

# Salesforce integration instruction with SerwerSMS



# Account registration



## Log in

Username [I forgot my username](#)

Password [I forgot my password](#)

[Log in](#)

or

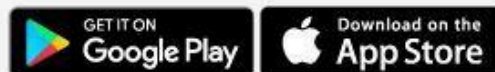
[Log in via URL](#)

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](#)



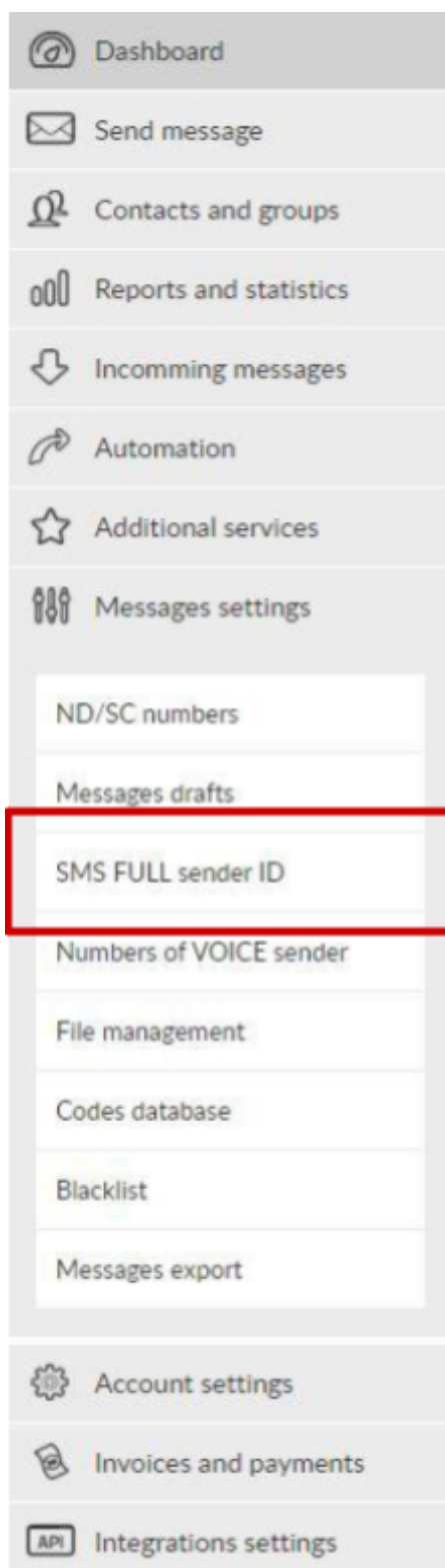
### Check in once a month

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:

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

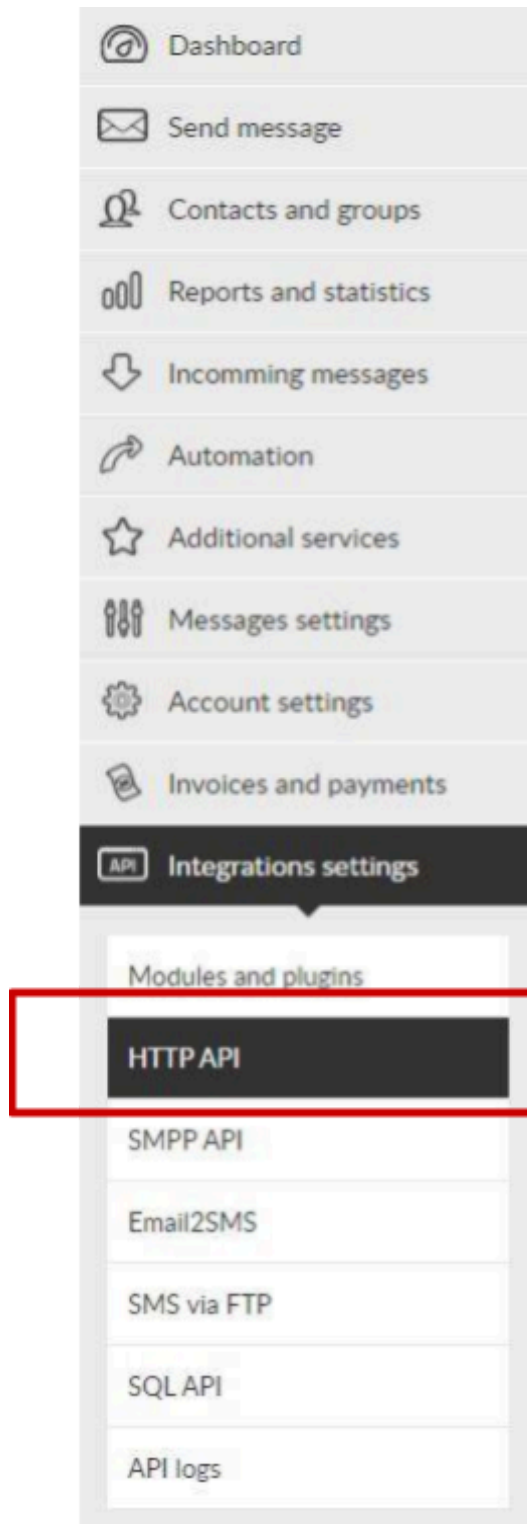
I accept



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 from the top of the page down to the 'Save' button. A red box also highlights the 'Save' button.

