Salesforce integration instruction with SerwerSMS

Account registration

Log in

Username	I forgot my username

USER

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
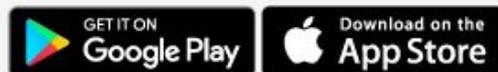
Go to mobile version

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

Test for free

Test the system now, no obligation.

o 14 days free trial.

o 100 free messages for activating your account, unless you have an individual one-time code.

o 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.

o You top up your account at any time.

o You use your top-up balance for any type of service.

o Simple and fast new top-up.

o The price for an SMS is from 0.08 PLN net.

o Flexible Pre-Paid pricing

Top up your account

### Check in once a month

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

o Without recharging, you will receive a collective invoice once a month.

o You use any type of service.

o Simple conclusion of a contract in traditional or electronic form.

o Price from 0.06 PLN net per SMS.

o Flexible Post-Paid Pricing .

Go to run package

Please select now your sender ID
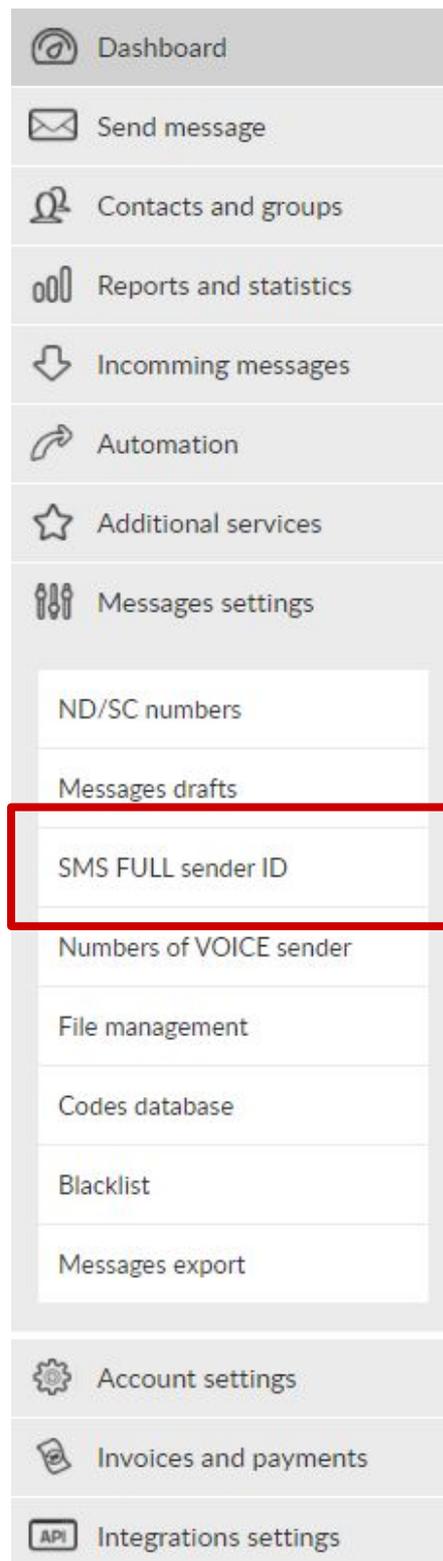
Select "+" and then add a new sender ID
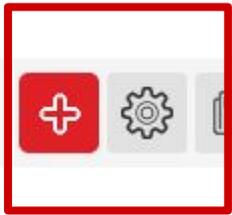
To connect SerwerSMS and Salesforce, it is necessary to create an API USER - this will increase the security of your account

