

Salesforce integration instruction with SerwerSMS



Account registration



Log in

Username [I forgot my username](#)

Password [I forgot my password](#)

[Log in](#)

or

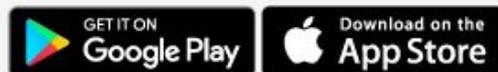
[Log in via URL](#)

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](#)



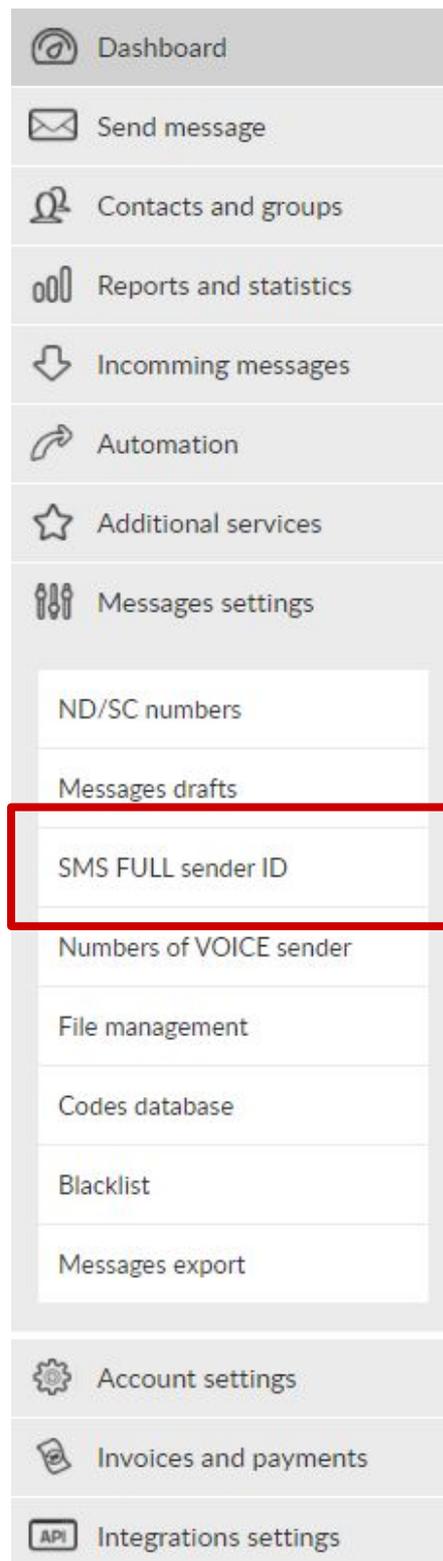
Check in once a month

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

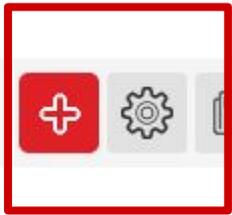
- Without recharging, you will receive a collective invoice once a month.
- You use any type of service.
- Simple conclusion of a contract in traditional or electronic form.
- Price from 0.06 PLN net per SMS.
- Flexible [Post-Paid Pricing](#).

[Go to run package](#)

Please select now your sender ID



Select "+" and then add a new sender ID



Approval: All State: All User: Main account



Create new Sender ID

Sender ID:

Assigned to user: -- Main account --

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

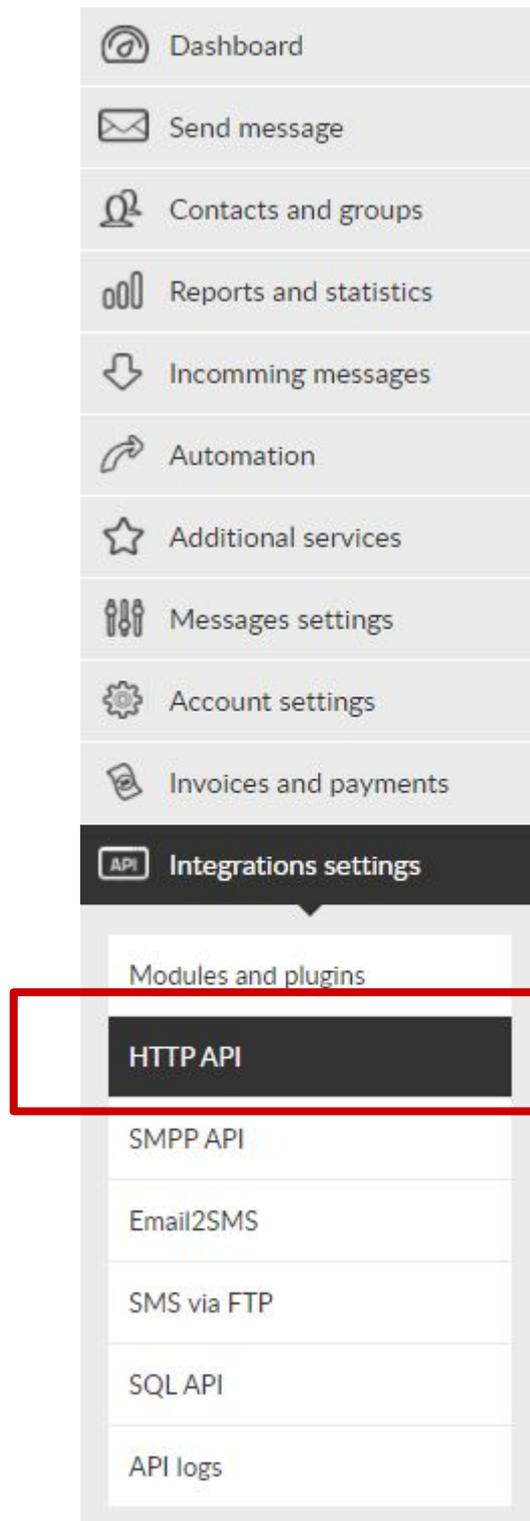
Create Sender ID



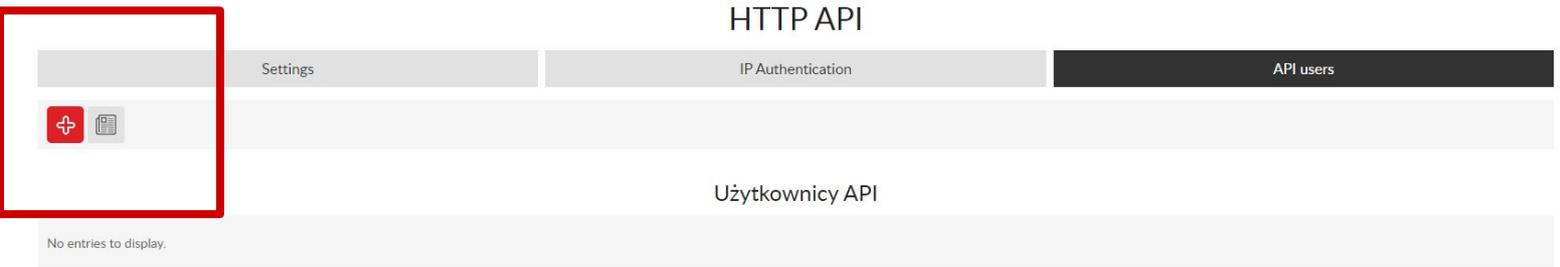
Approval: All State: All User: Main account

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. The form has the following fields and elements:

- User:** A dropdown menu with 'Main account' selected.
- Username: *** A text input field containing 'webapi_'.
- Suggested password:** A text input field containing 'a51d13e7' and a 'Set' button.
- Password: *** A text input field.
- Retype password: *** A text input field.
- Save:** A red button at the bottom right, highlighted with a red box.

A red arrow points downwards from the top of the page to the 'Save' button. At the bottom left, there is a note: '* 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 Salesforce 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 

Connect

Account in SerwerSMS

* Username: API

* Token

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.

App Launcher

▼ All Apps

	Service Manage customer service with accounts, contacts, cases, and more	⋮
	Salesforce Chatter The Salesforce Chatter social network, including profiles and feeds	⋮
	Service Console (Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	⋮
	Salesforce CMS Manage content and media for all of your sites.	⋮
	SerwerSMS 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. At the top, there is a navigation bar with a logo on the left and menu items: Home, SMS Configuration (highlighted), SMS Send, SMS Reports, and SMS Senders. Below the navigation bar, the page title is 'SMS Configuration'. The main content area contains a form titled 'Connect' under the heading 'Account in SerwerSMS'. The form has two input fields: '* Username API' and '* Token'. At the bottom right of the form, there are two red buttons: 'Create account' and 'Log in'.

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**

Lightning Experience App Manager

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	✓

app

New Salesforce Mobile App QuickStart

Data

Mass Transfer Approval Requests

App Manager

AppExchange Marketplace

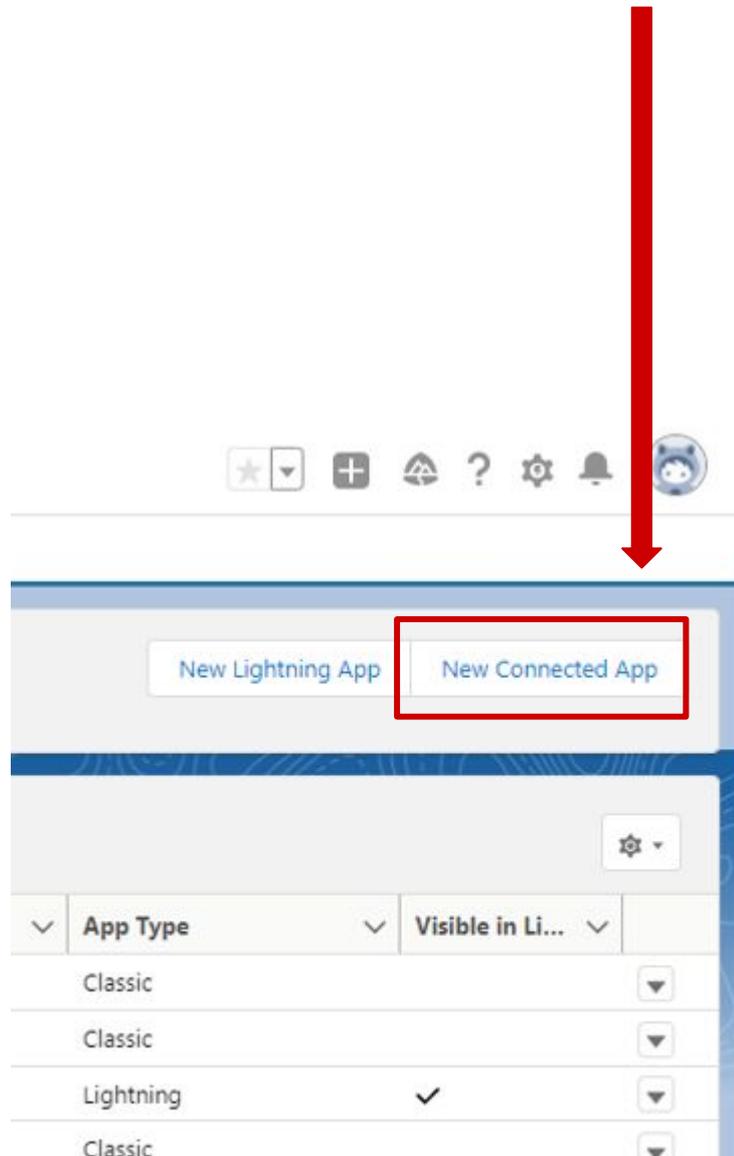
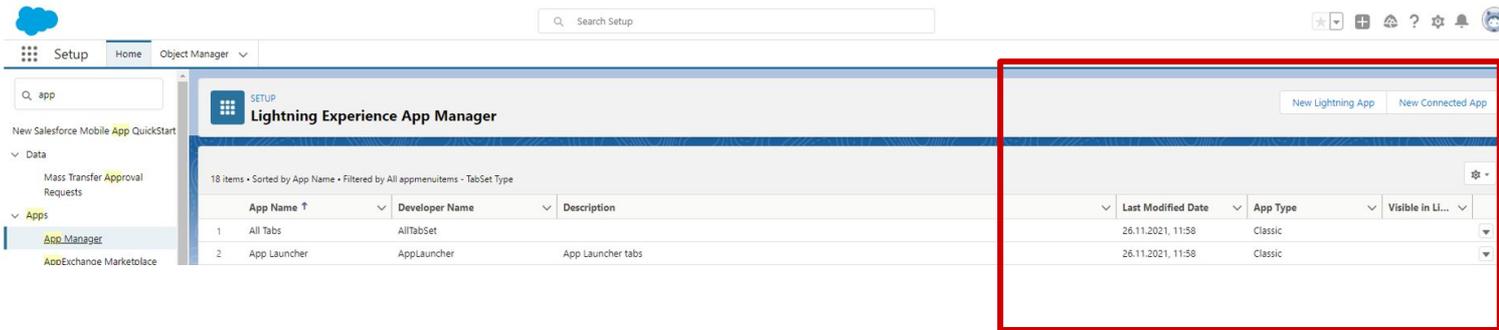
Connected Apps

