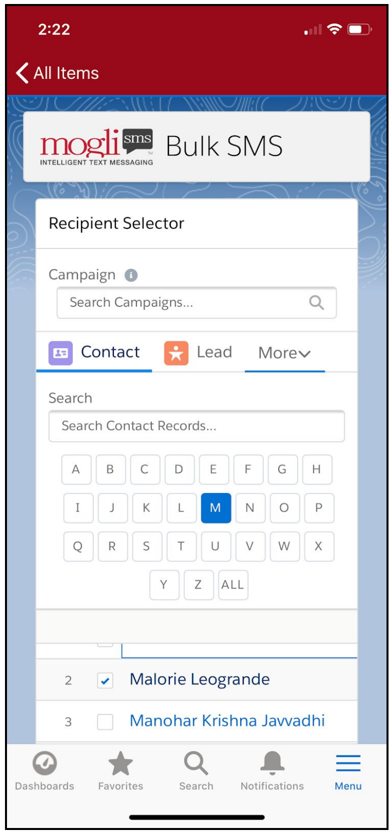


CONDUCT A 1:1 CONVERSATION VIA A CONTACT OR LEAD RECORD IN THE SALESFORCE MOBILE APP

1. Download the Salesforce Mobile app for iOS or Android
2. Navigate to a Contact or Lead record
3. Select Details and scroll down to Conversation View
4. Conduct your conversation. You can choose the Gateway, select an SMS Template, or even schedule the message. Even though you're using your personal mobile device to text message your Contacts and Leads, you'll be sending messages via the Gateways we've configured for your organization

SEND OR SCHEDULE A BULK MESSAGE IN THE SALESFORCE MOBILE APP

1. In the Salesforce Mobile app, from the Home screen, select Bulk SMS
2. Manually add Leads or Contacts, or attach a Campaign
3. Type a message directly in the Message field, or add an SMS Template
4. Choose the Gateway. Keeping the Gateway at Default will send the message via the Default Gateway as listed on your recipients' records. If there is no Default Gateway populated on their record, the message will be sent via the Global Default Gateway as listed in Application Settings
5. Optionally schedule the message



NOTIFICATIONS WITHIN THE SALESFORCE MOBILE APP

When using Mogli SMS with the Salesforce mobile app, you can still send and receive messages to/from your Contacts and Leads. Create a simple Process Builder that creates a Chatter Notification. Check out a two-minute video here on Chatter Notifications. Push Notifications may also be configured. For more info and how-to's, see our section on **OTHER NOTIFICATIONS**.

MORE ON 1:1 CONVERSATIONS

Why aren't my incoming messages displayed in conversation view in real-time?
If you are attempting to see incoming messages in conversation view in Lightning but are in a Classic-configured app, incoming messages may only appear upon refreshing the page. If you are in Classic and within a Classic-configured app, inbound messages should appear in real-time.

CUSTOM OBJECTS

ASSOCIATE TEXT MESSAGES WITH OBJECTS OTHER THAN CONTACTS AND LEADS

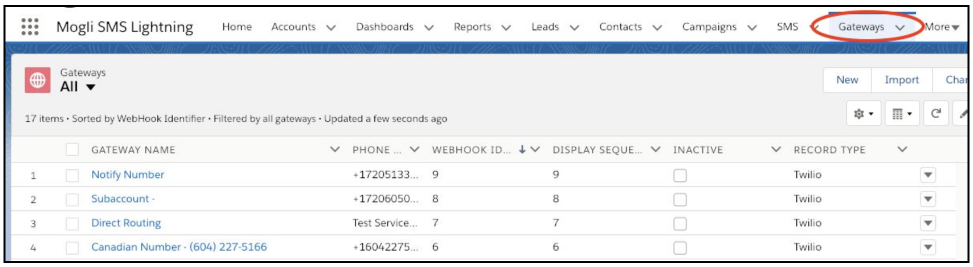
Our team will configure a designated amount of Custom Objects dependent upon your plan. Contact and Lead are included with every configuration. Opportunity will be configured upon request. Additional Objects may incur a fee. Please contact our team for more information.

Plan	Custom Object Configurations Included (besides Opportunity)
Starter	1
Standard	1
Elite	2
Enterprise	5

GATEWAYS

YOUR OUTBOUND PHONE NUMBERS

The Gateways tab contains information for all of your outbound phone numbers.

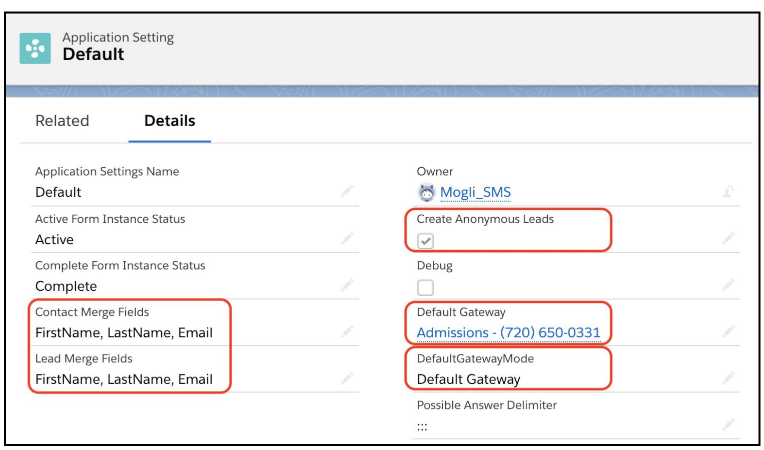


CONSIDERATIONS FOR YOUR GATEWAYS

- Please do not modify the Webhook Identifier for any of your Gateways. Those numbers are configured with our messaging partner and modifications will cause your messages to fail.
- You may modify the Name and Display Sequence for your Gateways. Simply select a Gateway Name and modify accordingly.

THE APPLICATION SETTINGS TAB

Find and modify your Global Default Gateway, choose your Contact and Lead merge fields, create Anonymous Leads, and assign Gateways to certain users:



THE GLOBAL DEFAULT GATEWAY

In Application Settings, the Default Gateway field is populated with one of your Gateways. This is your Global Default Gateway, and will be the outbound phone number used any time a Contact or Lead doesn't have a specified Default Gateway on their record. You can modify this at any time, but this field must be populated to maintain functionality.

CONTACT AND LEAD MERGE FIELDS

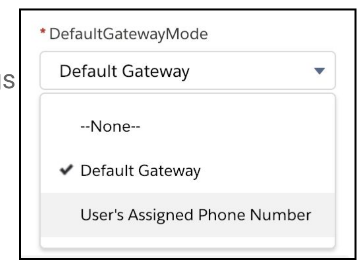
Populate these fields with the API-formatted name of the Standard or Custom fields you plan on using in your SMS Templates and 1:1 Conversations. Separate each field with a comma and a space.

CREATE ANONYMOUS LEADS

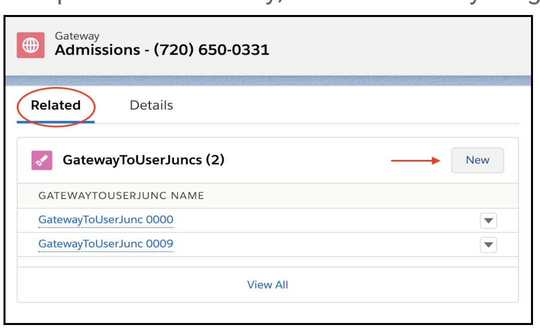
Checking this box ensures that if someone new to Salesforce texts into one of your Gateways, their messages will be stored on a newly created Lead record called, 'Anonymous Lead from Mogli.' The Anonymous Lead record allows you to convert the Lead into a Contact at any time. Mogli will create an Anonymous Lead if someone texts in to one of your phone numbers (Gateways) who does not have a Contact or Lead record associated with their mobile number (Mogli Number). Therefore, it's best practice to ensure that your Contacts and Leads have a Mogli Number populated to avoid the creation of a duplicate record. Uncheck the Create Anonymous Leads checkbox to disable Anonymous Lead creation.

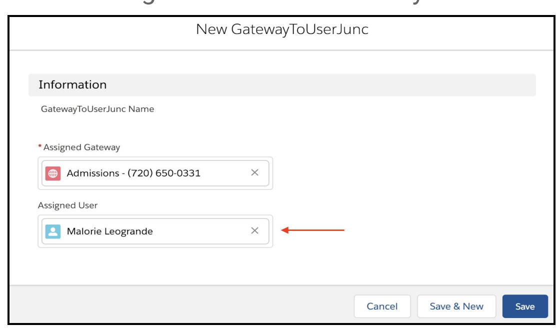
ASSIGN SELECT GATEWAYS TO USERS

If you want to restrict a subset of Gateways to certain users, you can assign them access to one or a subset of Gateways. Select the Application Settings tab, and click Default. In the DefaultGatewayMode field, click the dropdown menu and select *User's Assigned Phone Number*. Save.



Navigate back to the Gateways tab. Choose a Gateway and select Related. Click New. Assign a user to that particular Gateway, and Save. Every Mogli user must be assigned at least 1 Gateway.





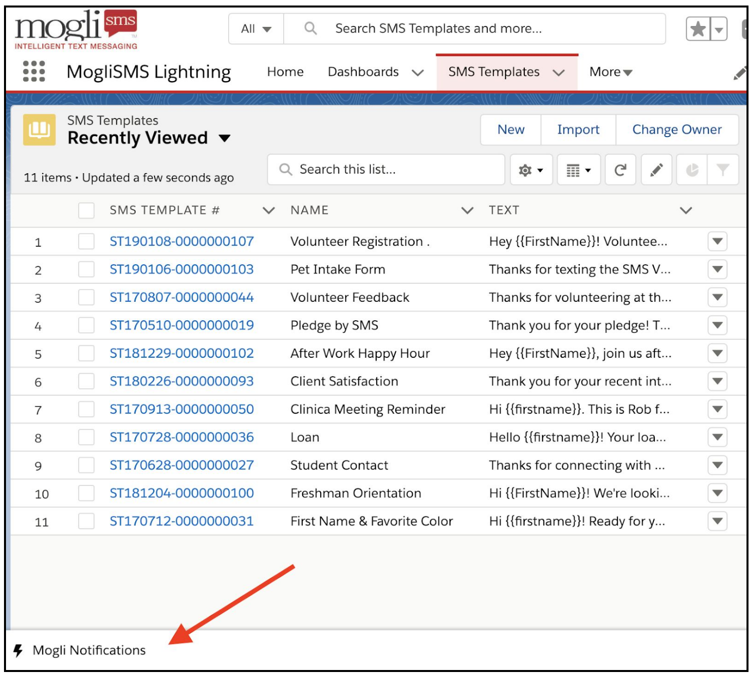
Now, the specified users will have the option of sending messages only from the Gateways to which they've been assigned. Revert to allowing users to access all Gateways by selecting Default Gateway as the value in the Default Gateway Mode field in Application Settings. There's no need to undo your settings in the Gateway related list.

ADMIN TIP: Keep in mind that assigning Gateways to particular users makes the Default Gateway option moot, as certain users may not have access to the Default Gateway.

IN-APP NOTIFICATIONS

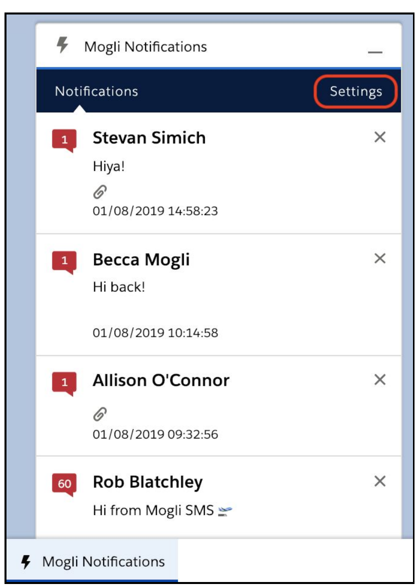
REAL-TIME IN-APP NOTIFICATIONS IN LIGHTNING EXPERIENCE

The Mogli Notifications Utility Bar Lightning component will blink and produce an audible chime when an important incoming message arrives.

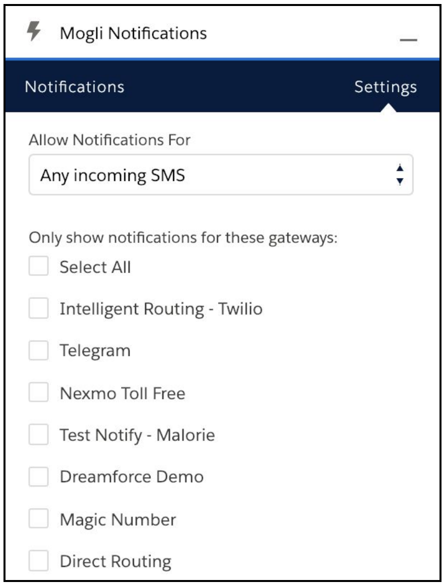


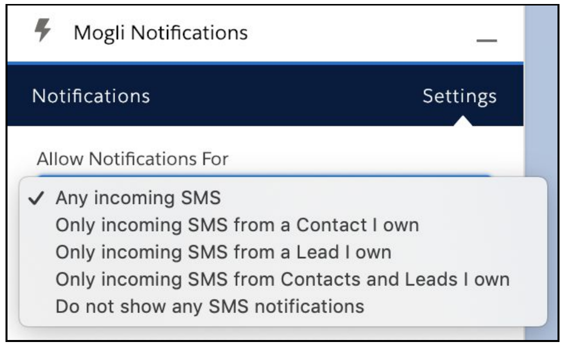
SELECT YOUR NOTIFICATION SETTINGS

1. Click the Mogli Notifications component in the Utility Bar and select Settings

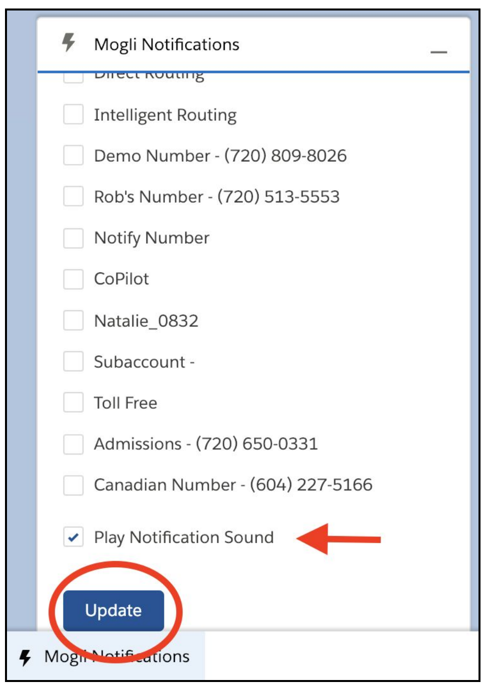


2. Click the arrows in the Allow Notifications For dropdown menu and select your preference



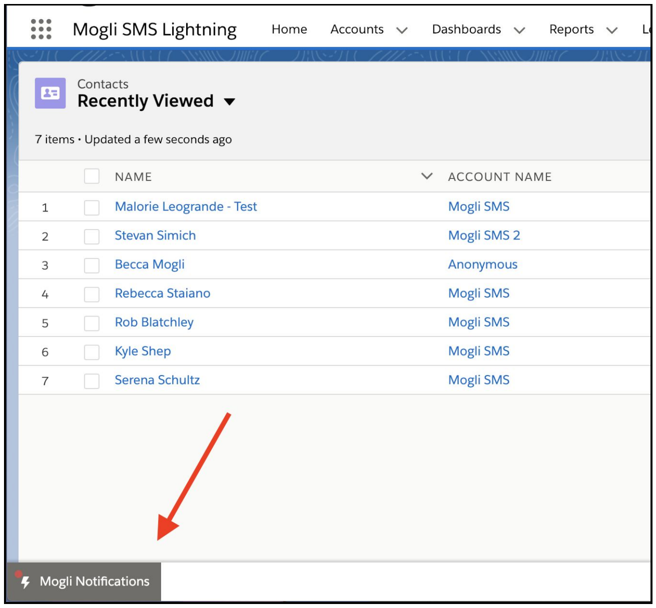


3. Select which Gateways you'd like to receive notifications from. Check or uncheck the Play Notification Sound checkbox and click Update. You'll now receive notifications according to your selected preferences

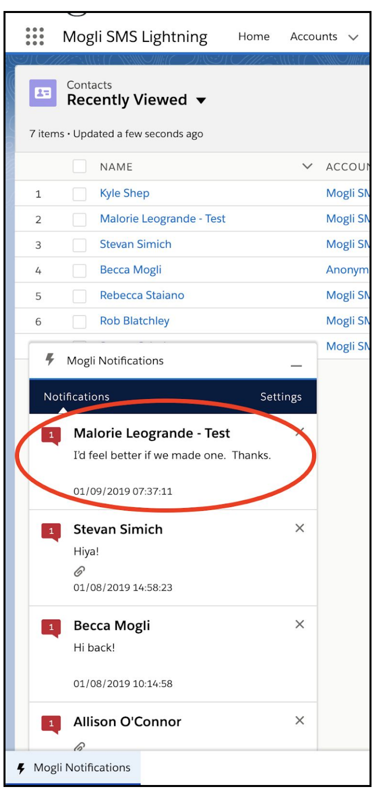


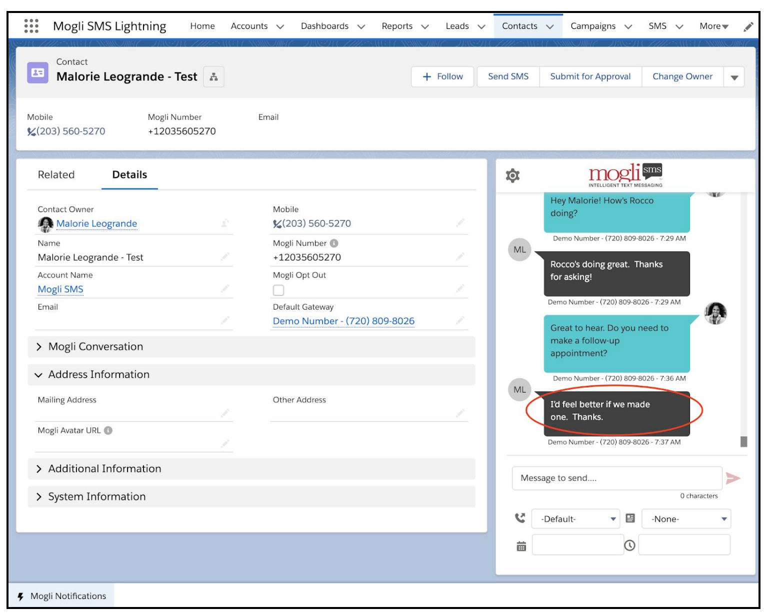
VIEWING NOTIFICATIONS

You could be doing something else inside of Salesforce when someone responds to your text message. When this happens, Mogli Notifications in the Utility Bar will blink and you'll hear an audible chime (if you've selected so in your settings)



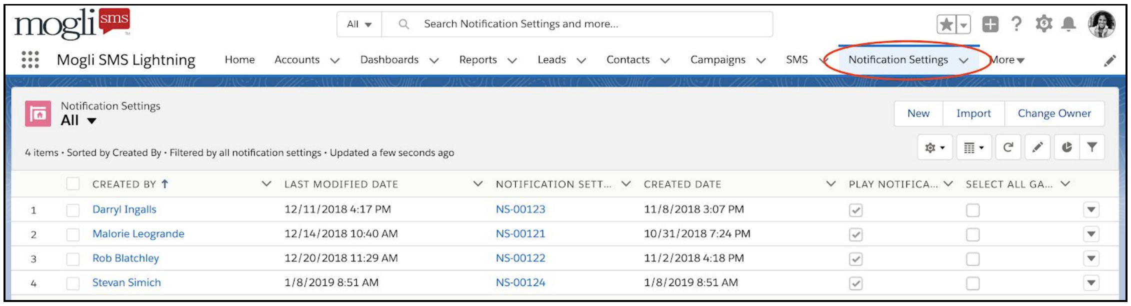
1. Click Mogli Notifications and select the Notification. You'll then be taken right to the Contact or Lead record where you may continue the conversation



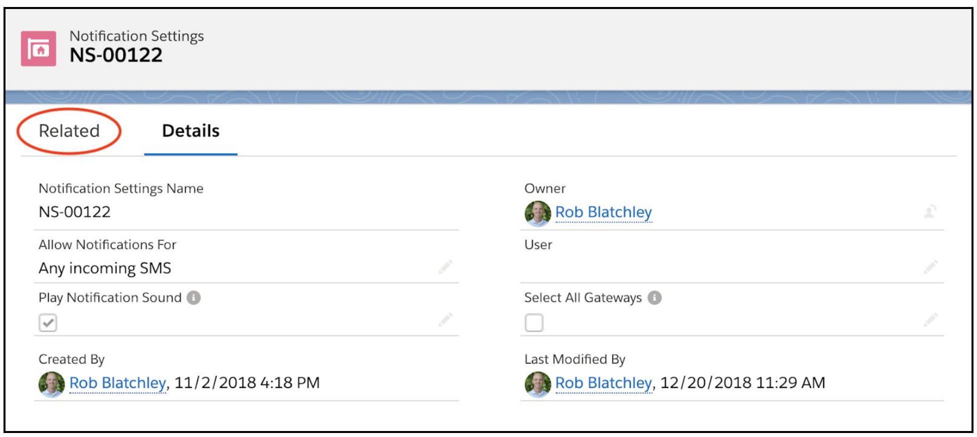


VIEW + MODIFY NOTIFICATION SETTINGS FOR ALL USERS

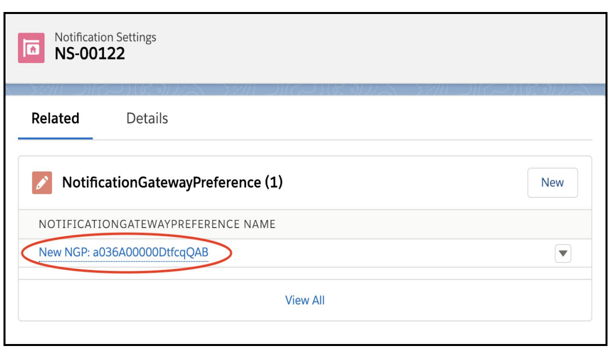
1. To see which users have selected Notification Settings, click the Notification Settings tab

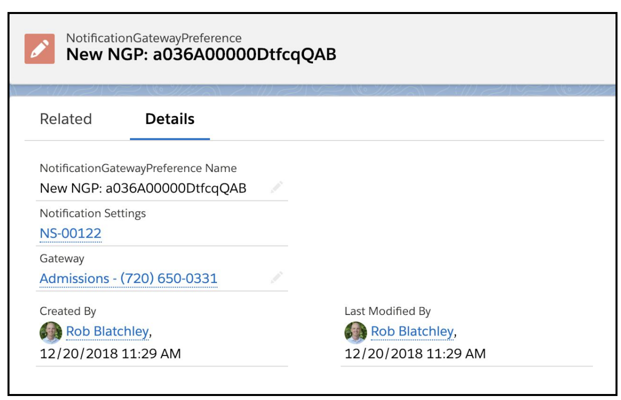


2. Select a Notification Setting, which begins with *NS*. Here's where you'll see the specified Notification Settings for that user. Click the Related List:



3. To see which Gateway(s) the user has selected for notifications, click the link that starts with *New NGP*:

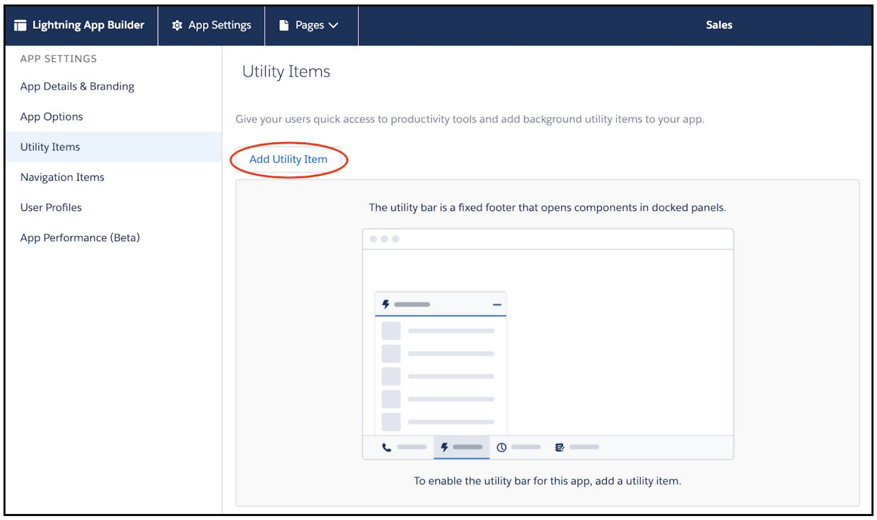




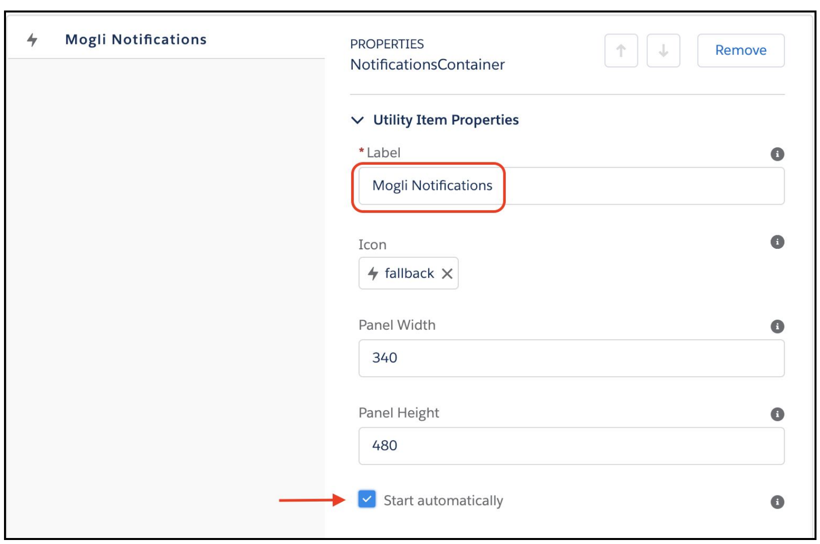
MOGLI NOTIFICATIONS IN OTHER LIGHTNING APPS

You can add the Mogli Notifications Component to any of your other unmanaged Lightning-based apps.

1. From Setup, enter App Manager
2. Find the Lightning app of your choice (ensure that it's an unmanaged package)
3. Click the caret on the right and select Edit



4. Click Utility Items
5. Click Add Utility Item
6. Scroll down and find *Mogli Notification Utility* in the Custom Properties. Change the Label to *Mogli Notifications*, and check the Start automatically checkbox. Click Save



7. Navigate to the Lightning-based app. You should now see the Mogli Notifications Component in your Utility Bar

OTHER NOTIFICATIONS

NOTIFICATIONS VIA WORKFLOW

Configure workflow rules to route notifications via Chatter, Push Notification, Email, and Text Message

CHATTER NOTIFICATIONS:

(entails the installation of an unmanaged package, page layout modification, and Flow modifications)

This example sends a Chatter notification to the Contact Owner of an incoming text message.