source: https://en.serwersms.pl/integrations/modules-and-sms-plugins/145-saleforce
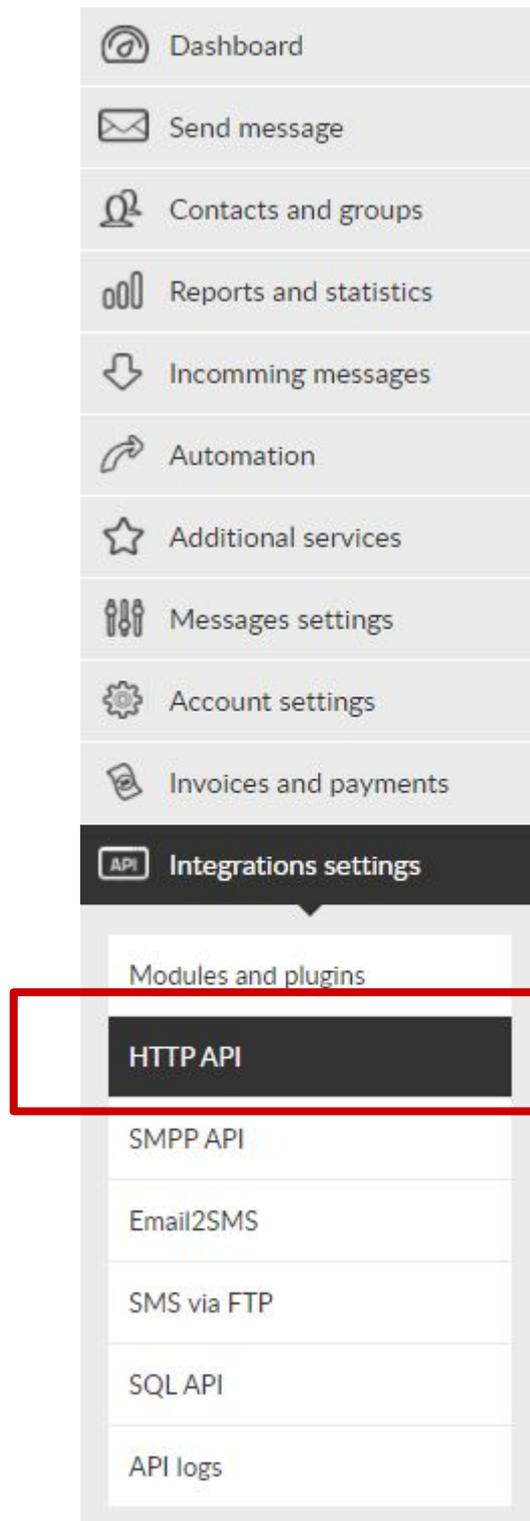
Select "+" and add an API user,
then save the settings
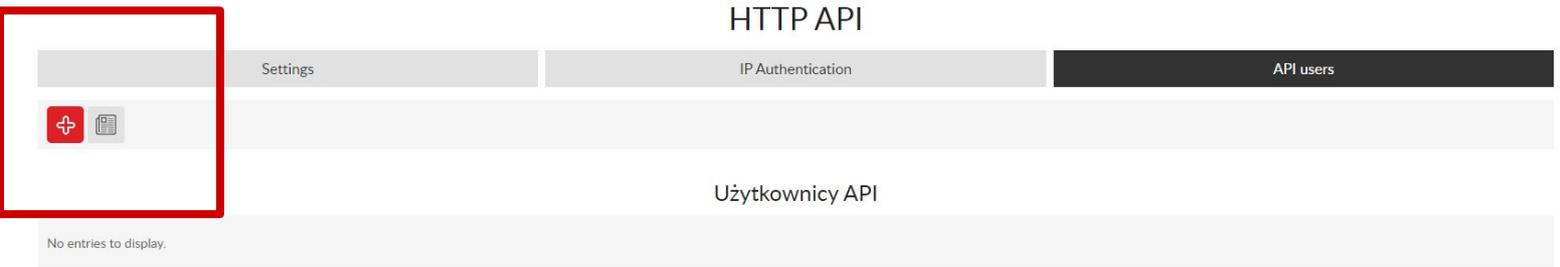
HTTP API

	Settings	IP Authentication	API users

Użytkownicy API

No entries to display.

Adding a new user API

User: Main account ▾

Username: *   webapi_ [   ]

Suggested password: a51d13e7   [Set]

Password: *   [   ]

Retype password: *   [   ]

                                          [Save]

* Required fields

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 Saleforce systems

HTTP API

Settings	IP Authentication	API users

Użytkownicy API

No.	Username	User	State	Test mode	Action
1	webapi_EXAMPLE	Main account	✓	🔴 No. Change	✎... 🔓 ✕

SMS Configuration

salesforce

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

>> 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 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**