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

Create account Log in

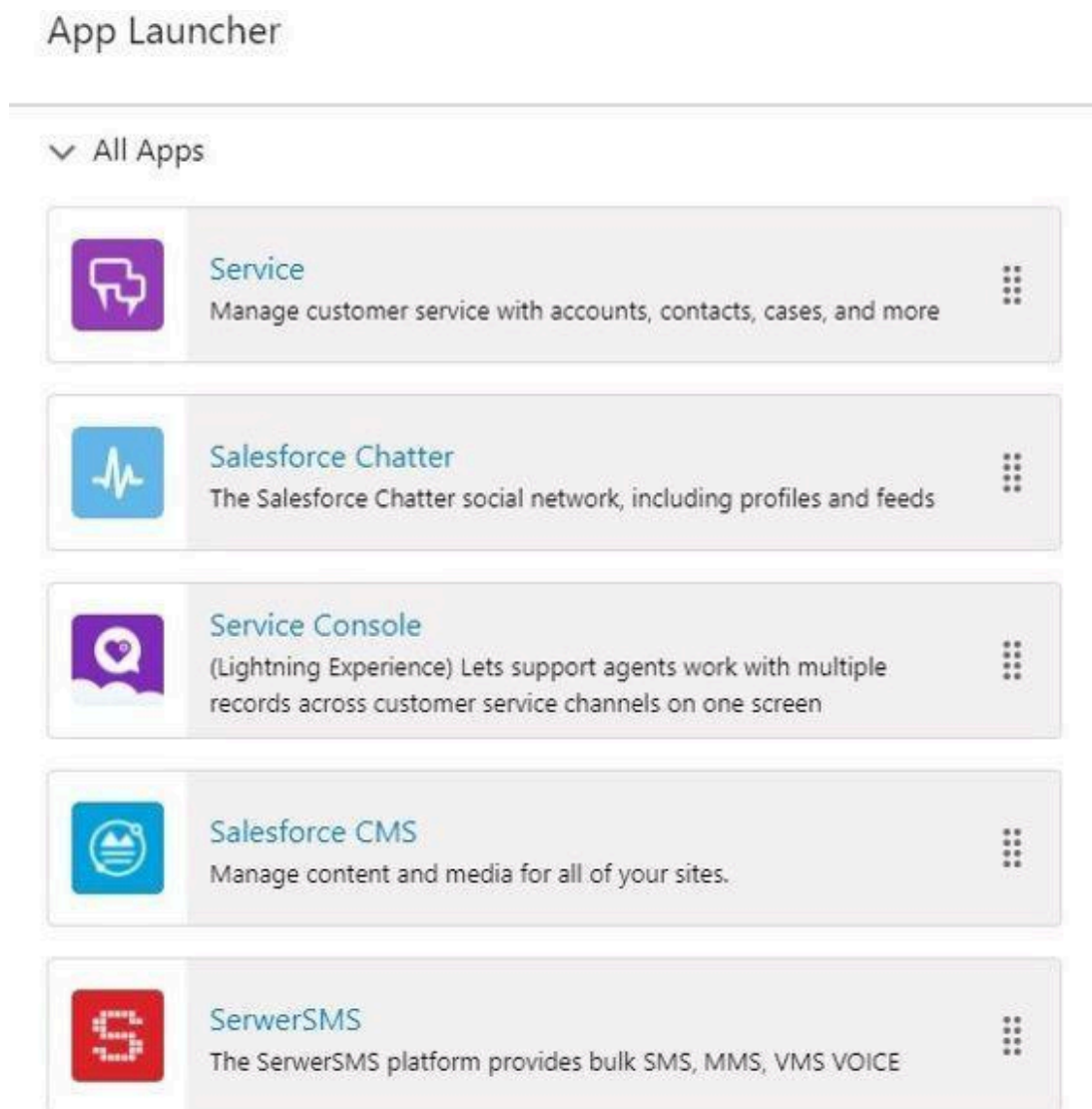
In Salesforce, this is where you add the data you've previously created

*(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 SMS Configuration, you can integrate Salesforce with SerwerSMS. To begin, click the 'Create account' button; you will be redirected to instructions on how to set up your account and complete the required configuration.

