

# Salesforce integration instruction with SerwerSMS



# Account registration



## Log in

Username [I forgot my username](#)

Password [I forgot my password](#)

**Log in**

or

**Log in via URL**

Demo version: login demo, password demo.

You don't have an account with us?


[Go to registration »](#)

Download the application to use SerwerSMS.pl  
on your smartphone



[Go to mobile version](#)

After creating an account, you can activate a trial version.

 **Test for free**


Test the system now, no obligation.

- 14 days free trial.
- 100 free messages for activating your account, unless you have an individual one-time code.
- Full system functionality with the possibility of API integration.

Activate

[Mam kod jednorazowy](#)


You can also choose one of the cooperation models: pre-paid or post paid

 **Top up your account without any obligations**

Use whenever you have the need.

- You top up your account at any time.
- You use your top-up balance for any type of service.
- Simple and fast new top-up.
- The price for an SMS is from 0.08 PLN net.
- Flexible [Pre-Paid pricing](#)

Top up your account

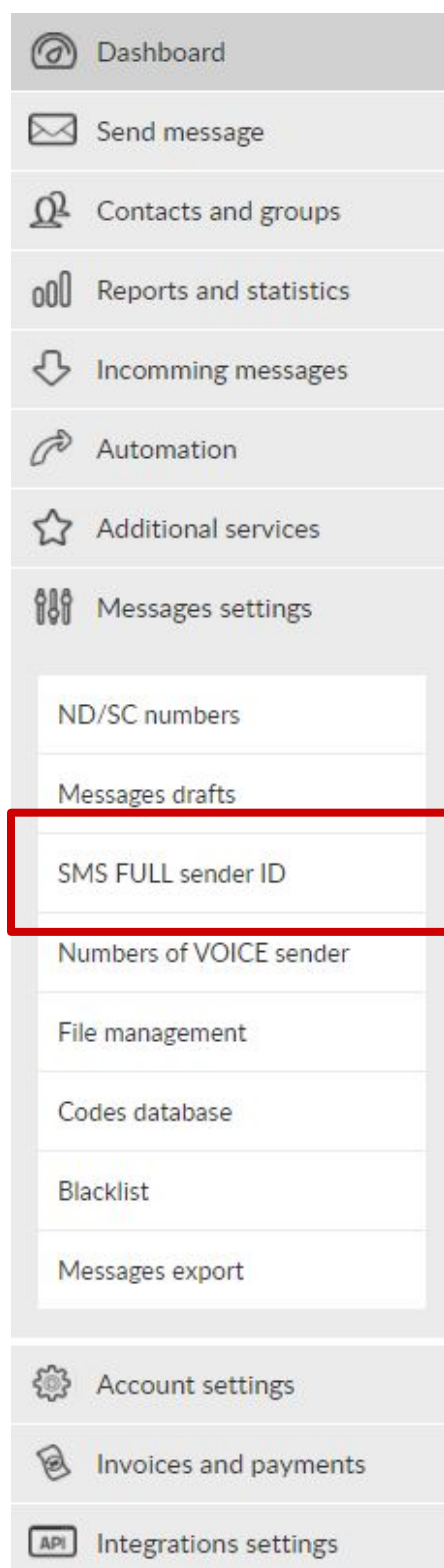
 **Check in once a month**

Send flexibly when you want and with no top-ups.

- Without recharging, you will receive a collective invoice once a month.
- You use any type of service.
- Simple conclusion of a contract in traditional or electronic form.
- Price from 0.06 PLN net per SMS.
- Flexible [Post-Paid Pricing](#).

Go to run package

Please select now your sender ID



Select "+" and then add a new sender ID



Create new Sender ID

Sender ID:

Assigned to user:

Statement: \*

The possibilities and limitations:

- The name can not be a number of 9-digits (eg. 500 600 700)
- The name can not be shortened number (eg. 71200)
- The name can contain up to 11 characters in the range a-z, A-Z, 0-9 plus special signs as: space, dot, dash

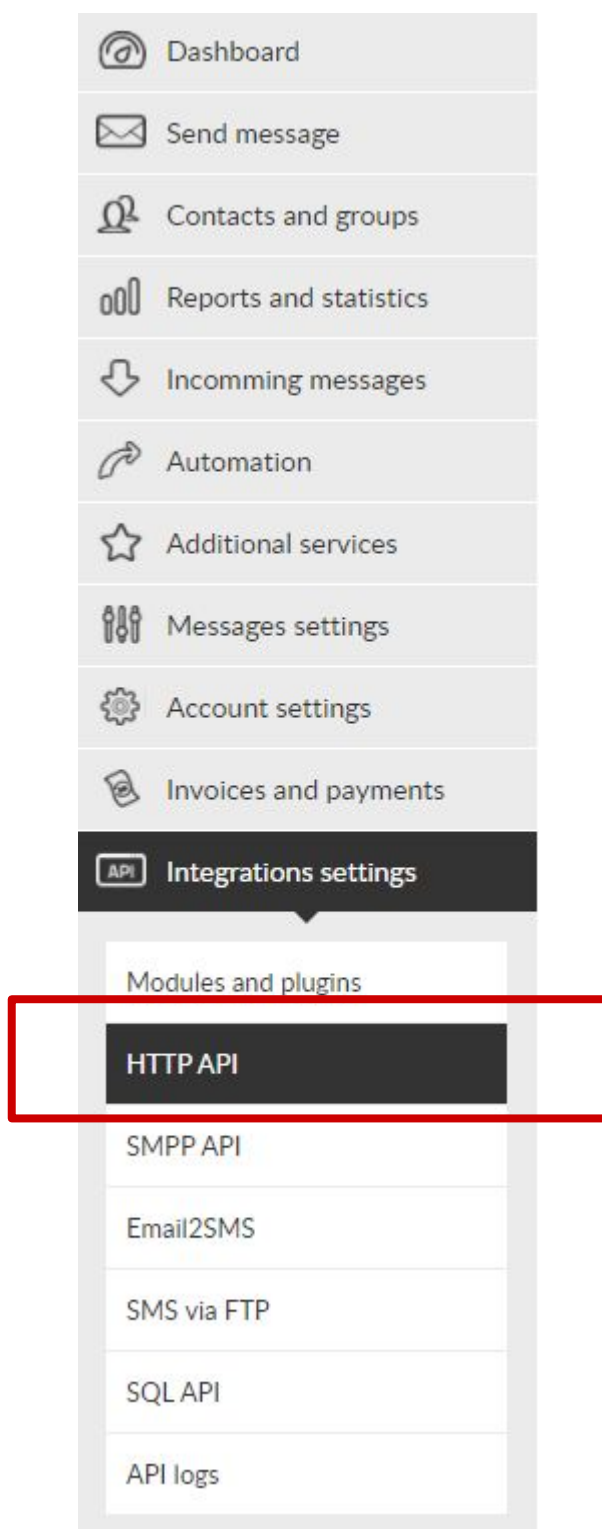
☐ I accept

Create Sender ID

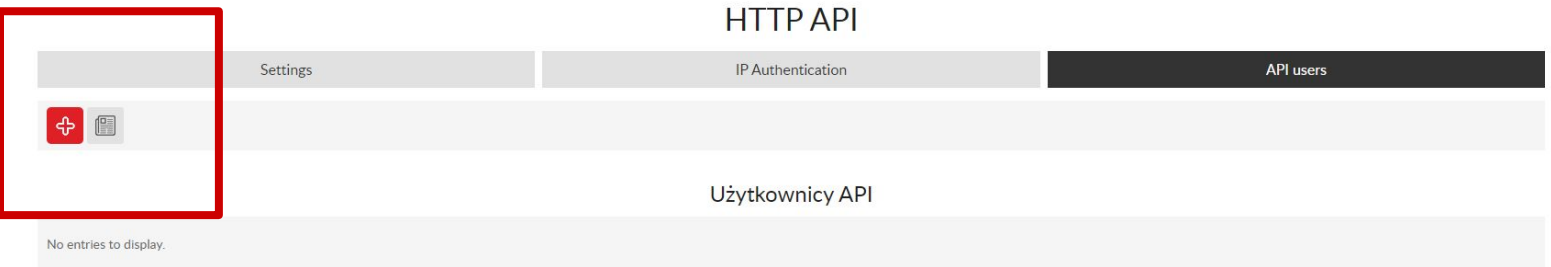


No.	Create date	Name	State	User
1	2021-08-17	EXAMPLE	✓ Activated	Main account

To connect SerwerSMS and Salesforce, it is necessary to create an API USER - this will increase the security of your account



Select "+" and add an API user,  
then save the settings



The screenshot shows the 'Adding a new user API' form. It includes fields for 'User:' (a dropdown menu with 'Main account' selected), 'Username: \*' (a text input field with 'webapi\_' entered), 'Suggested password:' (a text input field with 'a51d13e7' and a 'Set' button), 'Password: \*' (a text input field), and 'Retype password: \*' (a text input field). A red arrow points down from the top of the page to the 'Save' button, which is highlighted with a red box. The 'Save' button is a red rectangle with the text 'Save' in white.