Click on New Connected App Button in the section.
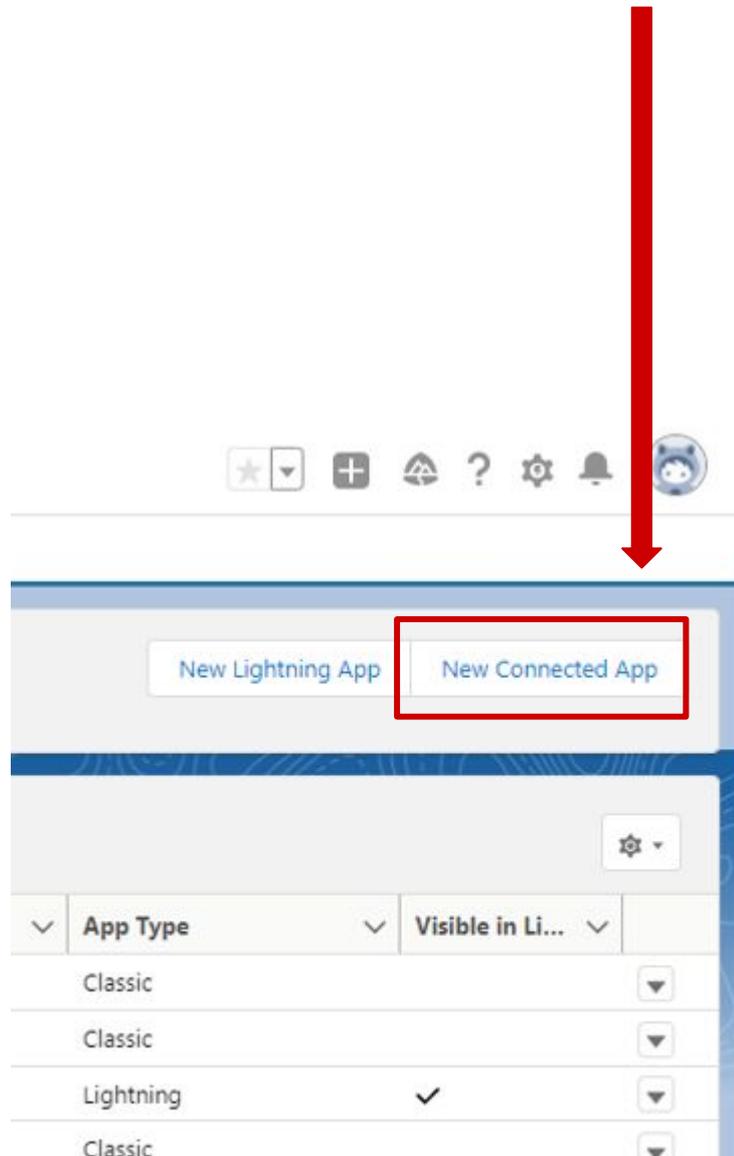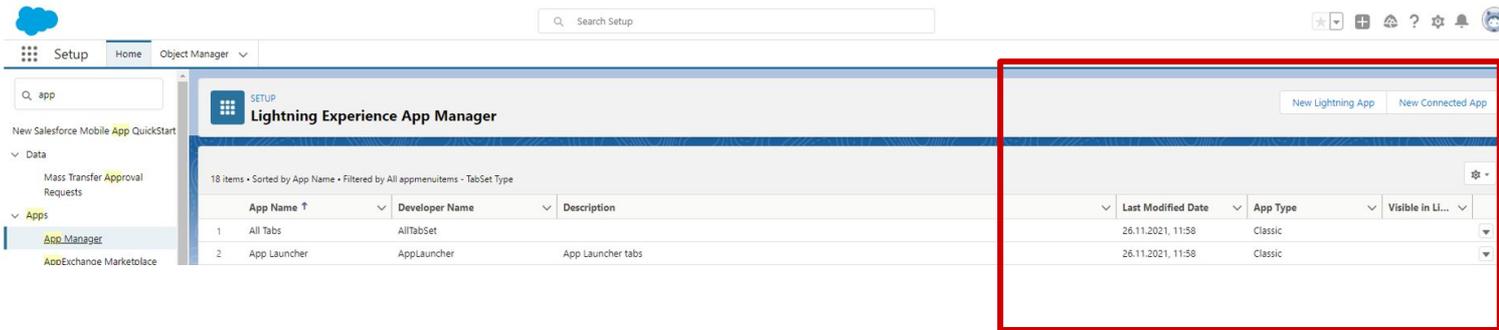
After clicking the "new Connected App" button, you will see the following view