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

### SMS Configuration

#### Connect

Account in SerwerSMS

\* Username API

\* Token

**Change**


#### Settings

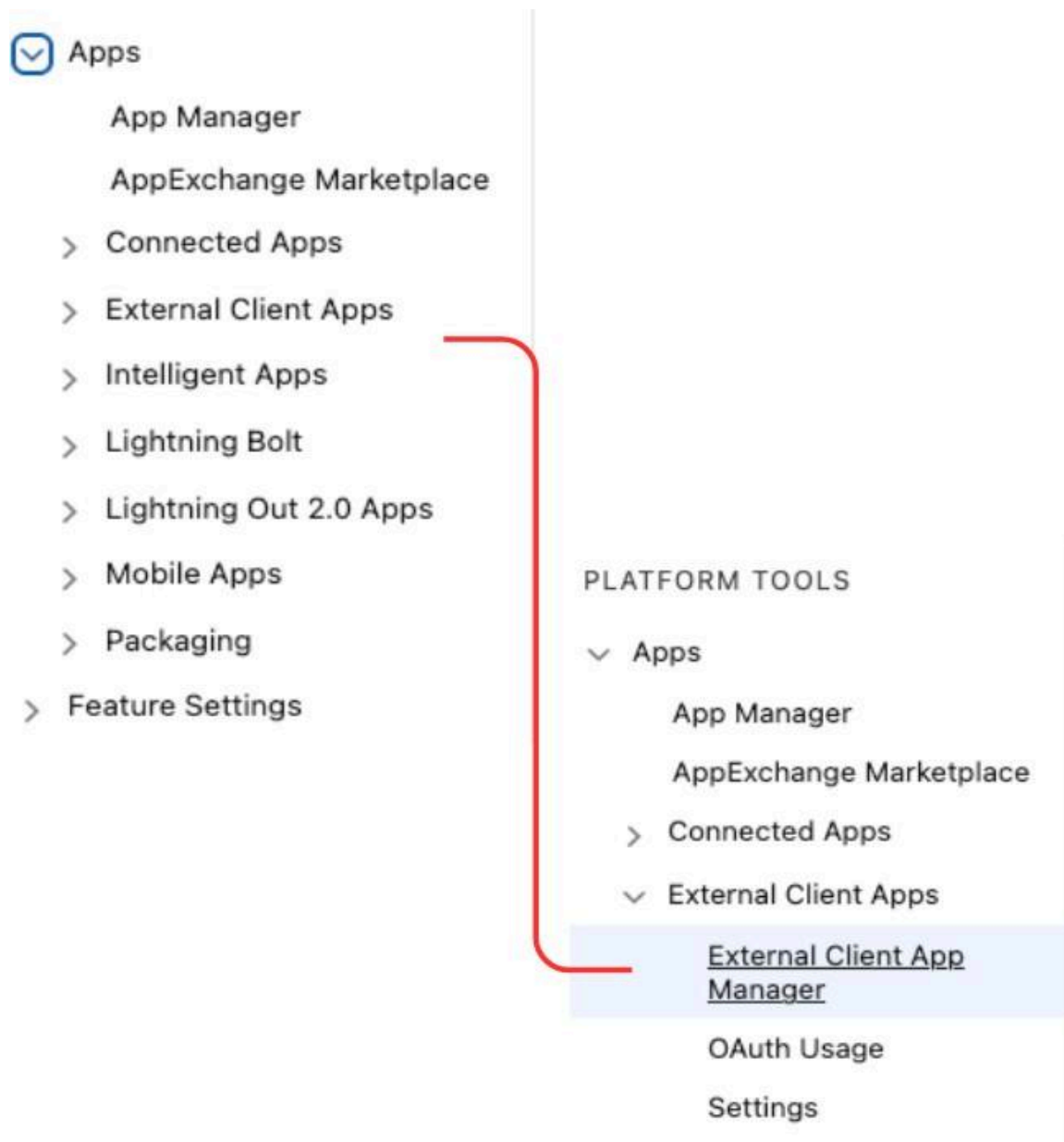
Sender

Access API Salesforce

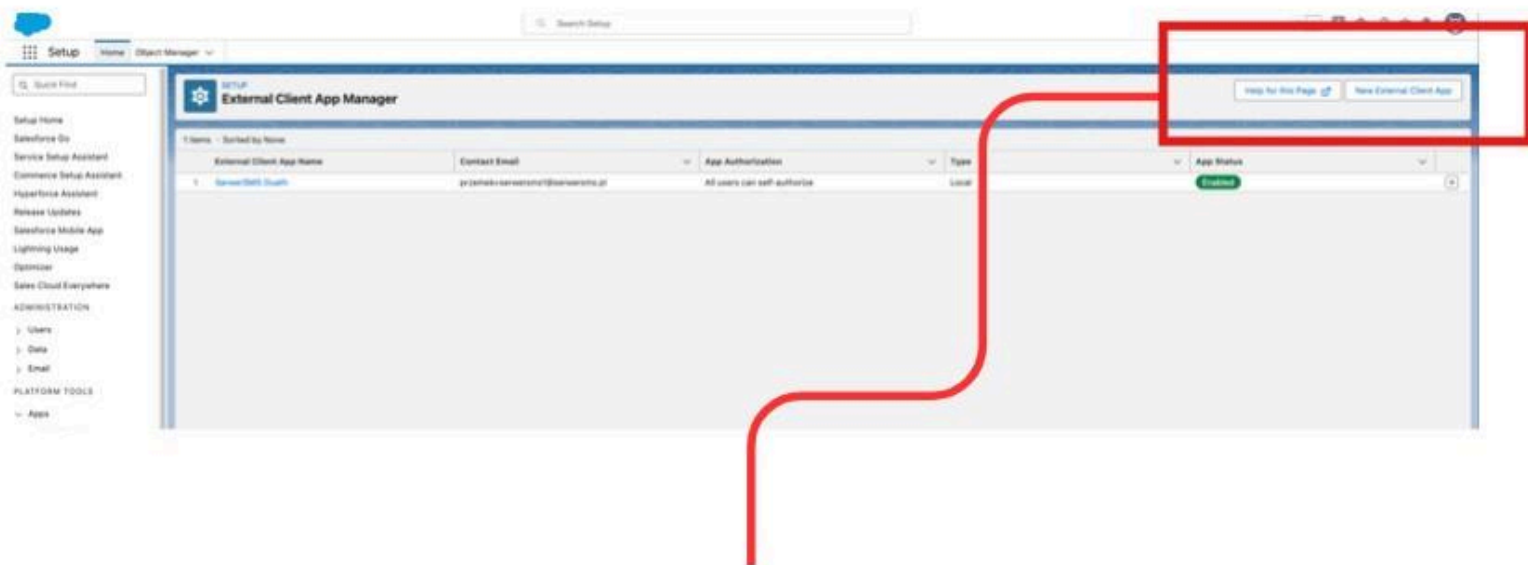
\* Client ID

**Save**

The views above demonstrate the account setup process. We recommend configuring the Salesforce application for mass SMS messaging. Attention! Without proper configuration, mass SMS messaging will be unavailable. Proceed to the App Manager (see next slide). 



In this section, click **New External Client App**.



Once you click 'New External Client App', the following screen will appear. Please complete the required information like External Client App Name, Contact Email, API Name etc.

SETUP  
External Client App Manager

Basic Information

*External Client App Name	*API Name