You have just created an API USER. In the next steps, rewrite the API LOGIN, API PASSWORD and the SENDER ID when connecting the SerwerSMS and Salesforce systems

HTTP API

Settings


IP Authentication

API users

Użytkownicy API

No.	Username	User	State	Test mode	Action
1	webapi_EXAMPLE	Main account	<div></div>	<div><div></div>No, <a href="#">Change</a></div>	<div><div></div><div></div><div></div></div>



SMS Configuration 

Connect

Account in SerwerSMS

\* Username: API

\* Token

Create account Log in

In Salesforce, this is where you add the data you've previously created

*(Screenshot from the Salesforce platform)*













# You already have an account on SerwerSMS. Take the next step. Go to



Download Serversms.pl in AppExchange. Open "App Launcher" in salesforce and select the SerwerSMS.pl app to start the integration.

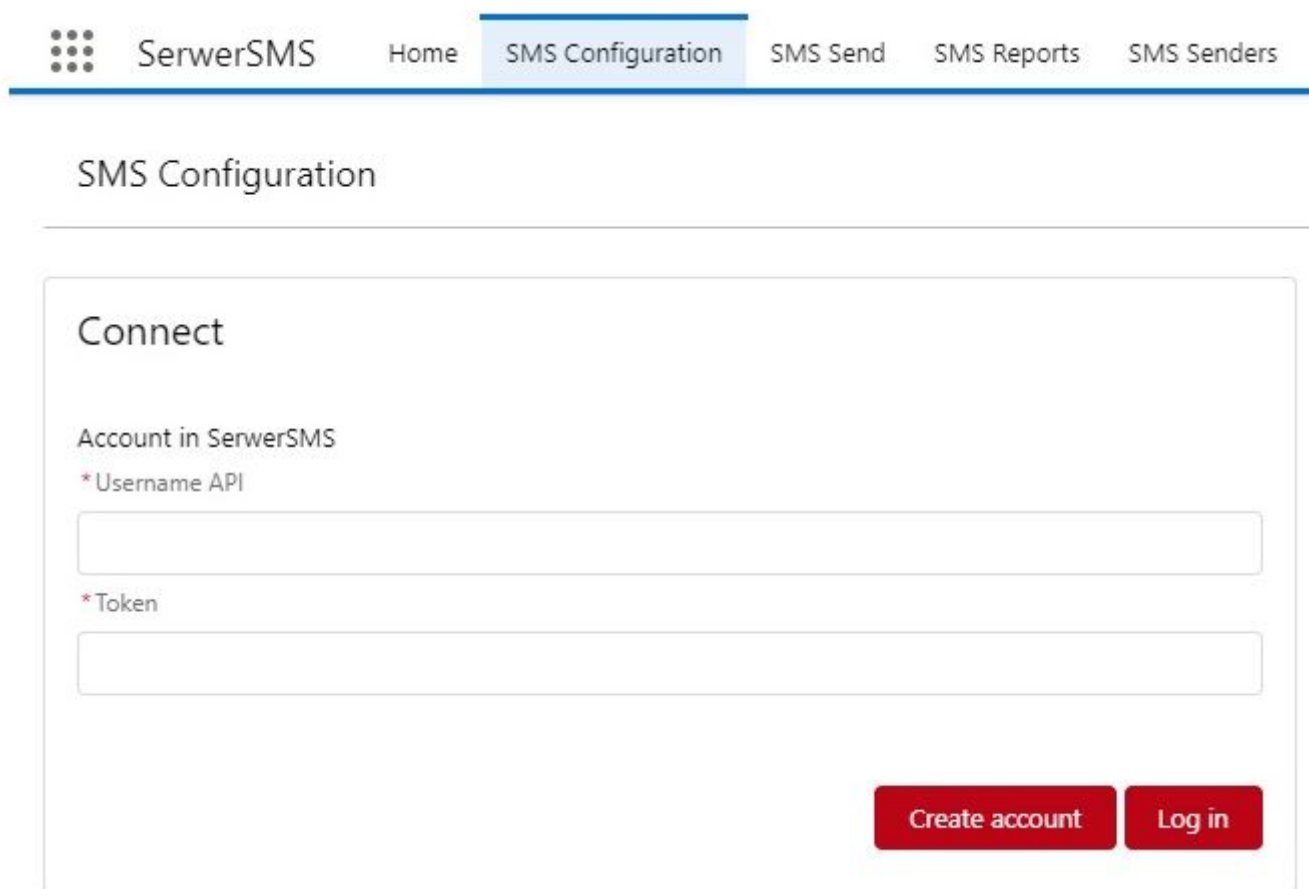
## App Launcher

▼ All Apps

	<b>Service</b> Manage customer service with accounts, contacts, cases, and more	
	<b>Salesforce Chatter</b> The Salesforce Chatter social network, including profiles and feeds	
	<b>Service Console</b> (Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	
	<b>Salesforce CMS</b> Manage content and media for all of your sites.	
	<b>SerwerSMS</b> The SerwerSMS platform provides bulk SMS, MMS, VMS VOICE	

## >> CONFIGURATION

After selecting the SMS Configuration, you can integrate Salesforce with SerwerSMS. To do this, first you need to click the Create account button, after which you will be redirected to the instructions for creating an account in SerwerSMS and the necessary configuration:



The screenshot shows the SerwerSMS web interface. The top navigation bar includes a logo, 'SerwerSMS', and links for 'Home', 'SMS Configuration' (which is highlighted), 'SMS Send', 'SMS Reports', and 'SMS Senders'. Below the navigation bar, the page title 'SMS Configuration' is displayed. The main content area is titled 'Connect' and contains the following elements:

- Section header: 'Account in SerwerSMS'
- Label: '\*Username API'
- Input field for Username API
- Label: '\*Token'
- Input field for Token
- Buttons: 'Create account' and 'Log in' (both in red)

Connect

Account in SerwerSMS

\* Username API

webapi\_salesforcetest

\* Token

Change

Settings

Sender


salesforce

Access API Salesforce

\* Client ID

\* Client Secret

Save

The views above show how to set up your account. We recommend that you configure the application in Salesforce for mass SMS sending. **Go to the App Manager (next slide)** 



Attention! Lack of configuration results in limiting the possibility of mass SMS sending

The views above show how to set up your account. We recommend that you configure the application in Salesforce for mass SMS sending. **Go to the App Manager**

Search Setup

Setup Home Object Manager

Lightning Experience App Manager

18 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible in Li...
1 All Tabs	AllTabSet		26.11.2021, 11:58	Classic	
2 App Launcher	AppLauncher	App Launcher tabs	26.11.2021, 11:58	Classic	
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	26.11.2021, 11:58	Lightning	✓
4 Community	Community	Salesforce CRM Communities	26.11.2021, 11:58	Classic	✓
5 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26.11.2021, 11:58	Lightning	✓
6 Marketing	Marketing	Best-in-class on-demand marketing automation	26.11.2021, 11:59	Classic	✓
7 Platform	Platform	The fundamental Lightning Platform	26.11.2021, 11:59	Classic	✓
8 Platform	Platform		26.11.2021, 11:58	Lightning	✓
9 Sales	Sales	The world's most popular sales force automation (SFA) solution	26.11.2021, 11:59	Classic	✓
10 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	26.11.2021, 11:58	Lightning	✓
11 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	26.11.2021, 11:58	Lightning	✓
12 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	26.11.2021, 11:58	Classic	✓
13 Salesforce CMS	SalesforceCMS	Manage content and media for all of your sites.	26.11.2021, 11:58	Lightning	✓
14 Service	Service	Manage customer service with accounts, contacts, cases, and more	26.11.2021, 11:59	Classic	✓
15 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	26.11.2021, 11:58	Lightning	✓
16 ServerSMS	ServerSMS	The ServerSMS platform provides bulk SMS, MMS, VMS VOICE	26.11.2021, 12:15	Classic (Managed)	✓
17 ServerSMS OAuth2	ServerSMS_OAuth2		03.02.2022, 16:32	Connected	
18 Your Account	OnlineSales	Add products and licenses, and review subscription details.	26.11.2021, 11:58	Lightning	✓