Lightning Experience App Manager

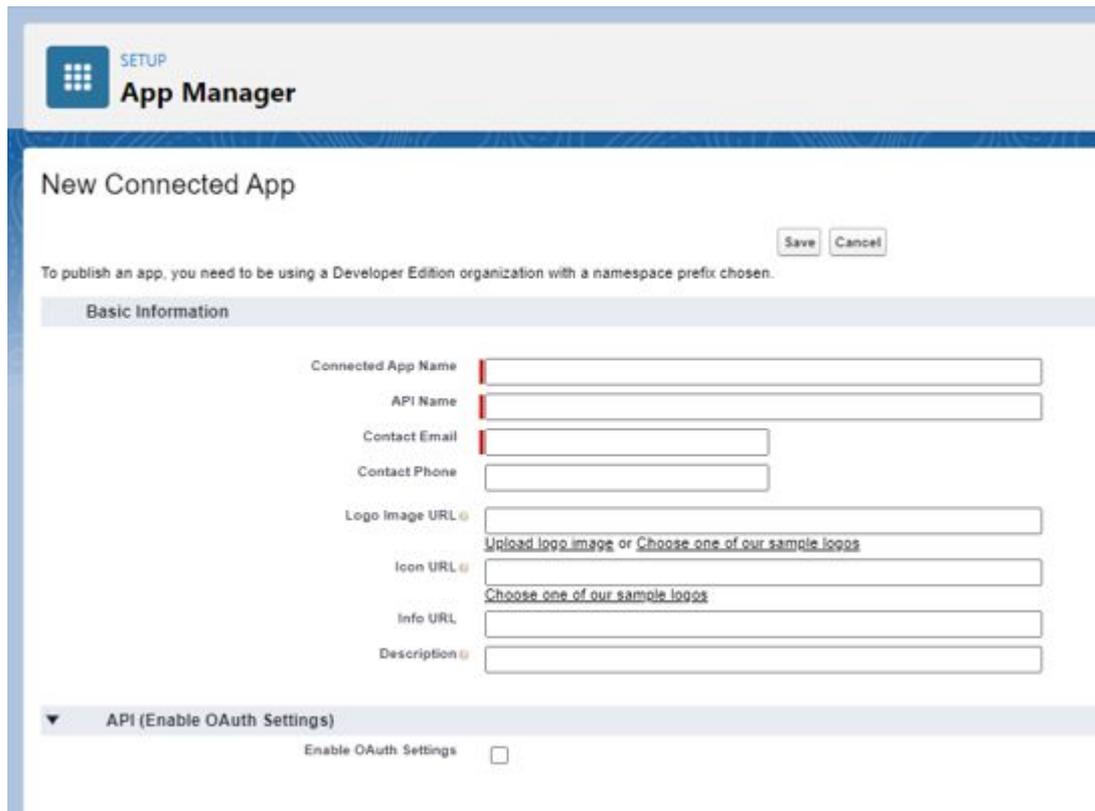
18 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

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 Salesforce App Manager. The page has a blue header with the 'App Manager' logo and 'SETUP' text. Below the header, the title 'New Connected App' is displayed. There are 'Save' and 'Cancel' buttons in the top right corner. A note states: 'To publish an app, you need to be using a Developer Edition organization with a namespace prefix chosen.' The main content area is divided into two sections: 'Basic Information' and 'API (Enable OAuth Settings)'. The 'Basic Information' section contains several input fields: '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 links for 'Upload logo image' and 'Choose one of our sample logos'. The 'API (Enable OAuth Settings)' section has a checkbox for 'Enable OAuth Settings'.

You must follow these steps now:

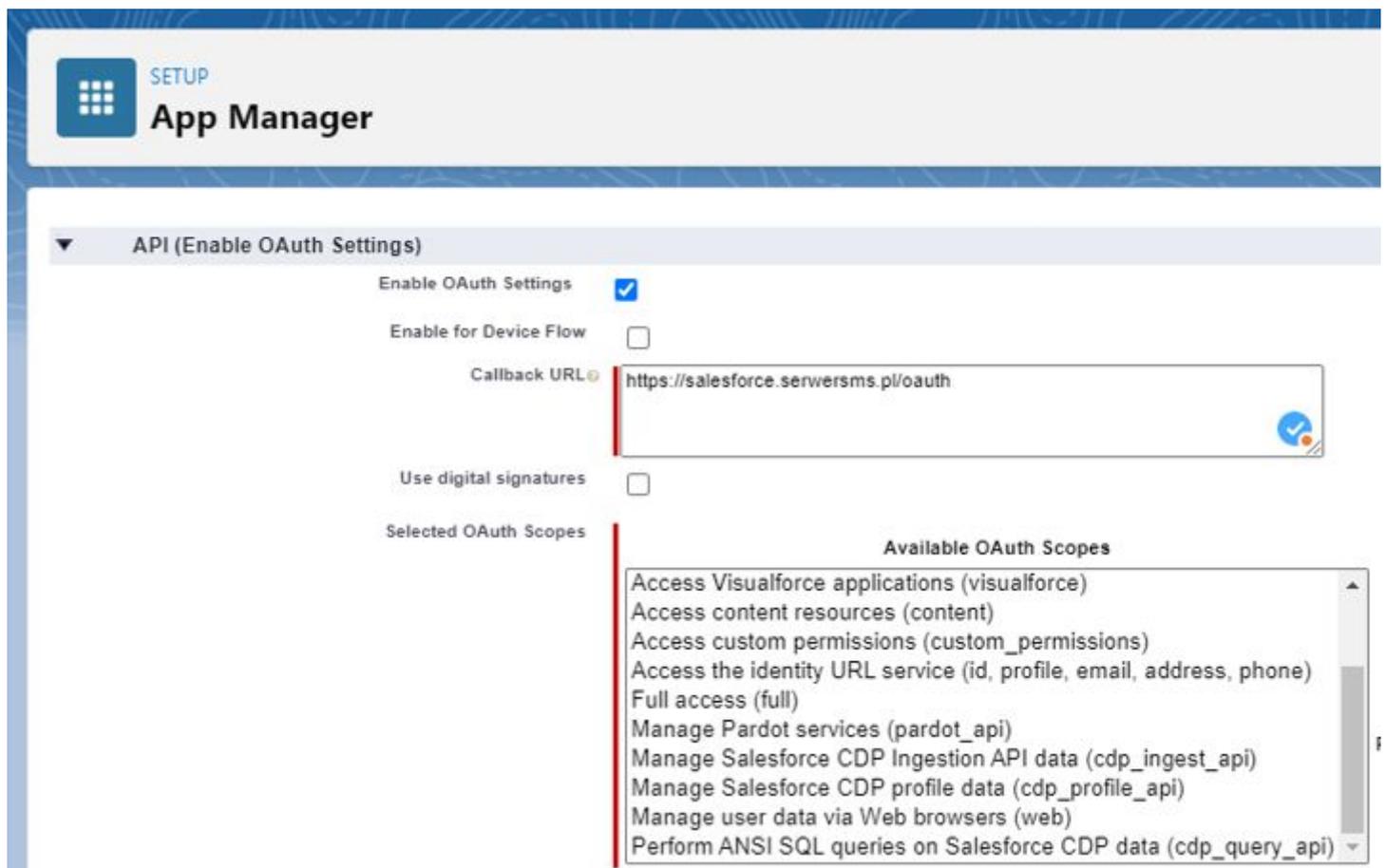
1. Add the sender's name
2. Enter a contact email address and any additional information relevant to your application.

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

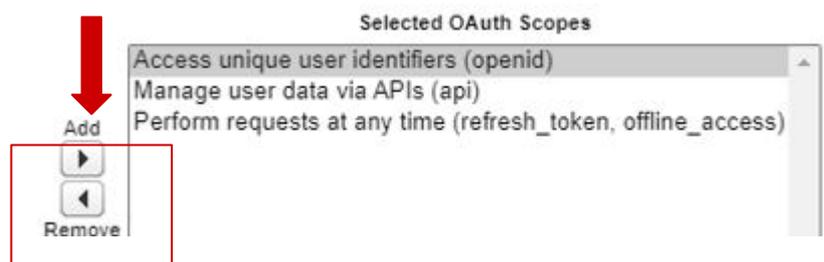
3. Enter a Callback URL. This is the URL that a user's browser is redirected to after successful authentication.

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

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



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





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:	Test Test
Contact Email	test@gmail.com
Contact Phone	
Last Modified Date	04.02.2022, 11:07
By:	Test Test
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	<input checked="" type="checkbox"/>
Introspect All Tokens	<input type="checkbox"/>
Include Custom Attributes	<input type="checkbox"/>
Enable Single Logout	Single Logout disabled



Consumer Secret

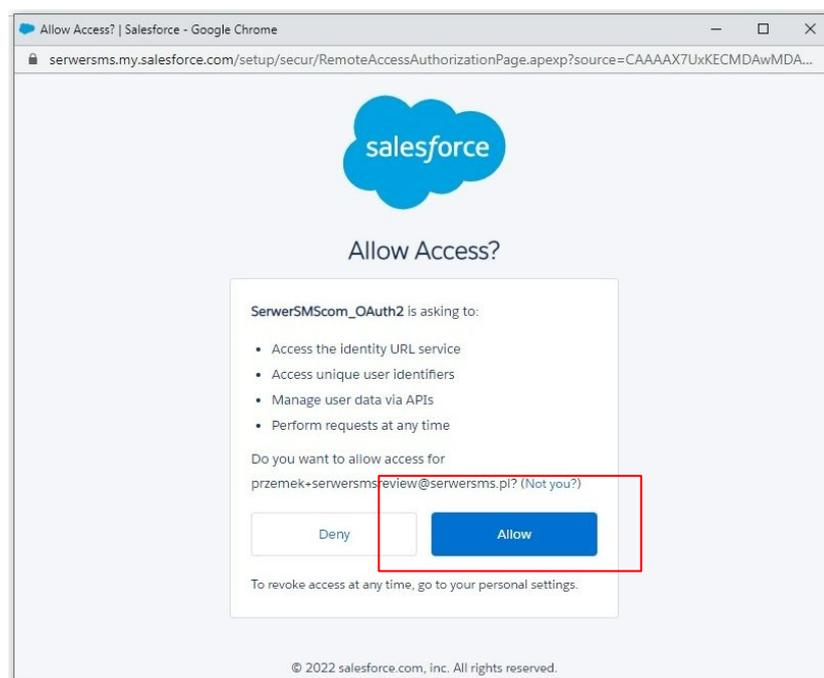
You still have to choose the sender's name and enter consumer key and consumer secret. **Enter the data below as shown in the graphic**



The screenshot shows the 'Settings' page in Salesforce. The 'Sender' dropdown menu is set to 'salesforce'. Below it, the 'Access API Salesforce' section contains two input fields: '* Client ID' and '* Client Secret'. A red box highlights the 'Save' button at the bottom right of the form.