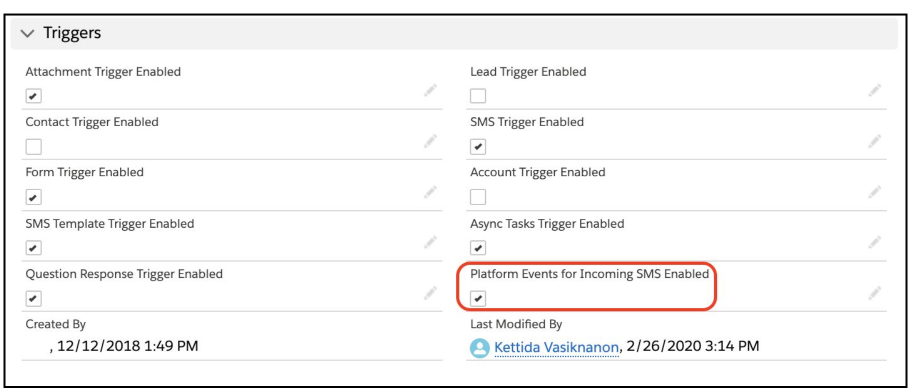
Install the custom notification unmanaged package:

1. From your Salesforce instance, append your Salesforce URL with the following string:
   packaging/installPackage.apexp?p0=04t6g000007LdSZ
   a. Remove the contents of the URL up until *lightning/* and paste the above. For example, your URL should now appear like this:
   *https://tact.lightning.force.com/lightning/*packaging/installPackage.apexp?p0=04t6g000007LdSZ
   b. Click Enter
   c. Install for All Users

Modify your Application Settings page layout:

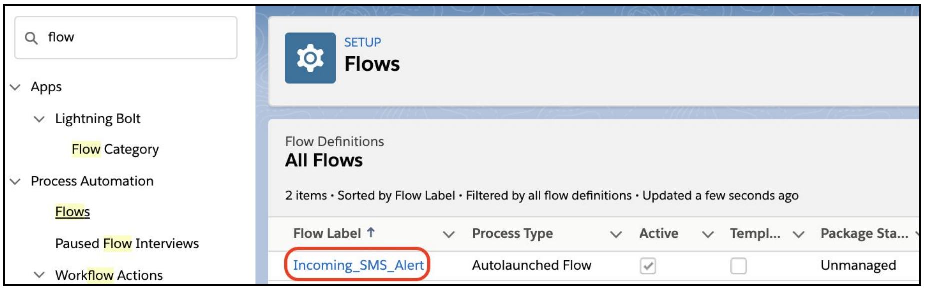
2. Once the package is installed, add the Platform Events for Incoming SMS Enabled checkbox to the page layout for Application Settings
   a. From Setup, access Object Manager and select Application Settings
   b. Select Page Layouts
   c. Select Default
   d. Pull in the Platform Events for Incoming SMS Enabled field into the Triggers section
   e. Save

3. Navigate to the Application Settings tab and check the box for Platform Events for Incoming SMS Enabled:

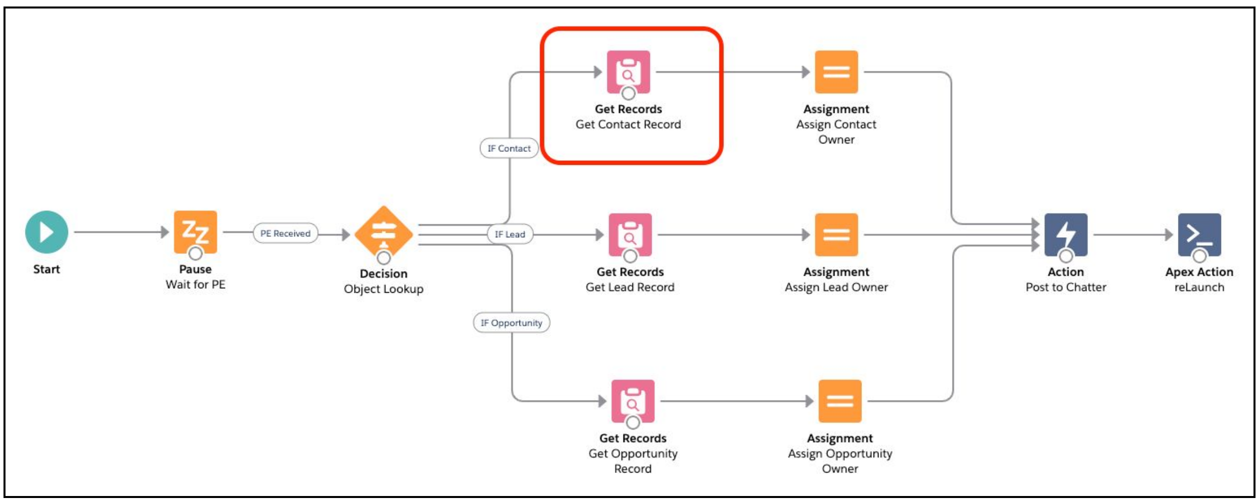


Modify your Flow:

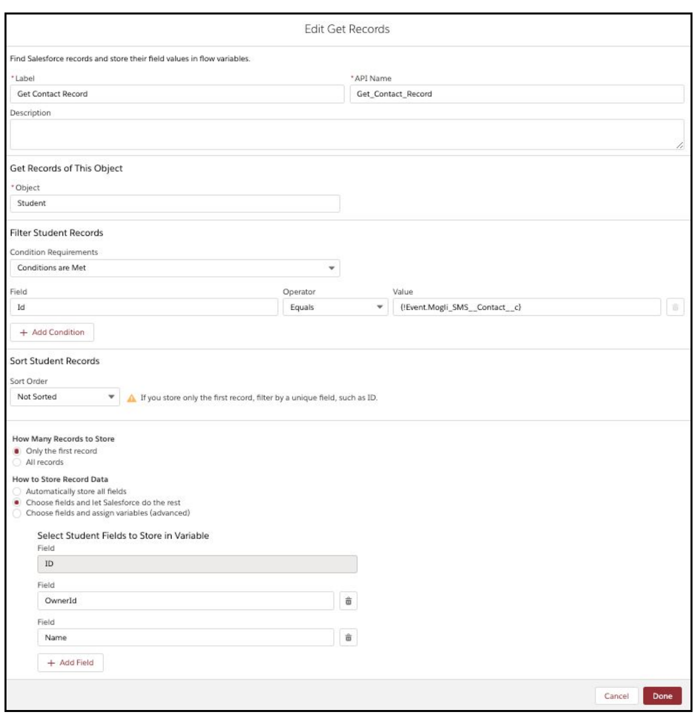
4. From Setup, access Flows > select and open the Flow entitled *Incoming SMS Alert*



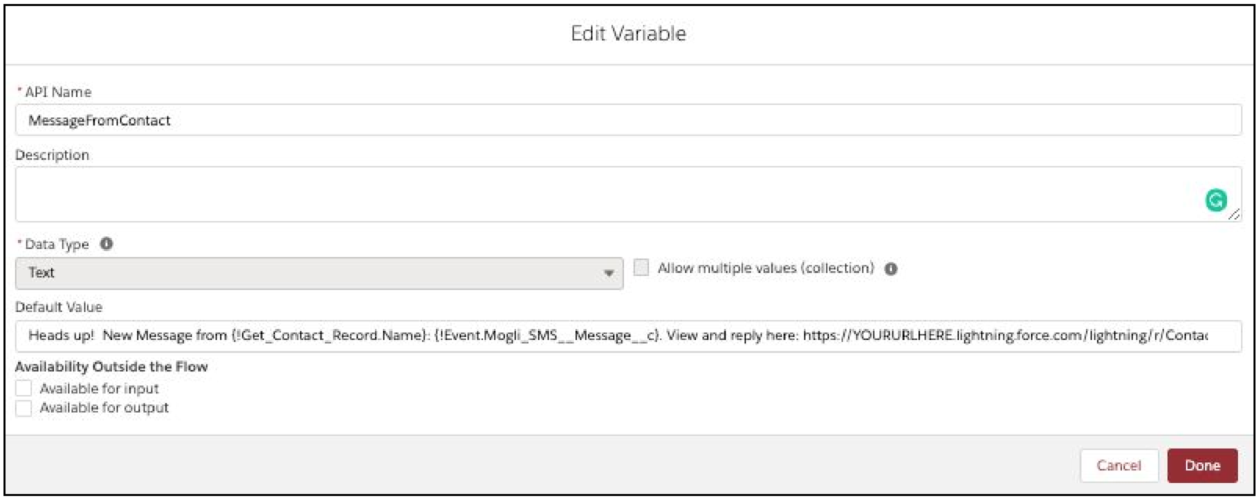
5. Within the Flow, double-click the Get Records element for Contact



6. In the Select Contact Fields to Store in Variable section, add the Contact fields you'll want to call upon in your Chatter post. Name = Contact's Full Name:

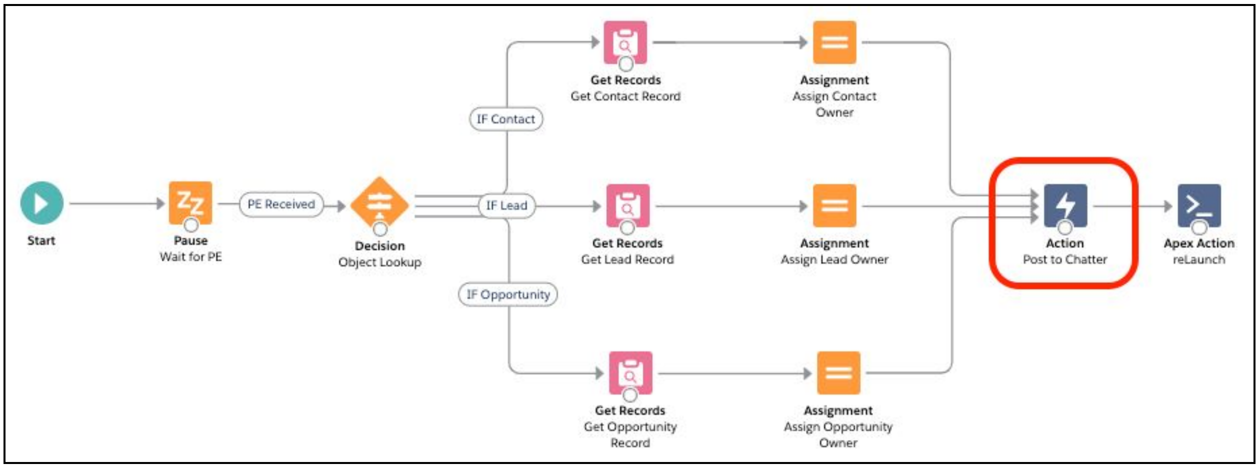


7. In the Flow sidebar, select Manager and click *New Resource*
8. Create a new Text Variable called MessageFromContact and populate it as so:

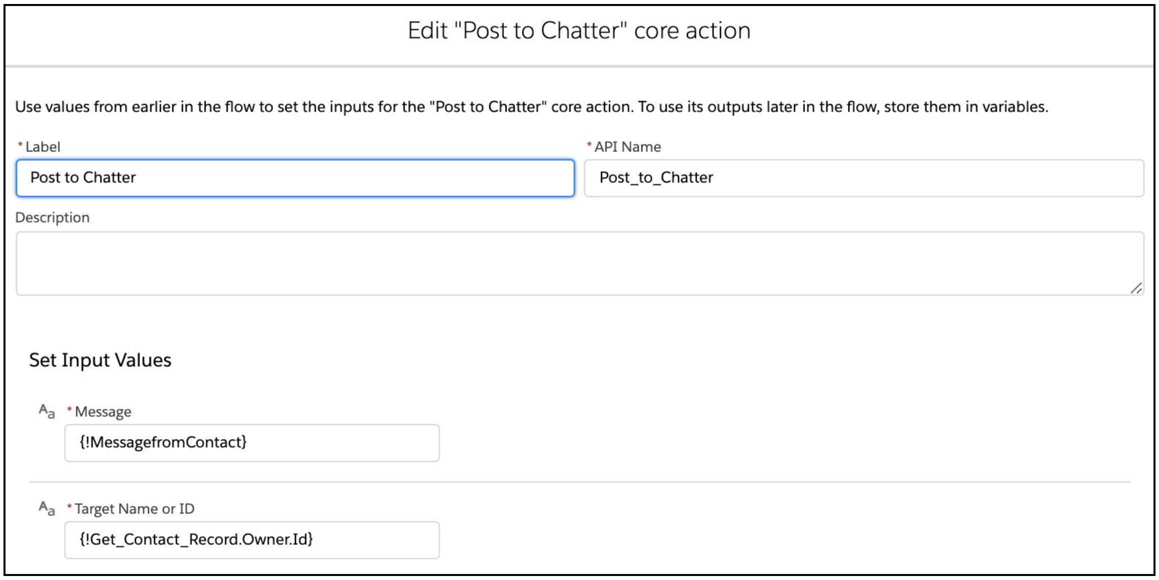


The Default Value contains:
Heads up! New Message from {!Get_Contact_Record.Name}: {!Event.Mogli_SMS__Message__c}. View and reply here: https://YourURLHere.salesforce.com/{!Get_Contact_Record.Id}

9. Click Done
10. Double-click the Action - Post to Chatter element:



11. Set the Input Values for Message and Target Name or ID:



a. For Message, add the Message element you recently created
b. For Target Name or ID, to post to the Contact Owner's Chatter feed, populate *{!Get_Contact_Record.Owner.Id}*
c. Save

12. Save the Flow and click Run

13. From Setup, enter 'Paused' in the Quickfind bar and select Paused Flow Interviews
    a. You should notice one Flow interview waiting to be triggered by your incoming text

Test:

14. Open up Chatter in another tab

15. Send an incoming text to one of your Gateways

16. Refresh Chatter and you should see your notification

ADMIN TIP: Be sure that users who intend on receiving Chatter notifications are assigned these profile permissions. If your users do not have the proper permissions, you will receive Apex Errors and your Process will fail. If you intend to utilize Push Notifications for mobile, please enable the proper permissions here.

PUSH NOTIFICATIONS FOR DESKTOP AND MOBILE

(entails the installation of an unmanaged package, page layout modification, creation of Custom Notification, Flow modifications, and mobile phone settings)

In this example, we're going to send a push notification to a Contact Owner when an incoming text arrives.

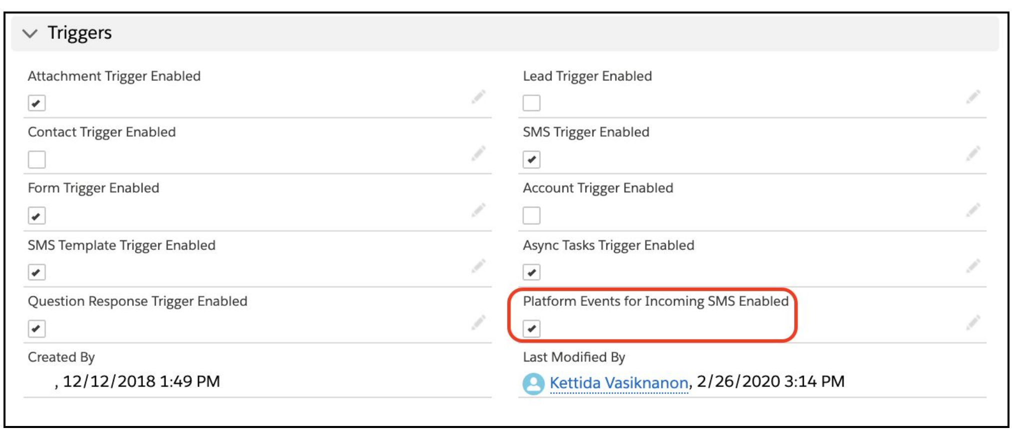
<u>Install the custom notification unmanaged package:</u>

1. From your Salesforce instance, append your Salesforce URL with the following string: packaging/installPackage.apexp?p0=04t6g000007LdSZ
    a. Remove the contents of the URL up until *lightning/* and paste the above. For example, your URL should now appear like this:
    *https://tact.lightning.force.com/lightning/*packaging/installPackage.apexp?p0=04t6g000007LdSZ
    b. Click Enter
    c. Install for All Users

<u>Modify your Application Settings page layout:</u>

2. Once the package is installed, add the Platform Events for Incoming SMS Enabled checkbox to the page layout for Application Settings
    a. From Setup, access Object Manager and select Application Settings
    b. Select Page Layouts
    c. Select Default
    d. Pull in the Platform Events for Incoming SMS Enabled field into the Triggers section
    e. Save

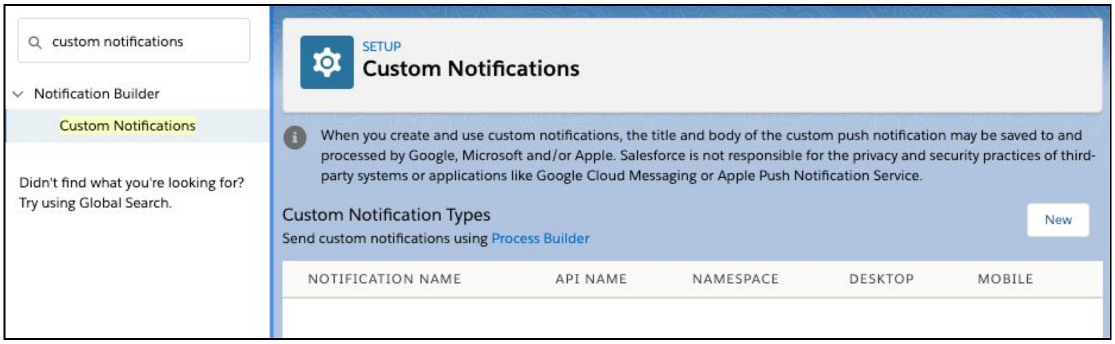
3. Navigate to the Application Settings tab and check the box for Platform Events for Incoming SMS Enabled:

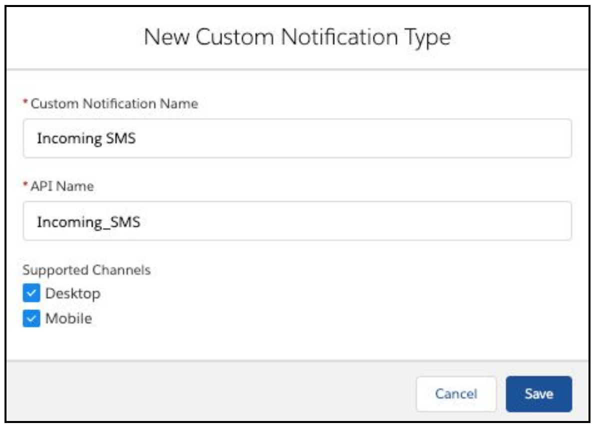


<u>Create your Custom Notification</u>

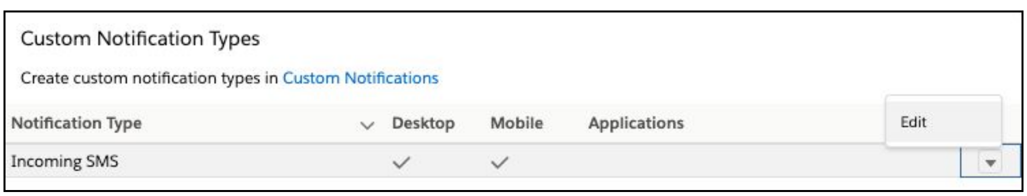
4. From Setup, enter Custom Notifications, and select Custom Notifications

5. Click New and populate a name, such as “Incoming SMS”. Select Desktop and/or mobile, depending on your use case, and Save:

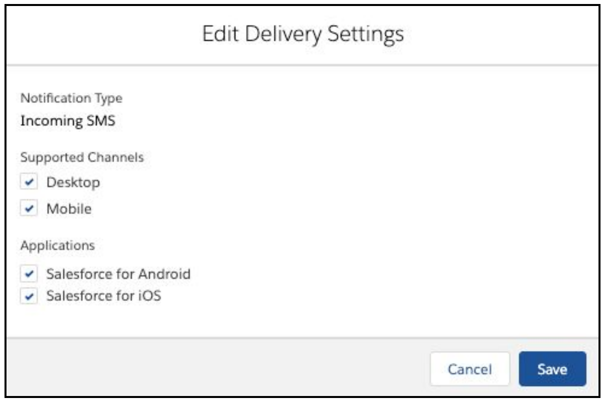




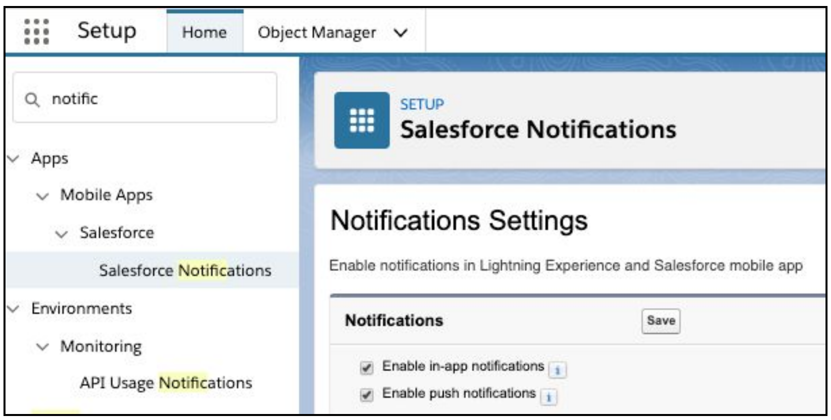
6. From Setup, enter notification and select Notification Delivery Settings. Scroll down to the bottom of the page, click the dropdown caret, and select Edit:



7. Select the appropriate options for Applications and Save:

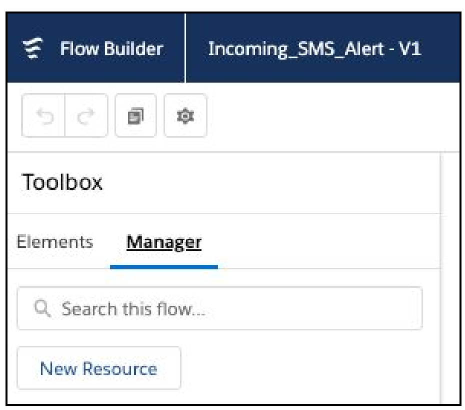


8. From Setup, enter Notifications and select Salesforce Notifications. Confirm that the both checkbox fields are checked:



Flow Modifications

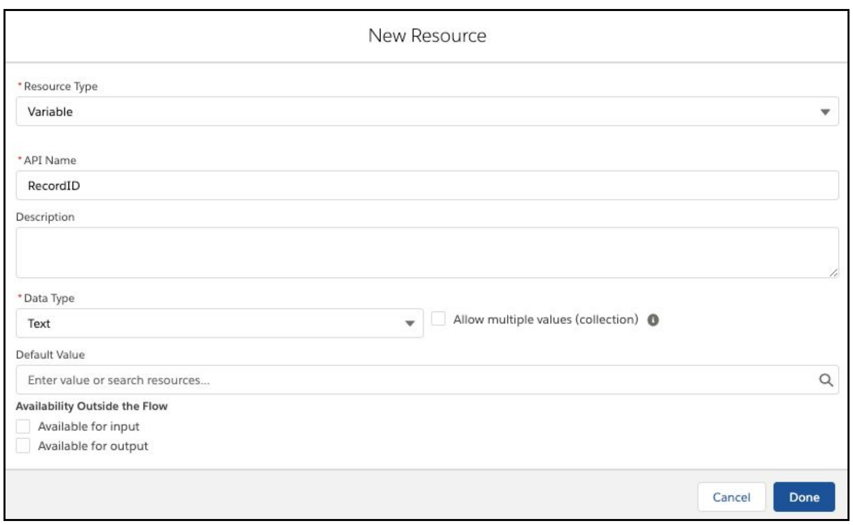
9. From Setup, enter Flow and select Flows
10. Select the Flow entitled 'Incoming_SMS_Alert'
11. In the Manager tab in the Flow Toolbox, click the New Resource button:



12. Populate the resource as follows:

a. Resource Type: Variable
b. API Name: RecipientCollection
c. Data Type: Text
d. Check the box for ‘Allow Multiple Values (collection)’

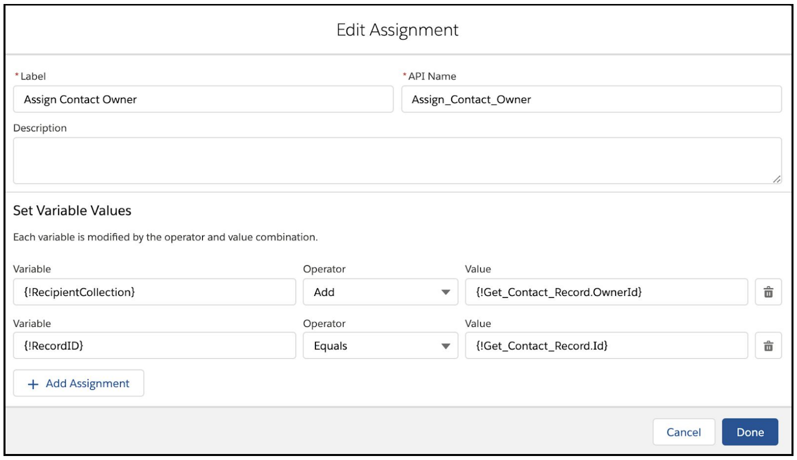
13. Click Done and create another resource populated as follows:
    a. Resource Type: Variable
    b. API Name: RecordID
    c. Data Type: Text
    d. DO NOT check the box for ‘Allow multiple values (collection)’



14. Click Done
15. Double-click the ‘Assign Contact Owner’ node

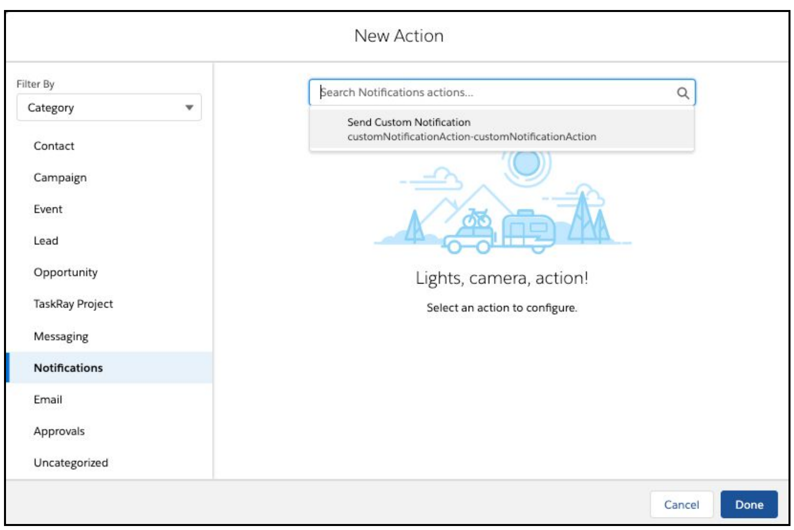
16. Modify the Assignment as follows:

a. Delete the contents of the Variable field and replace it with the {!RecipientCollection} variable
b. Change the Operator to 'Add'
c. Delete the contents of the Value field and replace it with {!Get_Contact_Record.OwnerId}
d. Add a new line where the {!RecordID} variable Equals {!Get_Contact_Record.Id}



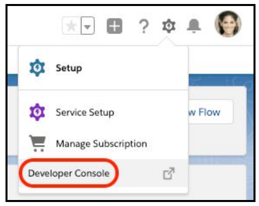
17. Click Done
18. Click on the Post to Chatter Action and delete it by clicking the trash can

19. In the Elements tab in the Flow Toolbox, drag a new Action into the same location as the Chatter Action you just deleted
20. Select Notifications from the column and select Send Custom Notification:



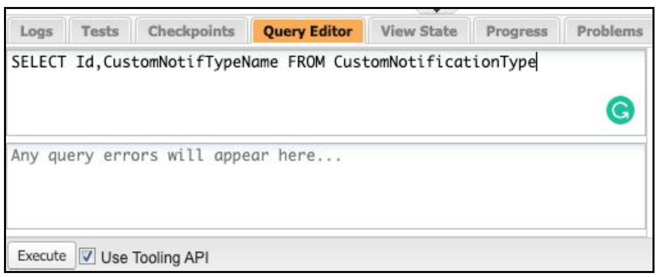
21. An Action Edit Screen will populate

22. Duplicate your Salesforce tab so that you're able to access another screen in Salesforce besides your Flow. Click the gear icon in the upper right-hand corner of your screen and select Developer Console:

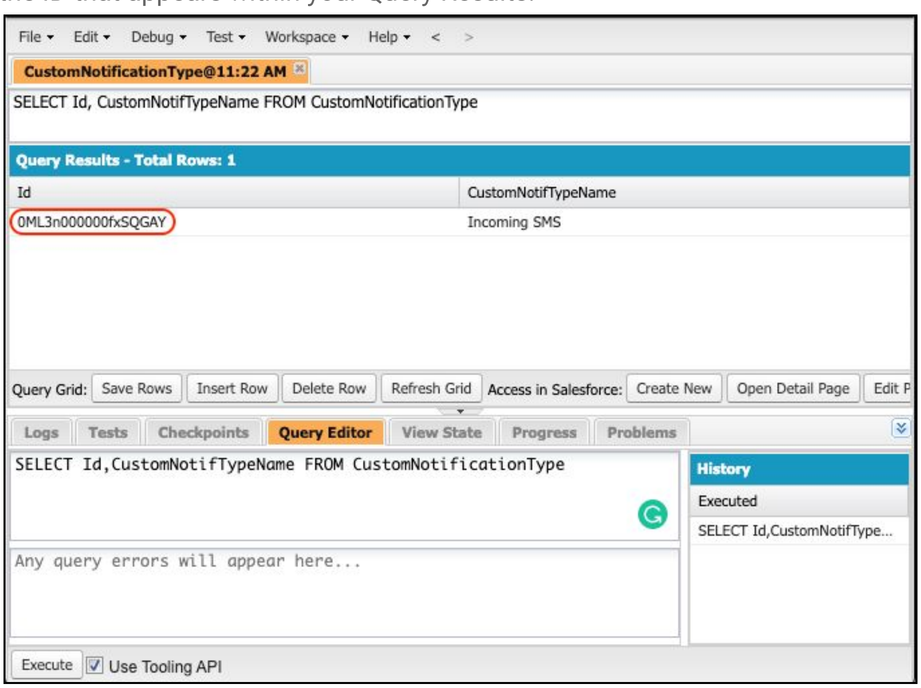


23. Select the Query Editor tab, check the Use Tooling API checkbox, and paste the following Query in the field as shown:

SELECT Id,CustomNotifTypeName FROM CustomNotificationType

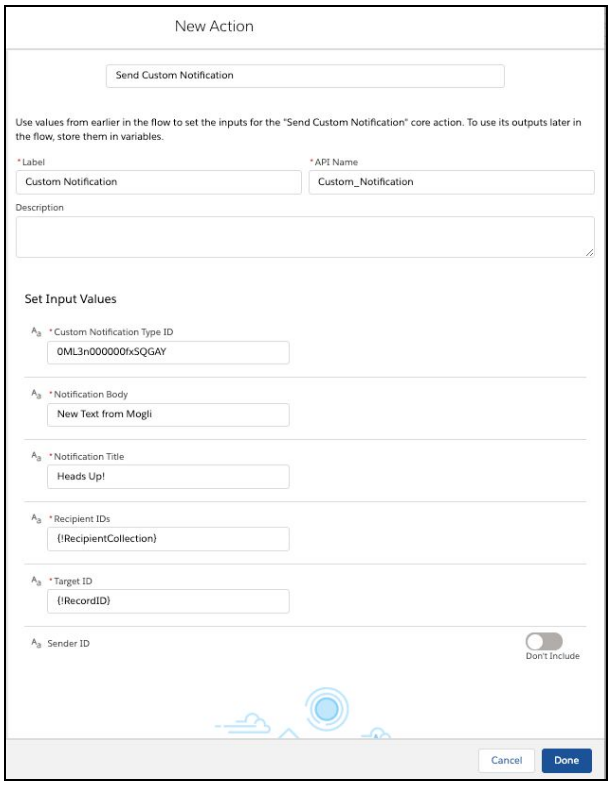


24. Click Execute
25. Copy the ID that appears within your Query Results:

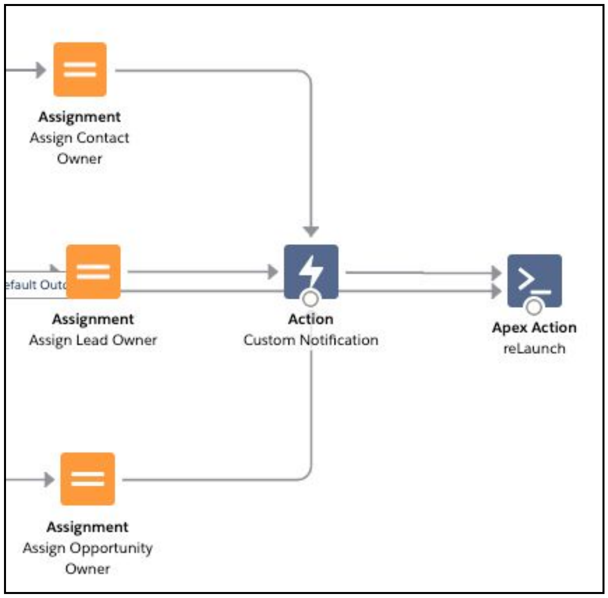


26. Access the tab with your Flow and continue populating the Action as follows:

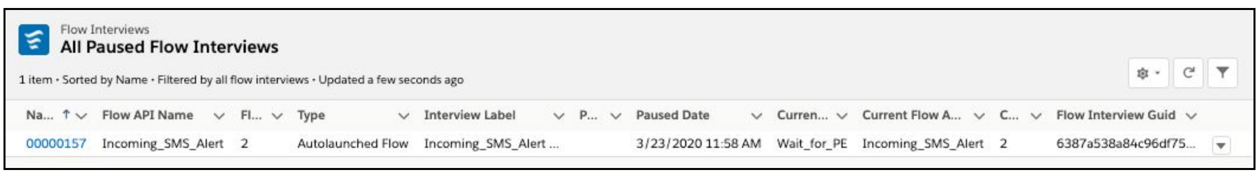
a. Label: Custom Notification
b. Custom Notification ID: paste the ID from the Developer Console
c. Notification Body: enter the desired content of the push notification
d. Notification Title: enter the desired title of the push notification
e. Recipient IDs: select the RecipientCollection collection variable you created earlier
f. Target ID: select the RecordID variable you created earlier
g. Click Done



27. Drag the nodes from each Assignment to the Custom Notification Action, and drag the node from your Custom Notification Action to the Apex Action (reLaunch):



28. Click Save, Activate, and Run
29. In Setup, enter ‘Paused’ and select Paused Flow Interviews. You should see your Flow waiting to run when an incoming SMS arrives:


Flow Interviews
All Paused Flow Interviews
1 item • Sorted by Name • Filtered by all flow interviews • Updated a few seconds ago

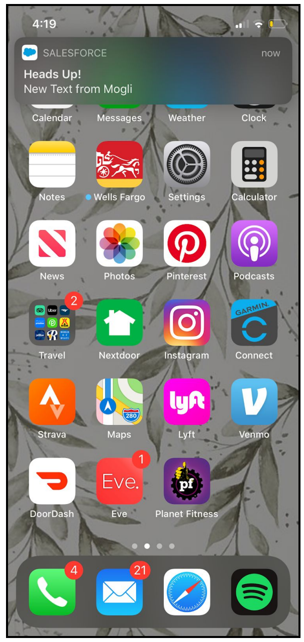
Na...	Flow API Name	Fl...	Type	Interview Label	P...	Paused Date	Curren...	Current Flow A...	C...	Flow Interview Guid
00000157	Incoming_SMS_Alert	2	Autolaunched Flow	Incoming_SMS_Alert ...		3/23/2020 11:58 AM	Wait_for_PE	Incoming_SMS_Alert	2	6387a538a84c96df75...