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.
<u>In this case we give -></u> https://salesforce.serwersms.pl/oauth
4. Add Selected OAuth Scopes. For instance, Full access(full).
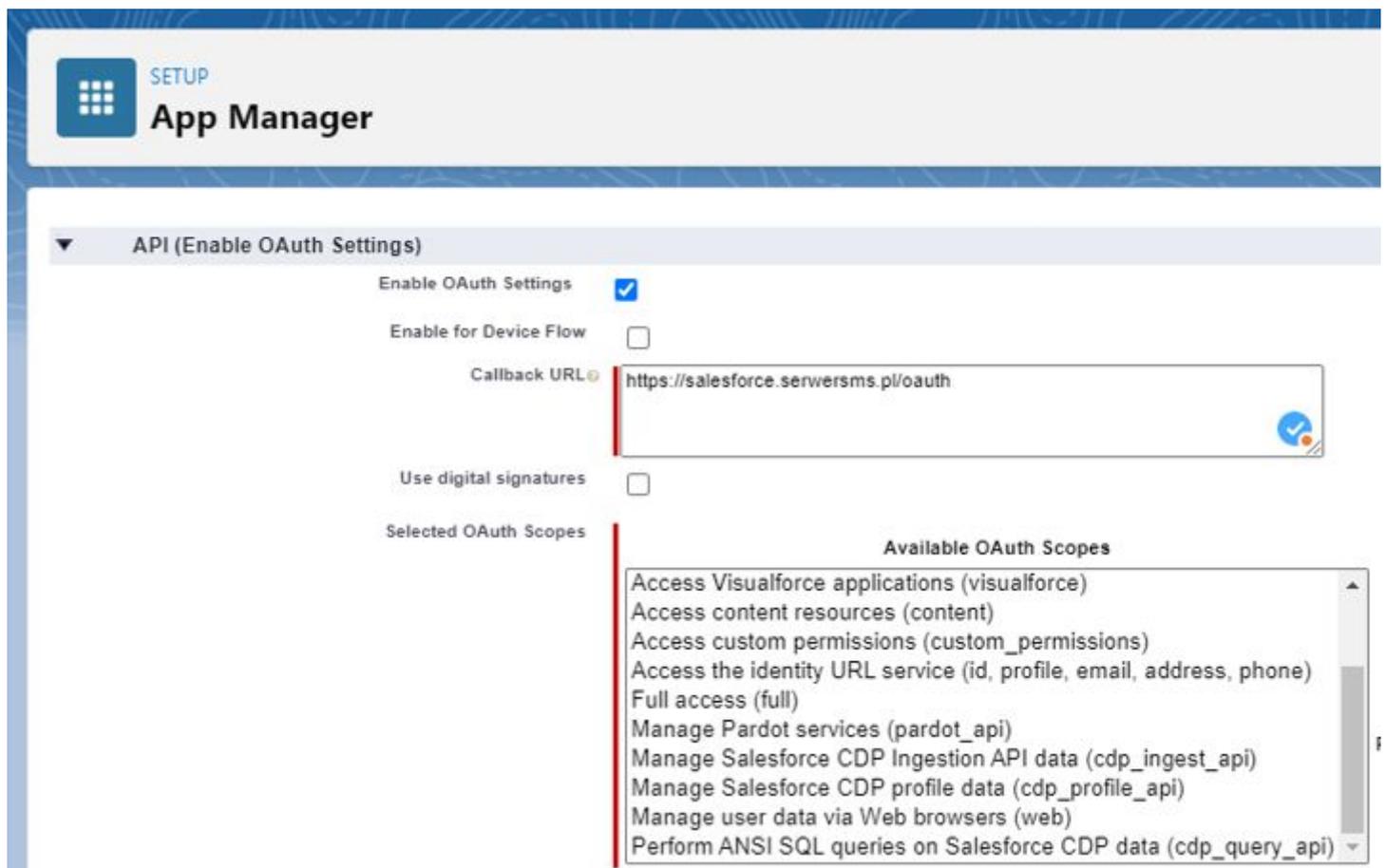
From the above permissions, select the appropriate ones and move them with the arrows to the right side.

source: https://en.serwersms.pl/integrations/modules-and-sms-plugins/145-saleforce

Consumer Key

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**


If you save, the pop-up you see in the image below will appear!
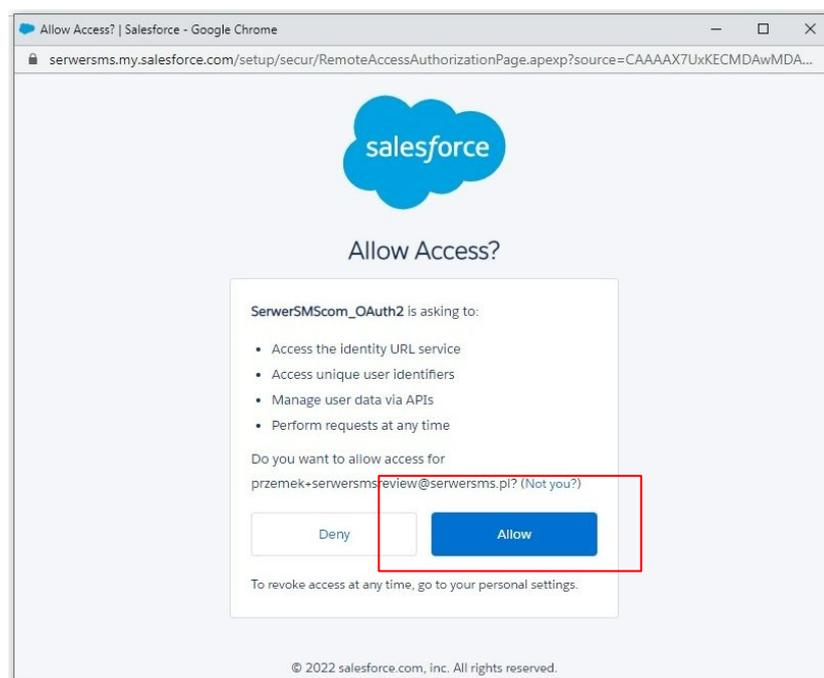
Attention! For the configuration to be correct, remember to have pop-ups unlocked in your Mozilla browser.