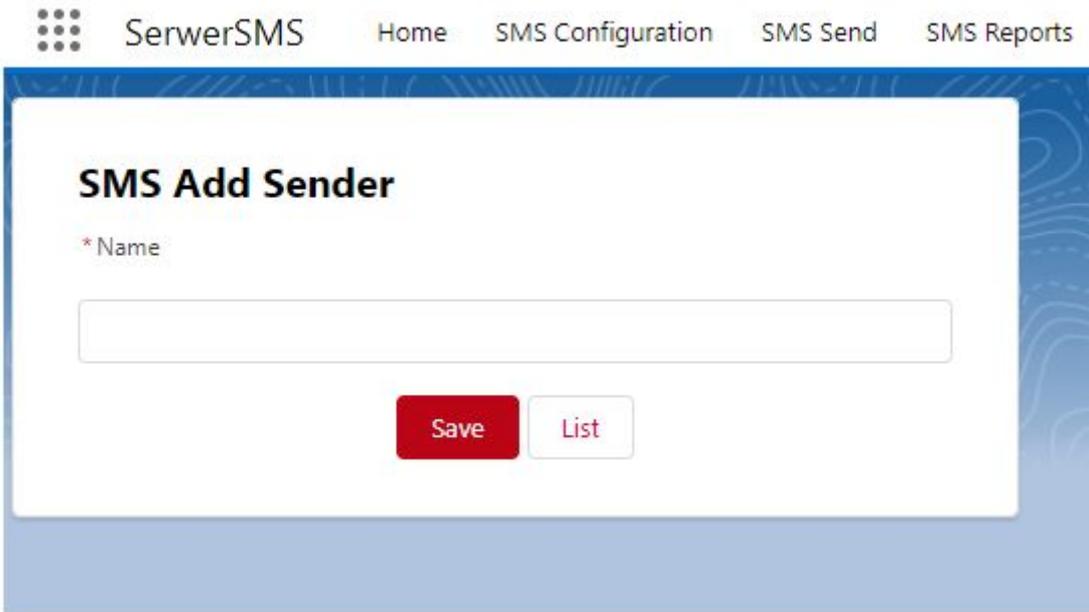
If you save, the pop-up you see in the image below will appear!



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:

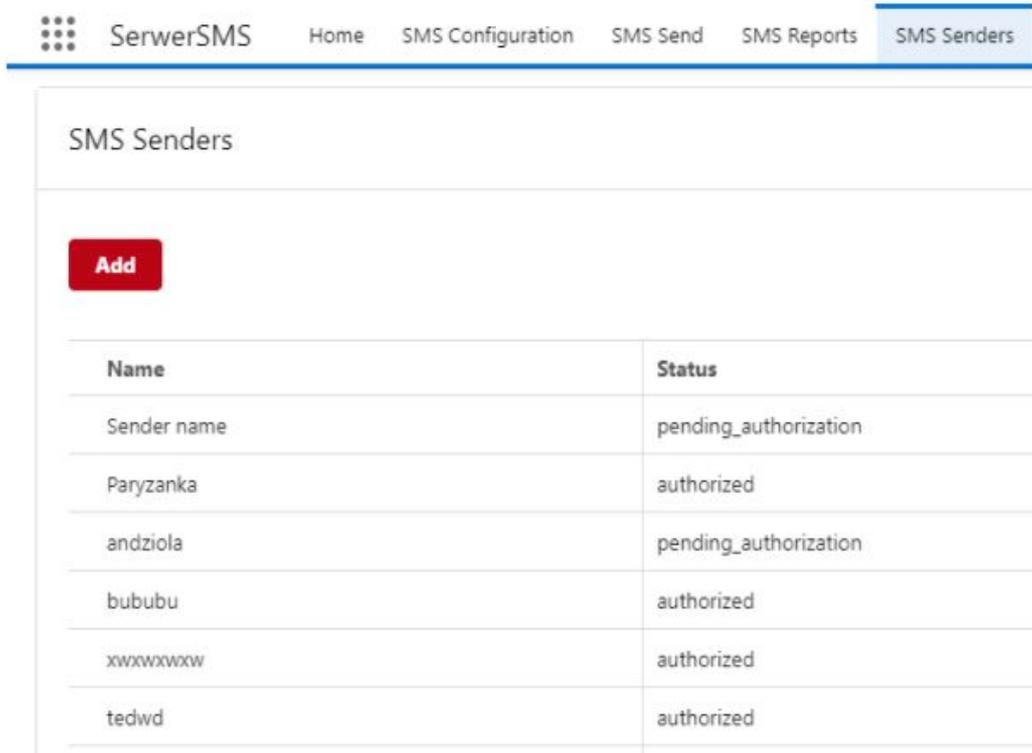


SerwerSMS Home SMS Configuration SMS Send SMS Reports

SMS Add Sender

* Name

Save List



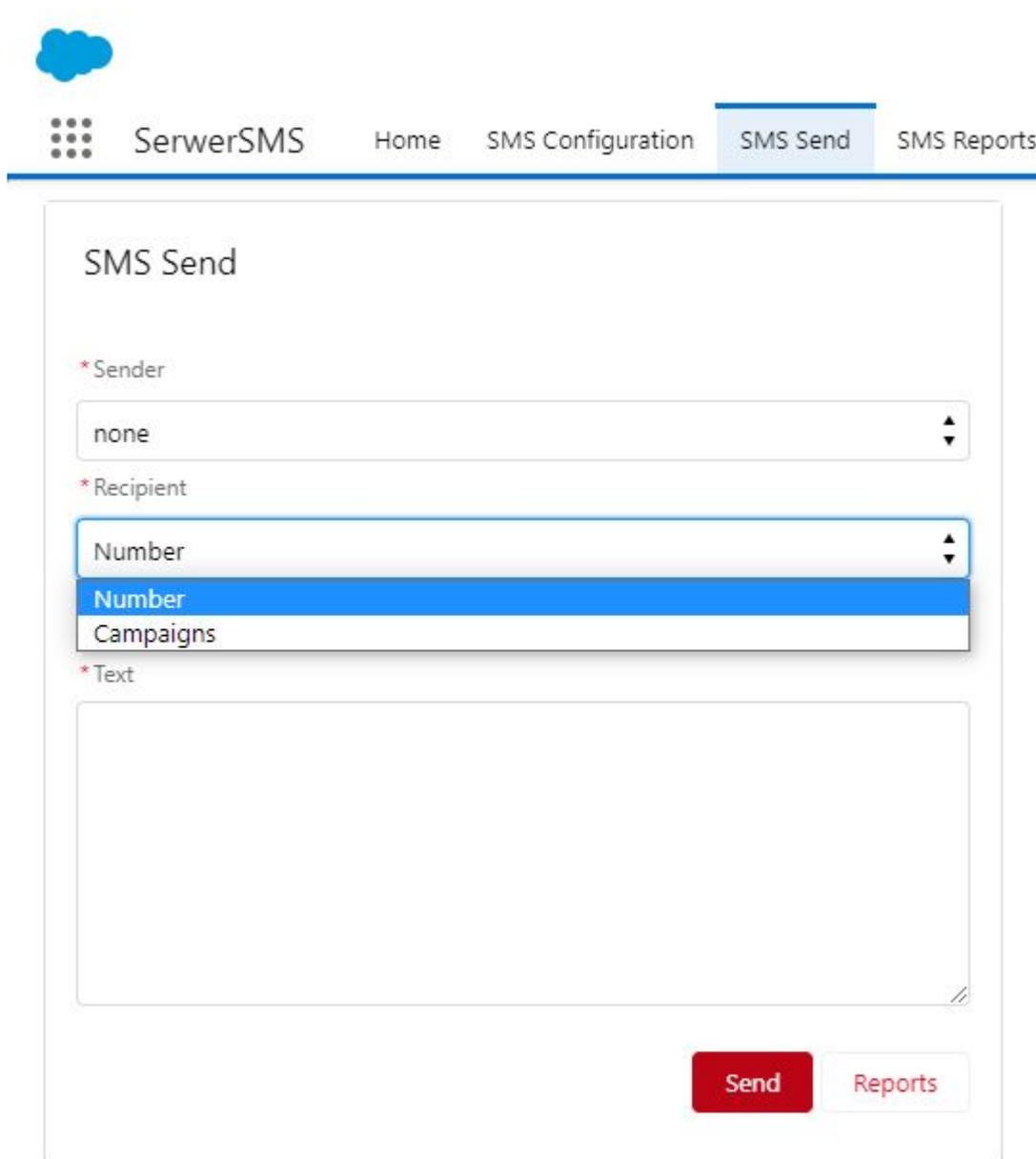
SerwerSMS Home SMS Configuration SMS Send SMS Reports SMS Senders

SMS Senders

Add

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 shows the 'SMS Send' interface within the SerwerSMS app. The navigation bar at the top includes 'SerwerSMS', 'Home', 'SMS Configuration', 'SMS Send' (which is highlighted), and 'SMS Reports'. The main form area is titled 'SMS Send' and contains three required fields:

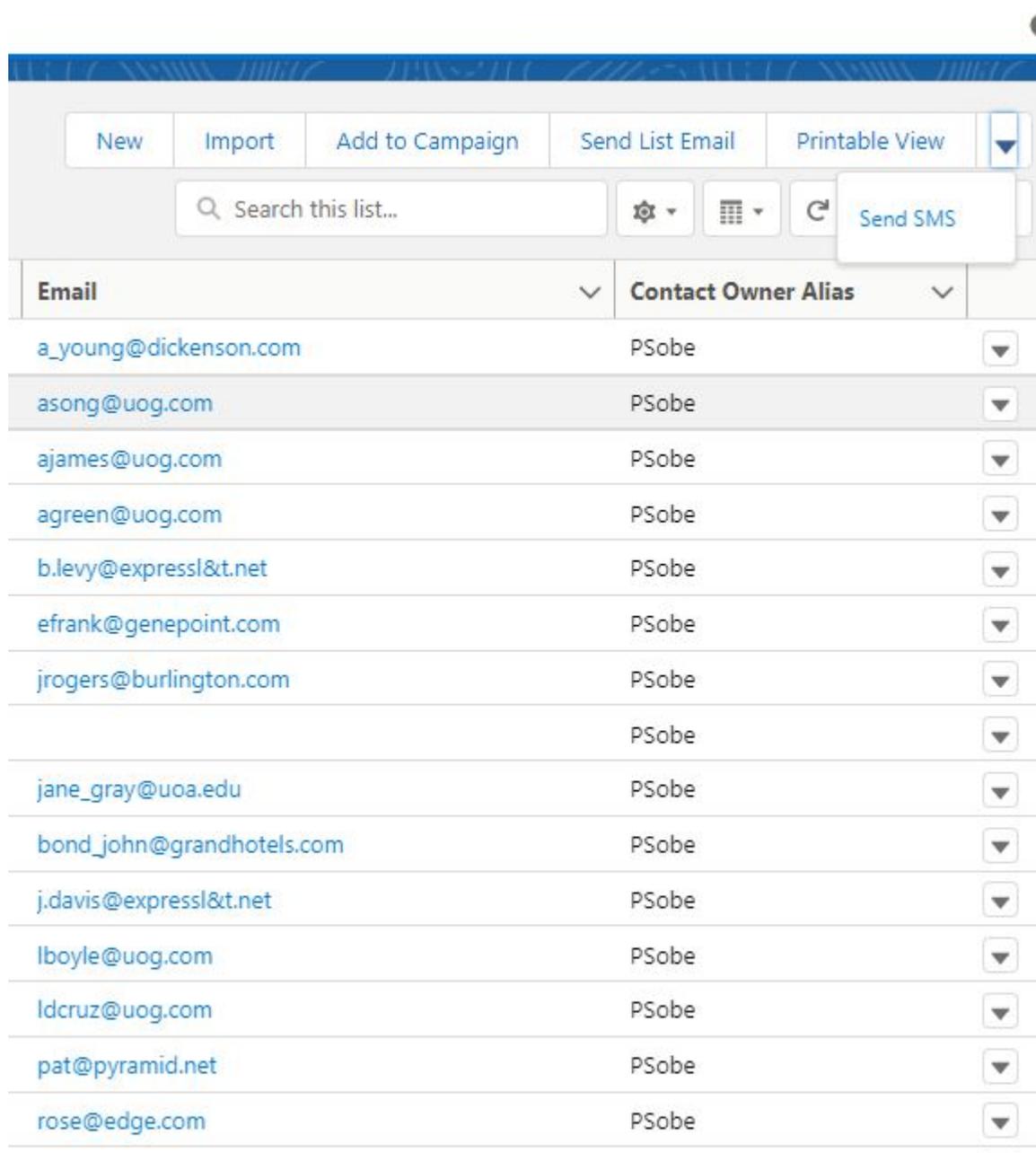
- * Sender:** A dropdown menu currently showing 'none'.
- * Recipient:** A dropdown menu with 'Number' selected. A list is open below it, showing 'Number' (highlighted in blue) and 'Campaigns'.
- * Text:** A large, empty text area for entering the message content.