<input type="text"/>	<input type="text"/>
*Contact Email	*Distribution State
<input type="text" value="Enter an email address..."/>	<input type="text" value="Local"/>
Contact Phone	Info URL
<input type="text" value="Enter a phone number..."/>	<input type="text" value="Enter a URL..."/>
Logo Image URL	Icon URL
<input type="text" value="Enter a URL..."/>	<input type="text" value="Enter a URL..."/>
<a href="#">Choose one of our sample logos.</a>	<a href="#">Choose one of our sample logos.</a>
Description	
<input type="text"/>	

> API (Enable OAuth Settings)

> Web App (Enable SAML Settings)

Once you have filled in the required information, go to '**API (Enable OAuth Settings)**' and follow the next steps to complete the configuration.



API (Enable OAuth Settings)

Enable OAuth

**App Settings**

\* Callback URL

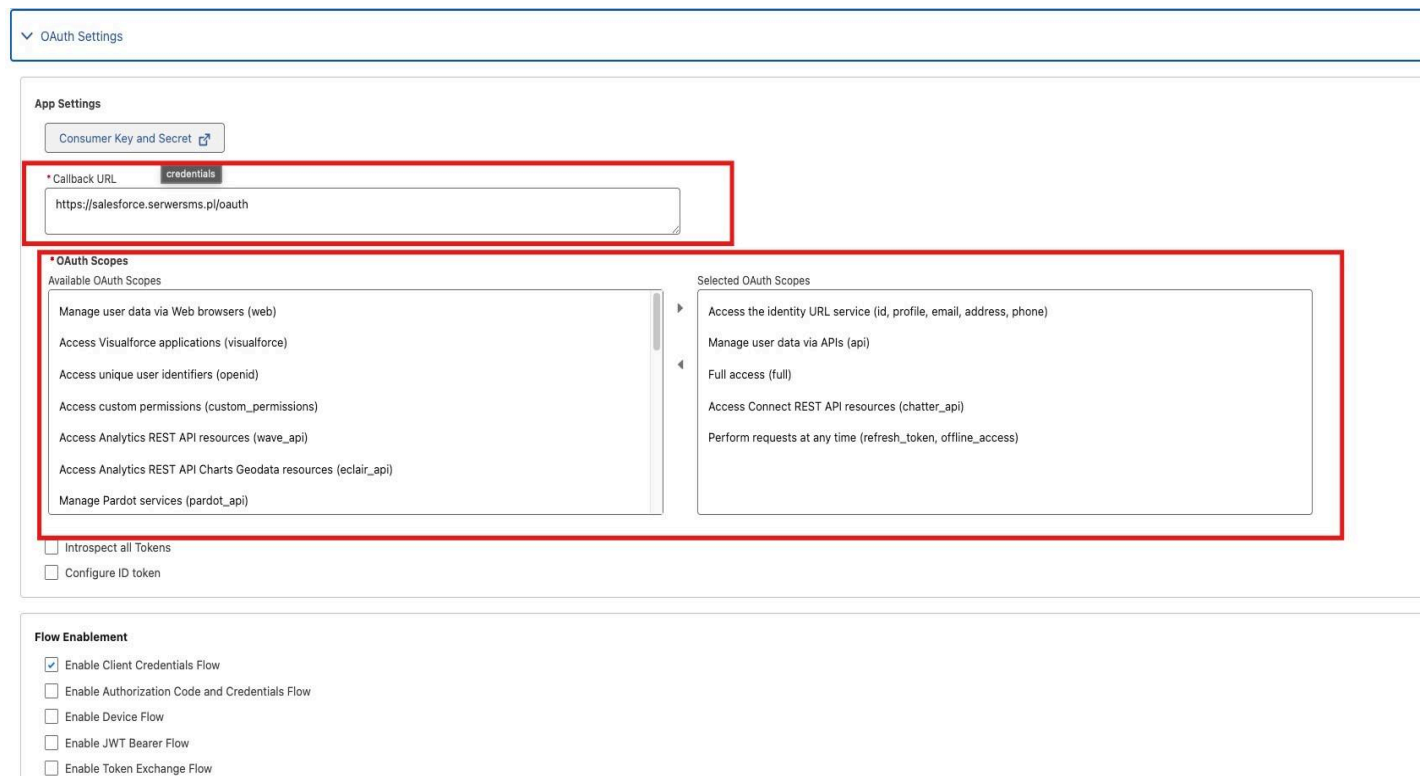
Enter a URL...