Search app

New Salesforce Mobile App QuickStart

✓ Data

Mass Transfer Approval Requests

✓ Apps

App Manager

AppExchange Marketplace

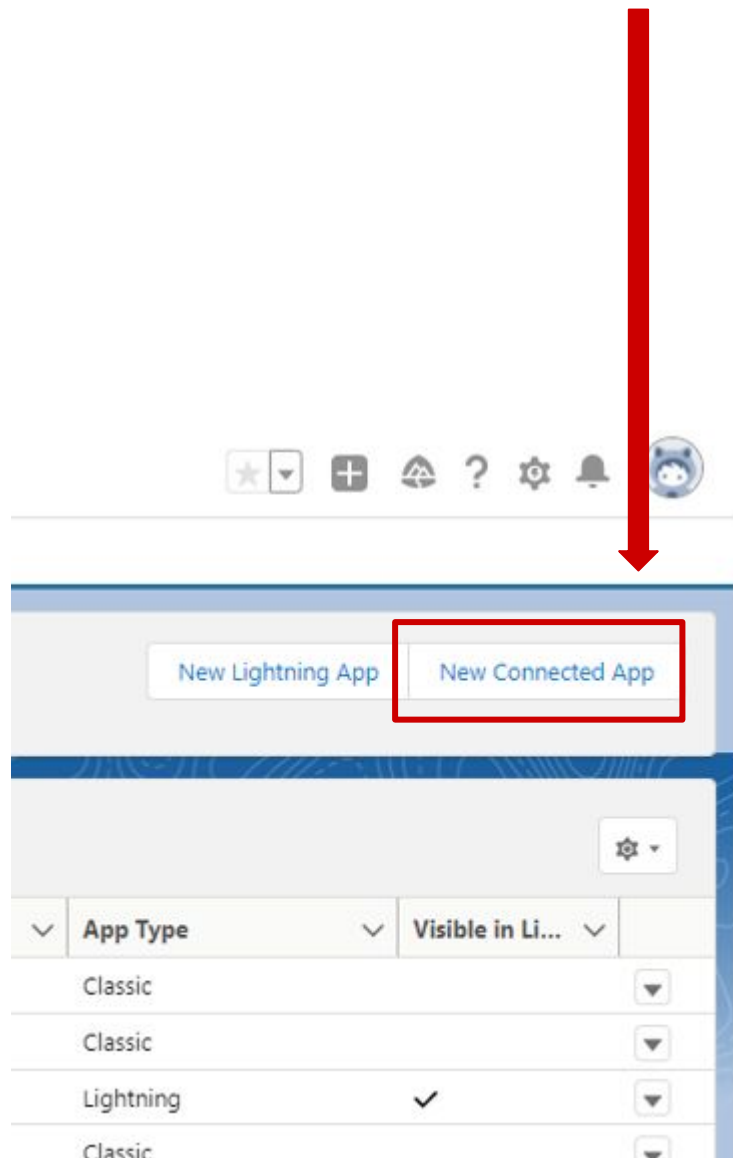
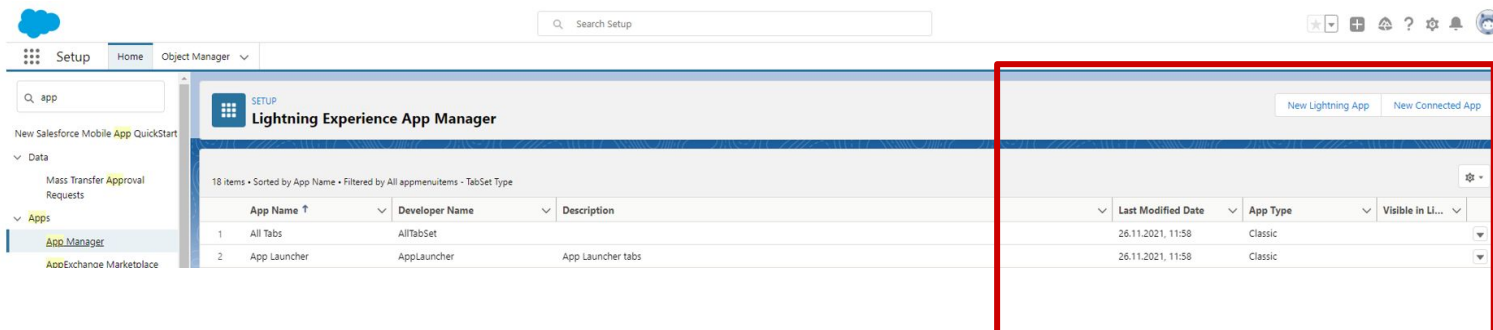
✓ Connected Apps

Lightning Experience App Manager

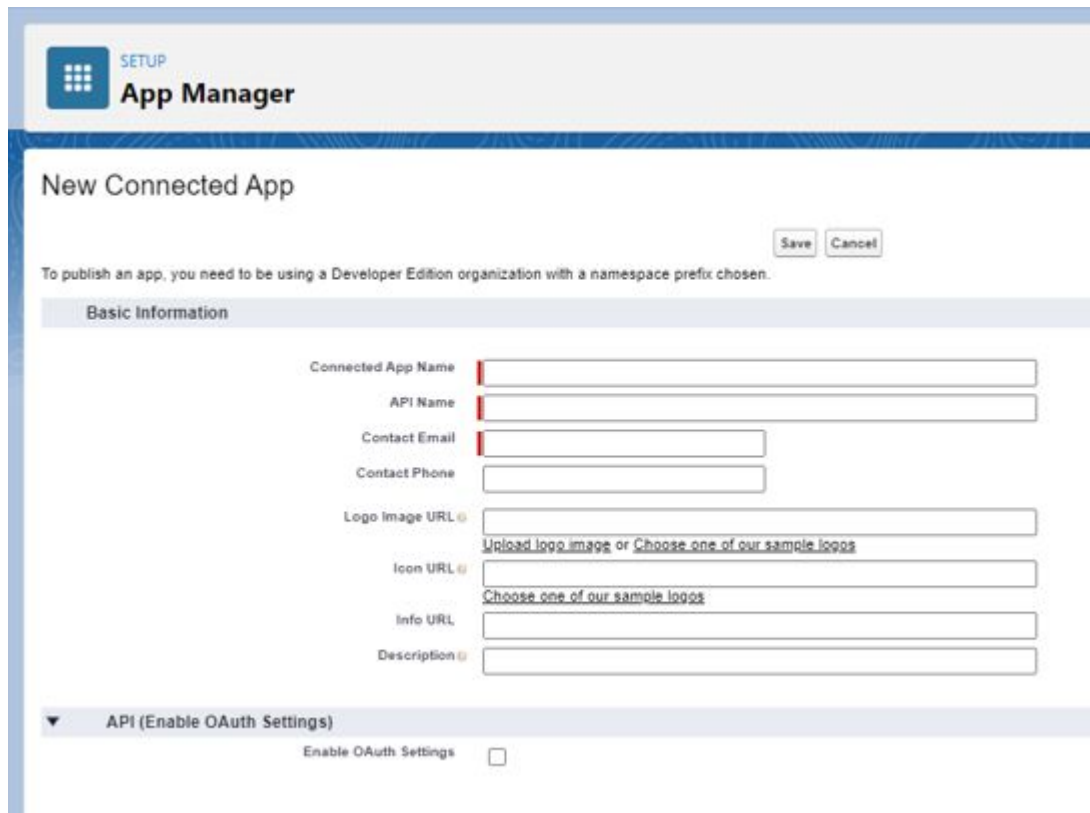
18 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name
1 All Tabs	AllTabSet
2 App Launcher	AppLauncher
3 Bolt Solutions	LightningBolt

Click on New Connected App Button in the section.