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

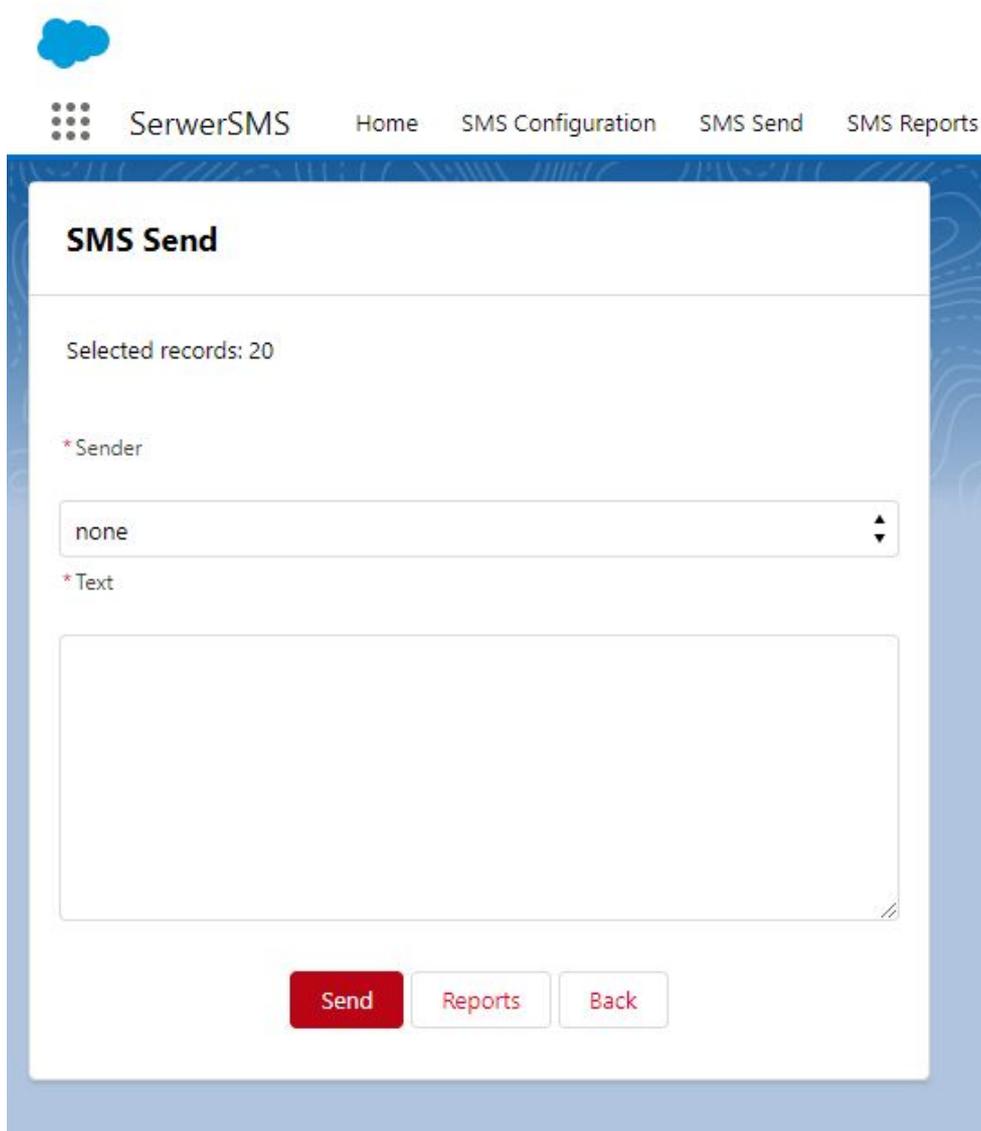
Sending SMS from the contact list. In order to be able to do this, you must first add the SEND SMS button to your contact list. Go to SETUP -> Object manager -> Contact -> **Search layouts / Search layouts for Salesforce -> Default Layout -> Edit**

The screenshot shows the Salesforce Setup interface for editing the search layout for the Contact object. The breadcrumb trail is: SETUP > OBJECT MANAGER > Contact. The left sidebar contains navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled "Edit Search Layout Contact Search Results". Below the title is a note: "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](#)." The interface is divided into two main sections: "Available Fields" and "Selected Fields". The "Available Fields" list includes: Salutation, First Name, Last Name, Account ID, Account Parent Account, Reports To, Mailing Street, Mailing City, Mailing State/Province, Mailing Zip/Postal Code, and Mailing Country. The "Selected Fields" list includes: Name, Account Name, Account Site, Phone, Email, and Contact Owner Alias. Between the two lists are "Add" and "Remove" buttons. To the right of the "Selected Fields" list are "Up" and "Down" buttons. Below the field lists is a checkbox labeled "Override the search result column customizations for all users". The next section is "Standard Buttons", which states: "There are no customizable standard buttons for this view." The final section is "Custom Buttons". It has two columns: "Available Buttons" and "Selected Buttons". The "Available Buttons" list contains "Send SMS". The "Selected Buttons" list contains "--None--". Between the columns are "Add" and "Remove" buttons. To the right of the "Selected Buttons" list are "Up" and "Down" buttons.