Configure Mobile Settings

30. Ensure that you and your users have downloaded the Salesforce mobile app on their devices
31. Ensure that your mobile device’s settings allow for push notifications on Salesforce
32. From within the Salesforce mobile app, access your profile (avatar or picture) > Settings > Push Notification Settings > turn on for Incoming SMS

Test:

33. Send an incoming text to one of your Gateways (be sure you’re the owner of your own test Contact). Your mobile device should display a notification like this:



34. Clicking on the push notification will open up to the Contact's record within Salesforce mobile app so that you may respond right away.

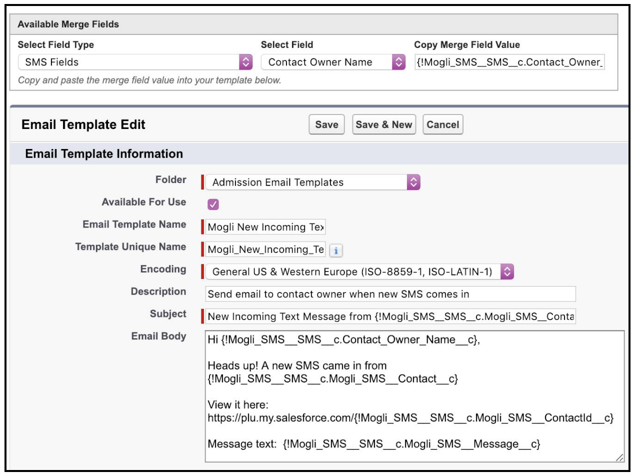
EMAIL NOTIFICATIONS

(entails the creation of 1 Email Template, 2 Workflow Rules, and 1 custom field on SMS)

In this example, we're going to send an email to a Contact Owner when an incoming text arrives.

<u>Create your notification Email Template</u>

1. From Setup, enter Email, and select Classic Email Templates
2. Click New Template
3. Select the Text radio button and click Next
4. Select SMS Fields from the dropdown, select Available for Use, populate your Email body with your fields of choice, and Save:



Create a custom field on the SMS record

1. From Setup, select Object Manager, and select SMS
2. Click Fields & Relationships > New
3. Select the Email radio button
4. Label the field Contact Owner Email, and select Next, Next, and Save
5. Assign and place the field accordingly on the SMS page layout
6. Ensure you've got access to this field within the SMS Site profile

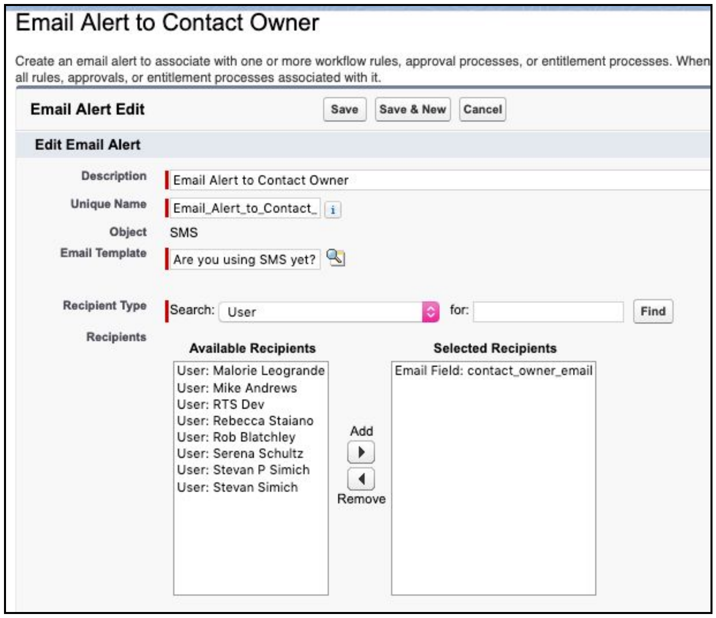
Create a Workflow Rule to populate Contact Owner Email

1. From Setup, enter Workflow Rules and select Workflow Rules
2. Click New Rule and entitle the Workflow Rule: Update Contact Owner Email
3. Trigger the workflow rule on record creation
4. For criteria, enter Direction equals Incoming, click Save & Next
5. Click the Add Workflow Action dropdown menu and select Field Update
6. Enter the formula to set the new value. In the Formula Editor, type in: Mogli_SMS__Contact__r.Owner.Email
7. Activate

Create a Workflow Rule called 'Send Email to Contact Owner'

1. From Setup, enter Workflow Rules, and select Workflow Rules
2. Click New Rule
3. Base the workflow on the SMS record and click Next
4. Set your Evaluation and Rule Criteria as follows:

5. Click Save & Next
6. Click the Add Workflow Action dropdown menu and select New Email Alert
7. Attach the Email Template you've just created
8. In the Recipient Type dropdown, search for Email Field and pull in your custom field named Contact Owner Email. Save and Test.



TEXT MESSAGE NOTIFICATIONS

(entails creation of 1 custom field and 1 Process Builder)

In this example, we're going to send a text message to Contact Owners when an incoming text arrives. The text will be sent to their personal cell phone number and contains a link to the Contact's record. Clicking on the link will open up the Contact's record within the Salesforce mobile app so that the Contact Owner may continue the conversation from there.

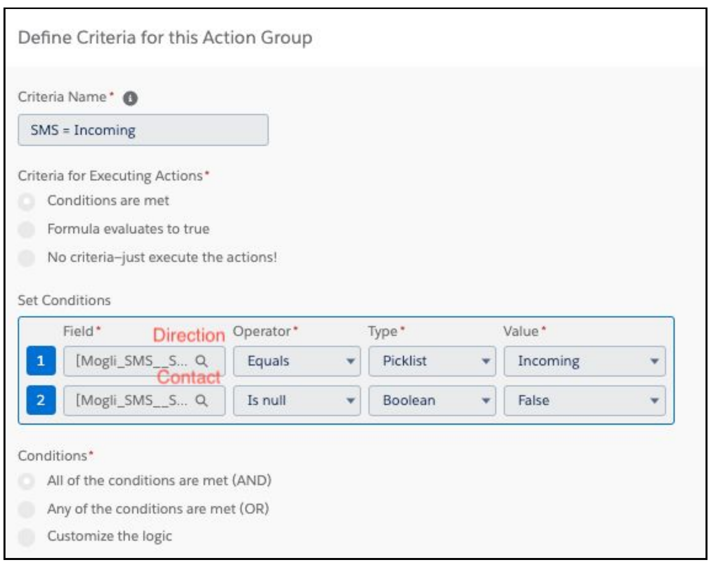
<u>Create a custom field on the User Detail record called 'Mogli-Formatted Mobile'</u>

1. From Setup, select Object Manager and click User
2. Click Fields & Relationships
3. Click New
4. Select the Text radio button and click Next
5. Enter a Field Label of Mogli-Formatted Mobile, a Length of 20 and click Next, Next, and Save
6. Access your user detail record and populate the Mogli-Formatted Mobile field with your number in this format: **+12223334444**

<u>Create a Process Builder on the SMS object called Incoming Text Message Notification to Contact Owner</u>

1. Start your process when a record changes
2. Start the process when a record is created
3. Check the box for Recursion:

4. Define your criteria for SMS = Incoming where all conditions are met:

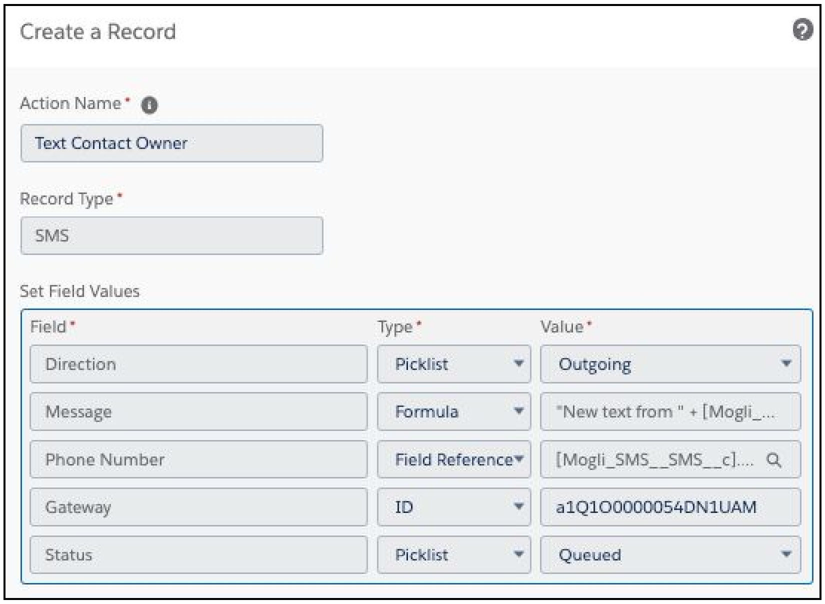


5. For Immediate Actions, select Create a Record for the Action Type. Name the Action “Text Contact Owner.” Select SMS as the Record Type. Populate the fields as follows, and Save:

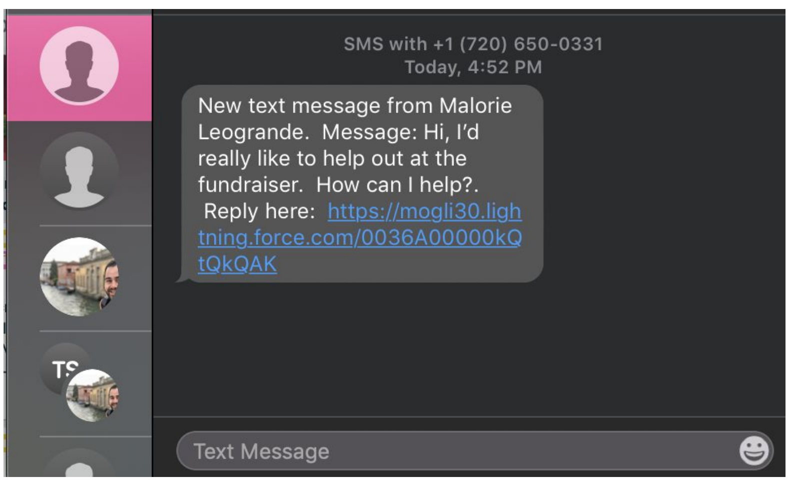
- Direction = Outgoing
- Message = Sample

*"New text message from " + **[Mogli_SMS__SMS__c].Mogli_SMS__Contact__c.FirstName** +" "+**[Mogli_SMS__SMS__c].Mogli_SMS__Contact__c.LastName** + ". Message: " +**[Mogli_SMS__SMS__c].Mogli_SMS__Message__c** +" Reply here: https://YourURLHere/"+**[Mogli_SMS__SMS__c].Mogli_SMS__Contact__c.Id***

- Phone Number = field reference from SMS > Contact > Owner > Mogli-Formatted Mobile
- Gateway = ID of choice
- Status = Queued



Activate and test. Here's an example text message notification:



MORE ON NOTIFICATIONS

I can't see the Mogli Notifications component in the Utility Bar.
Ensure that you're in the **Mogli SMS Lightning** app. If you're in Salesforce Lightning and in the **Mogli SMS** app, you won't be able to access Mogli Notifications. If you're in the Mogli SMS Lightning app and still cannot see Mogli Notifications in the Utility Bar, try deploying a Lightning Domain to your users. Here's a quick how-to article.

Where can I see the Notification Settings for all users?
Click the Notification Settings tab and select the appropriate fields to display so that you can view the notification settings each user has selected.

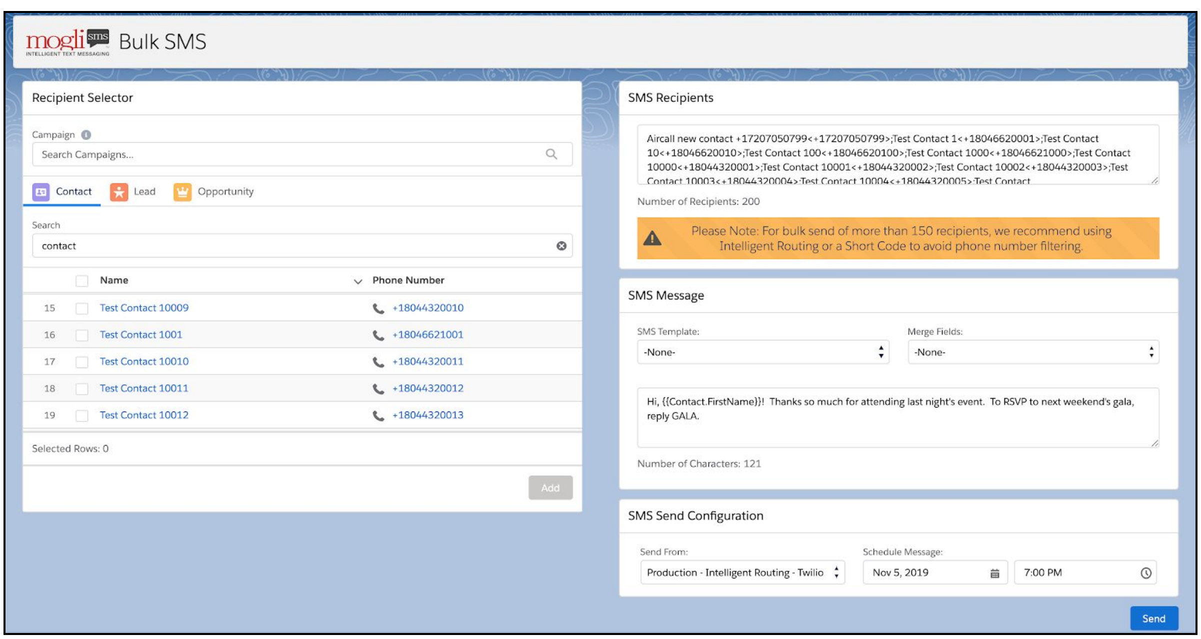
BULK MESSAGES

GET THE WORD OUT

Use the Bulk SMS tab or Contact and Lead list views to send a message to multiple recipients at a time.

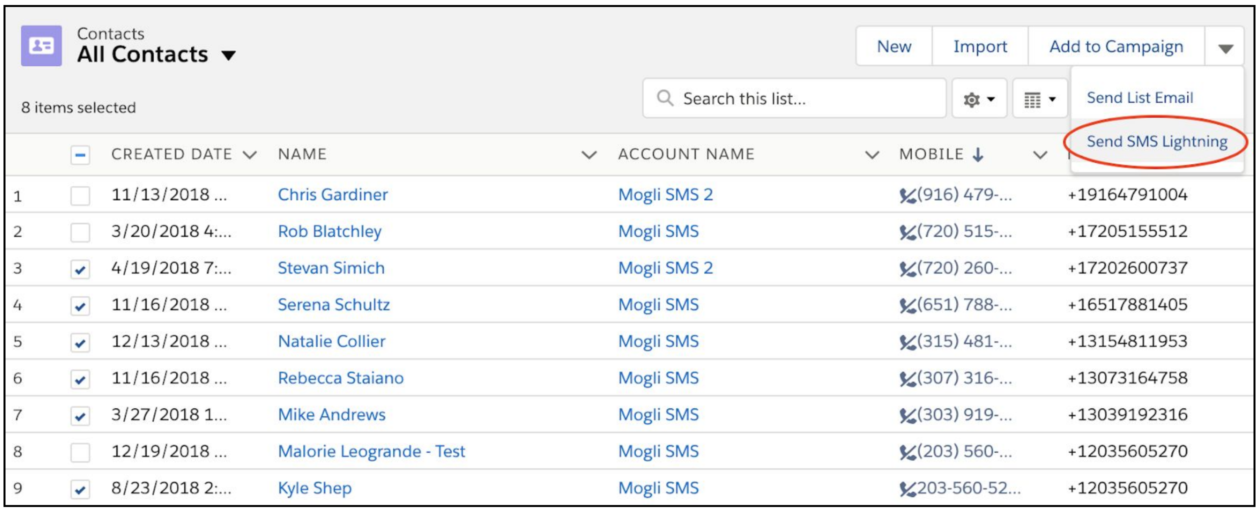
BULK SMS TAB

1. Be sure your intended recipients have a Mogli Number populated on their Contact or Lead record
2. Click the Bulk SMS tab
3. Select your recipients by adding a Campaign or SMS-configured Object, or manually adding Leads and Contacts. You'll see that your recipients will auto-populate in the SMS Recipients field to the upper right (If adding a Campaign, ensure that it's Active)
4. In the SMS Message section, manually type a message, pull in merge fields, or add an SMS Template
5. In the SMS Send Configuration section, choose the Gateway in the Send From drop-down menu. Keeping the Gateway at Default will send the message from the Default Gateway as listed on each recipient's record. If there is no Default Gateway listed on their record, the message will be sent via the Global Default Gateway as found in Application Settings. For < 150 recipients, feel free to send over a single phone number. For > 150 recipients, best practice is to select Intelligent Routing
6. Schedule the message if you'd like
7. Send



CONTACT AND LEAD LIST VIEWS

1. Be sure your intended recipients have a Mogli Number populated on their Contact or Lead record
2. Go to a Contact or Lead list view
3. Select your recipients (Up to 200 - Salesforce limitation)
4. In the upper right corner of the list view, click the caret and choose Send SMS Lightning
5. The Bulk SMS screen will auto-populate with your intended recipients



		CREATED DATE	NAME	ACCOUNT NAME	MOBILE	
1	☐	11/13/2018 ...	Chris Gardiner	Mogli SMS 2	(916) 479-...	+19164791004
2	☐	3/20/2018 4:...	Rob Blatchley	Mogli SMS	(720) 515-...	+17205155512
3	☑	4/19/2018 7:...	Stevan Simich	Mogli SMS 2	(720) 260-...	+17202600737
4	☑	11/16/2018 ...	Serena Schultz	Mogli SMS	(651) 788-...	+16517881405
5	☑	12/13/2018 ...	Natalie Collier	Mogli SMS	(315) 481-...	+13154811953
6	☑	11/16/2018 ...	Rebecca Staiano	Mogli SMS	(307) 316-...	+13073164758
7	☑	3/27/2018 1...	Mike Andrews	Mogli SMS	(303) 919-...	+13039192316
8	☐	12/19/2018 ...	Malorie Leogrande - Test	Mogli SMS	(203) 560-...	+12035605270
9	☑	8/23/2018 2:...	Kyle Shep	Mogli SMS	203-560-52...	+12035605270

NOTE: If the Mogli Opt Out checkbox = TRUE on your recipient's Contact or Lead record, and you attempt to send to them as part of a Campaign, they will not be added as a recipient in your bulk send.

ADMIN TIP: After sending a large bulk message (>1,000 recipients), it's best practice not to send or schedule another large bulk message until your initial send has processed. To monitor processing, access the Async Tasks tab and select the All list view. While your send is processing, you'll notice that the number of Async Task records dissipate as you refresh the list. Also monitor the SMS tab to ensure your messages contain a status of Sent Successfully before sending or scheduling another bulk message. Note that much larger sends (>5,000) may take several minutes to send. As long as the Async Tasks are dissipating, the send is processing. **If you notice that the Async Tasks do not dissipate after 15 minutes or if your SMS records remain in Queued Status, please contact us.**

MORE ON BULK MESSAGES

I've sent out my Bulk Message, but they're showing a status of Queued in the SMS tab.
With large bulk message sends, sometimes messages are delivered in batches. As you refresh your list view, you should see less and less Queued messages and more with a status of Sent Successfully. If you feel that messages have been in Queued status for longer than expected, ensure that your intended recipients each have a correctly-populated Mogli Number. If you find the need to correct some Mogli Numbers, please delete the Queued SMS records, modify the Mogli Numbers, and try again. Please reach out to our team if the messages are still appearing as undelivered.

How do I mass delete SMS records?
Check the boxes for your intended records to delete and click the Mass Delete button.

LIGHTNING: If you don't see the Mass Delete button, install Mass Delete from the AppExchange.

1. From Setup > enter Visualforce in the search bar and select Visualforce Pages
2. Click 'Mass_Delete_Account'
3. Clone and rename to 'Mass_Delete_SMS'
4. In the code itself, change 'standardController="Account"' to 'standardController="Mogli_SMS__SMS__c"'
5. Save
6. From Setup > Object Manager > SMS > Buttons, Links, and Actions
7. Click New Button or Link
    a. Label: Mass Delete
    b. Name: Mass_Delete_Records
    c. Display Type: List Button
    d. Behavior: Execute Javascript
    e. Content Source: Visualforce Page
    f. Content: Mass_Delete_SMS
8. Save
9. SMS > Search Layouts > List View > Edit > move Mass Delete to Selected Buttons
10. Save
    a. If Mass Delete for Classic is already installed in the org, there will already be a Mass Delete selection in the Selected Buttons column. Please ignore.
11. Repeat this process for any other Custom Objects you'd like

CLASSIC: If you don't see the Mass Delete button, from Setup, go to Object Manager or enter Objects in the search box. Select the SMS object. Click Search Layouts > List View. Click the drop-down arrow and select Edit. In the Available Buttons section, move Mass Delete to Selected Buttons.

How can I add Contacts and Leads to a Campaign?
Create and run a report of the Contacts and Leads you wish to add to the Campaign. Click the drop-down caret and select 'Add to Campaign.' Contacts and Leads can also manually be added to Campaigns by selecting the 'Add to Campaign' button via your Contact and Lead list views.

INTELLIGENT ROUTING

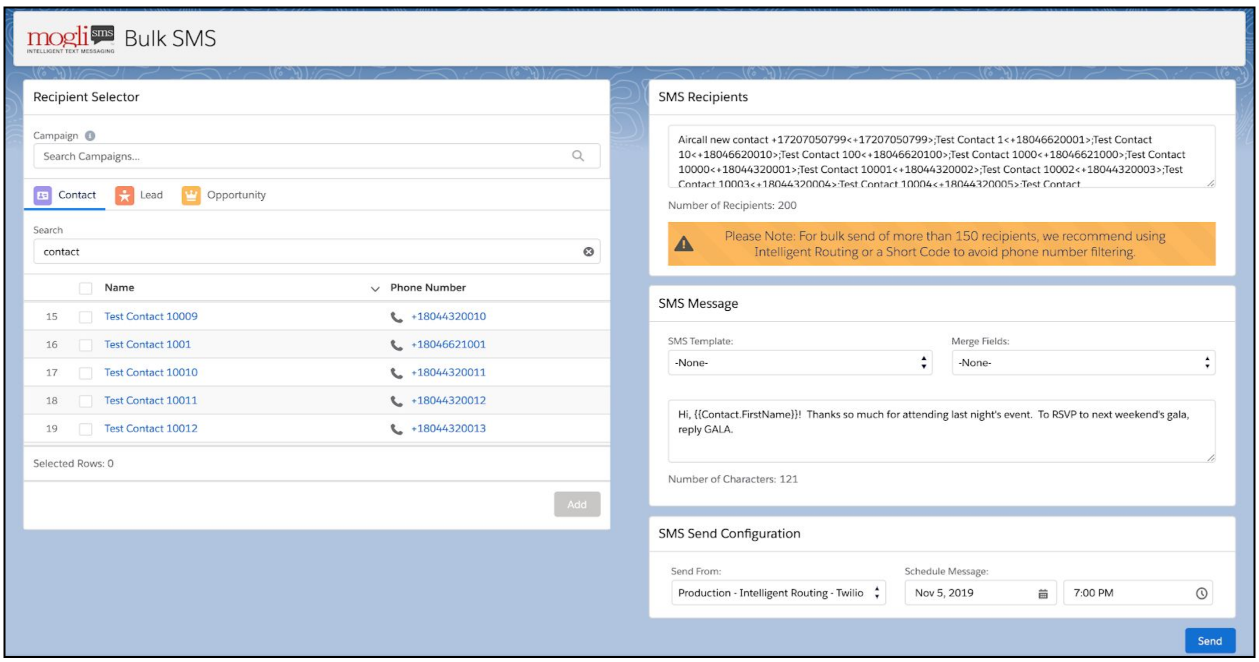
MAXIMIZE YOUR EFFICIENCY WITHOUT AN EXPENSIVE SHORT CODE

Intelligent Routing is Mogli's way of significantly reducing the cost of bulk messages. If you plan on sending messages to more than 150 recipients at once, this is the option for you.

Intelligent Routing allows you to disperse bulk traffic across many phone numbers for significantly faster throughput. Mogli will remember the number it used for each Contact so that it uses that same number again in the future.

HOW IT WORKS

1. Navigate to the Bulk SMS tab
2. Attach a Campaign or manually add Leads or Contacts
3. Attach an SMS Template or type directly in the Message field
4. In the From dropdown, select Intelligent Routing



MORE ON INTELLIGENT ROUTING

What are my options if I want to use a short code instead of Intelligent Routing?
We offer short codes at pass-through pricing, sourcing them from several different organizations. They charge $1000 per month to lease and host the short code, or $11,000 per year if paid in advance. There is a one time setup fee of $650 and the short code takes roughly 8-12 weeks to procure (short codes require application and use case approval by the carriers). Messages are 3/4 of a cent per message plus any carrier fees. Because all of our messaging is at cost (we don't take margin on messaging) you're getting a much lower rate than with most companies that take margin on every message you send. Short code pricing is pretty well regulated. The differentiator is typically how much the provider charges for messages. Typically, organizations choose short codes for a greater throughput of messages.

With Intelligent Routing, you can spread traffic across a pool of phone numbers to get that same (or better) throughput. There's also no procurement time or setup fee. And Mogli will remember the number it used for each Contact so future messages come from that same number.

WHATSAPP

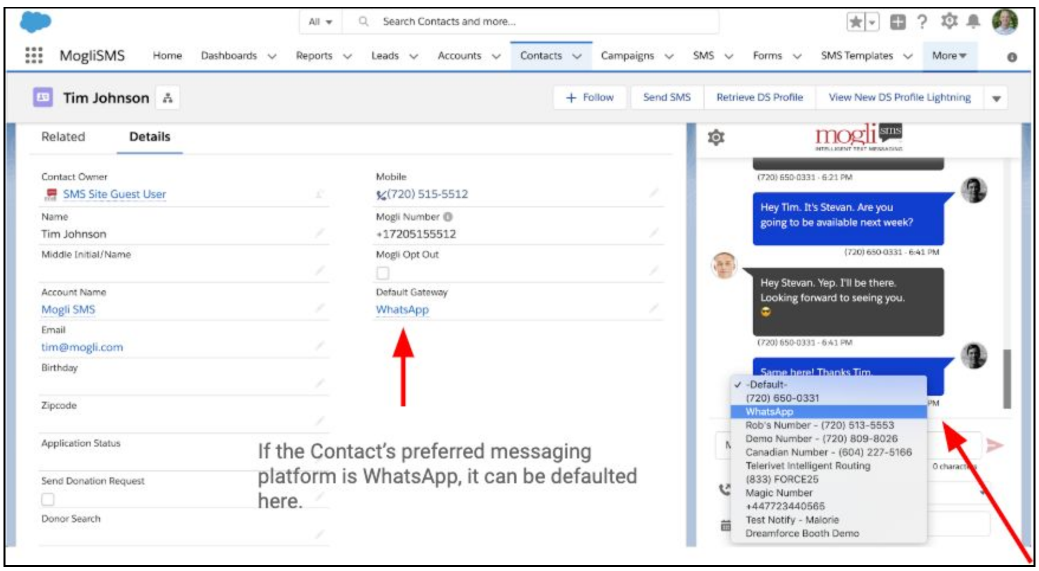
REACH MORE PEOPLE WITH OUR WHATSAPP INTEGRATION

Available for Elite and Enterprise plans. Interested? Reach out to our team for more information.

HOW IT WORKS

1. In order for our team to integrate Mogli SMS with WhatsApp, your business or organization will need to go through an approval process through our messaging partner
2. Our team with work with yours to get you set up with phone numbers and WhatsApp-approved templates

Your WhatsApp Gateway will appear just as your others in the drop-down menu in Conversation View:



MORE ON WHATSAPP

What are some typical use cases and benefits for using WhatsApp?
WhatsApp is a cross-platform free app that utilizes an internet connection to send messages, rather than over your mobile network. WhatsApp with Mogli SMS supports customer/constituent care and notifications.

How does it work?
WhatsApp requires users to have pre-approved templates for initiating conversations. Once a message is initiated and the recipient responds, there is a 24-hour window that the Mogli user may send any message to the recipient. This 24-hour window restarts every time the recipient sends an incoming message back to the WhatsApp Gateway. **See a short video of how it works** here.

What are the associated costs of WhatsApp?
WhatsApp functionality is an add-on feature of Mogli SMS. Contact our team for more information.

How long does it take to get up and running with WhatsApp?
It can take up to a few weeks to get up and running with WhatsApp.

1. Approval - applicants will need to fill out a form to request WhatsApp access. Applications are processed weekly.
2. Number configuration - a WhatsApp Business Profile must be created using an existing number. This is a part of the application process.
3. Template approval - templates must be approved by WhatsApp (can take 3-4 days)
4. Account verification

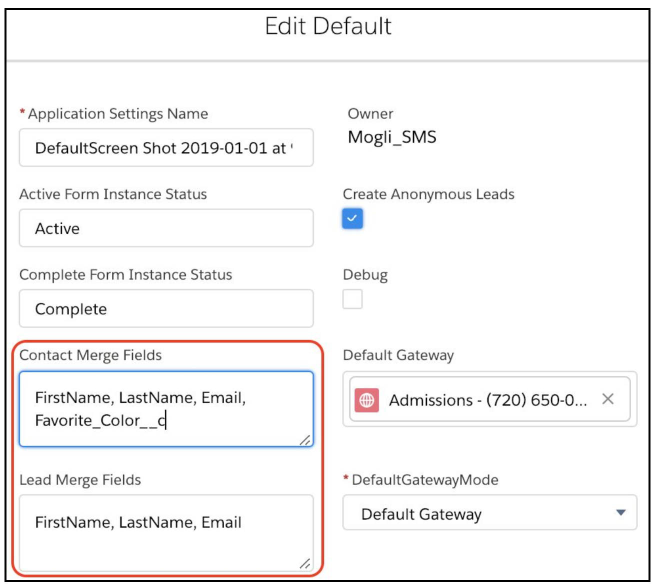
MERGE FIELDS

PERSONALIZE YOUR MESSAGES

In 1:1 Conversations and SMS Templates, any Standard or Custom fields from the Contact or Lead object may be used as merge fields, and must first be configured in Application Settings.