After clicking the "new Connected App" button, you will see the following view



The screenshot shows the 'New Connected App' setup page in the Salesforce App Manager. The page has a blue header with the 'App Manager' logo and a 'SETUP' label. Below the header, the title 'New Connected App' is displayed. To the right of the title are 'Save' and 'Cancel' buttons. A note states: 'To publish an app, you need to be using a Developer Edition organization with a namespace prefix chosen.' The form is divided into two sections: 'Basic Information' and 'API (Enable OAuth Settings)'. The 'Basic Information' section contains fields for 'Connected App Name', 'API Name', 'Contact Email', 'Contact Phone', 'Logo Image URL', 'Icon URL', 'Info URL', and 'Description'. The 'Logo Image URL' and 'Icon URL' fields have a small icon and a link to 'Upload logo image or Choose one of our sample logos'. The 'API (Enable OAuth Settings)' section has a dropdown arrow and a checkbox labeled 'Enable OAuth Settings'.

**You must follow these steps now:**

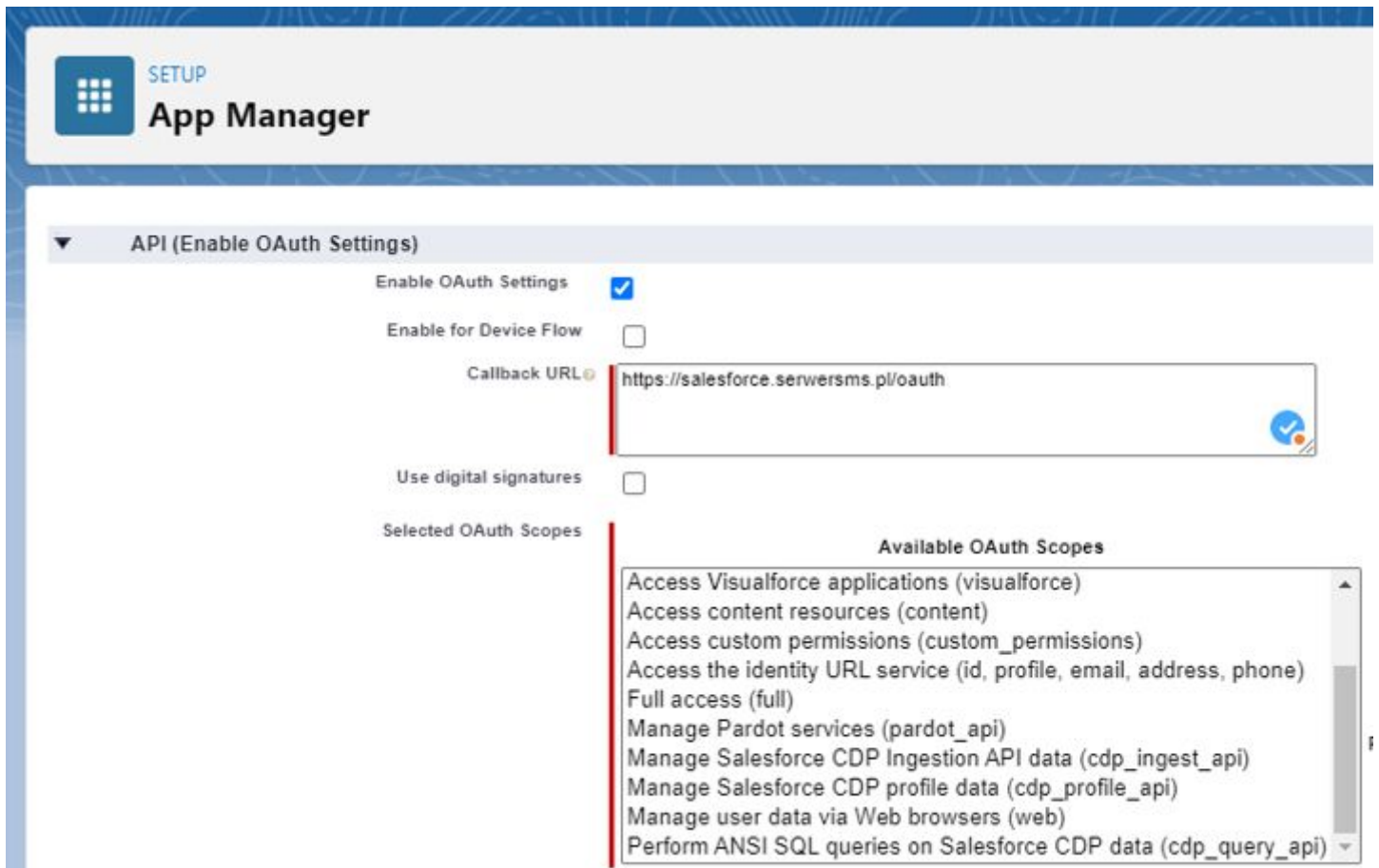
1. Add the sender's name
2. Enter a contact email address and any additional information relevant to your application.

## You still have the last two steps to complete (step 3 and 4:

3. Enter a Callback URL. This is the URL that a user's browser is redirected to after successful authentication.

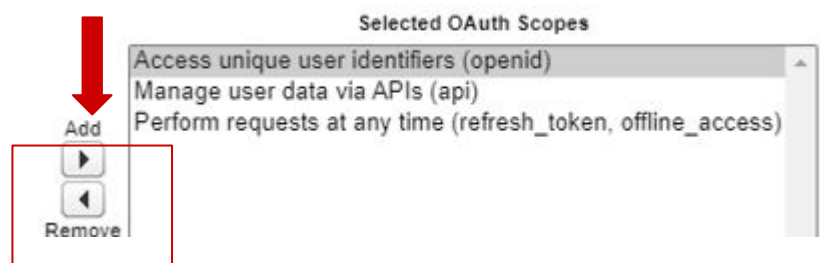
In this case we give -> <https://salesforce.serwersms.pl/oauth>

4. Add Selected OAuth Scopes. For instance, Full access(full).



The screenshot shows the 'App Manager' interface with the 'API (Enable OAuth Settings)' section expanded. The 'Enable OAuth Settings' checkbox is checked. The 'Callback URL' field contains 'https://salesforce.serwersms.pl/oauth'. The 'Selected OAuth Scopes' section is open, showing a list of available scopes on the right and a list of selected scopes on the left. The selected scopes are 'Access unique user identifiers (openid)', 'Manage user data via APIs (api)', and 'Perform requests at any time (refresh\_token, offline\_access)'. The available scopes include 'Access Visualforce applications (visualforce)', 'Access content resources (content)', 'Access custom permissions (custom\_permissions)', 'Access the identity URL service (id, profile, email, address, phone)', 'Full access (full)', 'Manage Pardot services (pardot\_api)', 'Manage Salesforce CDP Ingestion API data (cdp\_ingest\_api)', 'Manage Salesforce CDP profile data (cdp\_profile\_api)', 'Manage user data via Web browsers (web)', and 'Perform ANSI SQL queries on Salesforce CDP data (cdp\_query\_api)'.

From the above permissions, select the appropriate ones and move them with the arrows to the right side.



This close-up shows the 'Selected OAuth Scopes' section. A red arrow points to the 'Add' button, which is a right-pointing arrow. Below it is the 'Remove' button, which is a left-pointing arrow. The selected scopes are listed in a box: 'Access unique user identifiers (openid)', 'Manage user data via APIs (api)', and 'Perform requests at any time (refresh\_token, offline\_access)'.