Enter the **Callback URL**. This is the address to which the user's browser will be redirected after successful authentication.

Use the following URL:

<https://salesforce.serwersms.pl/oauth>

Then, add the **Selected OAuth Scopes** using arrows.



OAuth Settings

**App Settings**

Consumer Key and Secret

\* Callback URL credentials

<https://salesforce.serwersms.pl/oauth>

\* OAuth Scopes

Available OAuth Scopes

- Manage user data via Web browsers (web)
- Access Visualforce applications (visualforce)
- Access unique user identifiers (openid)
- Access custom permissions (custom\_permissions)
- Access Analytics REST API resources (wave\_api)
- Access Analytics REST API Charts Geodata resources (eclair\_api)
- Manage Pardot services (pardot\_api)

Selected OAuth Scopes

- Access the identity URL service (id, profile, email, address, phone)
- Manage user data via APIs (api)
- Full access (full)
- Access Connect REST API resources (chatter\_api)
- Perform requests at any time (refresh\_token, offline\_access)

Introspect all Tokens

Configure ID token

**Flow Enablement**

- Enable Client Credentials Flow
- Enable Authorization Code and Credentials Flow
- Enable Device Flow
- Enable JWT Bearer Flow
- Enable Token Exchange Flow

Remember to check the boxes in the Security section and add Trusted IP Ranges for OAuth Web Server Flow below (IP 185.49.12.79).