CONFIGURE CONTACT AND LEAD MERGE FIELDS

1. Go to the Application Settings tab and select Default
2. Populate your chosen standard or custom Contact and Lead merge fields in the fields labeled Contact Merge Fields and Lead Merge Fields. Use the API format. Custom fields must include __c at the end. Separate each merge field with a comma and space
3. Save. Your merge fields are now ready for use



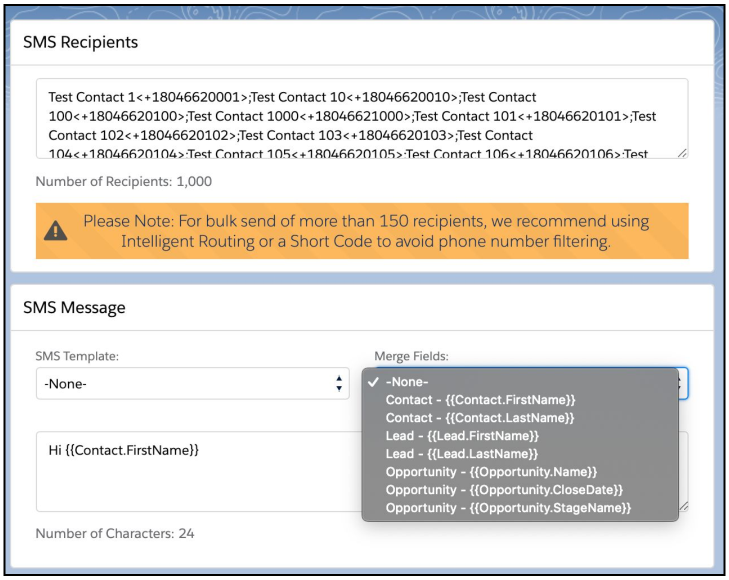
USING MERGE FIELDS IN SMS TEMPLATES AND 1:1 CONVERSATIONS

Enter merge fields in double curly brackets like this: **{{Favorite_Color__c}}** or **{{FirstName}}.**

> **Example:** *Hi, {{FirstName}}. Don't forget about your appointment tomorrow at 1:00PM. See you then!*

USING MERGE FIELDS IN BULK MESSAGES

From the Bulk SMS page, select merge fields in the Merge Fields dropdown menu:



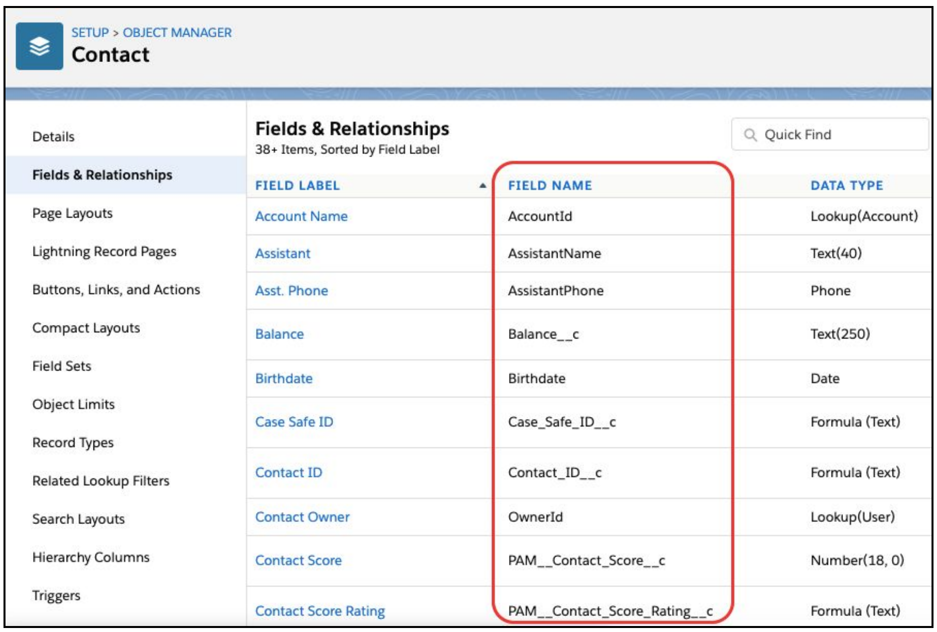
NOTE: Any merge fields you configured on Objects besides Contact and Lead will appear in the dropdown menu.

<u>**WATCH THIS 60-SECOND MOGLI MINUTE ON MERGE FIELDS**</u>

MORE ON MERGE FIELDS

How do I populate the Contact Owner merge field in a text message?
If you attempt to use the API name of Contact Owner field, OwnerID, that will populate a 15-digit string in your text message. Instead, create a custom text field named Owner Name, which pulls from the Contact Owner. If you'd like to create a text formula, use: Owner.FirstName &" "& Owner.LastName
Then, add the API name of that field into the Application Settings merge fields and test.

Where do I find the API-formatted names of Contact and Lead fields?
In Lightning, from Setup, click Object Manager. Find the Contact or Lead object and select Fields and Relationships. In the Field Name column, you'll find the API names.



What about merge fields on Person Accounts?
As long as the field you want to reference in your merge field also lives on the Contact Object, populate the merge fields you want to use for Person Accounts within the Contact Merge Fields field in Application Settings. You may choose to add Formula fields to your Person Account records and pull values from fields on the Contact level.

FORM TEMPLATES

OUR DECLARATIVE BREAD AND BUTTER

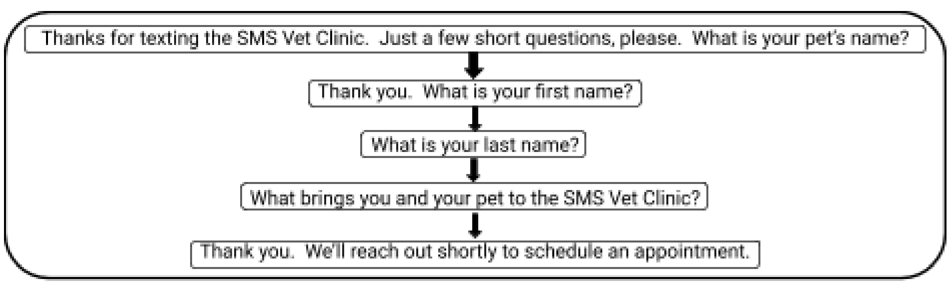
Automated Conversations, any way you like. Linear or Branching.

USE CASES

- Secure Opt-In to Text Messages - *create a keyword that people can text in so that you can ask for opt-in*
- Feedback/Surveys - *obtain feedback about an experience so that you can measure your impact*
- Inquiry Forms - *obtain name, email, and any pertinent info for new or existing Contacts or Leads*
- Inbound Lead and Contact Creation - *display your keyword and number to generate new connections*
- Text to Donate - *donate to a cause via a link with a pre-populated form*
- Appointment Confirmations - *confirmations, rescheduling, or canceling*
- Text to Case - *obtain support case info, measure urgency, and provide support*

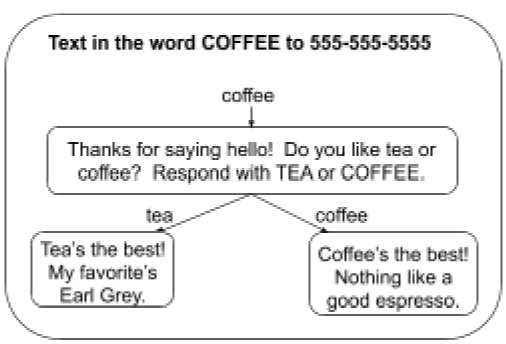
LINEAR FORM TEMPLATES

Everyone gets the same questions.



BRANCHING FORM TEMPLATES

Program your messages according to the recipients' response.



CREATE A LINEAR FORM TEMPLATE

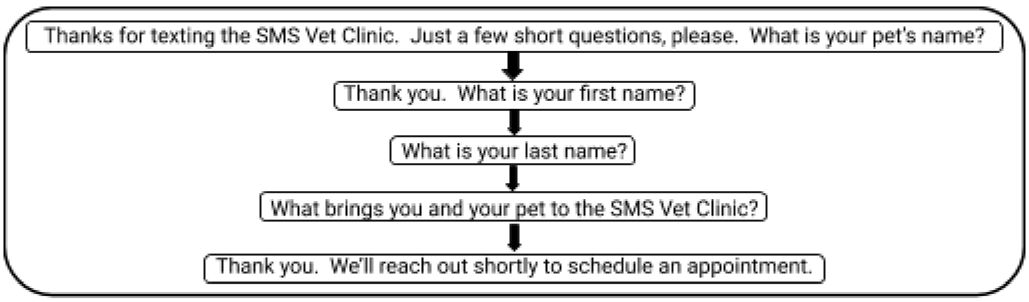
EVERYONE RECEIVES THE SAME SERIES OF QUESTIONS REGARDLESS OF THEIR RESPONSE.

Linear Form Templates are handy for collecting basic information quickly and seamlessly.

BLUEPRINT YOUR SCRIPT

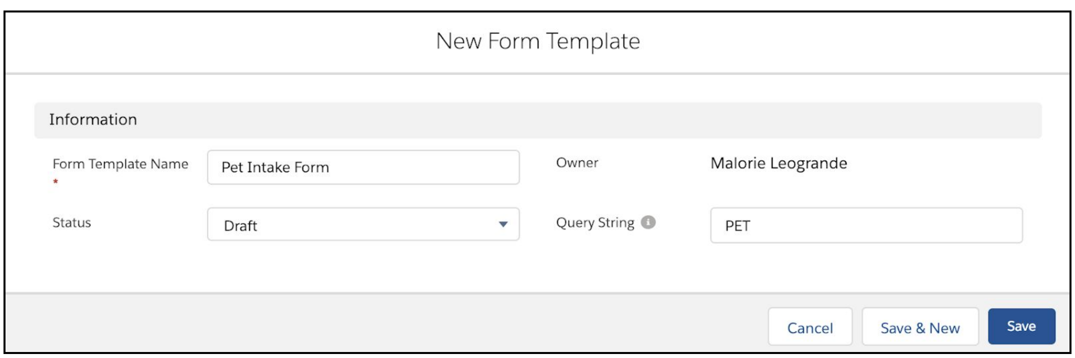
For this example, we're going to create a simple Appointment Intake Form for a Veterinary Hospital.

TEXT THE WORD **PET** TO 555-555-5555 FOR AN APPOINTMENT AT THE SMS VETERINARY CLINIC.



CREATE THE FORM TEMPLATE

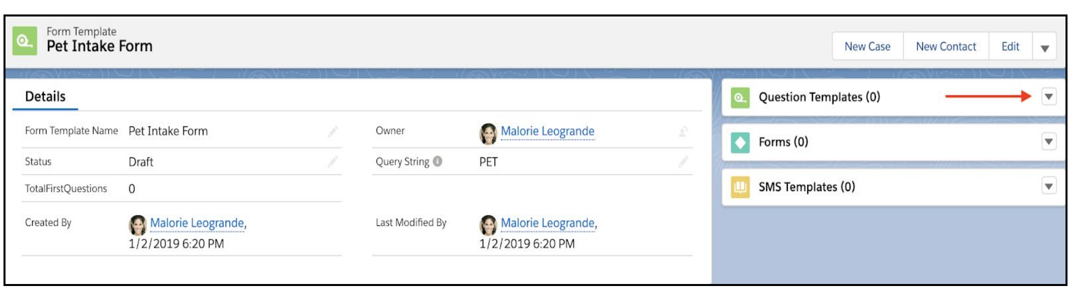
1. Go to the Form Templates tab and select New
2. Name your Form Template and select Draft for the Status
3. Create an inbound keyword and put that in the Query String field (This will be the word someone will text in to initiate the Form Template)



Creating a new Form Template

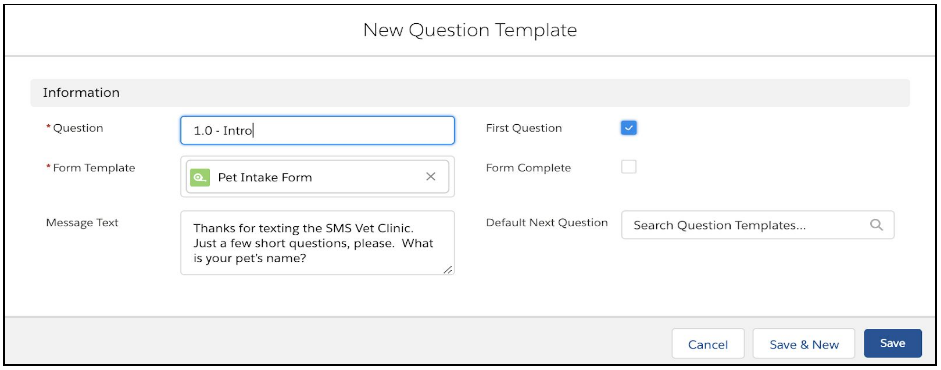
CREATE AND NUMBER YOUR QUESTIONS

1. Click the caret by Question Templates and click New

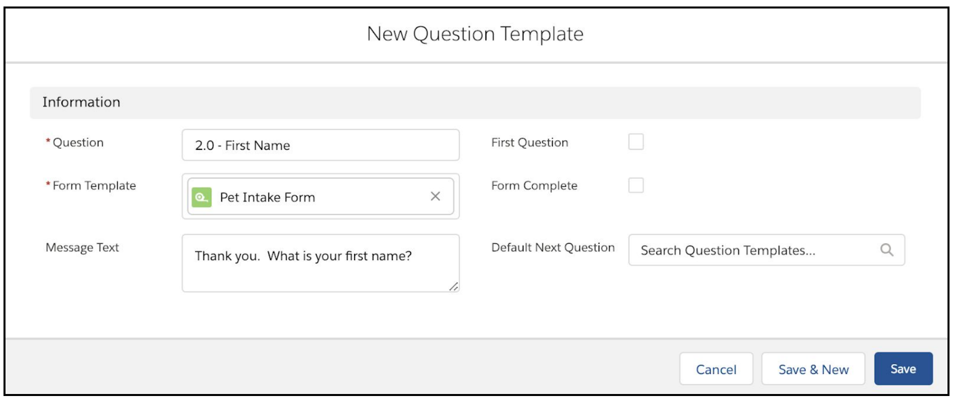


2. Name the question, select the associated Form Template, and enter your Message Text. Since this is the first question that will be sent when someone texts in the word PET, check the First Question checkbox. Click Save & New

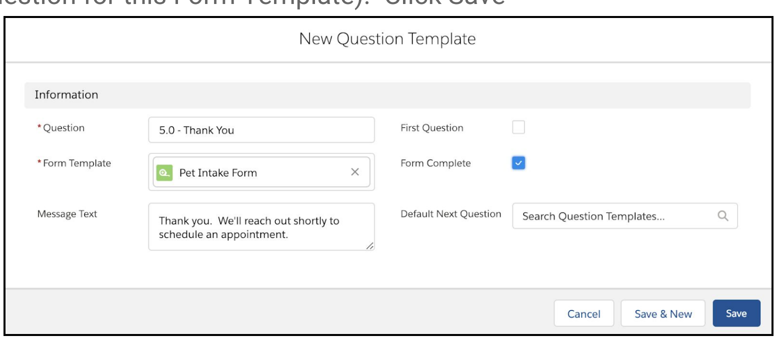
   USER TIP: Number your Question Template Names (1.0, 1.1, 2.0, etc) to easily organize the order.



3. Repeat the step above for your second question, naming it appropriately, and inputting your Message Text. Since this question is neither the first or last, do not check either checkbox for First Question or Form Complete. Click Save & New

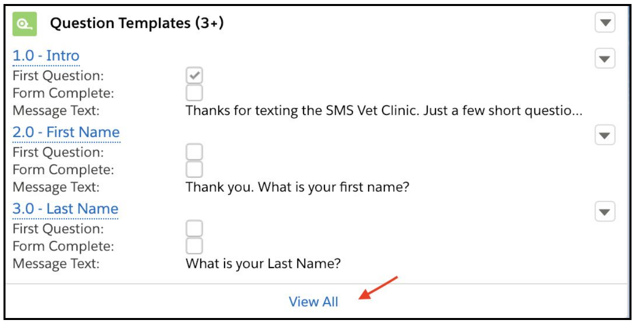


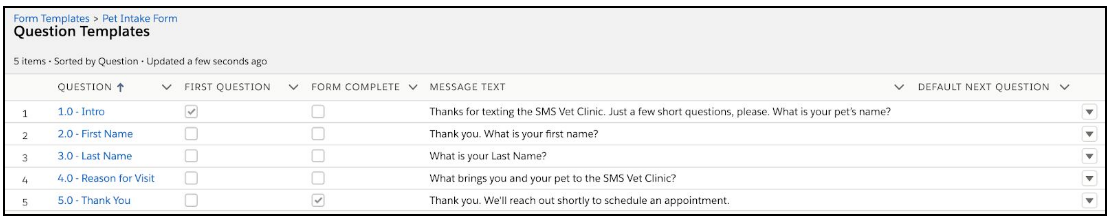
4. Repeat step 3 for “What is your last name?” and “What brings you to the SMS Vet Clinic?” Click Save & New
5. Enter your last question by repeating step 3 and checking the Form Complete checkbox (as this is your final question for this Form Template). Click Save



ORDER YOUR QUESTIONS

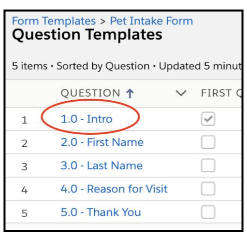
1. In the Question Template section, click View All, which brings you to your list of questions



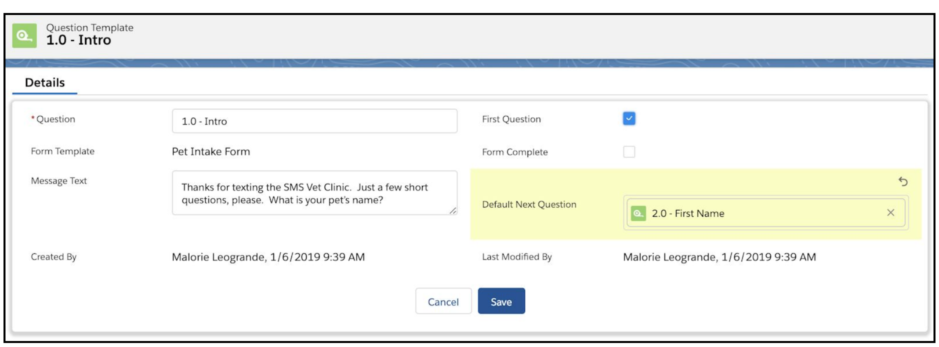


A list of Questions for a Form Template, yet to be ordered

2. Click on your first question, "1.0 - Intro"

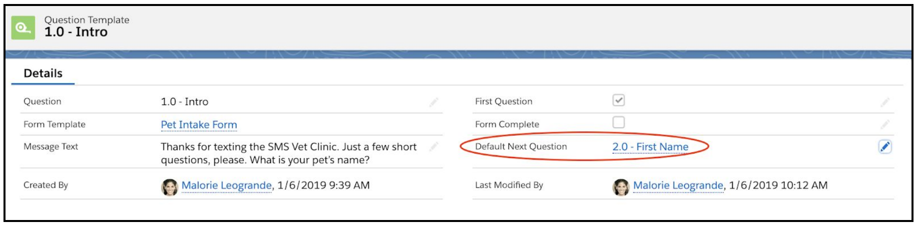


3. In the Default Next Question field, select the question that should come after your first question. In this case, it's "2.0 - First Name." *Then, copy the Message Text of your first question.* (We'll need this later.) Click Save



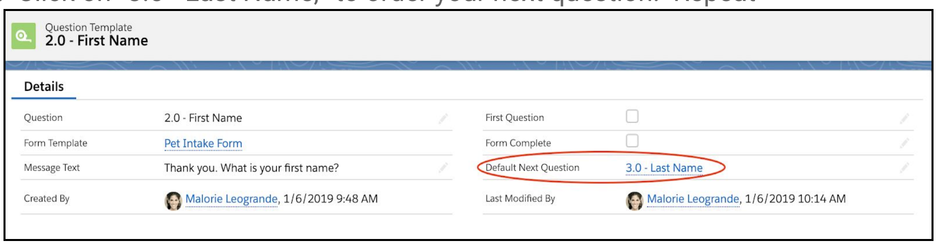
Populating the Default Next Question field with the next Question to come

4. Click on “2.0 - First Name,” to order your next question



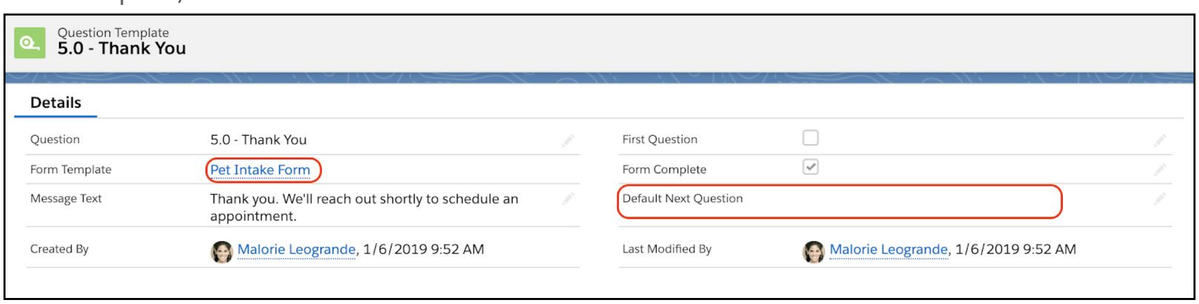
Ordering the next Question

5. In the Default Next Question field, select your next question, which will be “3.0 - Last Name.” Click Save. Click on “3.0 - Last Name,” to order your next question. Repeat



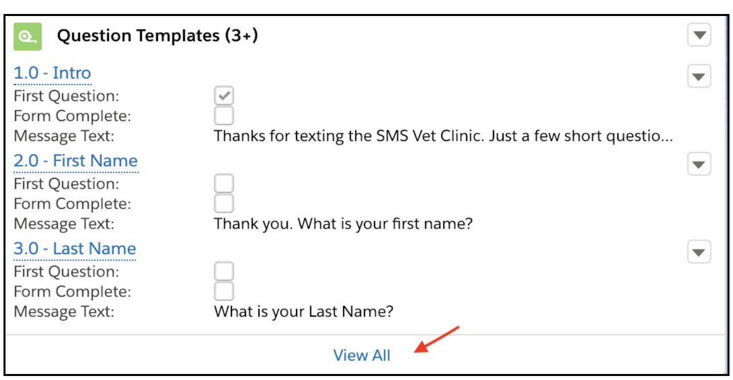
Ordering the next Question

6. Repeat the steps needed to organize your questions. On the last question, leave the Default Next Question field blank, as there are no further questions. Then, click on the name of your Form Template, “Pet Intake Form”

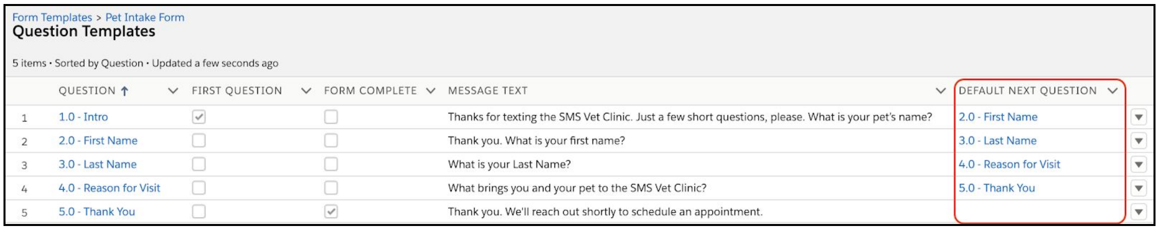


Leaving the Default Next Question field blank for the last Question

7. In the Question Template section, click View All

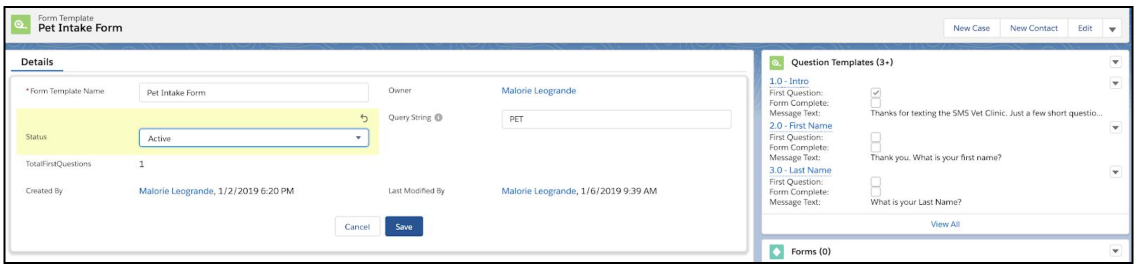


8. Notice your populated Default Next Questions. Double-check that the order of your questions is accurate, and that the First Question checkbox is checked appropriately, as is the Form Complete checkbox



An ordered list of Questions in a Form Template

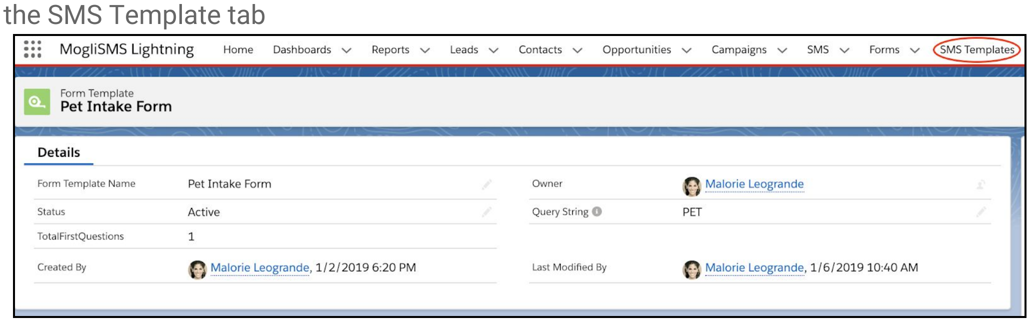
9. Go back to the previous screen and set the Status of your Form Template to Active. Click Save



Setting the Status of the Form Template to Active

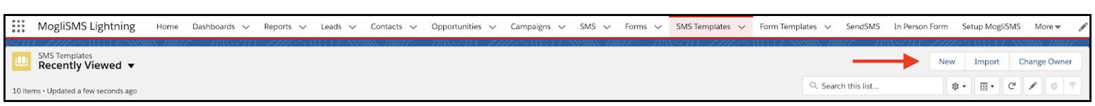
CREATE AN SMS TEMPLATE

1. Click the SMS Template tab

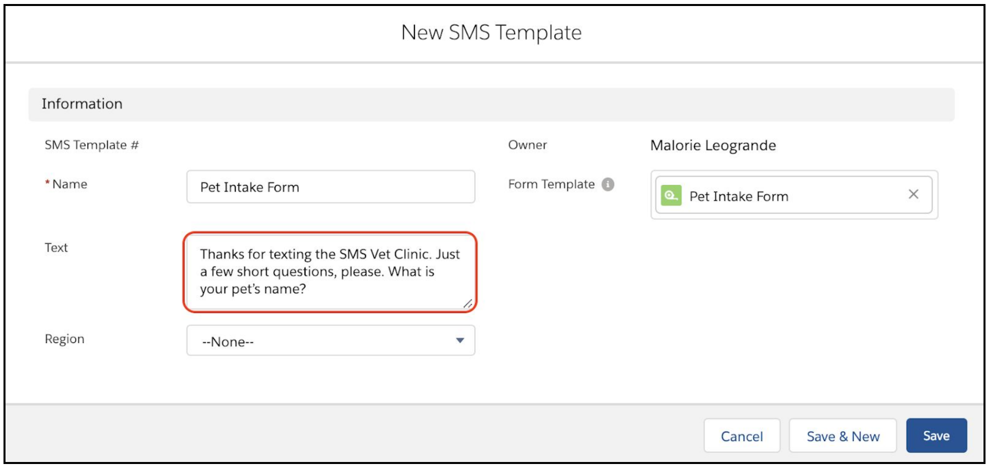


The SMS Template tab

2. Click New



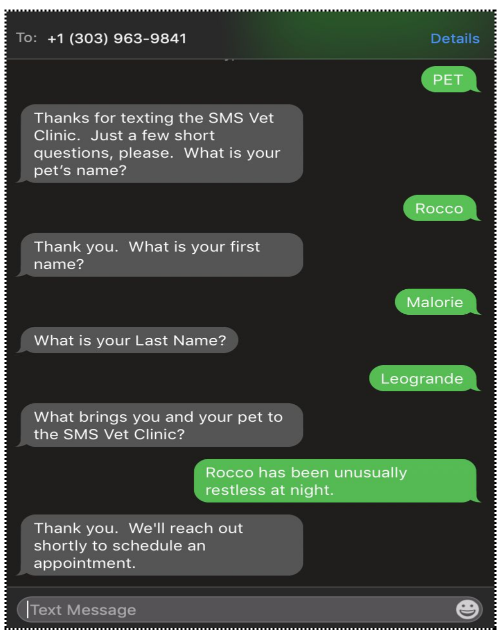
3. Name the SMS Template the same title as your Form Template, and paste the Message Text from your first question into the Text field. **The Text field must contain the EXACT text from your first question in order to work**. Leave the Region field blank, and attach the proper Form Template in the Form Template field. If you cannot locate your Form Template in the SMS Template lookup field, be sure that your Form Template is Active. Click Save



Creating an SMS Template to attach to a Form Template

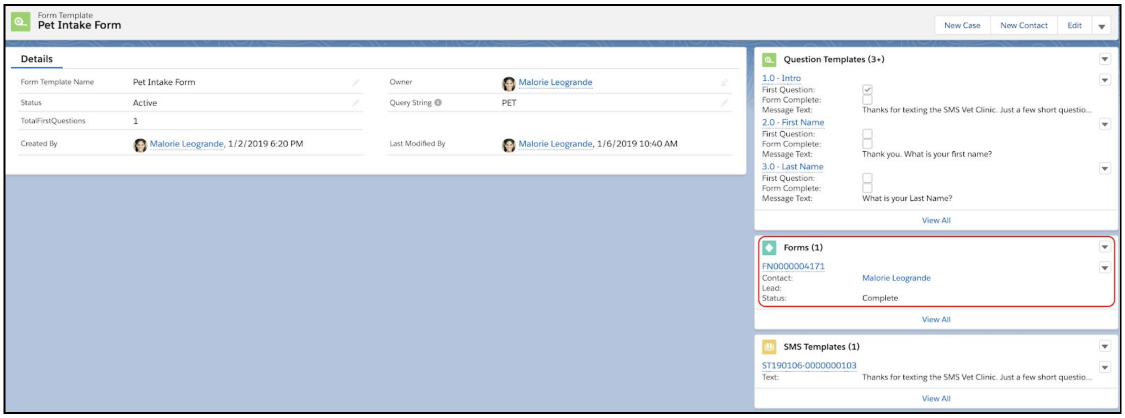
TEST AND CONTEXTUALIZE

1. Using your personal cell phone or messaging service, text in the word PET (or your chosen Query String) to one of your Gateways (phone numbers). As you answer each question, you should be taken to the next as you've ordered it



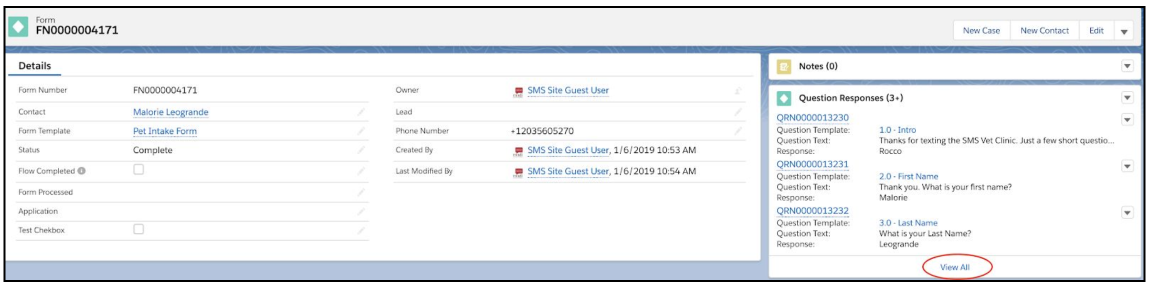
Testing the Form Template with Cell Phone