>> 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:
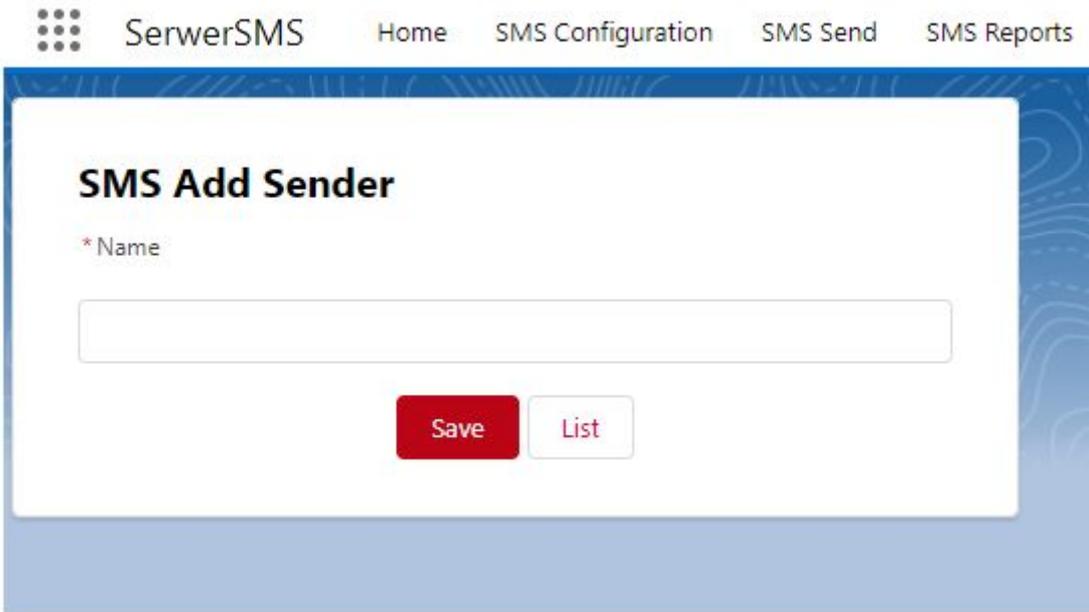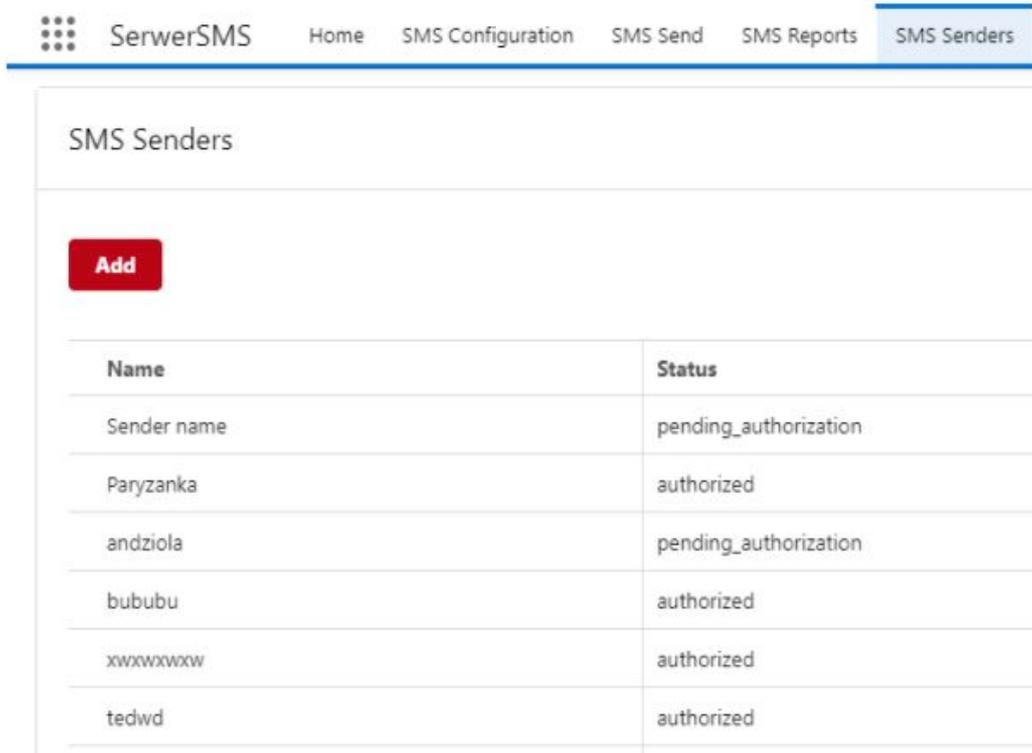
After accepting the sender ID's, you can start using it for SMS sending. In the SerwerSMS App in Salesforce, there are several ways to send SMS to your customers: Sending an SMS from a form to a single number or a Campaign created at that time:
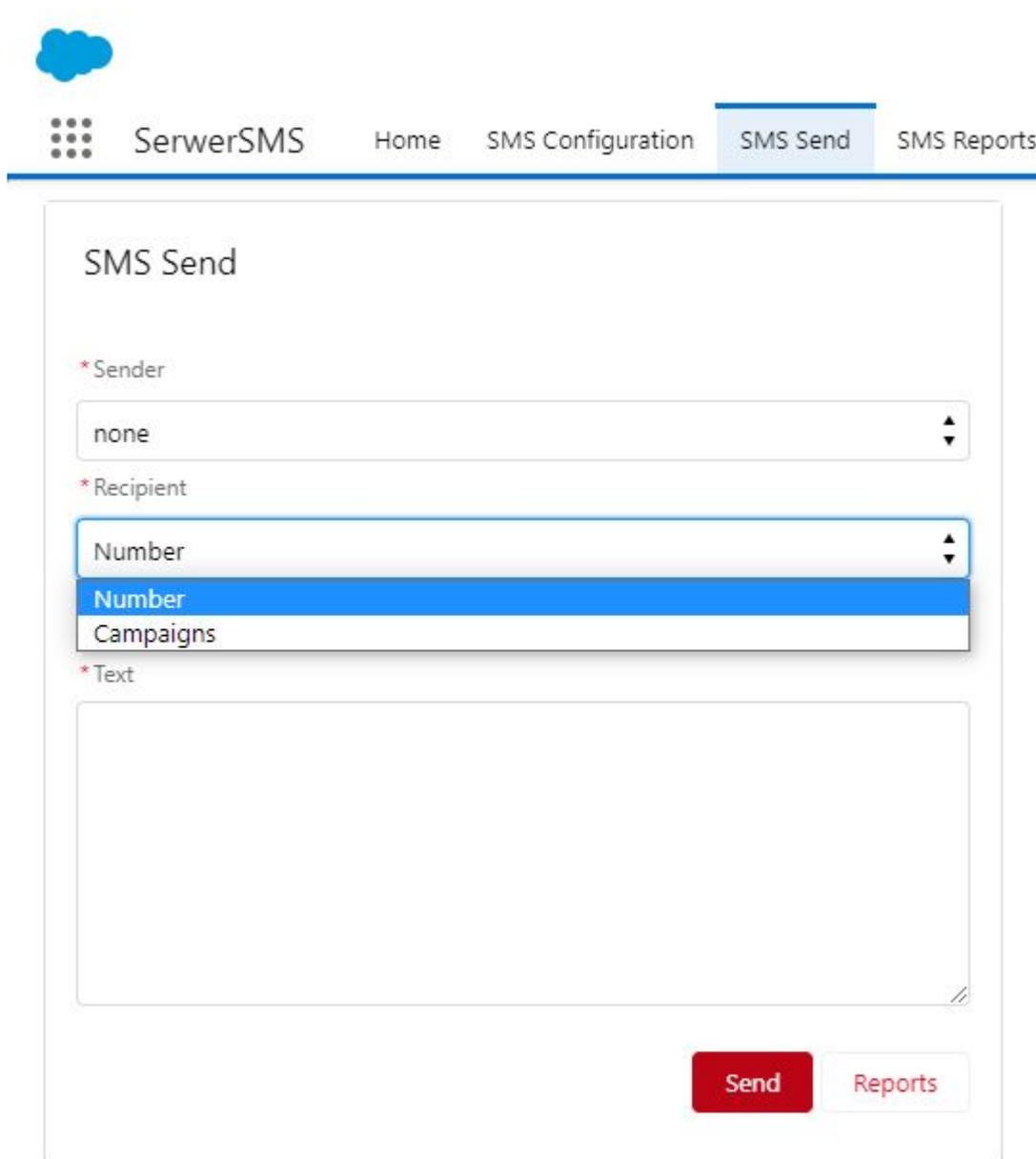
Sending SMS from the contact list. In order to be able to do this, you must first add the SEND SMS button to your contact list.Go to SETUP -> Object manager -> Contact -> **Search layouts / Search layouts for Salesforce** -> Default Layout -> Edit