SETUP

Manage Connected Apps

Connected App Name

App OAuth2

« Back to List: Custom Apps

Edit

Delete

Manage

Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

Version	1.0
API Name	App_OAuth2
Created Date	04.02.2022, 11:06
By:	<a href="#">Test Test</a>
Contact Email	test@gmail.com
Contact Phone	
Last Modified Date	04.02.2022, 11:07
By:	<a href="#">Test Test</a>
Description	
Info URL	

▼ API (Enable OAuth Settings)

Consumer Key

3MVG9t0sl2PpByqOwnT4pHsvFRwuiLyLhMm.rQXi5hzFHkTkNjmdk1Trf7NDFgn0vQPBSOhFK1Y8tS8GmVSd

Copy

Selected OAuth Scopes

Manage user data via APIs (api)  
 Perform requests at any time (refresh\_token, offline\_access)  
 Access unique user identifiers (openid)

Enable for Device Flow

☐

**Consumer Key**

Consumer Secret

[Click to reveal](#)

Callback URL

https://salesforce.serversms.pl/oauth

Require Secret for Web Server Flow

☒

Introspect All Tokens

☐

Include Custom Attributes

☐

Enable Single Logout

Single Logout disabled

**Consumer Secret**



You still have to choose the sender's name and enter consumer key and consumer secret. **Enter the data below as shown in the graphic**



Settings

Sender

salesforce

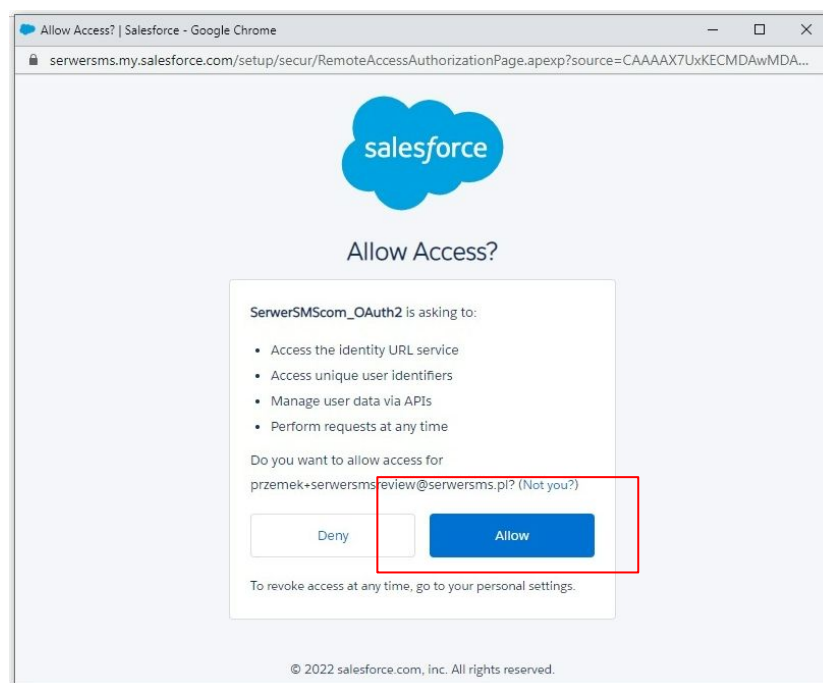
Access API Salesforce

\* Client ID

\* Client Secret

Save

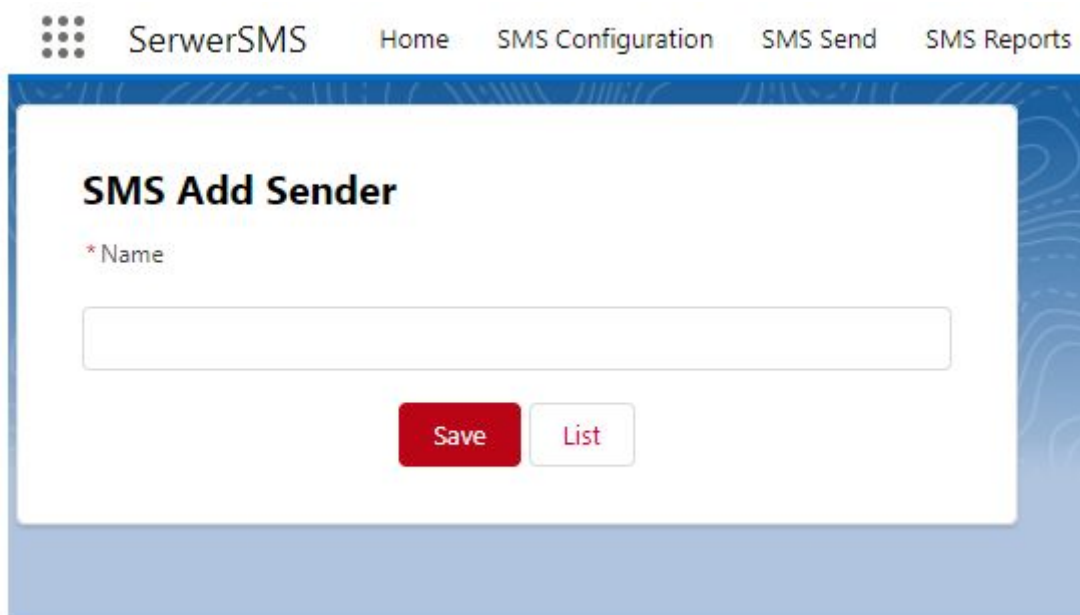
If you save, the pop-up you see in the image below will appear!



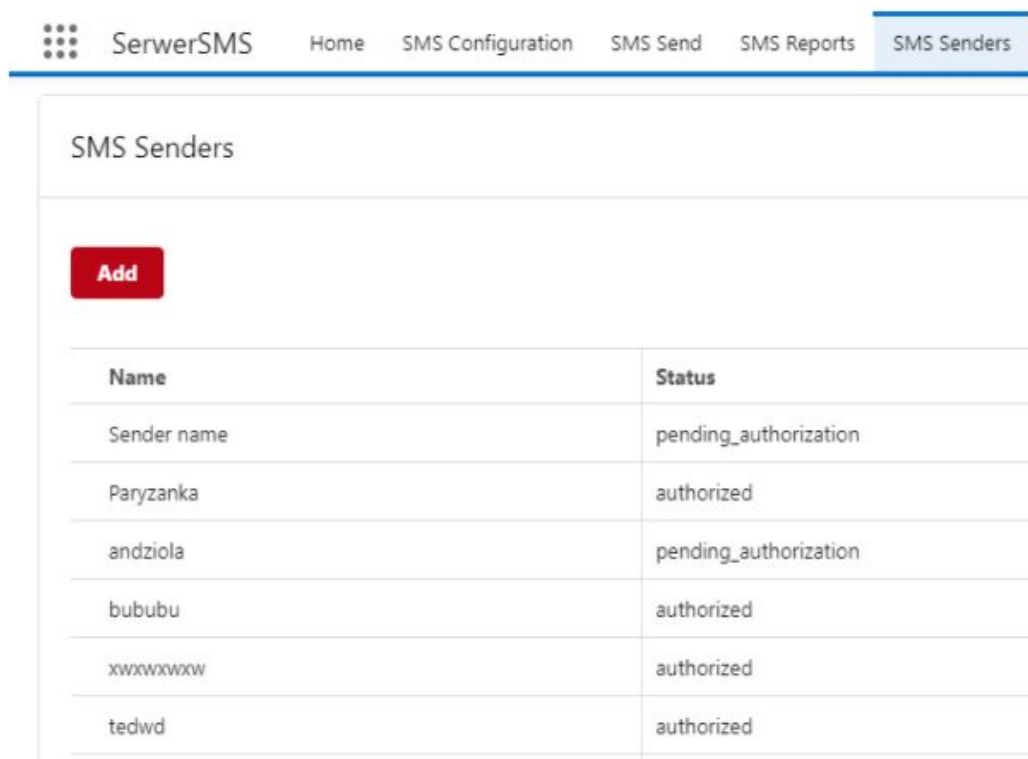
**Attention!** For the configuration to be correct, remember to have pop-ups unlocked in your Mozilla browser.

## >> FUNCTIONALITIES

Below there is an element for setting the default sender ID, used e.g. in the Process Builder, Flow automation process. To go to the SMS sending stage, you must also add the sender's ID:



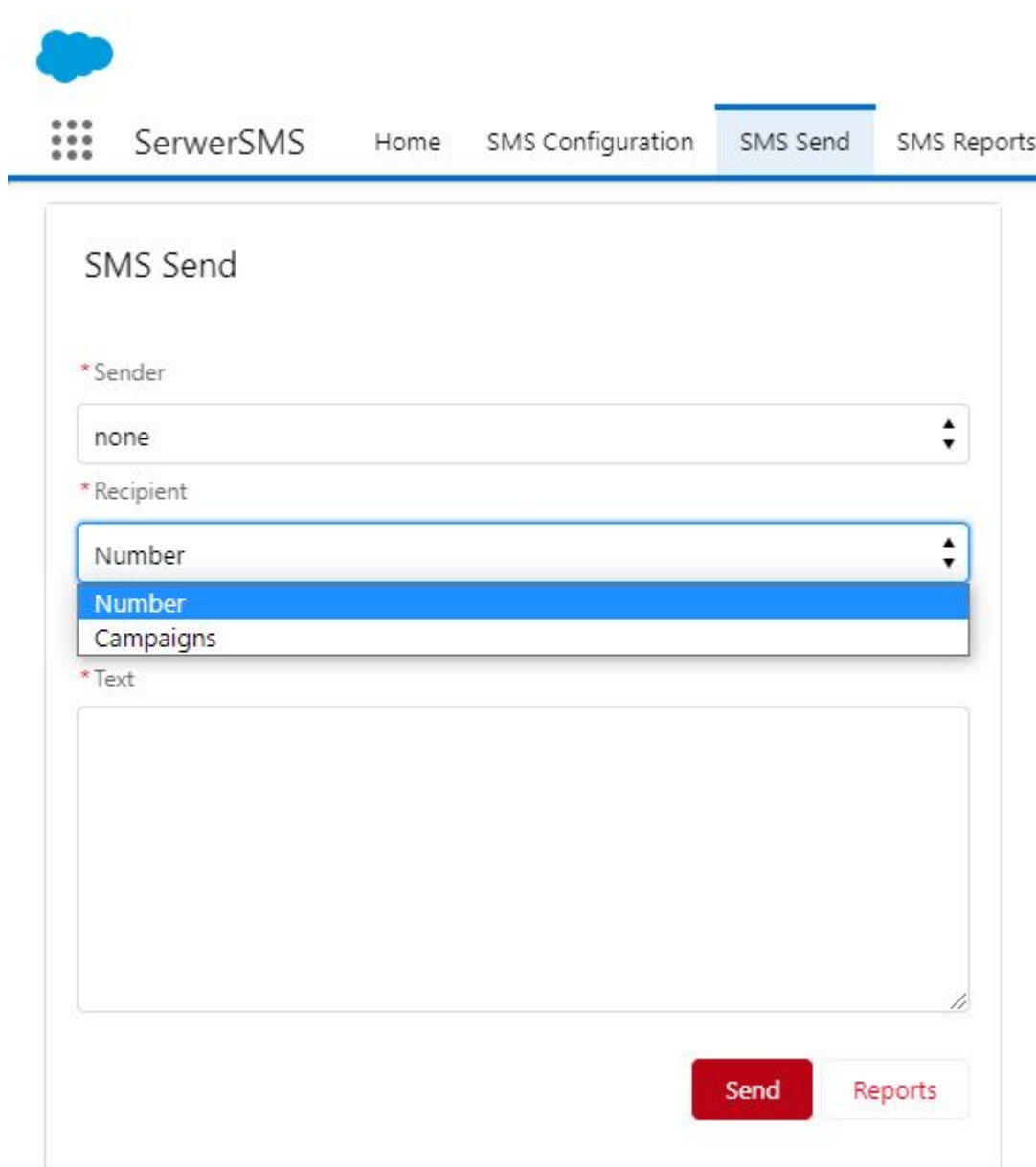
The screenshot shows the 'SMS Add Sender' form in the SerwerSMS application. The navigation bar at the top includes 'SerwerSMS', 'Home', 'SMS Configuration', 'SMS Send', and 'SMS Reports'. The form has a title 'SMS Add Sender' and a label '\* Name' above a text input field. Below the input field are two buttons: 'Save' (red) and 'List' (white with a red border).



The screenshot shows the 'SMS Senders' table in the SerwerSMS application. The navigation bar at the top includes 'SerwerSMS', 'Home', 'SMS Configuration', 'SMS Send', 'SMS Reports', and 'SMS Senders'. The table has two columns: 'Name' and 'Status'. There is an 'Add' button (red) above the table.

Name	Status
Sender name	pending_authorization
Paryzanka	authorized
andziola	pending_authorization
bububu	authorized
xwxwxwxw	authorized
tedwd	authorized

After accepting the sender ID's, you can start using it for SMS sending. In the SerwerSMS App in Salesforce, there are several ways to send SMS to your customers: Sending an SMS from a form to a single number or a Campaign created at that time:




The screenshot displays the 'SMS Send' interface within the SerwerSMS Salesforce app. The top navigation bar includes the SerwerSMS logo, a grid icon, and tabs for 'Home', 'SMS Configuration', 'SMS Send' (which is active), and 'SMS Reports'. The main content area is titled 'SMS Send' and contains three required fields, each marked with a red asterisk:

- \* Sender:** A dropdown menu currently showing 'none'.
- \* Recipient:** A dropdown menu with 'Number' selected. The dropdown list is open, showing 'Number' and 'Campaigns' as options.
- \* Text:** A large, empty text area for composing the message.

At the bottom right of the form, there are two buttons: a red 'Send' button and a white 'Reports' button with a red border.

Sending SMS from the contact list. In order to be able to do this, you must first add the SEND SMS button to your contact list. Go to SETUP -> Object manager -> Contact -> **Search layouts / Search layouts for Salesforce** -> Default Layout -> Edit

 **SETUP > OBJECT MANAGER**  
**Contact**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

**Search Layouts**

Search Layouts for Salesforce Classic

Hierarchy Columns

Triggers

Validation Rules

Edit Search Layout

Contact Search Results

Select the fields to include in this search layout. Note that your choices only determine the refer to the online help for [more information on search fields](#).

Available Fields

Salutation  
First Name  
Last Name  
Account ID  
Account Parent Account  
Reports To  
Mailing Street  
Mailing City  
Mailing State/Province  
Mailing Zip/Postal Code  
Mailing Country

Add  
Remove

Selected Fields

Name  
Account Name  
Account Site  
Phone  
Email  
Contact Owner Alias

Up  
Down

☐ Override the search result column customizations for all users

Standard Buttons

There are no customizable standard buttons for this view.