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:



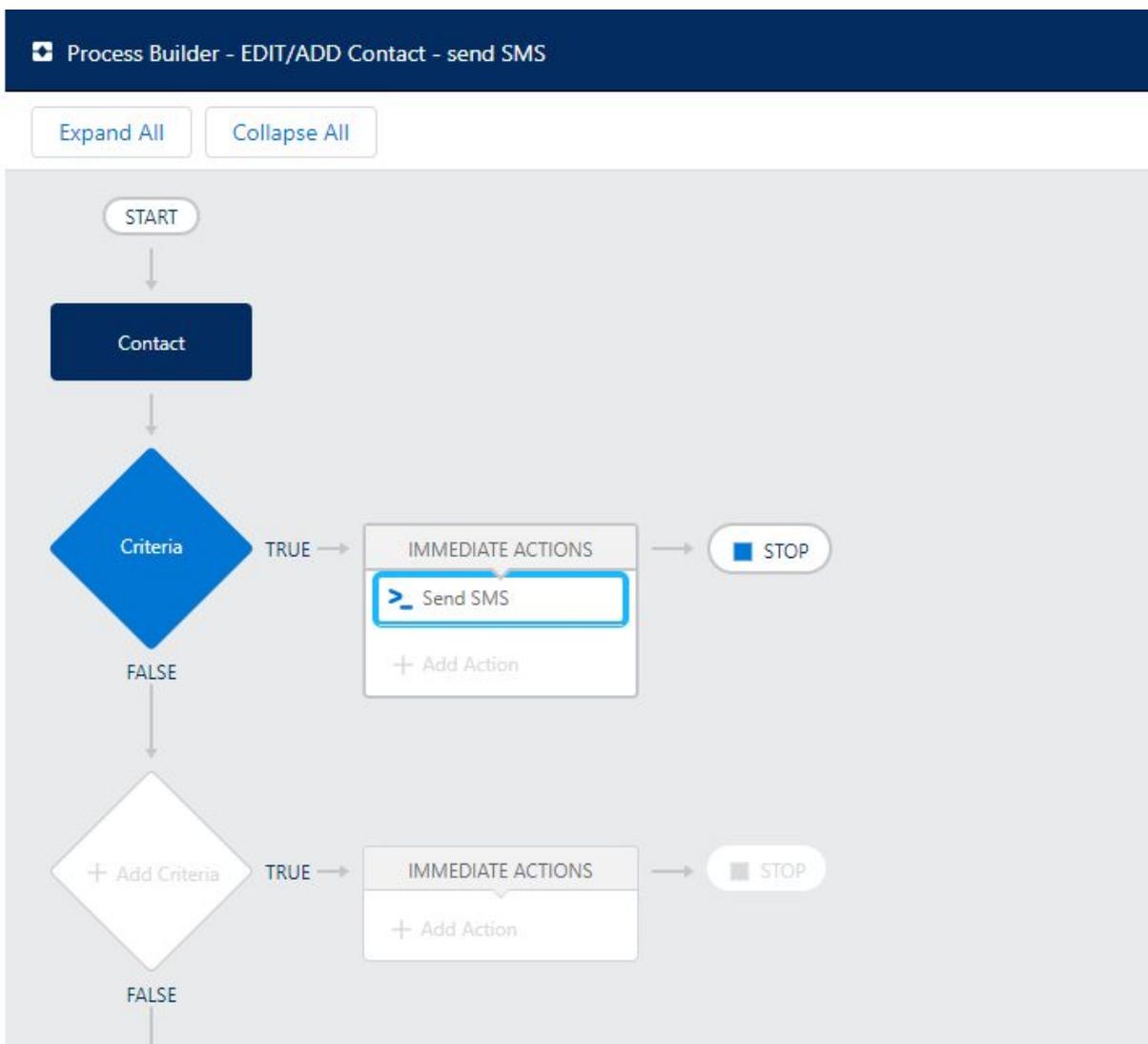
The screenshot displays the 'SMS Send' interface in the SerwerSMS application. At the top, there is a navigation bar with the SerwerSMS logo and menu items: Home, SMS Configuration, SMS Send, and SMS Reports. The main content area is titled 'SMS Send' and indicates that 20 records are selected. Below this, there is a form with two main sections: '* Sender' and '* Text'. The '* Sender' section features a dropdown menu currently showing 'none'. The '* Text' section is a large, empty text area for composing the message. 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 compent.

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
? ⓘ

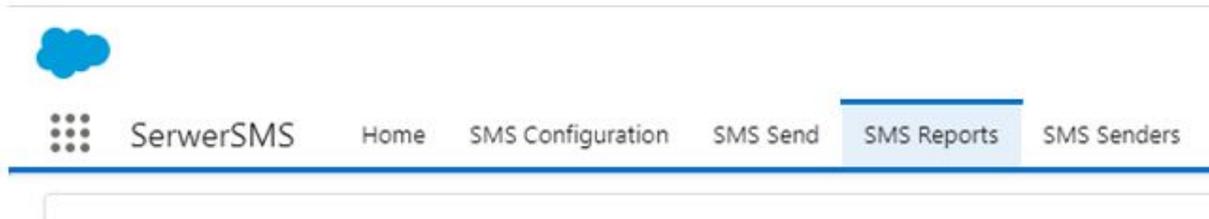
Action Name* ⓘ

Apex Class* ⓘ

Set Apex Variables

Field*	Type*	Value*
<input style="width: 100%;" type="text" value="text"/>	<input style="width: 100%;" type="text" value="String"/> ▼	<input style="width: 100%;" type="text" value="TEST"/>
<input style="width: 100%;" type="text" value="phone"/>	<input style="width: 100%;" type="text" value="Formula"/> ▼	<input style="width: 100%;" type="text" value="[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 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