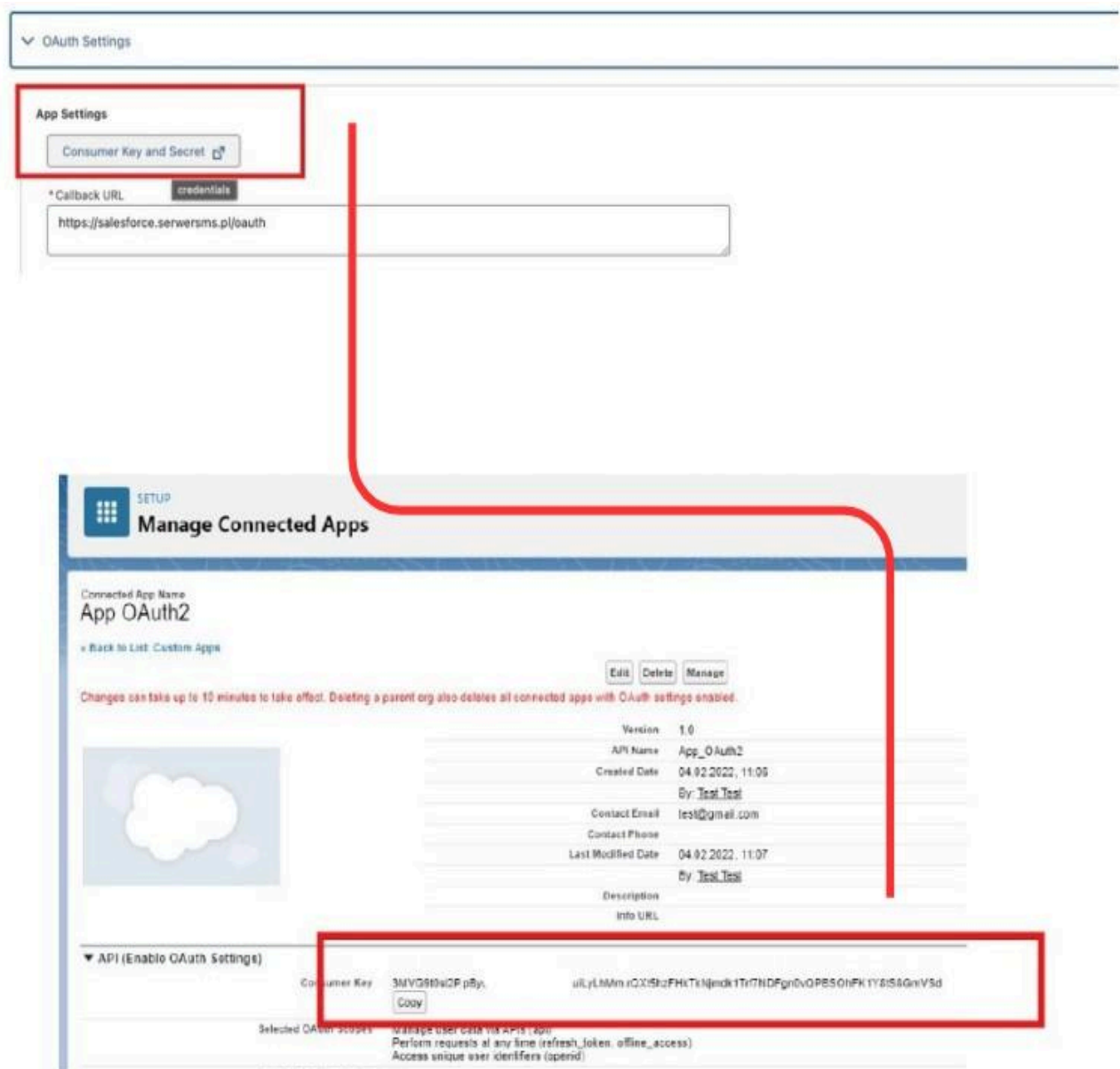
**Security**

- Require secret for Web Server Flow
- Require secret for Refresh Token Flow
- Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows
- Enable Refresh Token Rotation
- Issue JSON Web Token (JWT)-based access tokens for named users

**Trusted IP Ranges for OAuth Web Server Flow**

	Start IP Address	End IP Address	Description
1	185.49.12.79	185.49.12.79	

Please note that you will also need the **Client ID (Consumer Key)** to complete the application configuration. Navigate to the OAuth Settings tab and click on Consumer Key and Secret. You will be redirected to Manage Connected Apps, where you will find the Consumer Key (Client ID) under the API (Enable OAuth Settings) section.



Return to the SMS Configuration tab, then under Settings, add the Sender ID and Client ID (Consumer Key) and click Save.