2. Check to see that your responses are properly stored in the Forms object. Navigate back to the Form Template tab, and select the Form Template you've just tested. Notice that there's now a record stored in the Forms object and that the Status reads 'Complete.' If the status reads 'Active,' that means that someone started answering the questions, but didn't make it all the way to the last question (the question for which you checked the Form Complete checkbox)



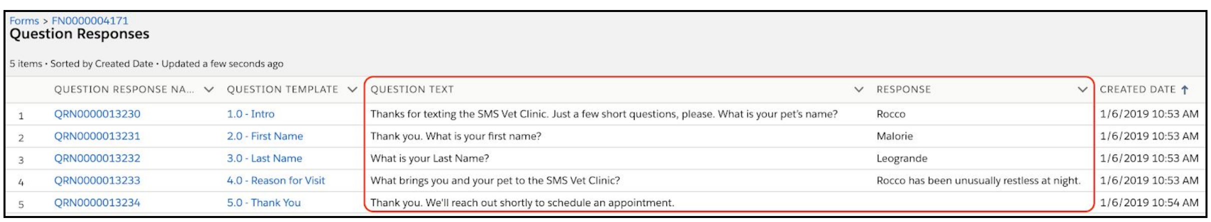
A newly-created Form as stored on the Form Template object

3. Click on the Form Number (starts with 'FN'), and click View All in the Question Response object



The Form record

4. Here, you'll find the responses to the questions asked in the Form Template you just tested



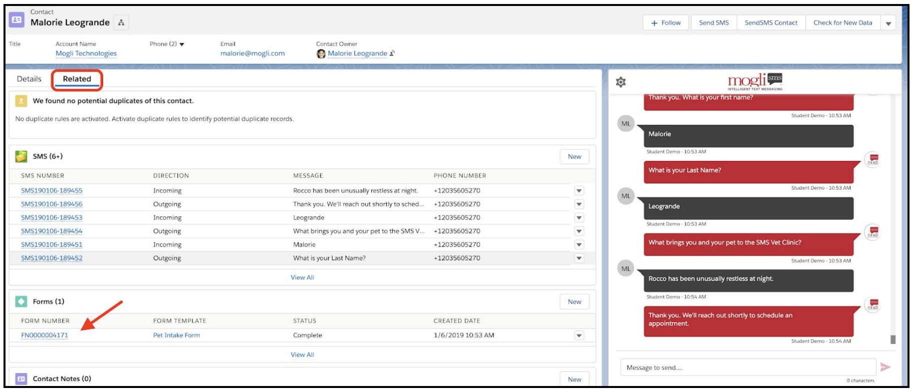
Forms > FN0000004171
Question Responses
5 items • Sorted by Created Date • Updated a few seconds ago

	QUESTION RESPONSE NA...	QUESTION TEMPLATE	QUESTION TEXT	RESPONSE	CREATED DATE
1	QRN0000013230	1.0 - Intro	Thanks for texting the SMS Vet Clinic. Just a few short questions, please. What is your pet's name?	Rocco	1/6/2019 10:53 AM
2	QRN0000013231	2.0 - First Name	Thank you. What is your first name?	Malorie	1/6/2019 10:53 AM
3	QRN0000013232	3.0 - Last Name	What is your Last Name?	Leogrande	1/6/2019 10:53 AM
4	QRN0000013233	4.0 - Reason for Visit	What brings you and your pet to the SMS Vet Clinic?	Rocco has been unusually restless at night.	1/6/2019 10:53 AM
5	QRN0000013234	5.0 - Thank You	Thank you. We'll reach out shortly to schedule an appointment.		1/6/2019 10:54 AM

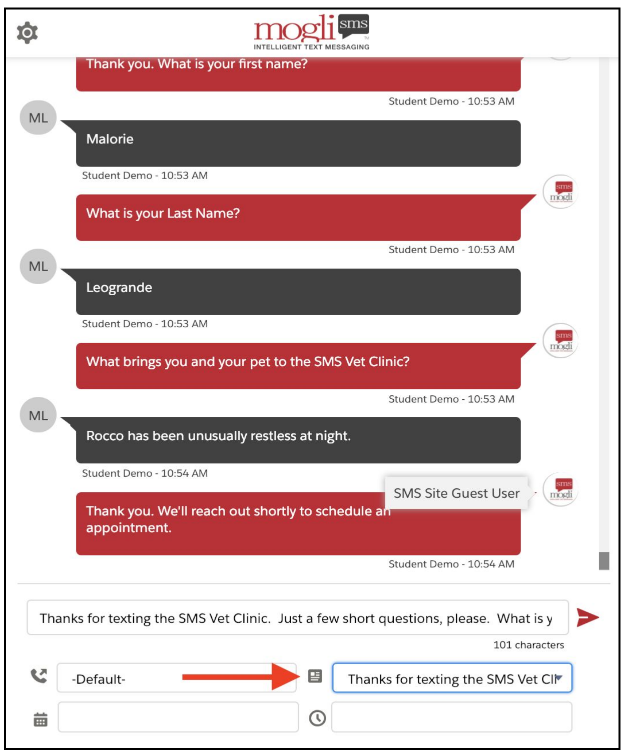
Question Responses in the Form record

5. Navigate to your own Contact record. You'll see that your Form Template conversation is with the SMS Site Guest User in Conversation View. The SMS Site Guest User is used for Form Template conversations and displays as such so that your users can visually discern from an automated text versus one with a user

Click the Related tab. You'll see your newly-created Form record in the Forms Related List:



NOTE: In this example, we've intended that people will text in a keyword (Query String) to initiate the Form Template. Not all Form Template instances will be based on an inbound keyword. Since all Form Templates must be connected to an SMS Template, you can easily initiate the Form Template by attaching it in Conversation View or via a bulk message via the Bulk SMS tab.



CREATE A BRANCHING FORM TEMPLATE

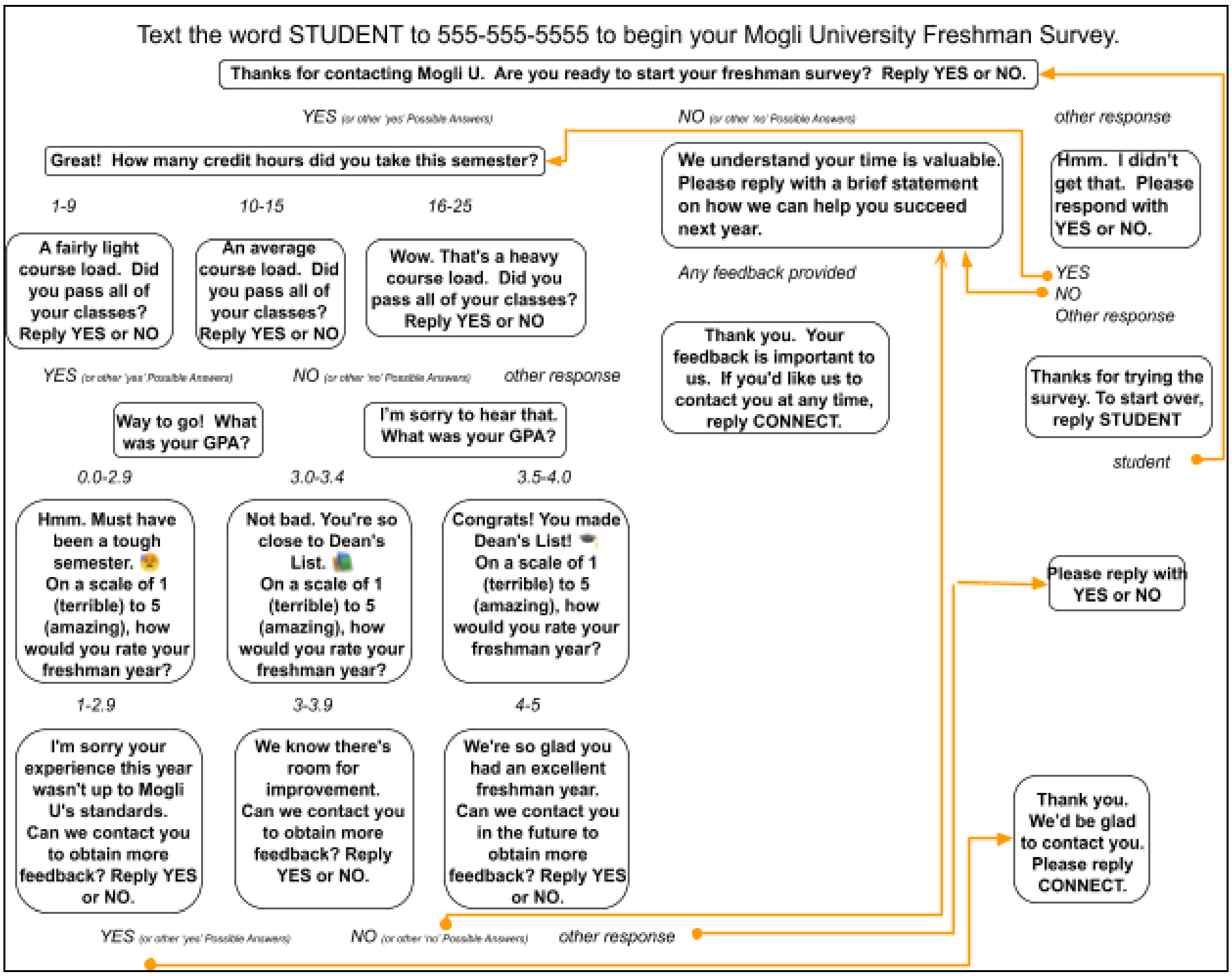
MOGLI CHOOSES THE BEST RESPONSE TO SEND TO THE RECIPIENT BASED ON HOW THEY INTERACT.

Branching Form Templates deliver a professional, smart, and customized interaction for your recipients.

WATCH THIS 60-SECOND MOGLI MINUTE ON BRANCHING FORM TEMPLATES

BLUEPRINT YOUR SCRIPT

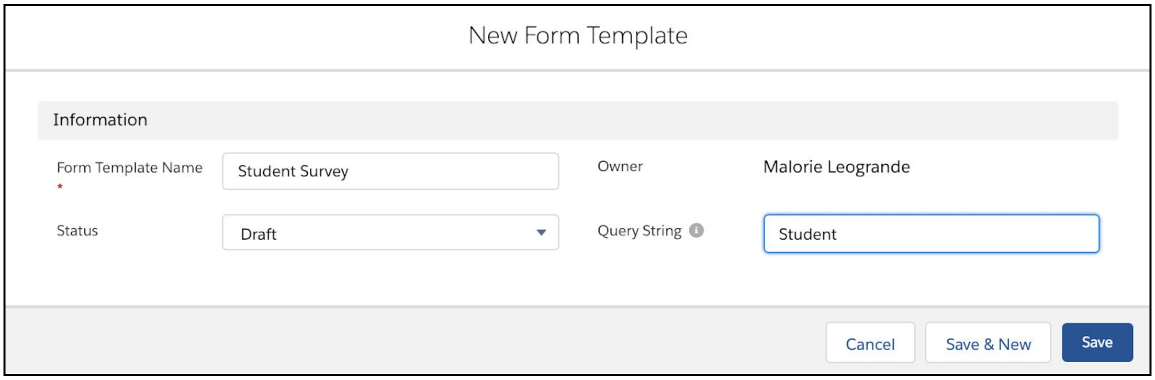
For this example, we're going to create a survey that Mogli University Freshmen can complete at year-end.



CREATE THE FORM TEMPLATE

1. Go to the Form Templates tab and select New
2. Name your Form Template and select Draft for the Status

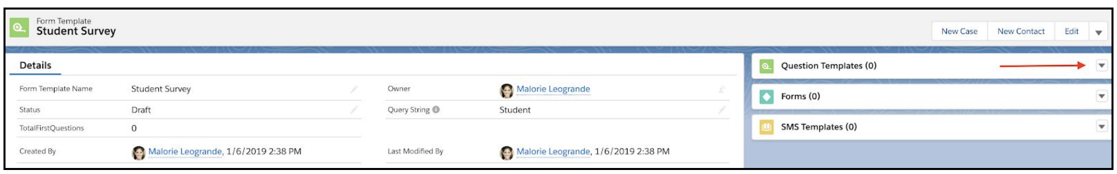
3. Create an inbound keyword and put that in the Query String field. (This will be the word someone will text in to initiate the survey)



Creating a New Form Template

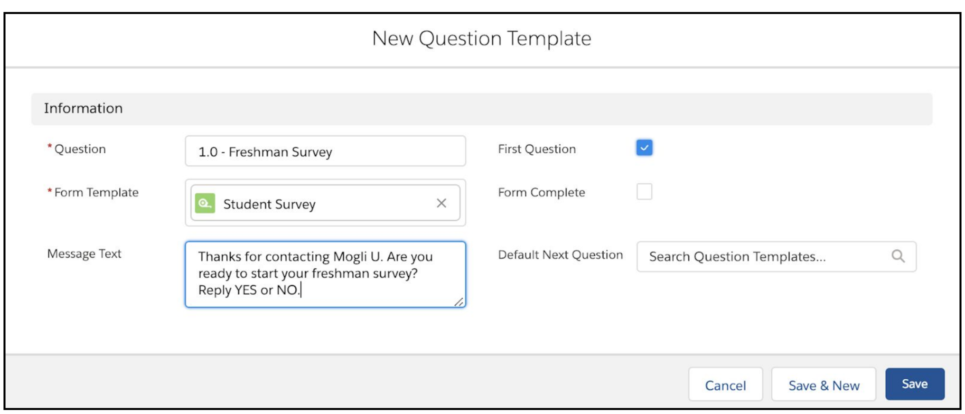
CREATE AND NUMBER YOUR QUESTIONS

1. Click the caret by Question Templates and click New



2. Name the question, select the associated Form Template, and enter your Message Text. Since this is the first question that will be sent when someone texts in the word STUDENT, check the First Question checkbox. Click Save & New

   USER TIP: Number your Question Template Names (1.0, 1.1, 2.0, etc) to easily organize the order.



Populating fields for the first Question in a Form Template

3. Repeat the step above for your second question, naming it appropriately, and inputting your Message Text. Since this question is neither the first or last, do not check either checkbox for First Question or Form Complete. Click Save & New
4. Continue naming and numbering all questions so that your Question Template contains your First Question with the checkbox checked. Also ensure that all possible last questions have the Form Complete checkbox checked. Ensure that every Question Template is unique. Otherwise, responses may not connect properly to your Form Template

Form Templates > Student Survey
Question Templates
24 items • Sorted by Question • Updated 2 hours ago

	QUESTION ↑	FIRST QUESTION	FORM COMPLETE	MESSAGE TEXT
1	1.0 - Freshman Survey	☑	☐	Thanks for contacting Mogli U. Are you ready to start your freshman survey? Reply YES or NO.
2	2.0 - Credit Hours	☐	☐	Great! How many credit hours did you take this semester?
3	2.1 - Contact Me	☐	☑	We'd be happy to connect with you. Reply with CONNECT.
4	3.0 - Courseload Low	☐	☐	A fairly light course load. Did you pass all of your classes? Reply YES or NO
5	3.1 - Average Coursel...	☐	☐	An average course load. Did you pass all of your classes? Reply YES or NO
6	3.2 - Heavy Courseload	☐	☐	Wow. That's a heavy course load. Did you pass all of your classes? Reply YES or NO
7	4.0 - Pass Yes	☐	☐	Way to go! What was your GPA?
8	4.1 - Pass No	☐	☐	I'm sorry to hear that. What was your GPA?
9	5.0 - Low GPA	☐	☐	Hmm. Must have been a tough semester. 😓 On a scale of 1 (terrible) to 5 (amazing), how would you rate your freshman year?
10	5.1 - Moderate GPA	☐	☐	Not bad. You're so close to Dean's List. 📚 On a scale of 1 (terrible) to 5 (amazing), how would you rate your freshman year?
11	5.2 - High GPA	☐	☐	Congrats! You made Dean's List! 🎓 On a scale of 1 (terrible) to 5 (amazing), how would you rate your freshman year?
12	6.0 - Low Rating	☐	☐	I'm sorry your experience this year wasn't up to Mogli U's standards. Can we contact you to obtain more feedback? Reply YES or NO.
13	6.1 - Medium Rating	☐	☐	We know there's room for improvement. Can we contact you to obtain more feedback? Reply YES or NO.
14	6.2 - High Rating	☐	☐	We're so glad you had an excellent freshman year. Can we contact you in the future to obtain more feedback? Reply YES or NO.
15	7.0 - Reply Connect	☐	☑	Thank you. We'd be glad to contact you. Please reply CONNECT
16	7.1 - Freeform Feedba...	☐	☐	We understand your time is valuable. Please reply with a brief statement on how we can help you succeed next year.
17	8.0 - Feedback Impor...	☐	☑	Thank you. Your feedback is important to us. If you'd like us to contact you at any time, reply CONNECT.
18	DEFAULT: CONTACT	☐	☐	Please reply with YES or NO
19	DEFAULT: Credit Hours	☐	☐	Please respond with a whole number between 1 and 25.
20	DEFAULT: Double Miss	☐	☑	Thanks for trying the survey. To start over, reply STUDENT
21	DEFAULT: GPA	☐	☐	Please respond with a number between 0.0 and 4.0
22	DEFAULT: Pass FAIL	☐	☐	Please respond with YES or NO
23	DEFAULT: Survey Start	☐	☐	Hmm. I didn't get that. Please respond with YES or NO
24	DEFAULT: RATING	☐	☐	Please choose a number between 1 (lowest) and 5 (highest)

Question Template for a branching Form Template (prior to ordering questions)

PROGRAM YOUR POSSIBLE ANSWERS

For branching surveys, there's an extra step of designing how the survey will fork, dependent upon incoming responses. This is where Possible Answers come into play.

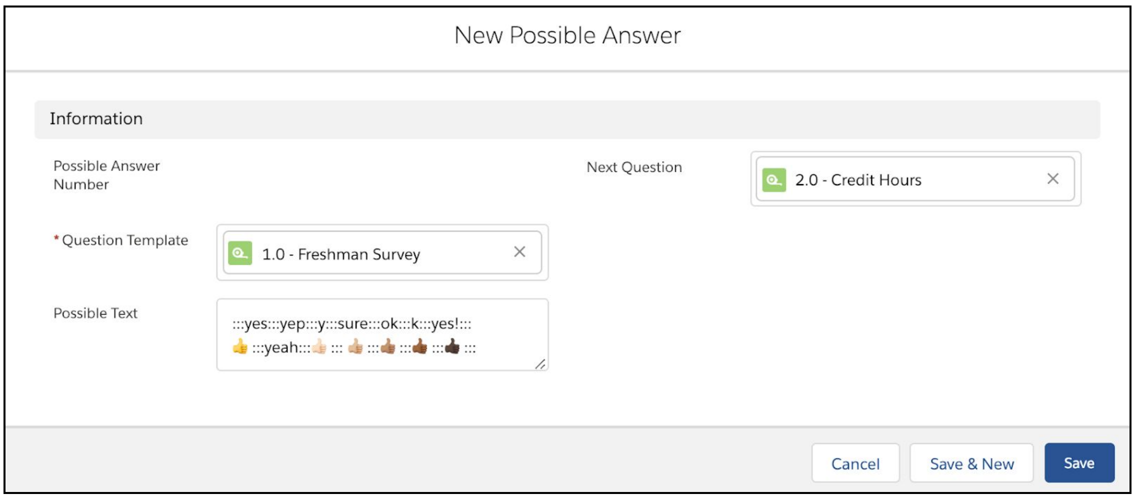
1. Click on your first question

Form Templates > Student Survey
Question Templates
24 items • Sorted by Question • Updated 2 hours ago

	QUESTION ↑	FIRST QUESTION	FORM COMPLETE	MESSAGE TEXT
1	1.0 - Freshman Survey	☑	☐	Thanks for contacting Mogli U. Are you ready to start your freshman survey? Reply YES or NO.

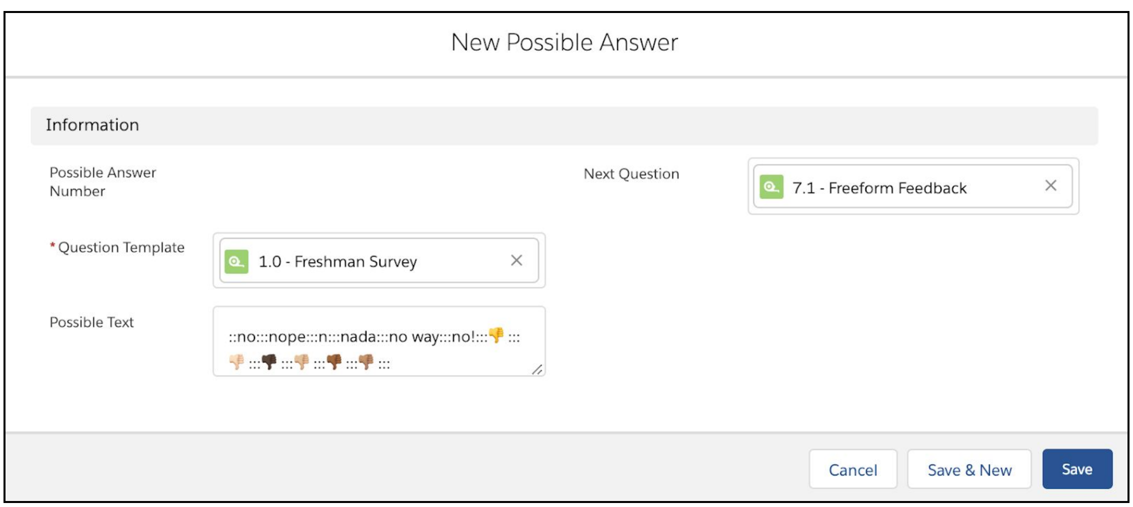
2. In this example, we're asking for a YES or NO response, but we know that people don't always follow directions. So, we've got to program in some possible YES and NO responses which will keep constituents on the survey path. Click the Carrot next to Possible Answers, and click New:

3. Program in a set of Possible Text for your question. If it's a YES or NO question, there are many variations of those. Start with the YES answers. Separate possible responses using **:::** as a delimiter. Populate the Next Question field with the question someone will receive if they respond with one of your YES Possible Answers. Click Save & New



Programming Possible Answers for YES responses, and the Next Question for those responses

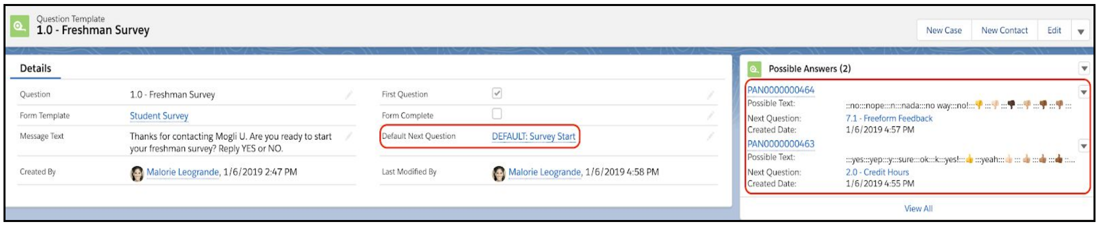
4. Program in a set of Possible Answers for NO responses. Click Save



Programming Possible Answers for NO responses, and the Next Question for those responses

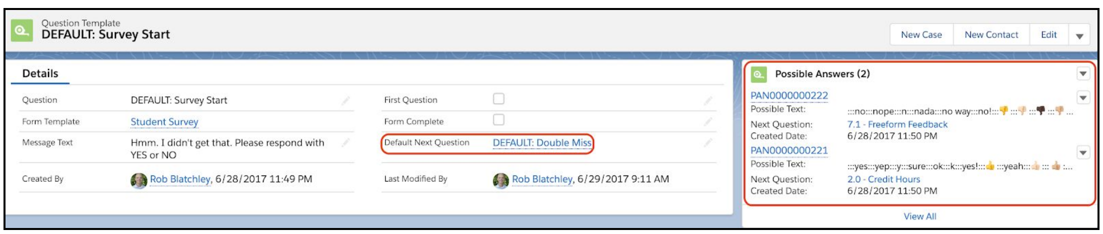
5. You've just programmed Possible Answers for your first question, along with the question that follows according to those Possible Answers. But what if someone doesn't respond with one of your Possible Answers? Cue the Default Next Question, which is the question someone receives

to get them back on the survey track. In this case, our Default Next Question will be 'DEFAULT - Survey Start,' which states: Hmm. I didn't get that. Please respond YES or NO



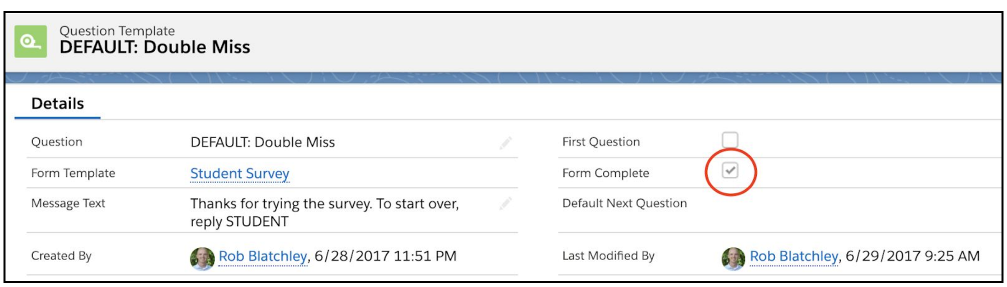
The Default Next Question and Possible Answers for the first question

6. Click on the Default Next Question (DEFAULT: Survey Start, in this example). If applicable, program your Possible Answers and Next Question. If you so choose, in the Default Next Question field, you can populate what we call a Default Double Miss - which is our plan of action when someone doesn't follow directions repeatedly. In this case, our Default Next Question will be 'DEFAULT - Double Miss,' which states: Thanks for trying the survey. To start over, reply STUDENT



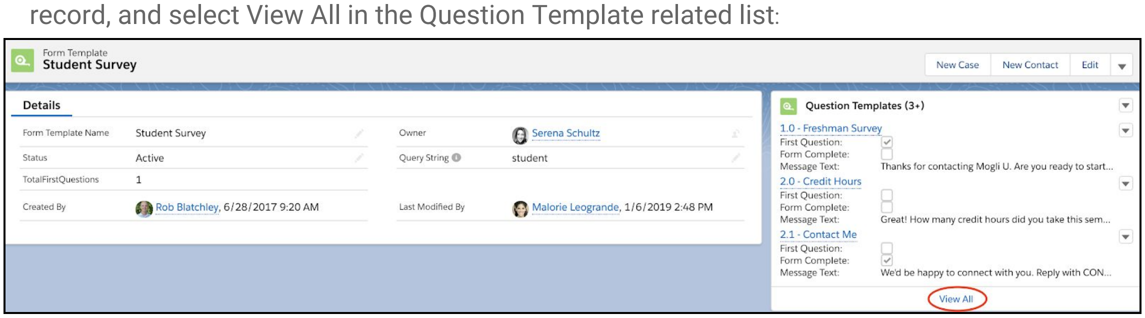
Possible Answers for the Default Question and populating the Default Double Miss

7. Click on DEFAULT: Double Miss. We think of the Default Double Miss as the last straw, so we make it a possible end to a survey, and ensure that the Form Complete checkbox is checked. There will be no Possible Answers for the Default Double Miss

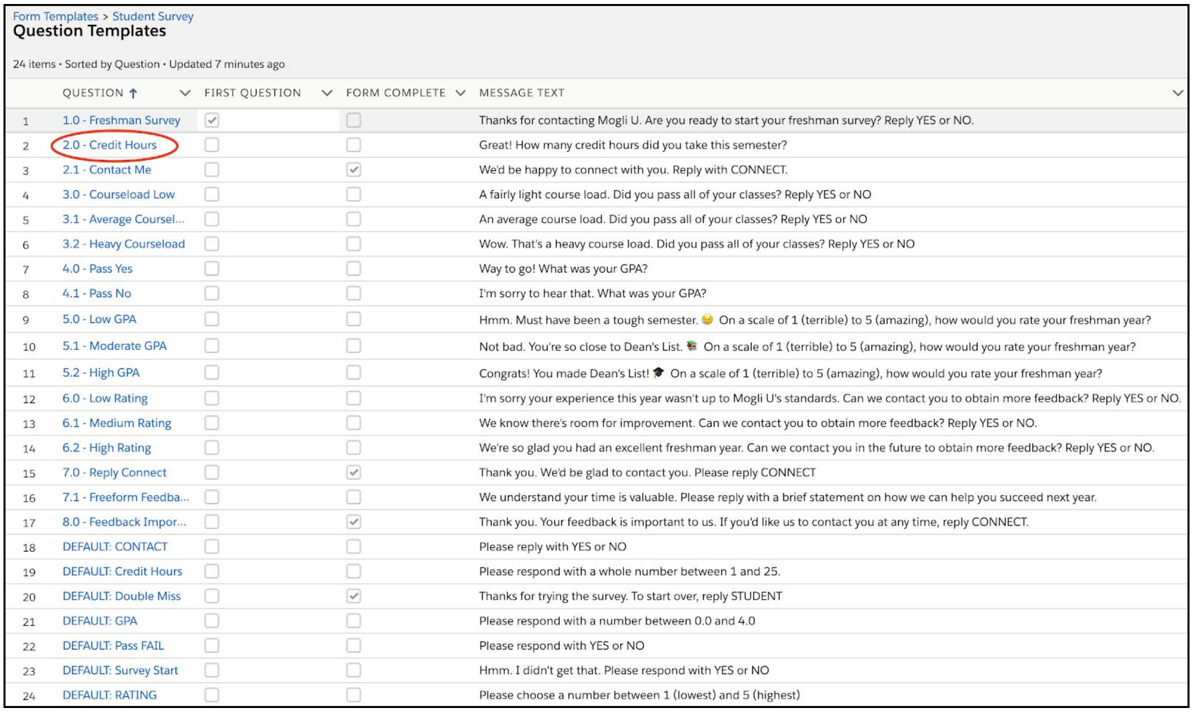


The Default Double Miss is a potential end to your survey

8. Click on the Form Template name (Student Survey) to be taken back to the Form Template record, and select View All in the Question Template related list:



9. Select your next question



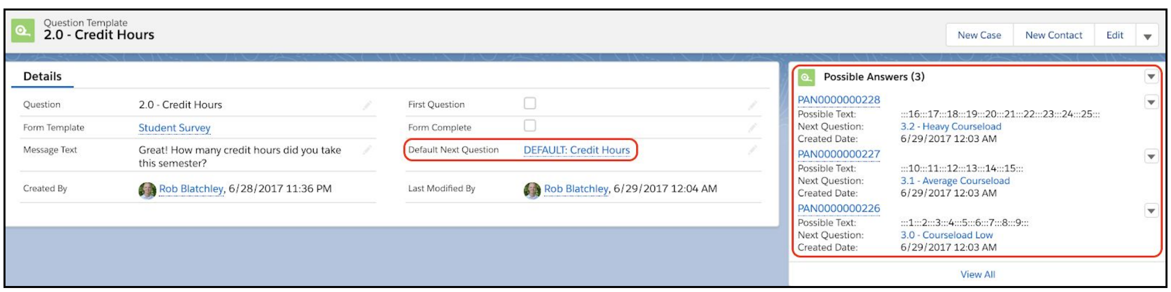
Form Templates > Student Survey
Question Templates