Custom Buttons

Available Buttons

Send SMS

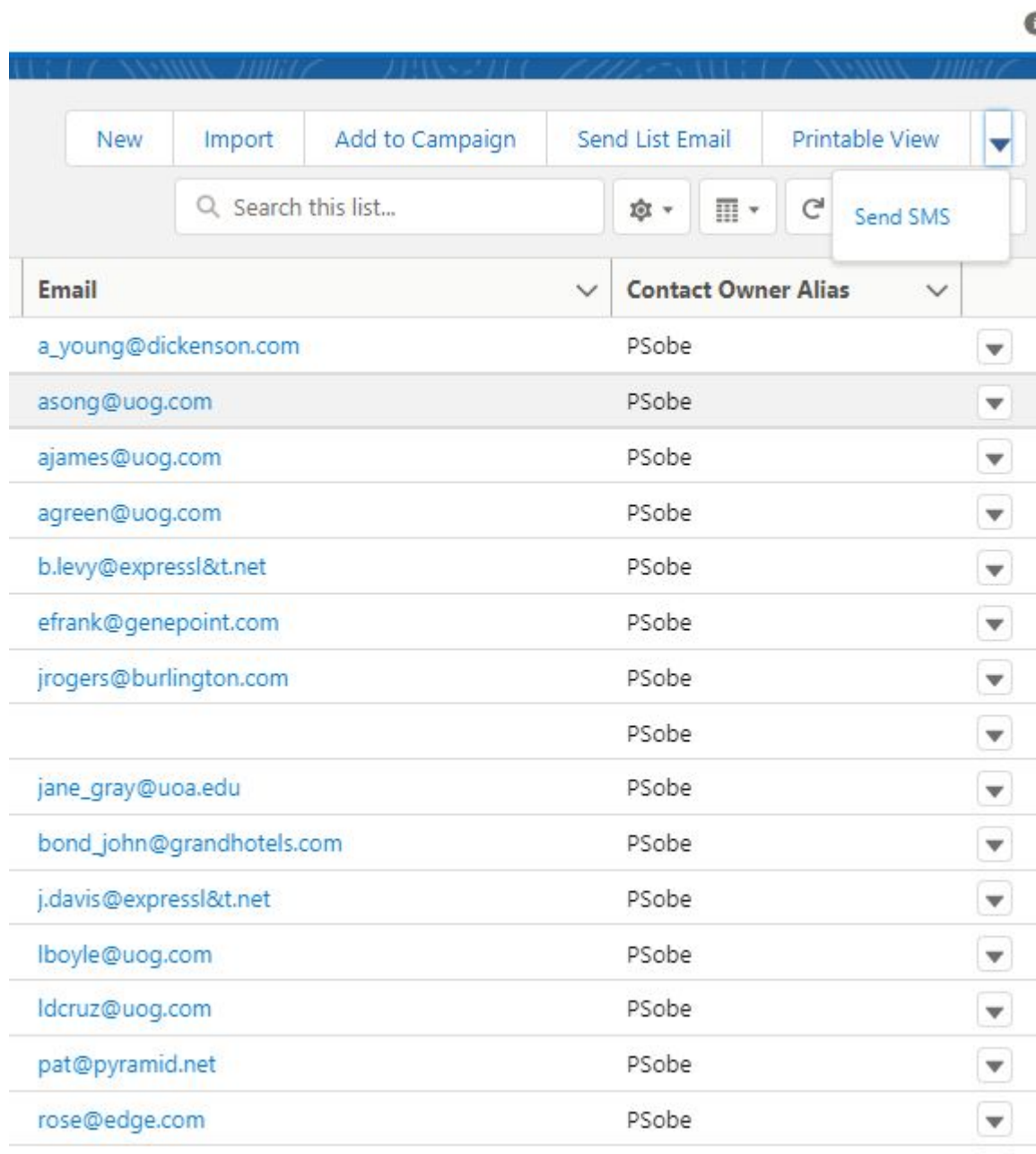
Add  
Remove

Selected Buttons

--None--

Up  
Down

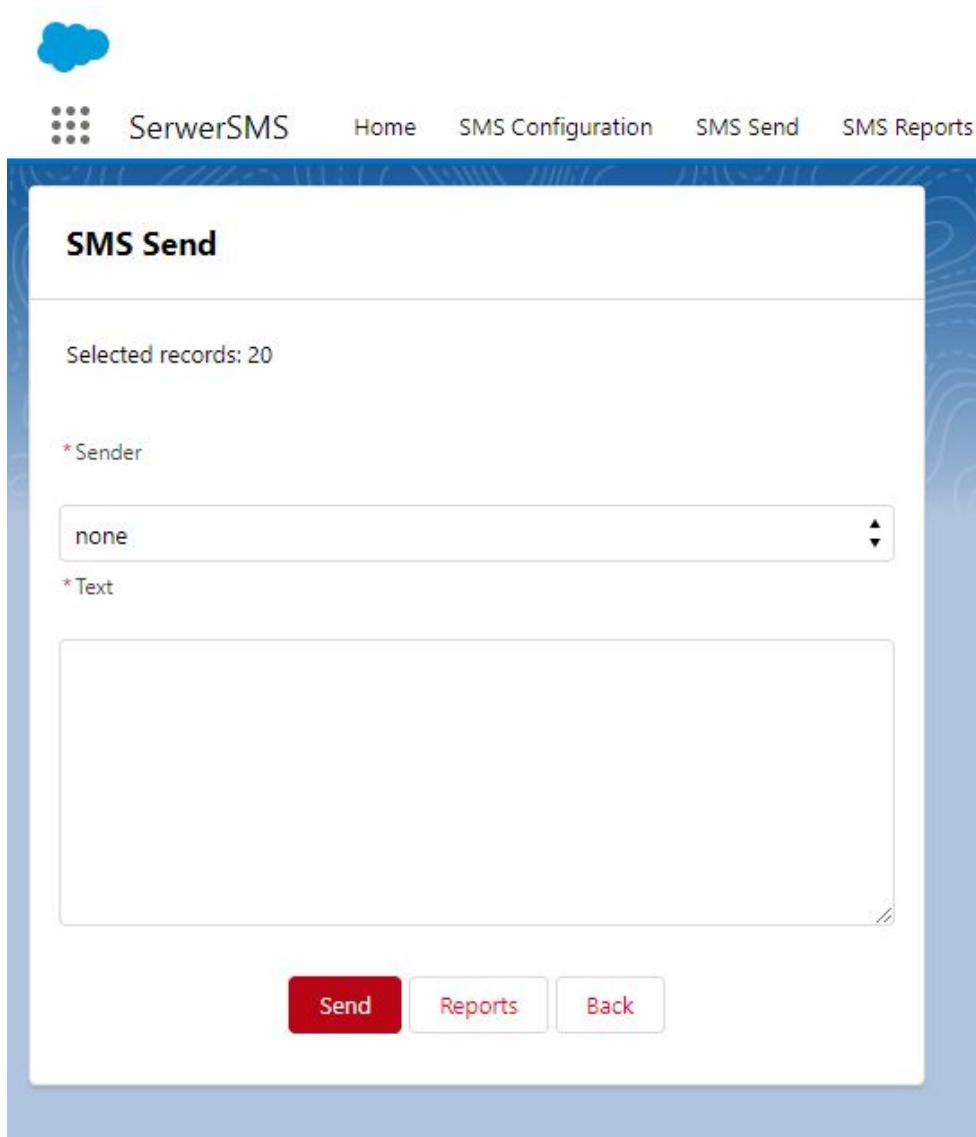
Then in Custom Buttons select Send SMS and add to Selected Buttons and save. Repeat the above operation for the Search Layouts for Salesforce -> List view -> Edit tab After correct configuration, we get the following view:



The screenshot shows a Salesforce list view interface. At the top, there is a toolbar with buttons: 'New', 'Import', 'Add to Campaign', 'Send List Email', 'Printable View', and a dropdown menu. Below the toolbar is a search bar labeled 'Search this list...'. To the right of the search bar are icons for settings, view type, and a 'Send SMS' button. The main area displays a table with two columns: 'Email' and 'Contact Owner Alias'. The table contains 15 rows of contact data. The 'Send SMS' button is highlighted in the toolbar.

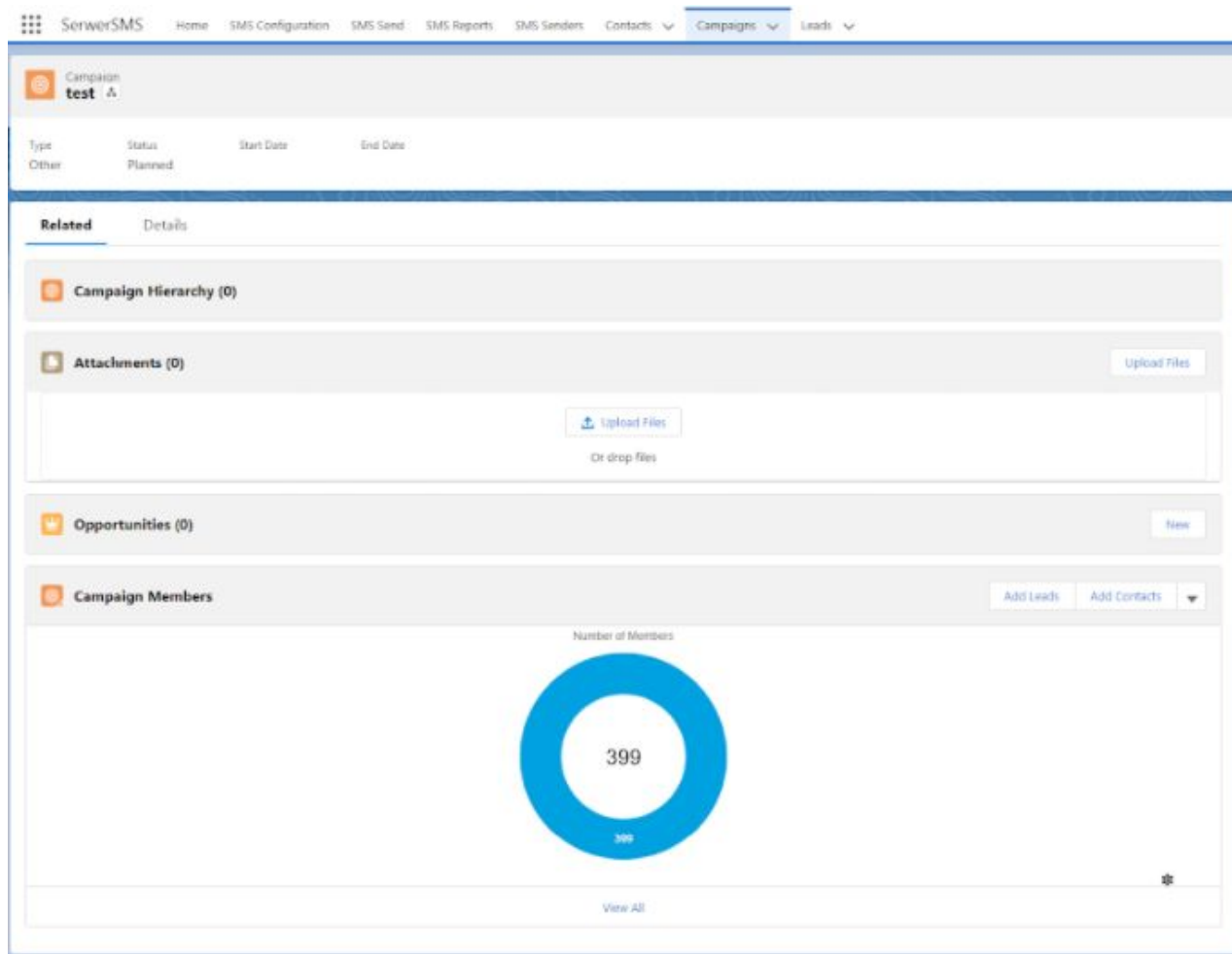
Email	Contact Owner Alias
<a href="mailto:a_young@dickenson.com">a_young@dickenson.com</a>	PSobe
<a href="mailto:asong@uog.com">asong@uog.com</a>	PSobe
<a href="mailto:ajames@uog.com">ajames@uog.com</a>	PSobe
<a href="mailto:agreen@uog.com">agreen@uog.com</a>	PSobe
<a href="mailto:b.levy@expressl&amp;t.net">b.levy@expressl&amp;t.net</a>	PSobe
<a href="mailto:efrank@genepoint.com">efrank@genepoint.com</a>	PSobe
<a href="mailto:jrogers@burlington.com">jrogers@burlington.com</a>	PSobe
	PSobe
<a href="mailto:jane_gray@uoa.edu">jane_gray@uoa.edu</a>	PSobe
<a href="mailto:bond_john@grandhotels.com">bond_john@grandhotels.com</a>	PSobe
<a href="mailto:j.davis@expressl&amp;t.net">j.davis@expressl&amp;t.net</a>	PSobe
<a href="mailto:lboyle@uog.com">lboyle@uog.com</a>	PSobe
<a href="mailto:ldcruz@uog.com">ldcruz@uog.com</a>	PSobe
<a href="mailto:pat@pyramid.net">pat@pyramid.net</a>	PSobe
<a href="mailto:rose@edge.com">rose@edge.com</a>	PSobe