Settings

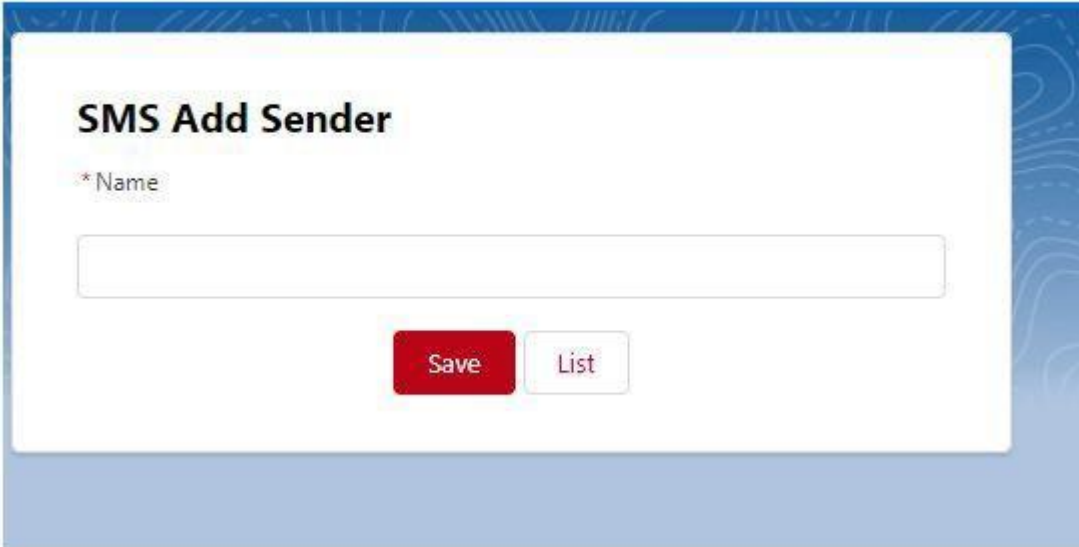
Sender  
none

Access API Salesforce  
\* Client ID

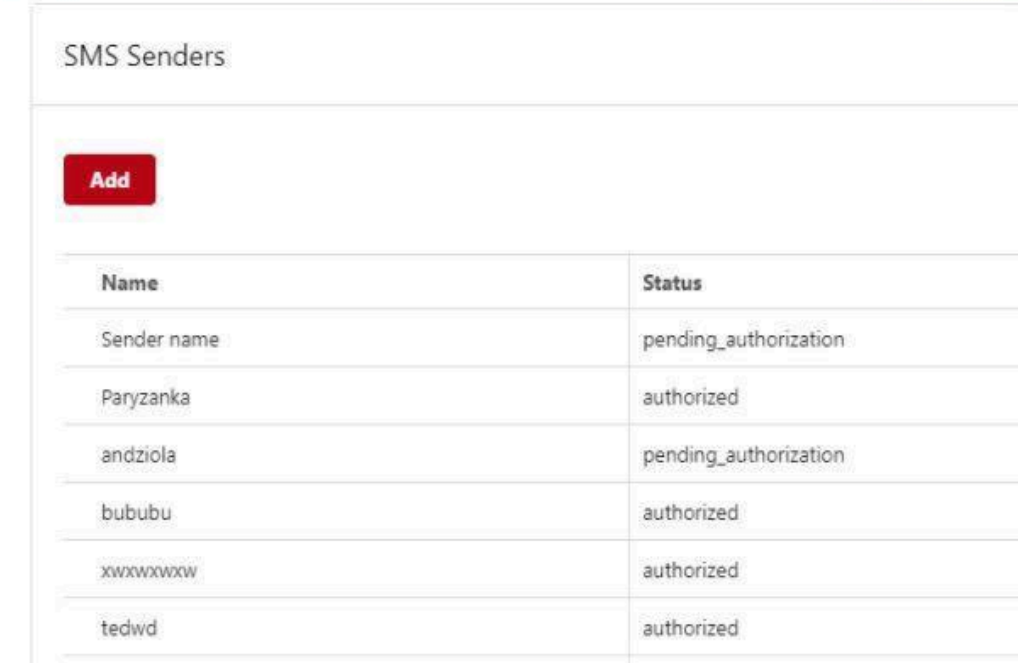
Save

## >> 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:



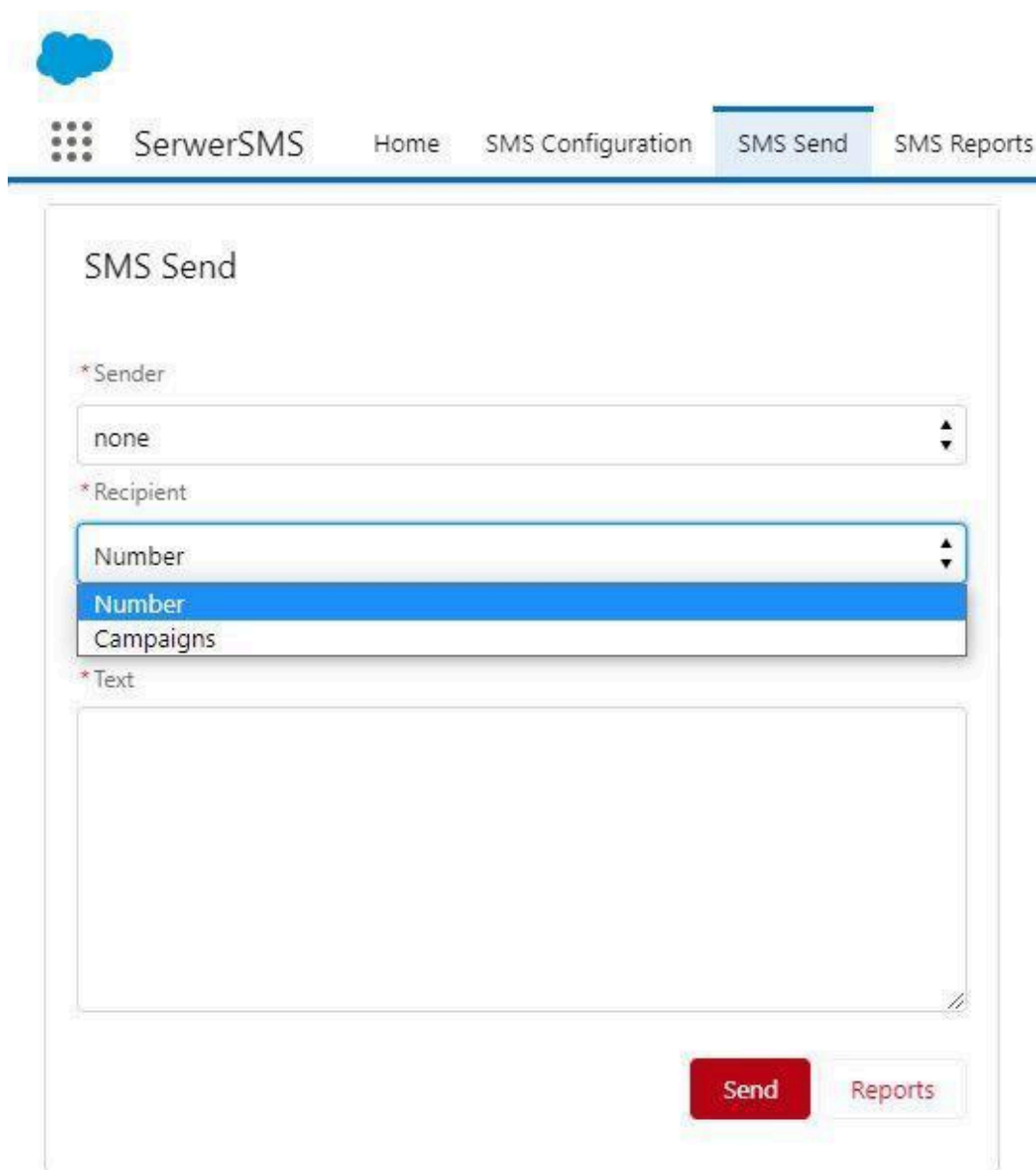
The screenshot shows the 'SMS Add Sender' form in the SerwerSMS application. The navigation bar includes 'SerwerSMS', 'Home', 'SMS Configuration', 'SMS Send', and 'SMS Reports'. The form has a title 'SMS Add Sender' and a required field '\* Name' with an empty text input box. Below the input box are two buttons: a red 'Save' button and a white 'List' button.



The screenshot shows the 'SMS Senders' list in the SerwerSMS application. The navigation bar includes 'SerwerSMS', 'Home', 'SMS Configuration', 'SMS Send', 'SMS Reports', and 'SMS Senders'. The page title is 'SMS Senders'. There is a red 'Add' button. Below it is a table with two columns: 'Name' and 'Status'.