source: https://en.serwersms.pl/integrations/modules-and-sms-plugins/145-saleforce

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:
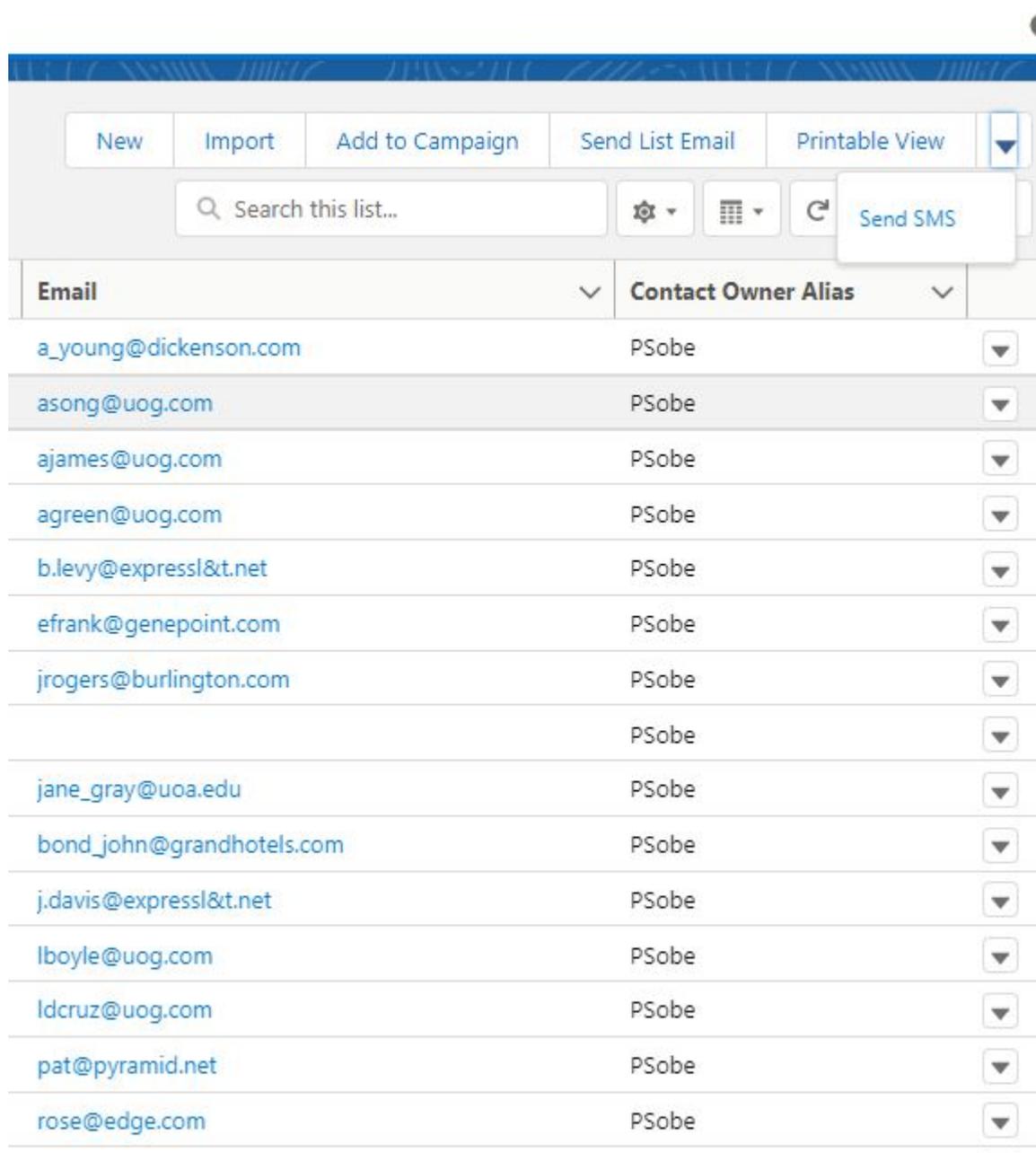
After selecting from the list of contacts and clicking the Send SMS button, we are redirected to the SMS sending form, where we can define the sender and the content of the messages sent:
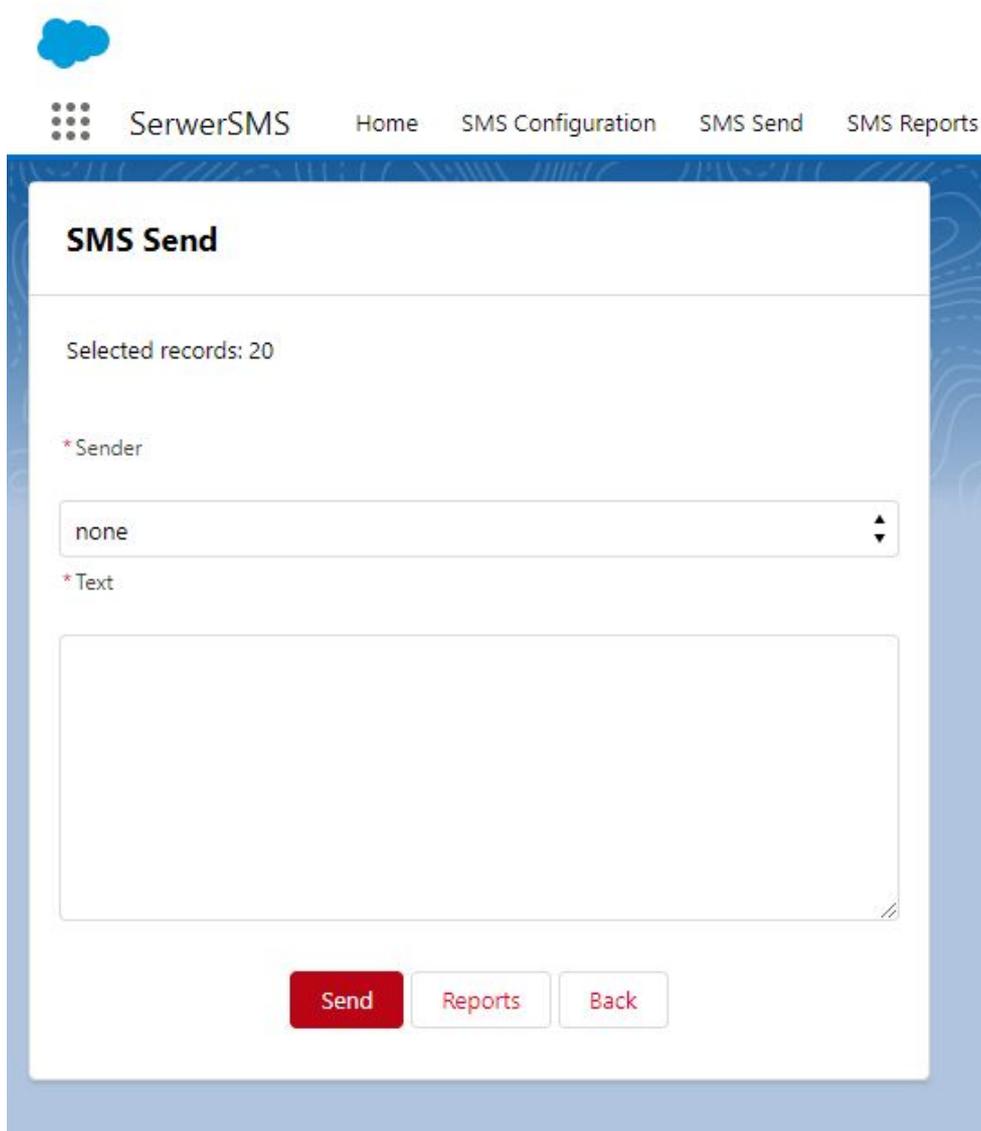
The same configuration is in the case of Leads to be able to send collectively about all records. The only difference is when you select the Lead object compared to the contacts.

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 compent.

source: https://en.serwersms.pl/integrations/modules-and-sms-plugins/145-saleforce

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.

source: https://en.serwersms.pl/integrations/modules-and-sms-plugins/145-saleforce

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.

source: https://en.serwersms.pl/integrations/modules-and-sms-plugins/145-saleforce

SerwerSMS   Home   SMS Configuration   SMS Send   **SMS Reports**   SMS Senders

SerwerSMS   Home   SMS Configuration   SMS Send   SMS Reports   SMS Senders   Contacts ∨   Campaigns ∨   Leads ∨

SMS Messages

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

Serwer SMS.pl
System Obsługi Marketingu Mobilnego