After selecting from the list of contacts and clicking the Send SMS button, we are redirected to the SMS sending form, where we can define the sender and the content of the messages sent:



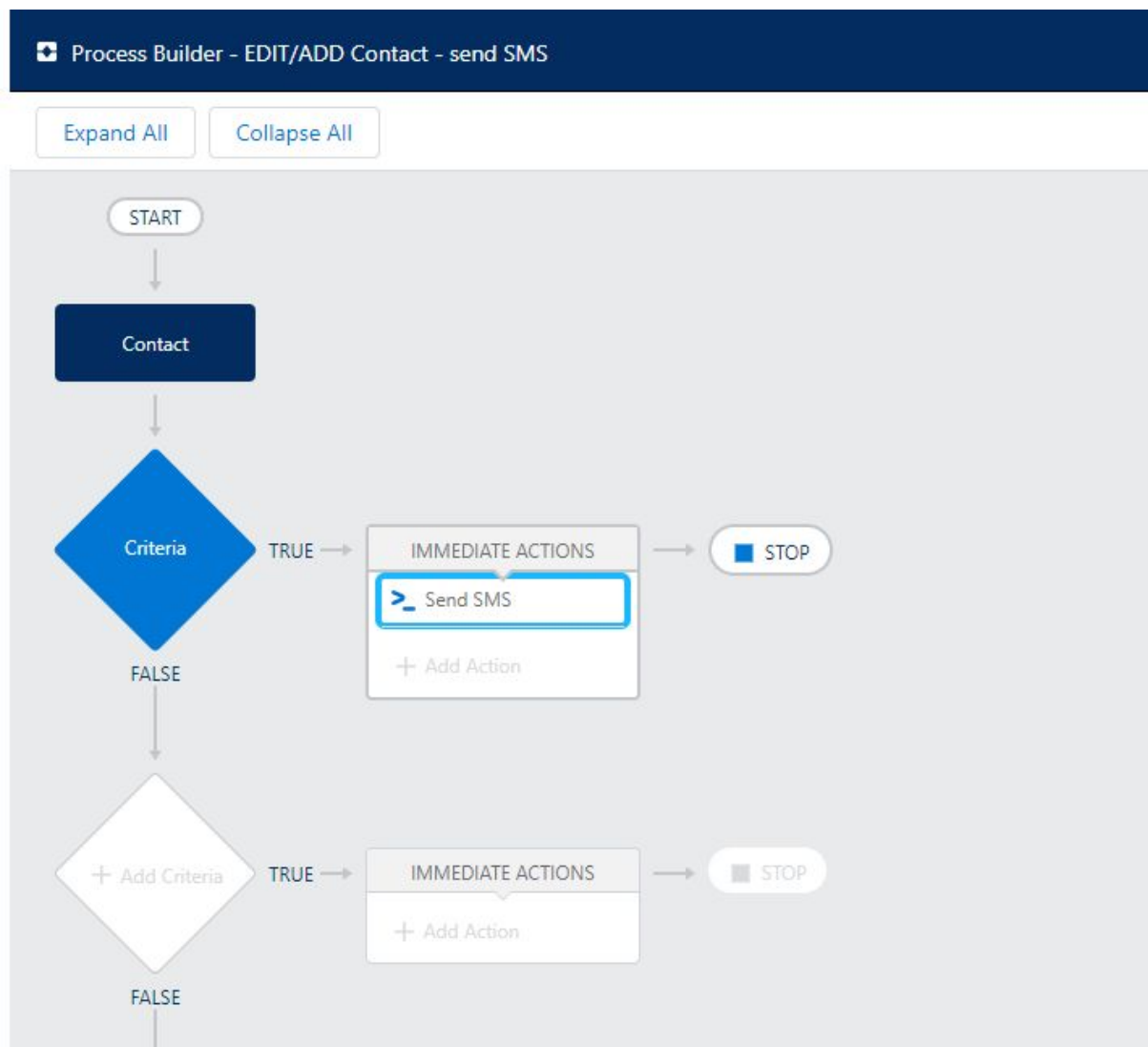
The screenshot displays the 'SMS Send' interface of the SerwerSMS application. At the top, there is a navigation bar with the SerwerSMS logo and menu items: Home, SMS Configuration, SMS Send, and SMS Reports. The main form area is titled 'SMS Send' and indicates 'Selected records: 20'. Below this, there is a required field for '\* Sender' with a dropdown menu currently showing 'none'. Another required field, '\* Text', is represented by a large, empty text area. At the bottom of the form, there are three buttons: a red 'Send' button, a white 'Reports' button, and a white 'Back' button.

The same configuration is in the case of Leads to be able to send collectively about all records. The only difference is when you select the Lead object compared to the contacts.



Another option for sending SMS is sending in the contact card/details of a lead or campaign. To configure it, go to the page edition and add the SMS sending component.

Another option of sending an SMS for the SerwerSMS application is the sending action after specific events and their preceding conditions. To do this, go to Setup-> Process Automation-> Process Builder and add a new process.





← Back To Setup
? Help

View All Processes
Clone
View Properties
Activate
Read Only

### Call Apex

Action Name \* i

Send SMS

Apex Class \* i

SMS Send

Set Apex Variables

Field *	Type *	Value *
text	String ▼	TEST
phone	Formula ▼	[Contact].MobilePhone

Another option of sending an SMS for the SerwerSMS application is the sending action after specific events and their preceding conditions. To do this, go to Setup-> Process Automation-> Process Builder and add a new process.

SerwerSMS Home SMS Configuration SMS Send SMS Reports SMS Senders

Sending: 0

Status  
Sent

ID	Phone	Status	Sender	Type	Text	Sent
6f9ea55117	+48792199129	delivered	bububu	full	test	2021-07-09 14:12:03
38fde0f1b3	+48792199129	delivered	przemek	full	TEST	2021-07-09 11:59:01
14f12ce5e3	+48792199129	delivered	bebe	full	aaa	2021-07-09 11:55:03
024efeae85	+48792199129	delivered	bububu	full	ssss	2021-07-09 11:54:03
53325ddb2e	+48792199129	delivered	TEST443	full	aaaaaaaaaaaa	2021-07-09 11:54:02

We can also put the list of reports as a component on any other Salesforce base page to observe sent messages