24 items • Sorted by Question • Updated 7 minutes ago

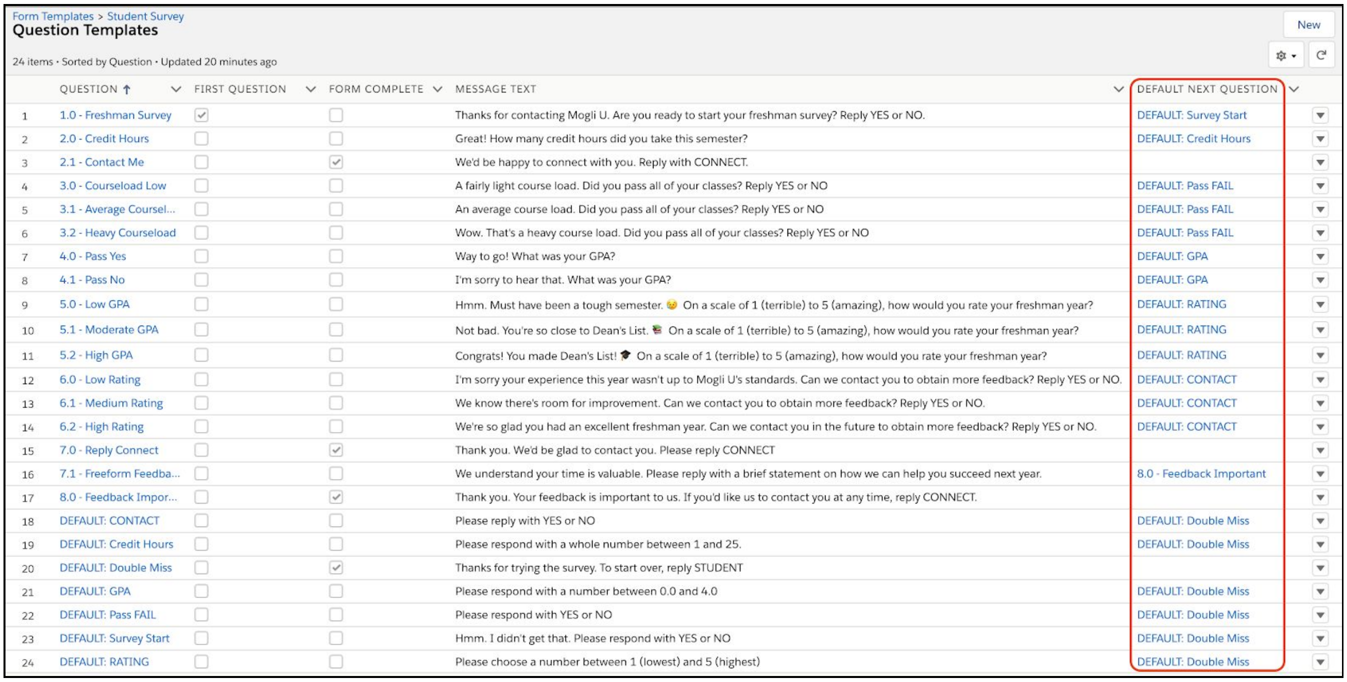
	QUESTION	FIRST QUESTION	FORM COMPLETE	MESSAGE TEXT
1	1.0 - Freshman Survey	✓		Thanks for contacting Mogli U. Are you ready to start your freshman survey? Reply YES or NO.
2	2.0 - Credit Hours			Great! How many credit hours did you take this semester?
3	2.1 - Contact Me		✓	We'd be happy to connect with you. Reply with CONNECT.
4	3.0 - Courseload Low			A fairly light course load. Did you pass all of your classes? Reply YES or NO
5	3.1 - Average Coursel...			An average course load. Did you pass all of your classes? Reply YES or NO
6	3.2 - Heavy Courseload			Wow. That's a heavy course load. Did you pass all of your classes? Reply YES or NO
7	4.0 - Pass Yes			Way to go! What was your GPA?
8	4.1 - Pass No			I'm sorry to hear that. What was your GPA?
9	5.0 - Low GPA			Hmm. Must have been a tough semester. 😓 On a scale of 1 (terrible) to 5 (amazing), how would you rate your freshman year?
10	5.1 - Moderate GPA			Not bad. You're so close to Dean's List. 📚 On a scale of 1 (terrible) to 5 (amazing), how would you rate your freshman year?
11	5.2 - High GPA			Congrats! You made Dean's List! 🎓 On a scale of 1 (terrible) to 5 (amazing), how would you rate your freshman year?
12	6.0 - Low Rating			I'm sorry your experience this year wasn't up to Mogli U's standards. Can we contact you to obtain more feedback? Reply YES or NO.
13	6.1 - Medium Rating			We know there's room for improvement. Can we contact you to obtain more feedback? Reply YES or NO.
14	6.2 - High Rating			We're so glad you had an excellent freshman year. Can we contact you in the future to obtain more feedback? Reply YES or NO.
15	7.0 - Reply Connect		✓	Thank you. We'd be glad to contact you. Please reply CONNECT
16	7.1 - Freeform Feedba...			We understand your time is valuable. Please reply with a brief statement on how we can help you succeed next year.
17	8.0 - Feedback Impor...		✓	Thank you. Your feedback is important to us. If you'd like us to contact you at any time, reply CONNECT.
18	DEFAULT: CONTACT			Please reply with YES or NO
19	DEFAULT: Credit Hours			Please respond with a whole number between 1 and 25.
20	DEFAULT: Double Miss		✓	Thanks for trying the survey. To start over, reply STUDENT
21	DEFAULT: GPA			Please respond with a number between 0.0 and 4.0
22	DEFAULT: Pass FAIL			Please respond with YES or NO
23	DEFAULT: Survey Start			Hmm. I didn't get that. Please respond with YES or NO
24	DEFAULT: RATING			Please choose a number between 1 (lowest) and 5 (highest)

The list of Question Templates for the Form Template: Student Survey

10. Program Possible Answers along with Next Questions for each. Also set your Default Next Question



11. Repeat this process until the list of Question Templates has only 1 First Question marked, and the possible Form Complete options have no Default Next Question populated. Copy the text from your First Question


Form Templates > Student Survey
Question Templates
New
24 items • Sorted by Question • Updated 20 minutes ago

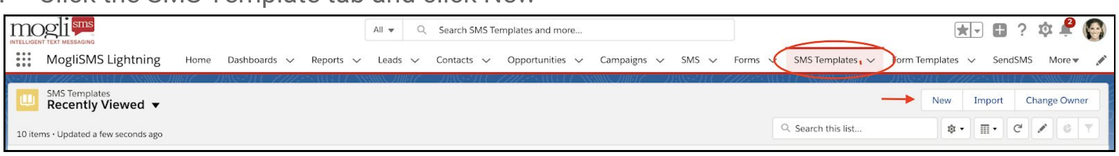
	QUESTION	FIRST QUESTION	FORM COMPLETE	MESSAGE TEXT	DEFAULT NEXT QUESTION
1	1.0 - Freshman Survey	☑	☐	Thanks for contacting Mogli U. Are you ready to start your freshman survey? Reply YES or NO.	DEFAULT: Survey Start
2	2.0 - Credit Hours	☐	☐	Great! How many credit hours did you take this semester?	DEFAULT: Credit Hours
3	2.1 - Contact Me	☐	☑	We'd be happy to connect with you. Reply with CONNECT.	
4	3.0 - Courseload Low	☐	☐	A fairly light course load. Did you pass all of your classes? Reply YES or NO	DEFAULT: Pass FAIL
5	3.1 - Average Coursel...	☐	☐	An average course load. Did you pass all of your classes? Reply YES or NO	DEFAULT: Pass FAIL
6	3.2 - Heavy Courseload	☐	☐	Wow. That's a heavy course load. Did you pass all of your classes? Reply YES or NO	DEFAULT: Pass FAIL
7	4.0 - Pass Yes	☐	☐	Way to go! What was your GPA?	DEFAULT: GPA
8	4.1 - Pass No	☐	☐	I'm sorry to hear that. What was your GPA?	DEFAULT: GPA
9	5.0 - Low GPA	☐	☐	Hmm. Must have been a tough semester. On a scale of 1 (terrible) to 5 (amazing), how would you rate your freshman year?	DEFAULT: RATING
10	5.1 - Moderate GPA	☐	☐	Not bad. You're so close to Dean's List. On a scale of 1 (terrible) to 5 (amazing), how would you rate your freshman year?	DEFAULT: RATING
11	5.2 - High GPA	☐	☐	Congrats! You made Dean's List! On a scale of 1 (terrible) to 5 (amazing), how would you rate your freshman year?	DEFAULT: RATING
12	6.0 - Low Rating	☐	☐	I'm sorry your experience this year wasn't up to Mogli U's standards. Can we contact you to obtain more feedback? Reply YES or NO.	DEFAULT: CONTACT
13	6.1 - Medium Rating	☐	☐	We know there's room for improvement. Can we contact you to obtain more feedback? Reply YES or NO.	DEFAULT: CONTACT
14	6.2 - High Rating	☐	☐	We're so glad you had an excellent freshman year. Can we contact you in the future to obtain more feedback? Reply YES or NO.	DEFAULT: CONTACT
15	7.0 - Reply Connect	☐	☑	Thank you. We'd be glad to contact you. Please reply CONNECT	
16	7.1 - Freeform Feedba...	☐	☐	We understand your time is valuable. Please reply with a brief statement on how we can help you succeed next year.	8.0 - Feedback Important
17	8.0 - Feedback Impor...	☐	☑	Thank you. Your feedback is important to us. If you'd like us to contact you at any time, reply CONNECT.	
18	DEFAULT: CONTACT	☐	☐	Please reply with YES or NO	DEFAULT: Double Miss
19	DEFAULT: Credit Hours	☐	☐	Please respond with a whole number between 1 and 25.	DEFAULT: Double Miss
20	DEFAULT: Double Miss	☐	☑	Thanks for trying the survey. To start over, reply STUDENT	
21	DEFAULT: GPA	☐	☐	Please respond with a number between 0.0 and 4.0	DEFAULT: Double Miss
22	DEFAULT: Pass FAIL	☐	☐	Please respond with YES or NO	DEFAULT: Double Miss
23	DEFAULT: Survey Start	☐	☐	Hmm. I didn't get that. Please respond with YES or NO	DEFAULT: Double Miss
24	DEFAULT: RATING	☐	☐	Please choose a number between 1 (lowest) and 5 (highest)	DEFAULT: Double Miss

An ordered list of Question Templates, complete with Default Next Questions

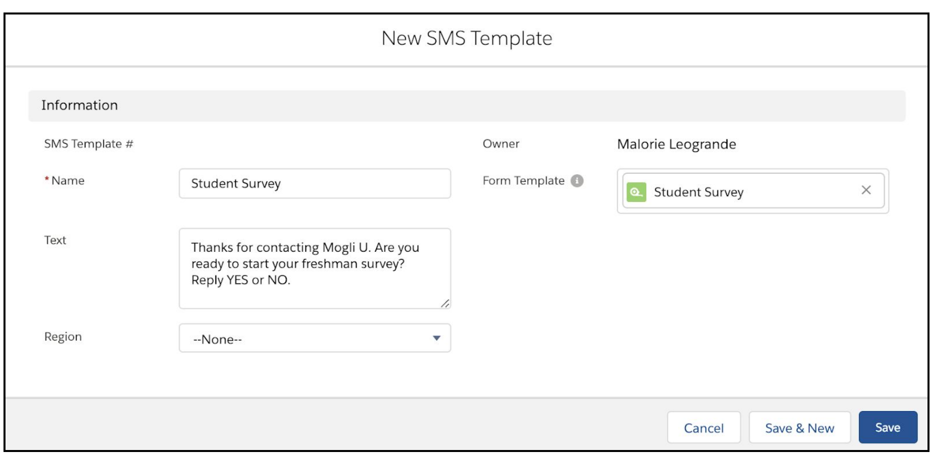
12. Click on the Form Template name (Student Survey) to be taken back to the Form Template record, and set the Status to Active

CREATE AN SMS TEMPLATE

1. Click the SMS Template tab and click New

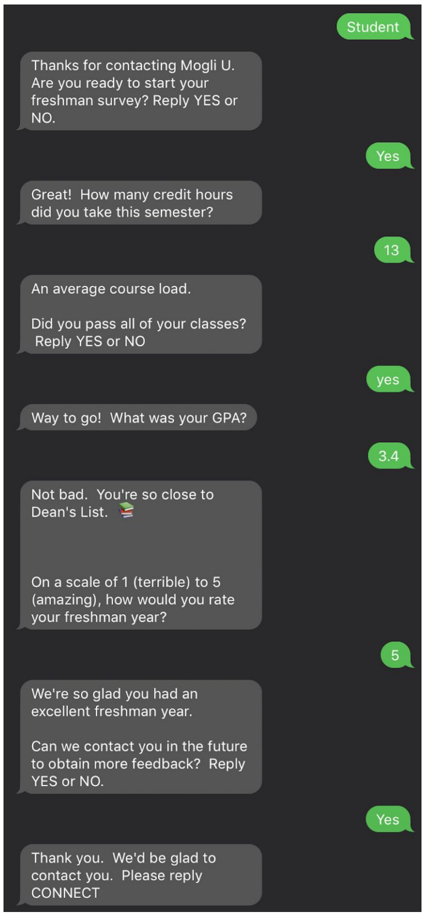


2. Name the SMS Template the same as your Form Template. Paste the text of your first question in the Text field. Leave the region as -None- and attach the appropriate Form Template. Save

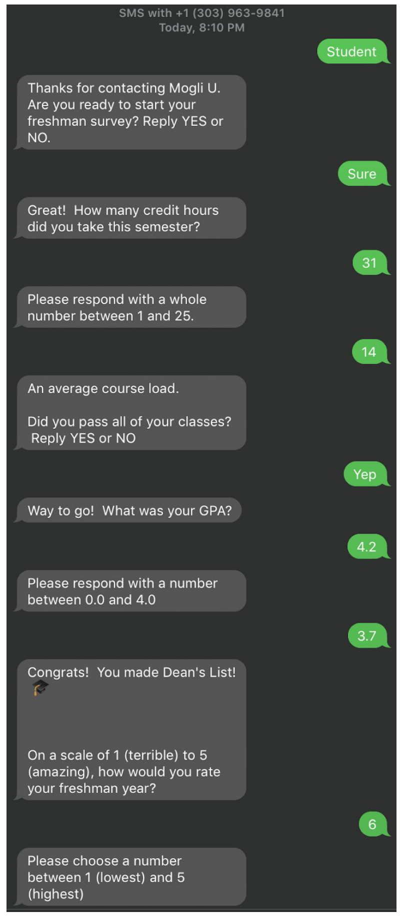


TEST AND CONTEXTUALIZE

1. Using your personal cell phone or messaging service, text in the word STUDENT (or your chosen Query String) to one of your Gateways (phone numbers). As you answer each question, you should be taken to the next as you've ordered it. Double-check that your Default Next Questions and Default Double Miss's trigger as expected. Ask a few members of your team to test as well. This will help imitate the variety of responses you might find when the Form Template goes live

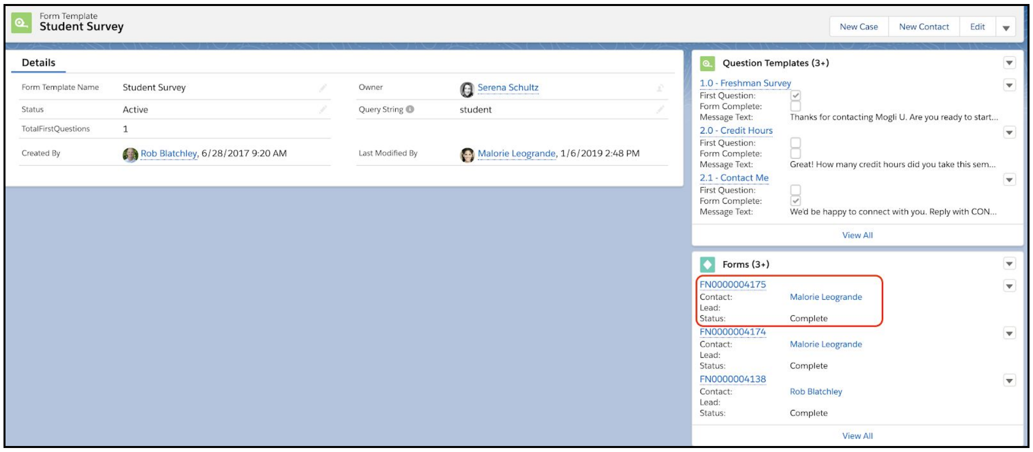


Test #1



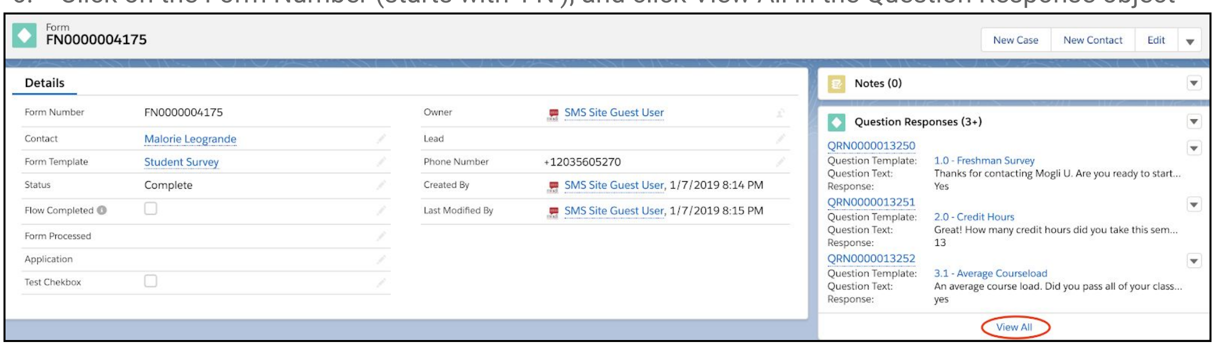
Test #2

2. Check to see that your responses are properly stored in the Forms object. Navigate back to the Form Template tab, and select the Form Template you've just tested. Notice that there's now a record stored in the Forms object and that the Status reads 'Complete.' If the status reads 'Active,' that means that someone started answering the questions, but didn't make it all the way to the last question (the question for which you checked the Form Complete checkbox)



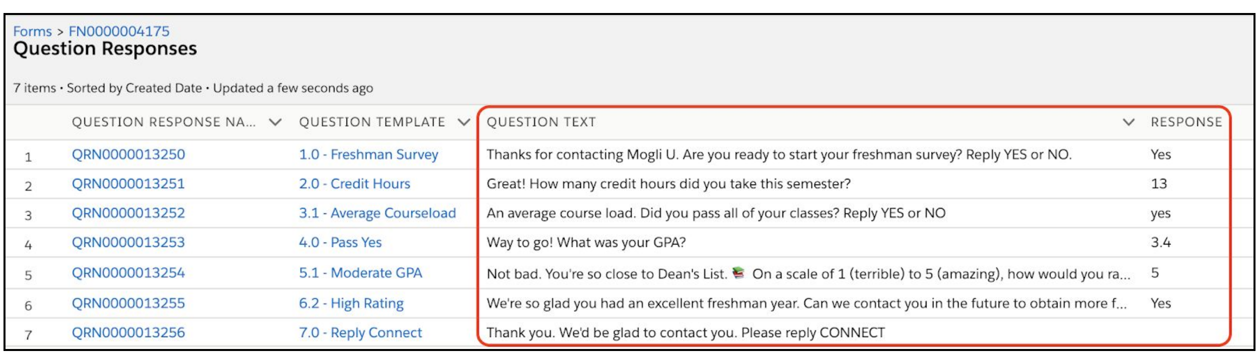
A newly-created Form as stored on the Form Template object

6. Click on the Form Number (starts with 'FN'), and click View All in the Question Response object



The Form record

7. Here, you'll find the responses to the questions asked in the Form Template you just tested

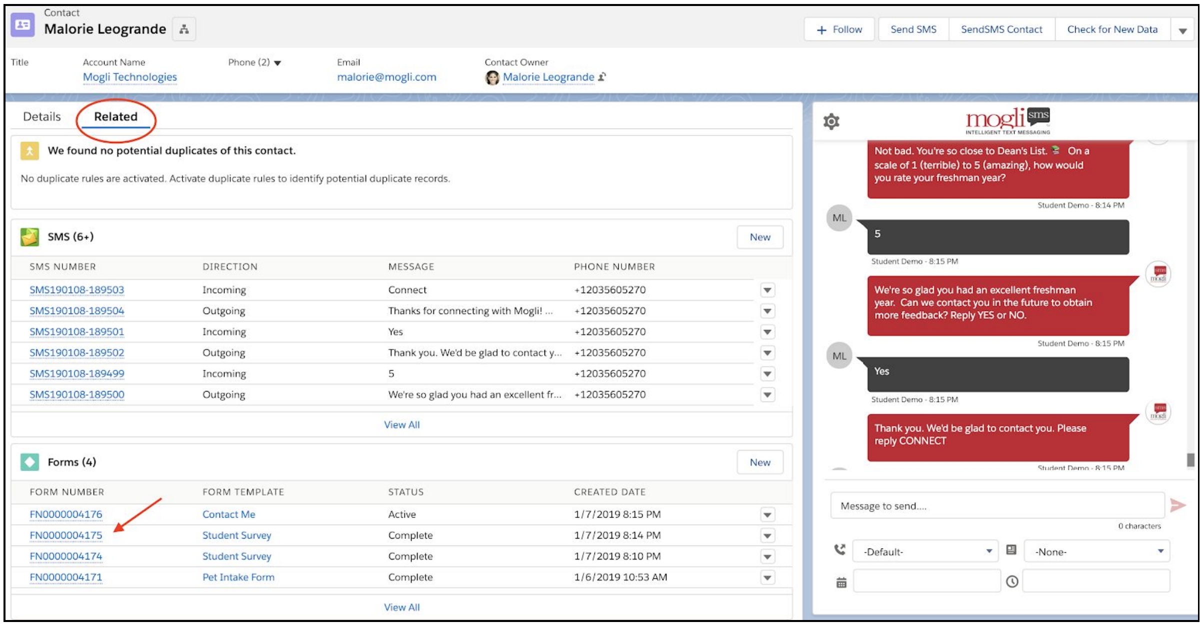

Forms > FN0000004175
Question Responses

7 items • Sorted by Created Date • Updated a few seconds ago

	QUESTION RESPONSE NA...	QUESTION TEMPLATE	QUESTION TEXT	RESPONSE
1	QRN0000013250	1.0 - Freshman Survey	Thanks for contacting Mogli U. Are you ready to start your freshman survey? Reply YES or NO.	Yes
2	QRN0000013251	2.0 - Credit Hours	Great! How many credit hours did you take this semester?	13
3	QRN0000013252	3.1 - Average Courseload	An average course load. Did you pass all of your classes? Reply YES or NO	yes
4	QRN0000013253	4.0 - Pass Yes	Way to go! What was your GPA?	3.4
5	QRN0000013254	5.1 - Moderate GPA	Not bad. You're so close to Dean's List. 📚 On a scale of 1 (terrible) to 5 (amazing), how would you ra...	5
6	QRN0000013255	6.2 - High Rating	We're so glad you had an excellent freshman year. Can we contact you in the future to obtain more f...	Yes
7	QRN0000013256	7.0 - Reply Connect	Thank you. We'd be glad to contact you. Please reply CONNECT	

Question Responses in the Form record

8. Navigate to your own Contact record. You'll see that your Form Template conversation is with the SMS Site Guest User in Conversation View. The SMS Site Guest User is used for Form Template conversations and displays as such so that your users can visually discern from an automated text versus one with a user. Click the Related tab. You'll see your newly-created Form record in the Forms Related List



A Contact record with evidence of engagement with a Form Template, as well as the Form record in the Forms Related List

Since all Form Templates must be connected to an SMS Template, you can easily initiate the Form Template by attaching its accompanying SMS Template in Conversation View or within a bulk message via the Bulk SMS tab.

MORE ON FORM TEMPLATES

What if the recipient didn't receive the survey?
Check to be sure that their Contact or Lead record has a properly-populated Mogli Number, that the Form Template is in Active Status, and that it's properly connected to an SMS Template. Query Strings that are not exact will not initiate the Form Template.

My recipient receives the first question of the survey, but nothing else after their initial response.
Check that you've populated the Next Question field in the Possible Answers or Question Template sections. Also ensure that your accompanying SMS Template exactly matches the first question of your Form Template.

What happens if a reply isn't a Possible Answer?
If you set up a Default Next Question, that is the message that will be sent. If you've not set up a Default Next Question, no message will be sent and the Form will remain in Active status.

CONSIDERATIONS FOR QUERY STRINGS AND POSSIBLE ANSWERS

- Avoid Query Strings consisting of END, STOP, BLOCK, CANCEL, UNSUBSCRIBE, or QUIT, as these words can cause our carrier to block your Gateway (phone number).
- Avoid Query Strings consisting of HELP or INFO, as these words will trigger a text message from our carrier stating, "Reply STOP to unsubscribe. Msg&Data rates may apply."
- Responses are case-insensitive. If you request a response of YES or NO, and a recipient responds with Yes or yes, that will be understood as YES. No need to populate YES:::yes:::Yes in your Possible Answers.

CONSIDERATIONS FOR MODIFYING FORM TEMPLATES

- When modifying the text of the First Question in a Form Template, always be sure that your accompanying SMS Template is also modified to match your new text.
- If you're running automations off of your Form Templates, you're going to need to use the Question Name. If, for any reason you modify the Question Name in your Question Template, be sure to go into your Process Builder or Flow and modify the name of the Question Template so that your automations run as they should.

CONSIDERATIONS FOR FORM STATUSES

- When someone texts in a keyword (Query String) and initiates a Form, they may not finish it and the Form may remain in Active status. If they later send an incoming text message that is unrelated to the Form, it may 'attach' to the Form. Mogli will check to see if there are any Forms with an Active status to relate the next incoming response. Because the Form wasn't in Complete status, Mogli will respond with the next survey question, which can cause confusion for your recipient. **Best practice would be to manually set all active Forms to Complete after a given period of time.** When Mogli opens a new Form, it automatically sets the status of the prior Form to Complete (if it isn't already). So, there should always only be 0 or 1 Active Form record per Contact or Lead.

FORM TEMPLATE TIPS, TRICKS + TIMESAVERS

- Use Emojis by right-clicking and selecting **Emoji & Symbols**
- Access and edit Contact and Lead Merge Fields by going to the Application Settings tab > Default > Edit > insert any standard or custom field from the Contact or Lead objects may be used in the API format: Favorite_Color__c, Pets_Name__c, Birthdate, Email. When using Merge Fields in 1:1 conversations or outgoing bulk messages, use double curly brackets. *Ex. - Hi {{FirstName}}! We hope {{Pets_Name__c}} is feeling better.*

POSSIBLE ANSWERS BANK (copy and paste in the Possible Answers object when creating Form Templates)

Yes	yes:::yep:::yeah:::ya:::yea:::yup:::sure:::Y:::ok:::fine:::K:::kk:::cool:::si:::yas:::yes please:::👍🏻:::👍:::👍🏼:::👍🏽:::👍🏾:::👍🏿
No	no:::nope:::nah:::nada:::N:::no way:::no thanks:::👎:::👎🏻:::👎🏼:::👎🏽:::👎🏾:::👎🏿
Unsure	unsure:::I don't know:::idk:::um:::I dunno:::no idea
States	AK:::AL:::AZ:::AR:::CA:::CO:::CT:::DC:::DE:::FL:::GA:::HI:::ID:::IL:::IN:::IA:::KS:::KY:::LA:::ME:::MD:::MA:::MI:::MN:::MS:::MO:::MT:::NE:::NV:::NH:::NJ:::NM:::NY:::NC:::ND:::OH:::OK:::OR:::PA:::RI:::SC:::SD:::TN:::TX:::UT:::VT:::VA:::WA:::WV:::WI:::WY
GPA's	0.0:::0:::00:::0.1:::0.2:::0.3:::0.4:::0.5:::0.6:::0.7:::0.8:::0.9 1.0:::1.1:::1.2:::1.3:::1.4:::1.5:::1.6:::1.7:::1.8:::1.9 2.0:::2.1:::2.2:::2.3:::2.4:::2.5:::2.6:::2.7:::2.8:::2.9 3.0:::3.1:::3.2:::3.3:::3.4:::3.5:::3.6:::3.7:::3.8:::3.9:::4.0
Default Question	- I didn't quite get that. Please respond with a whole number between 1 and 5. - I didn't understand. Please respond with a four-digit year, like '1995.' - Hmm. I didn't get that. Please respond with YES or NO.
Default Double Miss	- I still didn't get that. To give our survey another shot, text the word START to 222-333-4444. (Be sure to tick the Form Complete checkbox for Default Double Miss questions).
Years	2026:::2025:::2024:::2023:::2022:::2021:::2020:::2019:::2018:::2017:::2016:::2015:::2014:::2013:::2012:::2011:::2010:::2009:::2008:::2007:::2006:::2005:::2004:::2003:::2002:::2001:::2000:::1999:::1998:::1997:::1996:::1995:::1994:::1993:::1992:::1991:::

SMS TEMPLATES

PERSONALIZED TEMPLATES YOU CAN ADD TO ANY MESSAGE

Send fast, easy, personalized messages. No typing required.

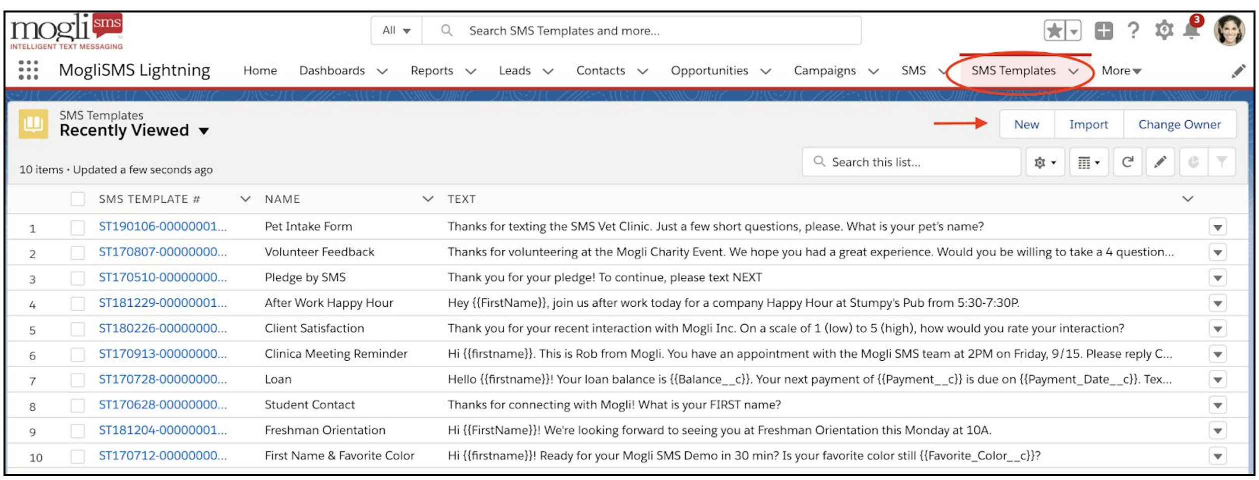
USE CASES

- Announcements *Join us for Happy Hour after today's {{Event_Name__c}} at the SMS Pub from 5-8P.*
- Reminders *Hi {{firstname}}! Just a reminder that the Thanksgiving football game starts at 10A.*
- Call to Action *Volunteer registration is open, so head over to https://bit.ly/2C7mN5Z to sign up today.*
- Greetings *Hi {{firstname}}. How are you feeling today?*
- Engagement *Your loan balance is {{Balance__c}}. Your next payment of {{Payment__c}} is due on {{Payment_Date__c}}. Text ASSIST if you are not able to pay as expected.*
- Survey Starters (see the Form Template section)

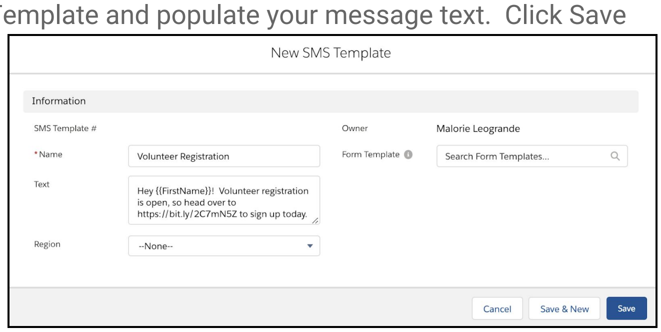
CREATE A STANDALONE SMS TEMPLATE (not connected to a Form Template)

Before beginning, if you plan to utilize Contact or Lead Merge Fields, ensure that the API-formatted name of the Merge Fields are populated in Application Settings. See the Merge Fields section for more information.

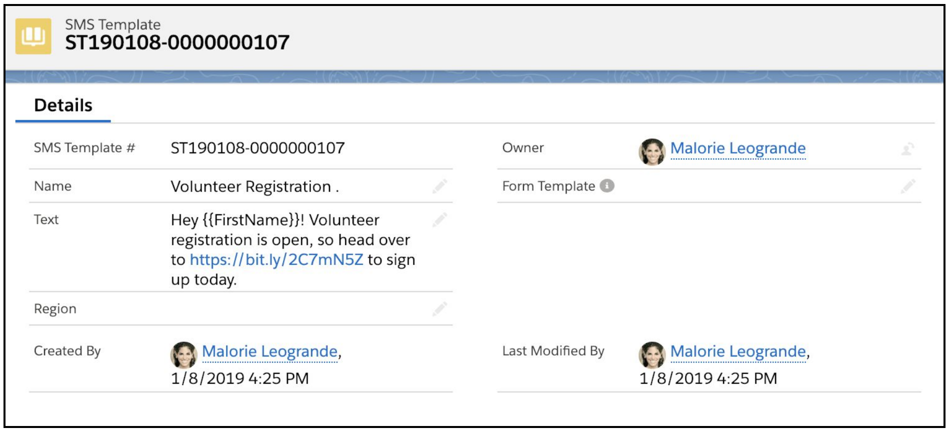
1. Click the SMS Templates tab and click New



2. Name the SMS Template and populate your message text. Click Save



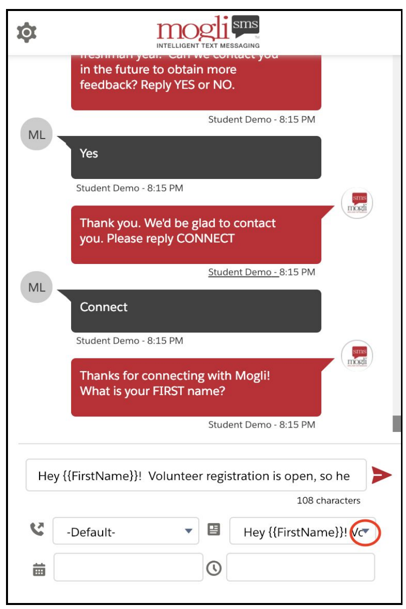
3. Here's your finished SMS Template record



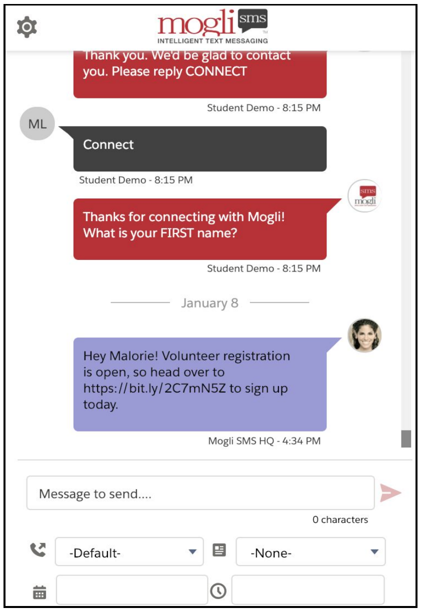
An SMS Template record

TEST

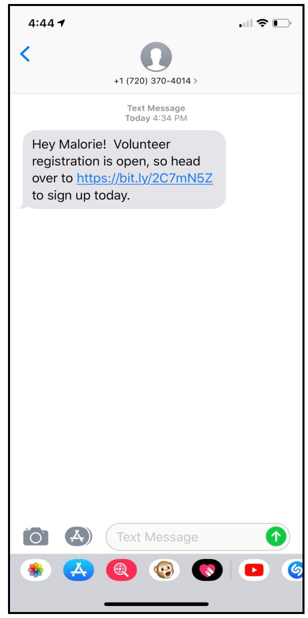
1. Navigate to a Contact or Lead record. From Conversation View, click the caret to the right of the icon and select your SMS Template



2. Click the red arrow or hit Enter to send. Your delivered message should populate the correct variable from the Merge Field. Your new SMS Template is ready for use in 1:1 Conversations and in Bulk Messages



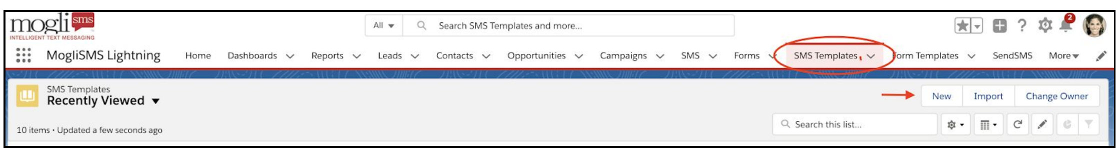
A delivered message via SMS Template in Conversation View



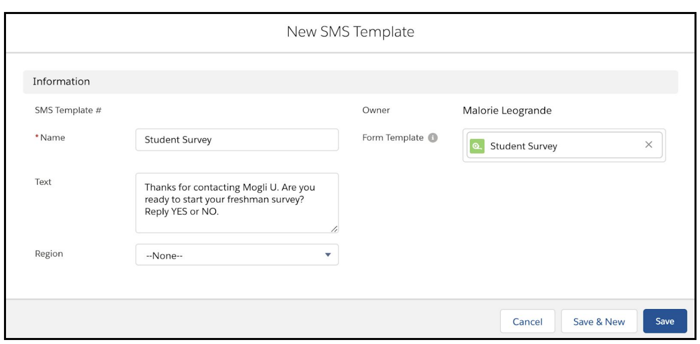
What the Contact or Lead sees

CREATE A SURVEY-STARTER SMS TEMPLATE

1. Create a Form Template (See the Form Template Section)
2. Copy the text from the first question of your Form Template
3. Go the the SMS Templates tab and click New



4. Name the SMS Template the same as your Form Template. Paste the text of your first question in the Text field. Leave the region as -None- and attach the appropriate Form Template. Save



You can now use the SMS Template to initiate your Form Template survey in 1:1 Conversations and in Bulk Messages.

WATCH THIS 60-SECOND MOGLI MINUTE ON SMS TEMPLATES

AUTOMATIONS

DO LESS. GET MORE.

Let Mogli SMS do the heavy lifting with Process Builder and Flow.

USE CASES FOR PROCESS BUILDER

- Mogli Opt-Out - automatically check and uncheck the Mogli Opt-Out checkbox based on inbound keywords you specify. This will keep you in compliance with Opt-In/Out practices so that you keep your Contacts and Leads happy.
- Send an email to a particular user based on a specific Question Reponse in a Form Template.
- Create or update a record when a specific message is received or a specific Form is completed
- Trigger text messages to be sent according to status changes, scheduled events, and more
- Chatter and email notifications for important inbound messages (see *Notifications* section)

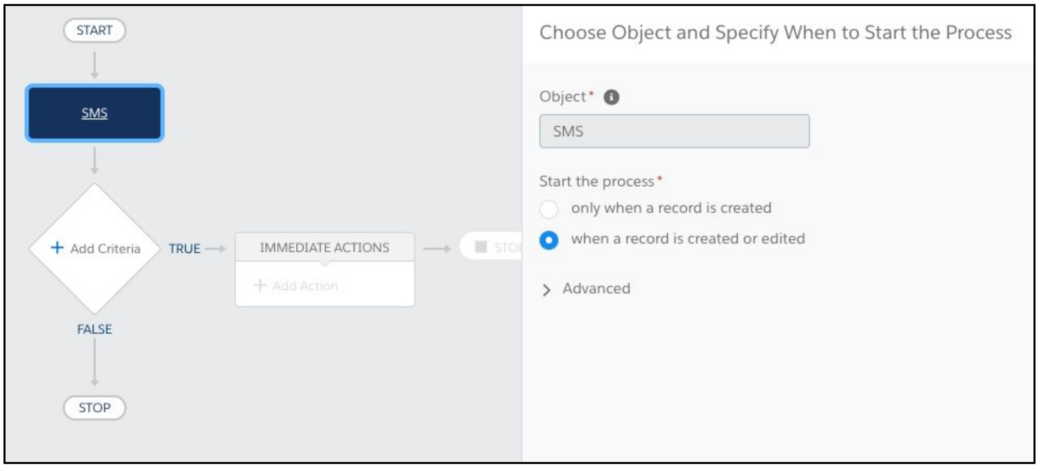
USE CASES FOR FLOW

- Auto-creation of Contacts and Leads from Inquiry Form Templates, including population of certain fields based on Question Responses in a Form
- Populate fields based off of information provided in Form Templates

MOGLI OPT-OUT AUTOMATION FOR CONTACTS AND LEADS

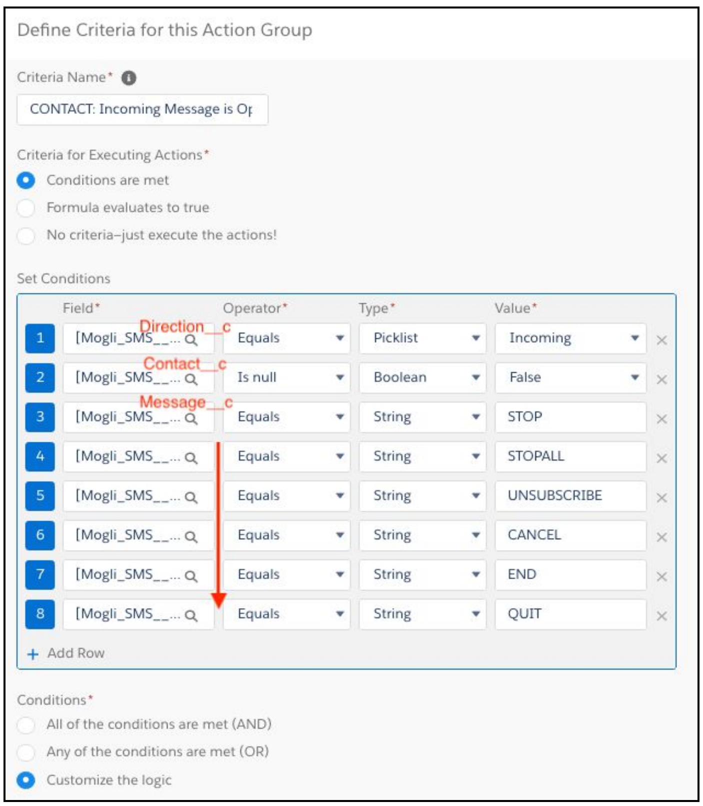
1. From Setup, enter Process Builder and select Process Builder
2. Click New

3. Fill in your information for the New process. Be sure to start the process when a record changes. Click Save

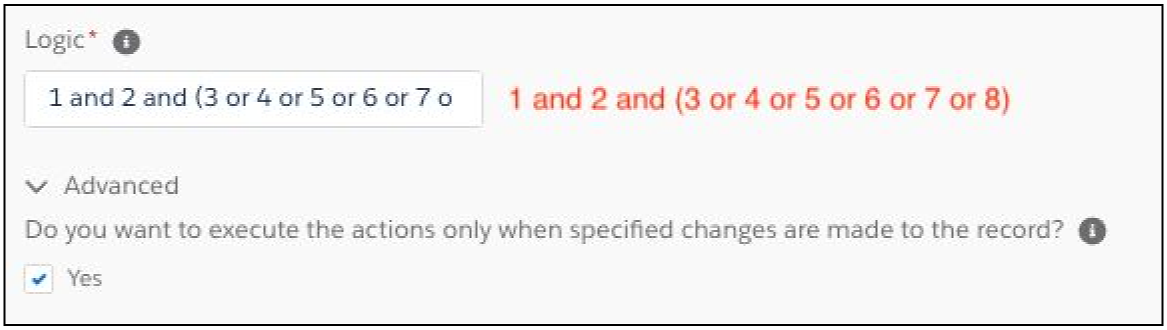


4. Start your process on the SMS object, and when a record is created or edited. Click Save

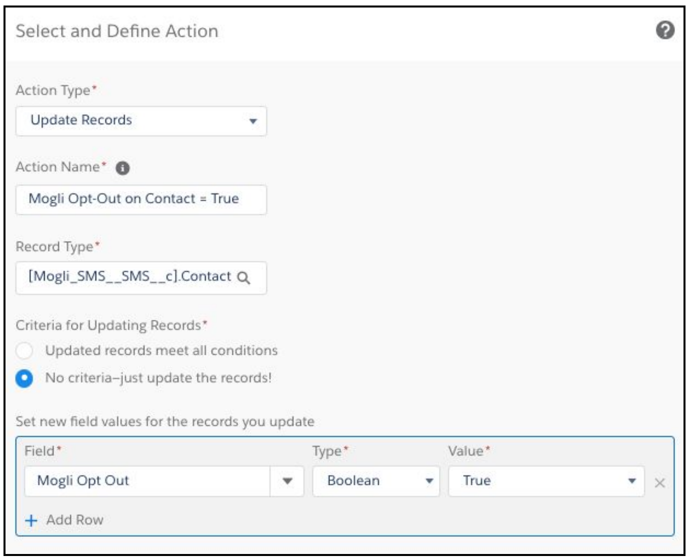
5. Click Add Criteria and Define your Criteria for the Action Group as follows:



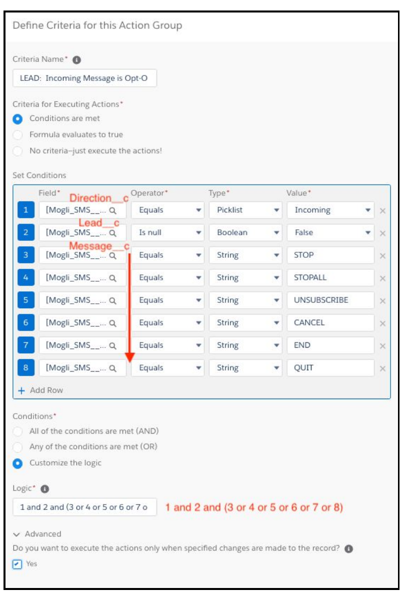
6. In the Conditions section, select the Customize the logic radio button and populate the field as so:

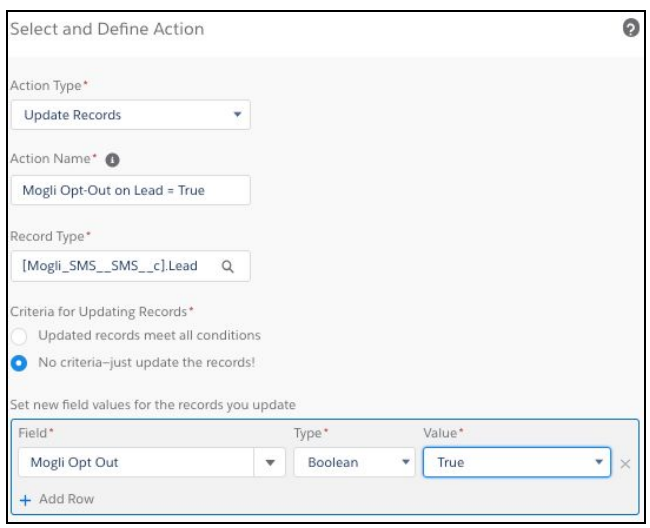


7. Check the checkbox in the Advanced section and click Save
8. In the Immediate Actions section, click Add Action. Enter your criteria as such, and click Save

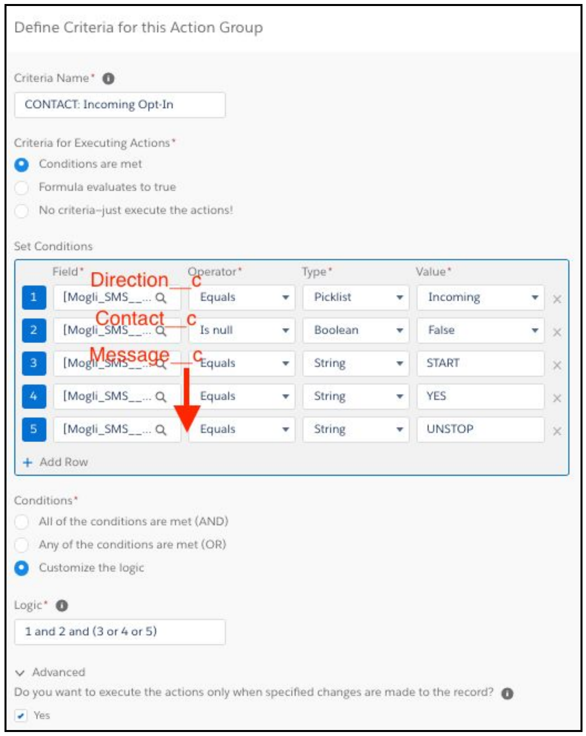


9. Click Add Criteria, repeat the process for Leads, and click Save:



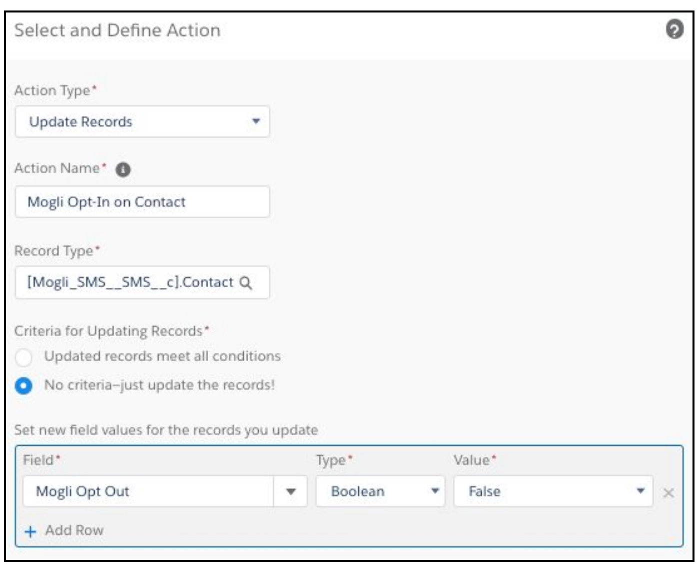


10. Now, add your criteria for when a Contact decides to opt back in. Click Add Criteria and populate the fields as such:

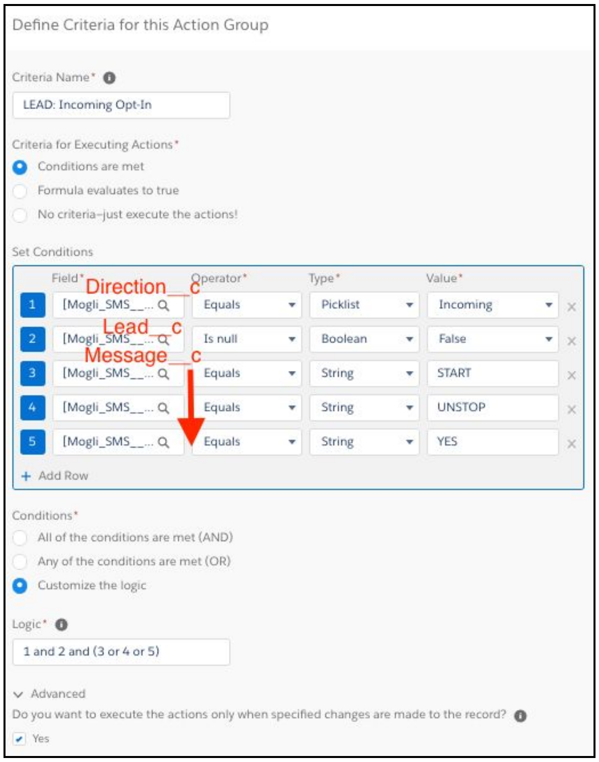


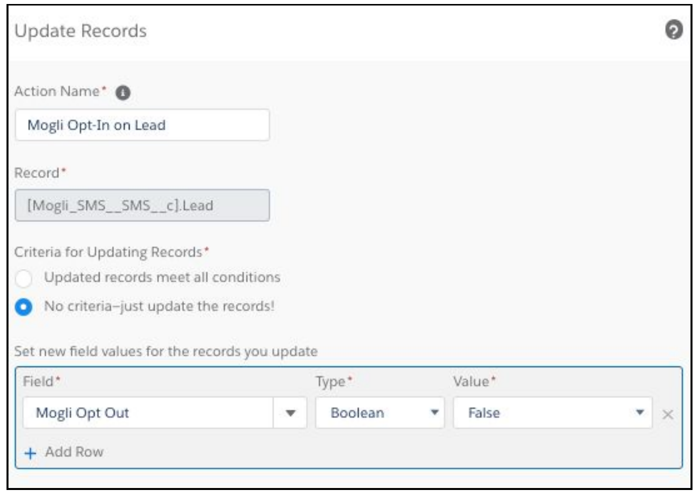
11. In the Immediate Actions section, click Add Action. Select the radio button for *Select a record related to the Mogli_SMS__SMS__c.* Enter your criteria as such and click Save

12.

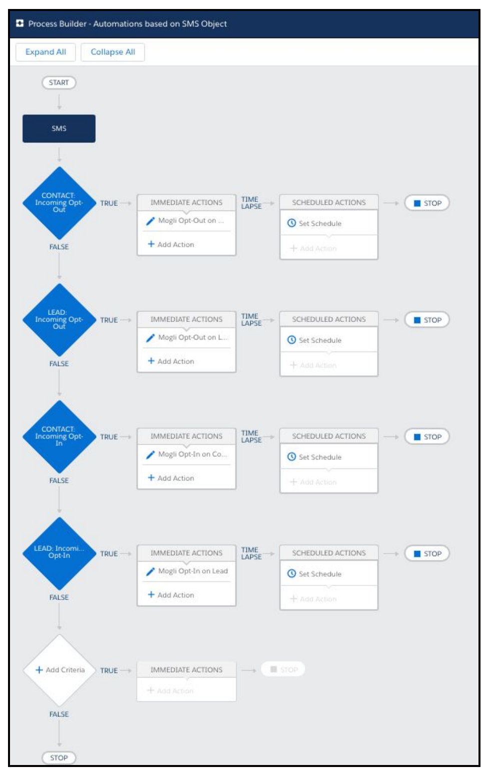


13. Click Add Criteria, repeat the process for Leads, and click Save





Your Process Builder should now look like this:



- In the upper right corner, click Activate
- Create a test Contact or Lead for yourself (if you haven't already) and be sure that your Mogli Number is correctly populated. Text in one of your specified Opt-Out keywords to one of your Gateways. Ensure that the Mogli Opt-Out checkbox has been checked and that Conversation View is greyed out. Then, text in one of your specified Opt-In keywords to that same Gateway. Ensure that the Mogli Opt-Out checkbox is unchecked and that Conversation View is enabled

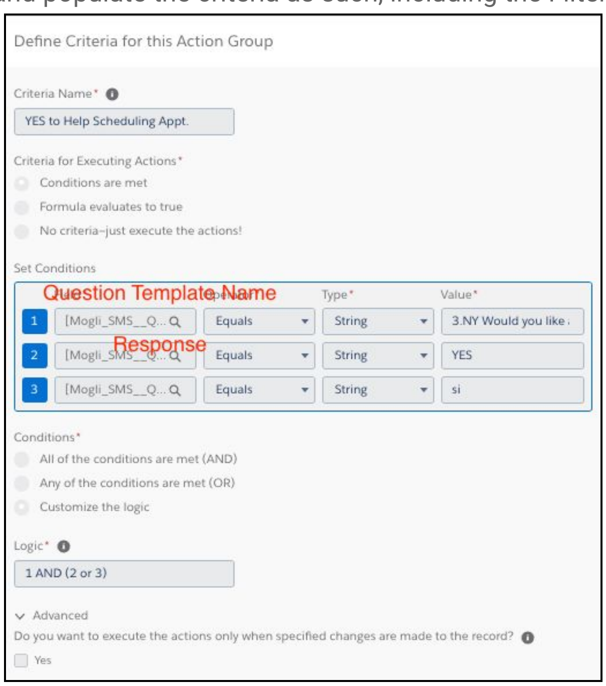
ADMIN TIP: Depending upon the version of Mogli you're running (4.2 and under), you may need to allow 5-10 minutes for the Mogli Opt-Out Automation to take effect. The Process will run at the rate of your batch process, which runs anywhere from 5-10 minutes. To see how often your batch process is running, go to Setup > Scheduled Jobs. To modify your batch process, go to the SetupMogliSMS tab, click unschedule, enter 5 and click Schedule.

SEND AN EMAIL ALERT BASED ON A QUESTION RESPONSE IN A FORM TEMPLATE (SURVEY)

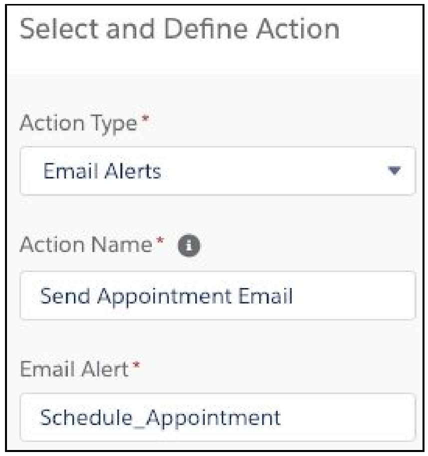
In this example, we're going to trigger an email notification to be sent out to a user when someone responds with one of the possible YES answers to the Question Templates that asks if they'd like help scheduling an appointment.

1. From Setup, enter Classic Email Templates, and customize the email to be triggered by the Process you're about to create. Click Save
2. From Setup, enter Process Builder and select Process Builder
3. Click New
4. Fill in your information for the new process. Be sure to start the process when a record changes. Click Save
5. Select the Question Response object to start the Process, and start the process when a record is created or edited

6. Click Add Criteria, and populate the criteria as such, including the Filter Logic, and click Save

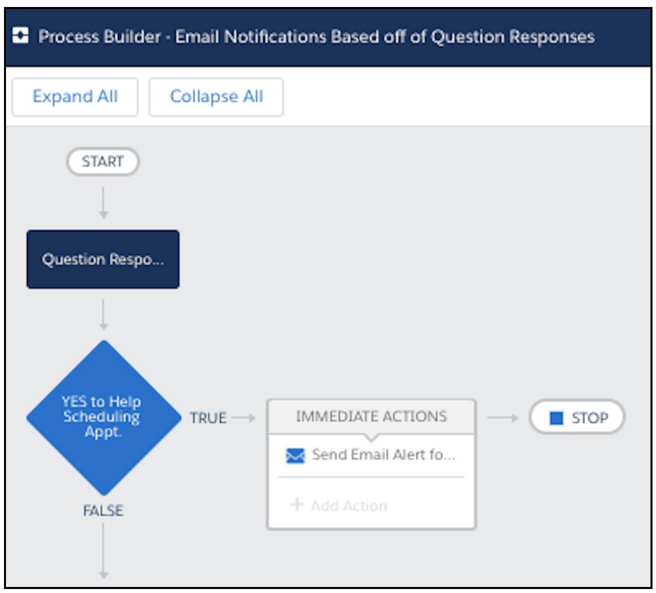


These criteria specify the exact Question Template and Possible Responses which will trigger the email



7. Click Immediate Actions and populate the fields as such, including the Email Template you've just created, and Save

   Your Process Builder should now look like this:



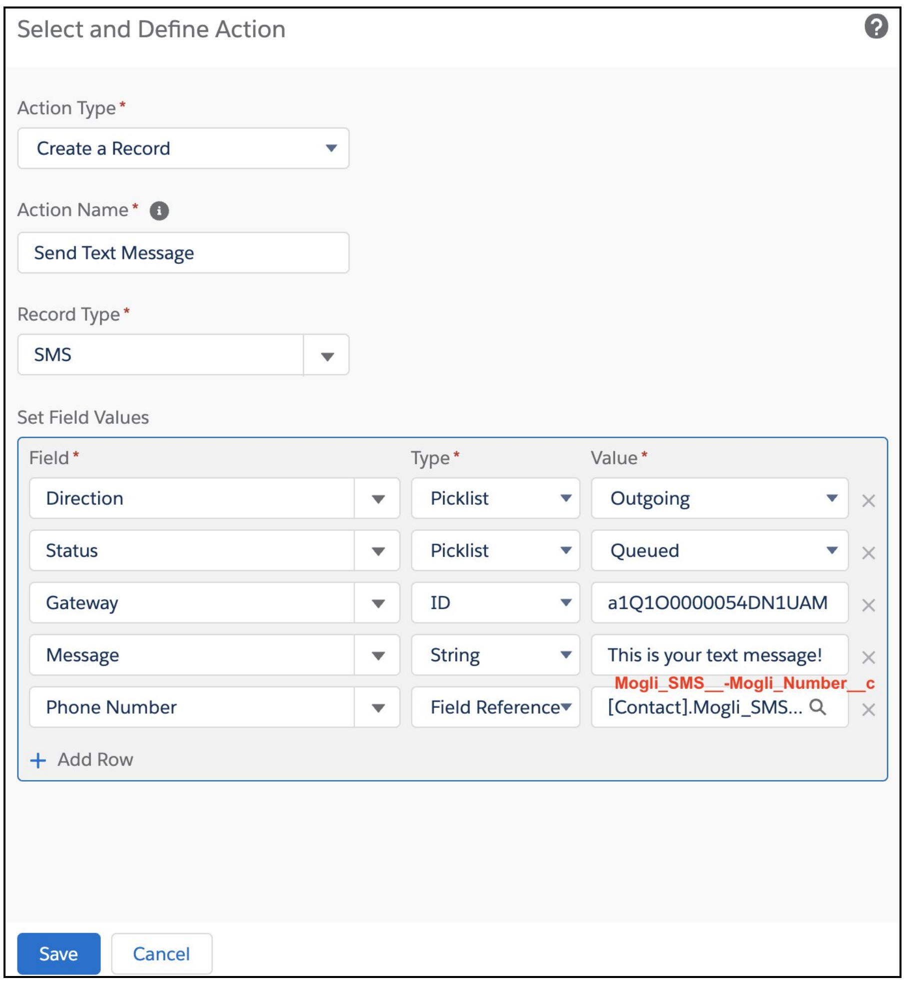
8. In the upper right corner, click Activate

9. Create a test Contact or Lead for yourself (if you haven't already) and be sure that your Mogli Number is correctly populated. Initiate the survey by texting in the Query String (keyword) to one of your active Gateways. Respond to the survey in accordance with your Process Builder criteria. Check your email

TRIGGER A TEXT MESSAGE TO BE SENT TO A CONTACT OR LEAD WITH PROCESS BUILDER

In this example, we're going to trigger a text message to be sent to a Contact or Lead when certain criteria are met.

1. From Setup, enter Process Builder and select Process Builder\
2. Click New
3. Fill in your information for the new process. Click Save
4. Select the appropriate object to start the Process, and start the process when a record is created or edited
5. Add your specific criteria (when a Status changes, picklist value changes, when a checkbox = TRUE or FALSE, etc.) Click Save
6. In the Immediate Actions section, trigger your text message to be sent out by populating the fields as follows:



7. In the upper right corner, click Activate
8. Create a test Contact or Lead for yourself (if you haven't already) and be sure that your Mogli Number is correctly populated (+12223334444). Be sure you've met the appropriate criteria on your record and check to see if you've received the text message

MORE ON AUTOMATIONS

If I build a process on the SMS Object, will I run into queueable errors?
When many incoming messages come in quickly through Salesforce, there is a chance that you may receive a Flow or Apex error. Mitigate this risk by minimizing how often the process runs by making your criteria as specific as possible.

How do I trigger an outbound automated conversation/survey (Form Template) from Process Builder?
Follow the steps outlined above. In the Message field, include the exact text of the First Question of your Form Template. This should also be the exact text of the SMS Template to which it's associated. When your process fires, it will initiate the Form Template and your recipient will be able to engage.

REPORTS + DASHBOARDS

CONTEXTUALIZE YOUR DATA

Create roll ups, reports and dashboards for surveys to see responses in aggregate.

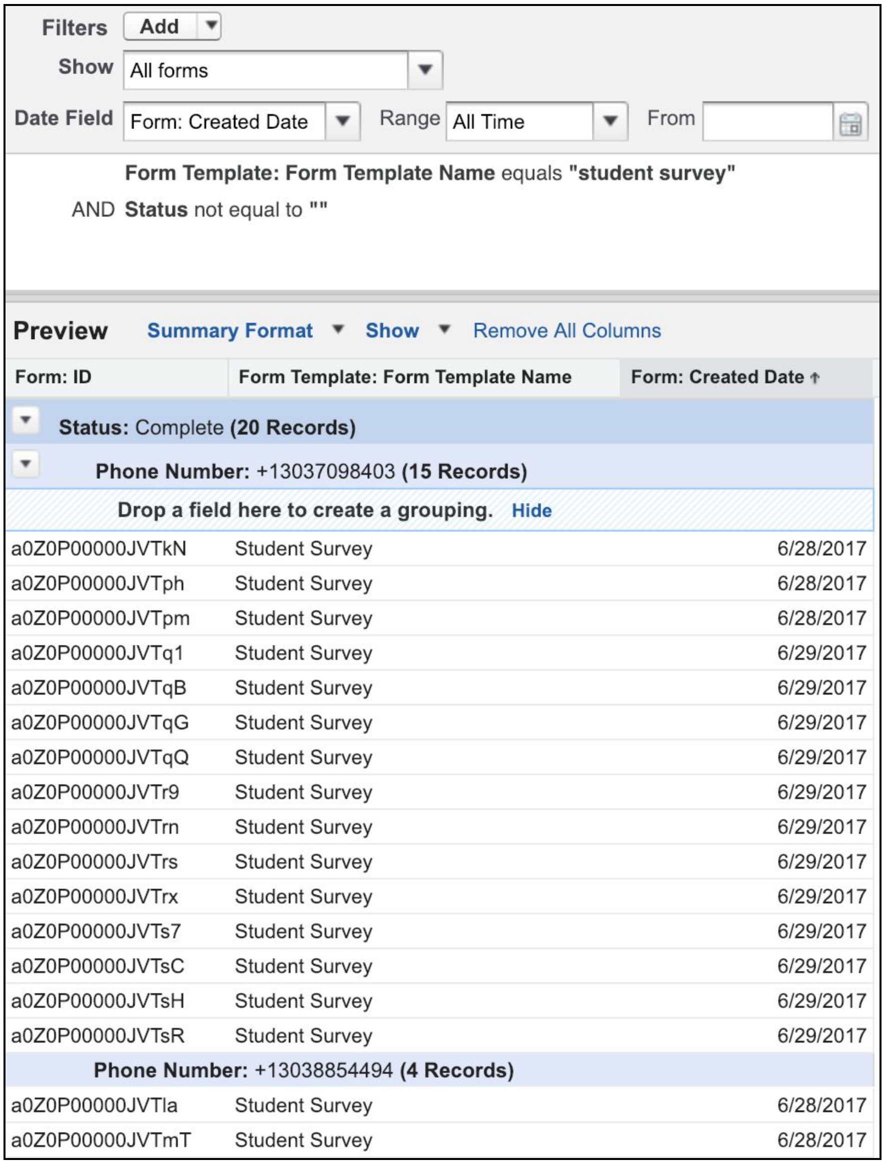
A DASHBOARD FOR THE STUDENT SURVEY (SEE EXAMPLE IN FORM TEMPLATES SECTION)

A dashboard displaying record counts of Question Responses from a Student Survey Form Template

Create Reports by Navigating to the Reports tab

REPORTS FROM THE STUDENT SURVEY DASHBOARD

TOTAL SURVEYS INITIATED



Filters Add
Show All forms
Date Field Form: Created Date Range All Time From

Form Template: Form Template Name equals **"student survey"**
AND **Status** not equal to **""**

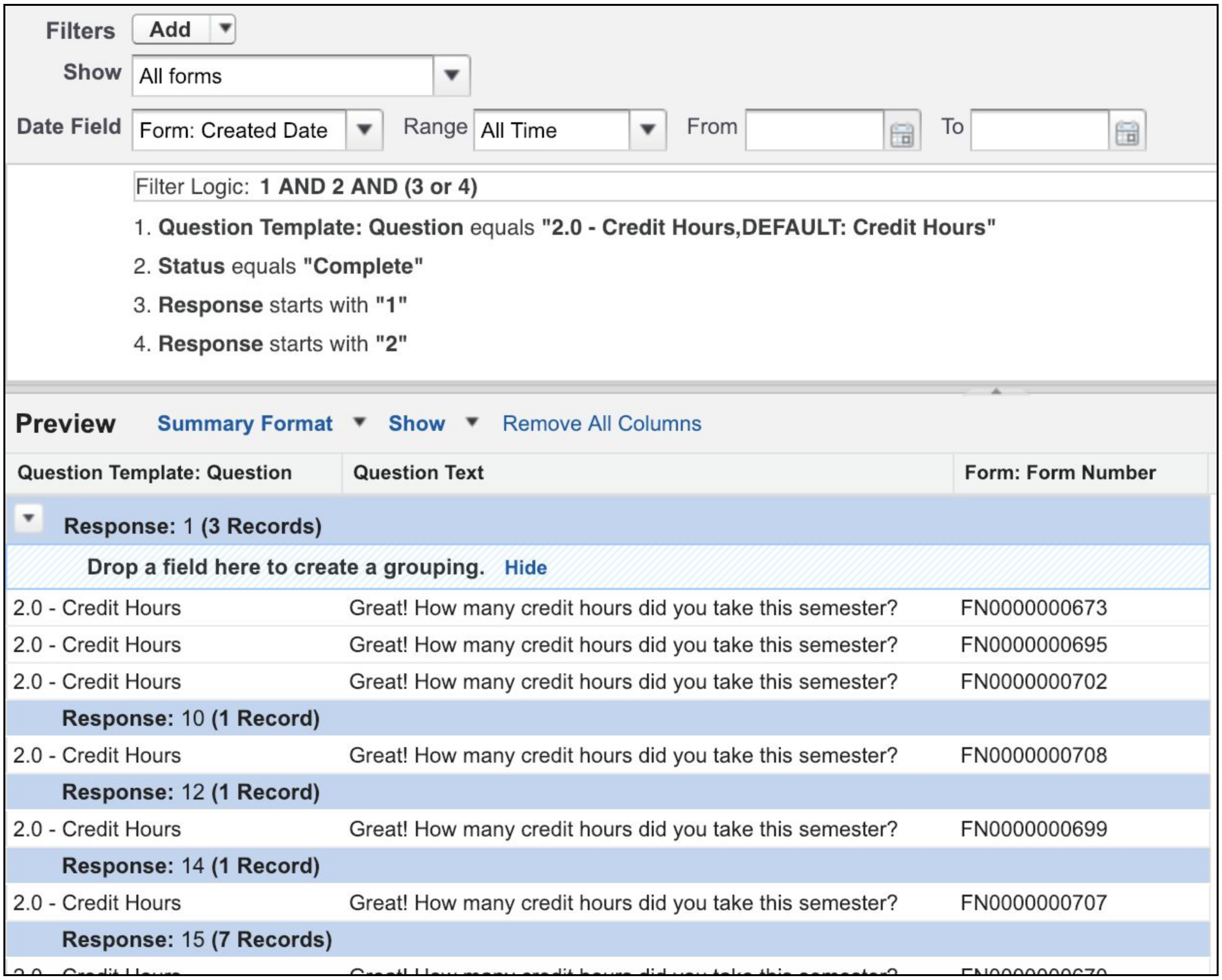
Preview Summary Format Show Remove All Columns

Form: ID	Form Template: Form Template Name	Form: Created Date
Status: Complete **(20 Records)**		
Phone Number: +13037098403 **(15 Records)**		
Drop a field here to create a grouping. Hide		
a0Z0P00000JVTkN	Student Survey	6/28/2017
a0Z0P00000JVTph	Student Survey	6/28/2017
a0Z0P00000JVTpm	Student Survey	6/28/2017
a0Z0P00000JVTq1	Student Survey	6/29/2017
a0Z0P00000JVTqB	Student Survey	6/29/2017
a0Z0P00000JVTqG	Student Survey	6/29/2017
a0Z0P00000JVTqQ	Student Survey	6/29/2017
a0Z0P00000JVTr9	Student Survey	6/29/2017
a0Z0P00000JVTrn	Student Survey	6/29/2017
a0Z0P00000JVTrs	Student Survey	6/29/2017
a0Z0P00000JVTrx	Student Survey	6/29/2017
a0Z0P00000JVTs7	Student Survey	6/29/2017
a0Z0P00000JVTsC	Student Survey	6/29/2017
a0Z0P00000JVTsH	Student Survey	6/29/2017
a0Z0P00000JVTsR	Student Survey	6/29/2017
Phone Number: +13038854494 **(4 Records)**		
a0Z0P00000JVTla	Student Survey	6/28/2017
a0Z0P00000JVTmT	Student Survey	6/28/2017

Building the Report for Total Surveys Initiated with the Classic Report Builder

- Report Type: Form with Form Template
- Summary Format
- Form: Created Date - All Time
- Sort Group by Status
- Form Template equals Student Survey
- Status not equal to “ “

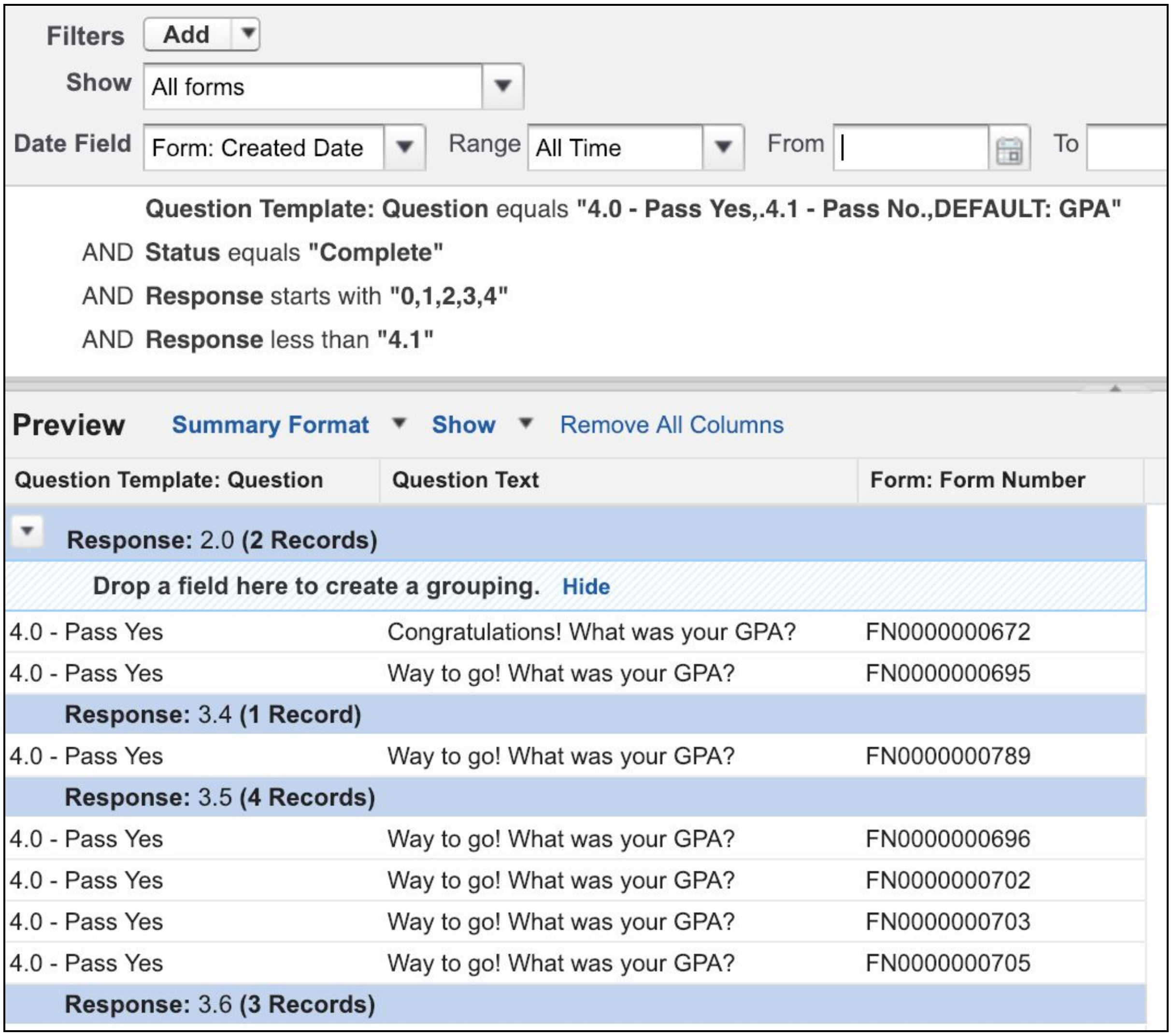
NUMBER OF CREDIT HOURS



Building the Report for Number of Credit Hours with the Classic Report Builder

- Report Type: Forms with Question Responses and Question Template
- Summary Format
- Form: Created Date - All Time
- Sort group by Response
- Question Template: Question equals 2.0 Credit Hours, DEFAULT: Credit Hours
- Status = Complete
- Response starts with 1 or 2 (Filter Logic)

WHAT WAS YOUR GPA?



Filters Add
Show All forms
Date Field Form: Created Date Range All Time From To

Question Template: Question equals **"4.0 - Pass Yes,.4.1 - Pass No.,DEFAULT: GPA"**
AND **Status** equals **"Complete"**
AND **Response** starts with **"0,1,2,3,4"**
AND **Response** less than **"4.1"**

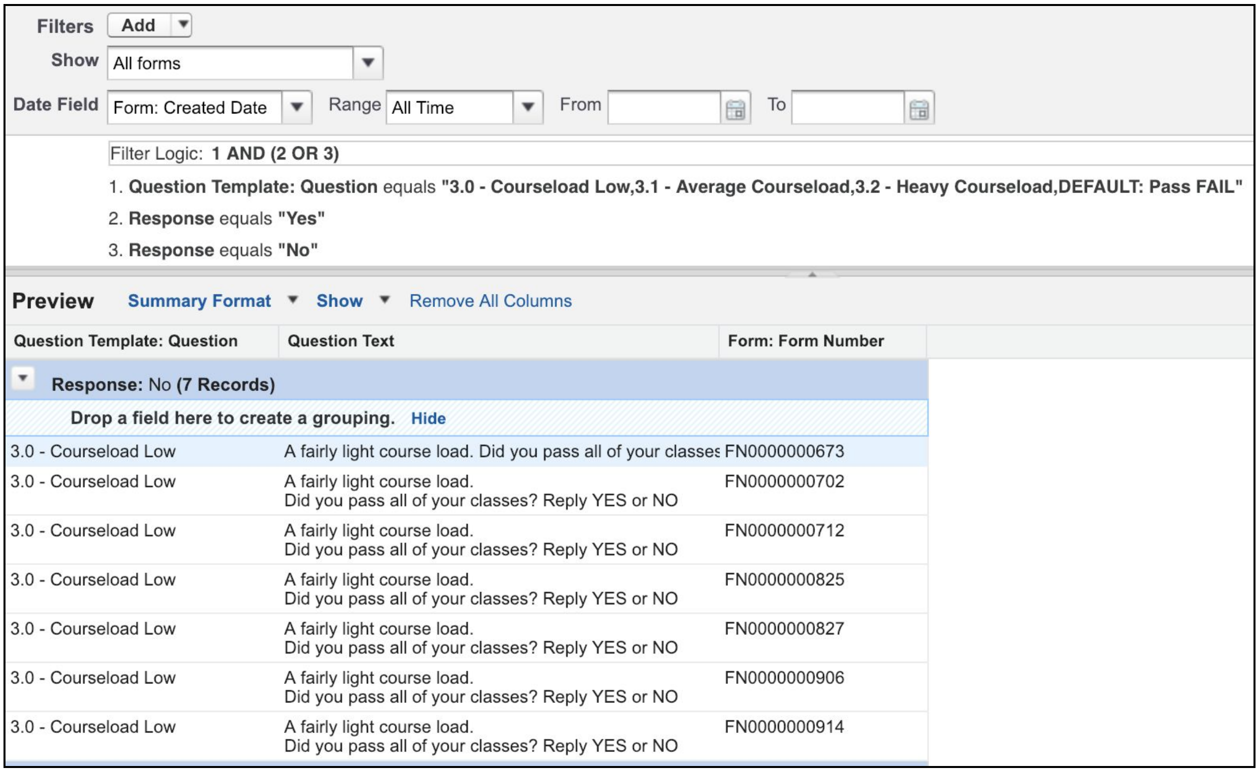
Preview Summary Format Show Remove All Columns

Question Template: Question	Question Text	Form: Form Number
Response: 2.0 **(2 Records)**		
Drop a field here to create a grouping. Hide		
4.0 - Pass Yes	Congratulations! What was your GPA?	FN0000000672
4.0 - Pass Yes	Way to go! What was your GPA?	FN0000000695
Response: 3.4 **(1 Record)**		
4.0 - Pass Yes	Way to go! What was your GPA?	FN0000000789
Response: 3.5 **(4 Records)**		
4.0 - Pass Yes	Way to go! What was your GPA?	FN0000000696
4.0 - Pass Yes	Way to go! What was your GPA?	FN0000000702
4.0 - Pass Yes	Way to go! What was your GPA?	FN0000000703
4.0 - Pass Yes	Way to go! What was your GPA?	FN0000000705
Response: 3.6 **(3 Records)**		

Building the Report for GPA with the Classic Report Builder

- Report Type: Forms with Question Responses and Question Template
- Summary Format
- Form: Created Date - All Time
- Sort group by Response
- Question Template: Question equals 4.0 - Pass Yes, 4.1 - Pass No., DEFAULT: GPA
- Status equals Complete
- Response starts with 0, 1, 2, 3, 4
- Response less than 4.1

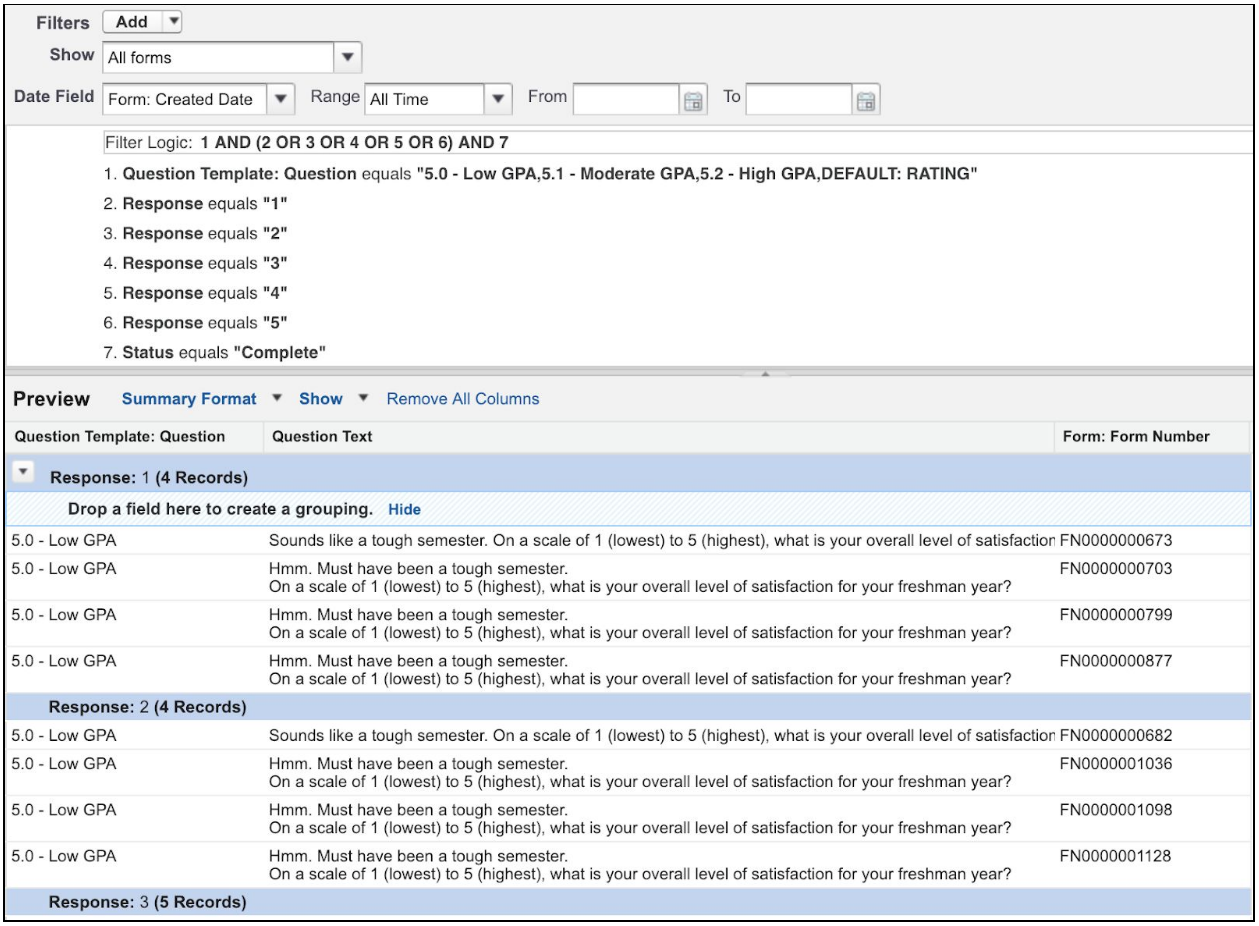
DID YOU PASS ALL CLASSES?



Building the Report for Classes Passed with the Classic Report Builder

- Report Type: Forms with Question Responses and Question Template
- Summary Format
- Form: Created Date - All Time
- Sort group by Response
- Question Template: Question equals 3.0 - Courseload Low, 3.1 - Average Courseload, 3.2 - Heavy Courseload, DEFAULT: Pass FAIL
- Response equals YES or NO (Filter Logic)

LEVEL OF SATISFACTION



Building the Report for Level of Satisfaction with the Classic Report Builder

- Report Type: Forms with Question Responses and Question Template
- Summary Format
- Form: Created Date - All Time
- Sort group by Response
- Question Template: Question equals 5.0 - Low GPA, 5.1 - Moderate GPA, 5.2 - High GPA, DEFAULT: Rating
- Response equals 1, 2, 3, 4, 5 (Filter Logic)
- Status equals Complete

UPGRADING

HOW-TOs + BEST PRACTICES FOR UPGRADING TO THE LATEST VERSION OF MOGLI SMS

Keep in mind the following tips when upgrading Mogli SMS.

HOW-TOs

1. **Schedule a time to upgrade with the Mogli team**
   a. Scheduling ahead of time helps our team prepare to configure your environment while minimizing any down-time of Mogli functionality. Upgrading may impact your existing automations, so we'll work to address those issues when upgrading. We'll set up a meeting on both our calendars to designate timing.

2. **At the agreed-upon time, install the latest version of Mogli SMS via the AppExchange in your preferred environment for Admins only**
   a. **IMPORTANT:** Especially if your utilization of Mogli SMS is heavy, we recommend installing any offered upgrades in your Sandbox and testing thoroughly before installing in Production.

3. **Grant org access to the Mogli team if we don't already have login credentials:**

LIGHTNING	CLASSIC
• Click on your Avatar (top right corner) > Settings > Grant Account Login Access • Set the access expiration date for 'Tact, L3C' for a minimum of 1 month. Save. • Please let our team know once you've granted access, as we aren't notified	• Click on your Name > My Settings > My Personal Information > Grant Account Login Access • **OR** Setup > My Personal Information > Grant Account Login Access • Set the access expiration date for 'Tact, L3C' for a minimum of 1 month. Save. • Please let our team know once you've granted access, as we aren't notified

4. **The Mogli team will configure the upgrade, which usually takes 30-60 minutes**
   a. Depending on the nature of the upgrade, we may ask that you assign your Mogli users to Mogli-related permission sets.

5. **Our team will follow up with you over the next few days to make sure things are still working smoothly post-upgrade**

DATA LOADING

BEST PRACTICES FOR MIGRATING HISTORICAL SMS RECORDS

INSERTING HISTORICAL SMS RECORDS:

1. Ensure you're running Mogli on version 4.16.3 or later
2. Ensure that Gateways are configured in Mogli for proper mapping
3. Ensure you have the Create Audit Fields permission set
4. Collect your historical SMS data in a spreadsheet and map it to our SMS fields:
    a. **Direction** = Incoming or Outgoing
    b. **Status** = Sent Successfully or Received Successfully
    c. **Message** = message text
    d. **Created Date**
    e. **Created By ID**
    f. **Last Modified By ID** (can only be modified on insert)
    g. **Last Modified Date** (can only be modified on insert)
    h. **Phone Number** = must be in this format: +12223334444
    i. **Opportunity ID** = ID of Opportunity (if applicable)
    j. **Lead ID** = ID of Lead (if applicable)
    k. **Contact ID** = ID of Contact (if applicable)
    l. **Gateway ID** = ID of the Gateway that was used to send or receive the message
5. Export your file to CSV
6. Use Data Loader to Insert records and map accordingly

UPDATING HISTORICAL SMS RECORDS:

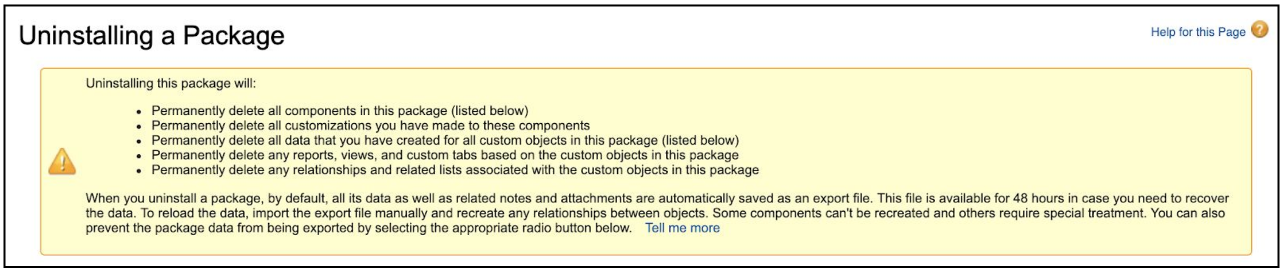
1. Ensure you're running Mogli on version 4.16.3 or later
2. Ensure you have the Create Audit Fields permission set
3. Run a report that includes the Case Safe IDs of the SMS records to update
4. Collect your historical SMS data in a spreadsheet and map it to our SMS fields as described above with the addition of:
    a. **ID = Case Safe ID**
5. Export your file to CSV
6. Use Data Loader to Update records and map accordingly

UNINSTALLING

WE'LL MISS YOU

Keep in mind the following tips when uninstalling Mogli.

Prior to uninstalling, be sure to export and archive any relevant data you'll want to access later. Then, remove Mogli-related objects, fields, workflows, and automations to which they reference. Remove the SMS Site and accompanying profile.



1. From Setup, enter Installed Packages in the quickfind bar and select Installed Packages
2. Find Mogli_SMS and click Uninstall
3. Check the box for 'Yes, I want to uninstall this package and permanently delete all associated components'
4. Follow the prompts to delete all remaining Mogli components

PROFESSIONAL SERVICES

LET US DO THE HEAVY LIFTING

Our Professional Services team builds automations involving SMS all the time. In fact, we really love it. We're always discovering the cool new things we can do inside of Salesforce. We'll work with you to fully understand your requirements so that we can design something clean and efficient, while delivering a seamless user experience to exceed your expectations.

SOME OF OUR MOST COMMON AUTOMATIONS:

- *Inquiry Form Templates* which can update fields on an existing Contact or Lead and create a new Contact or Lead with the information provided in Question Responses.
- *Trigger a task, email, or notification* to go out to a support representative when a client, customer, or constituent has a poor experience.
- *Automated texts based on updates in Salesforce*, such as when a student's application status changes from applied to admitted, send out a congratulatory text message right away.
- *Automated appointment reminders* with a personalized touch 48 hours before the scheduled appointment.
- *Create records* with fields populated from Question Responses in a Form.
- *Text to Donate* Form Templates which pre-populate web forms with Contact or Lead information so that you can receive donations quickly and seamlessly.

HAVE AN IDEA, BUT DON'T KNOW WHERE TO START?
Reach out anyway. We'd love to help you discover the possibilities.

HELP

WE HAVE YOUR BACK. Our support team is available M-F from 9A-5P in Mountain Time.

YOUR GO-TO CONTACTS

Rob Blatchley, rob@mogli.com
VP of Product

Malorie Leogrande, malorie@mogli.com
Senior Client Success Manager

Jake Brady, jake@mogli.com
Associate Client Success Manager

Colin Gerard, colin@mogli.com
Inside Sales Specialist

Rebecca Staiano, rebecca@mogli.com
Client Success Manager

HOW TO GRANT US ACCESS TO YOUR ORG

Sometimes we may need to access your org to resolve an issue. It is our policy to leave your data as it is.
We strongly believe in accessing your org for this sole purpose, and with your permission.

LIGHTNING	CLASSIC
• Click on your Avatar (top right corner) > Settings > Grant Account Login Access • Set the access expiration date for 'Tact, L3C' for a minimum of 1 month. Save. • Please let our team know once you've granted access, as we aren't notified	• Click on your Name > My Settings > My Personal Information > Grant Account Login Access • **OR** Setup > My Personal Information > Grant Account Login Access • Set the access expiration date for 'Tact, L3C' for a minimum of 1 month. Save. • Please let our team know once you've granted access, as we aren't notified

Would you be willing to give us a 5-star review on the AppExchange?
If not, please drop us a line and let us know how we can earn one.

salesforce appexchange