Name	Status
Sender name	pending_authorization
Paryzanka	authorized
andziola	pending_authorization
bububu	authorized
xwxxxxw	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 app. The navigation bar at the top includes the SerwerSMS logo, a grid icon, and menu items for 'Home', 'SMS Configuration', 'SMS Send' (which is the active tab), and 'SMS Reports'. The main content area is titled 'SMS Send' and contains three required fields, each marked with an asterisk:

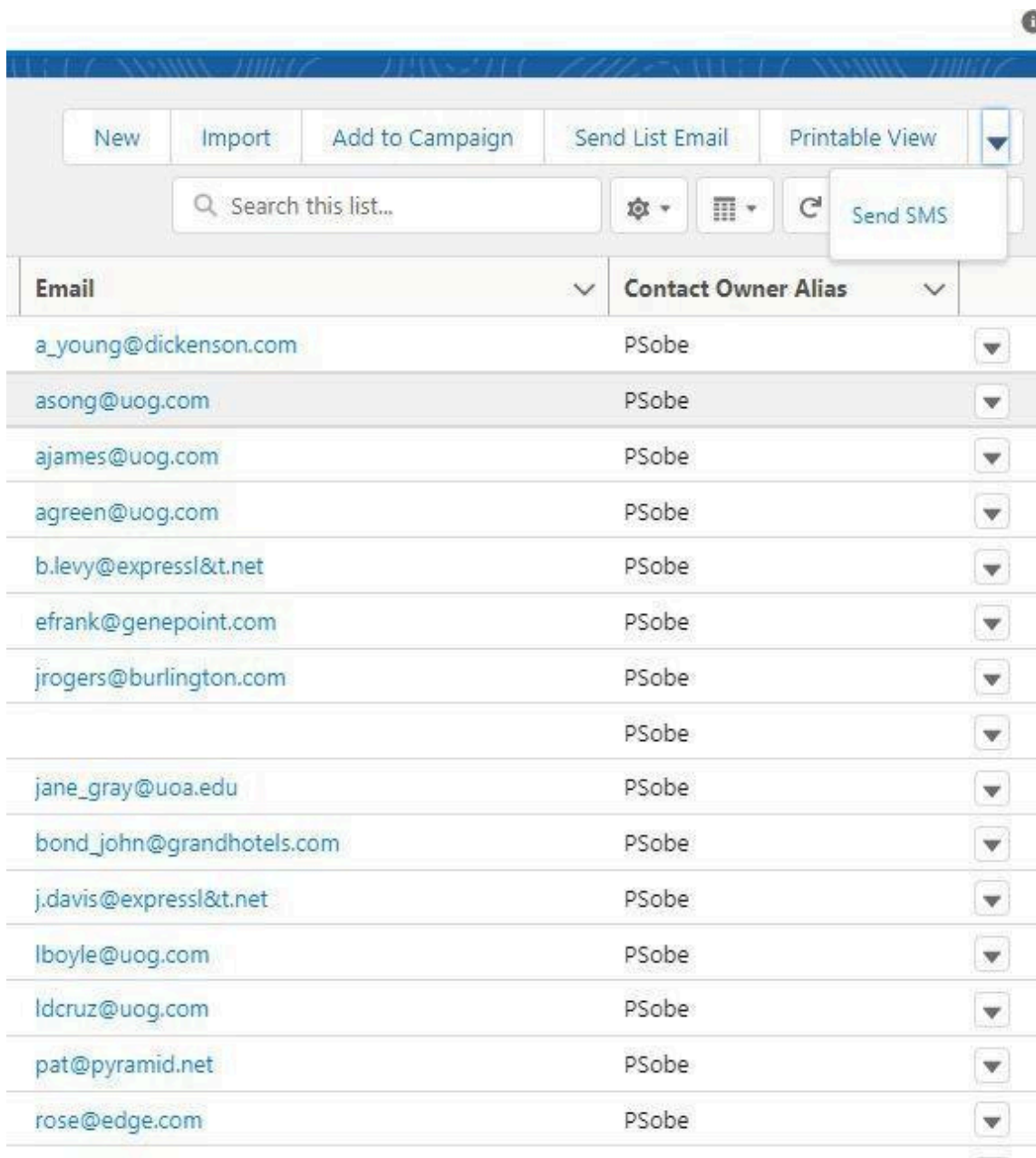
- \* Sender:** A dropdown menu currently showing 'none'.
- \* Recipient:** A dropdown menu with 'Number' selected and highlighted in blue. Other options visible are 'Number' and 'Campaigns'.
- \* Text:** A large, empty text area for entering the message content.

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 'Contact Search Results' search layout. The breadcrumb trail is 'SETUP > OBJECT MANAGER > Contact'. The left sidebar contains a navigation menu with 'Search Layouts' highlighted. The main content area is titled 'Edit Search Layout: Contact Search Results' and includes 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](#).' Below this, there are two columns: '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 columns are 'Add' and 'Remove' buttons. To the right of the 'Selected Fields' list are 'Up' and 'Down' buttons. Below the fields is a checkbox labeled 'Override the search result column customizations for all users'. The 'Standard Buttons' section states 'There are no customizable standard buttons for this view.' The 'Custom Buttons' section has two columns: 'Available Buttons' (containing 'Send SMS') and 'Selected Buttons' (containing '--None--'). 'Add', 'Remove', 'Up', and 'Down' buttons are also present for the custom buttons.

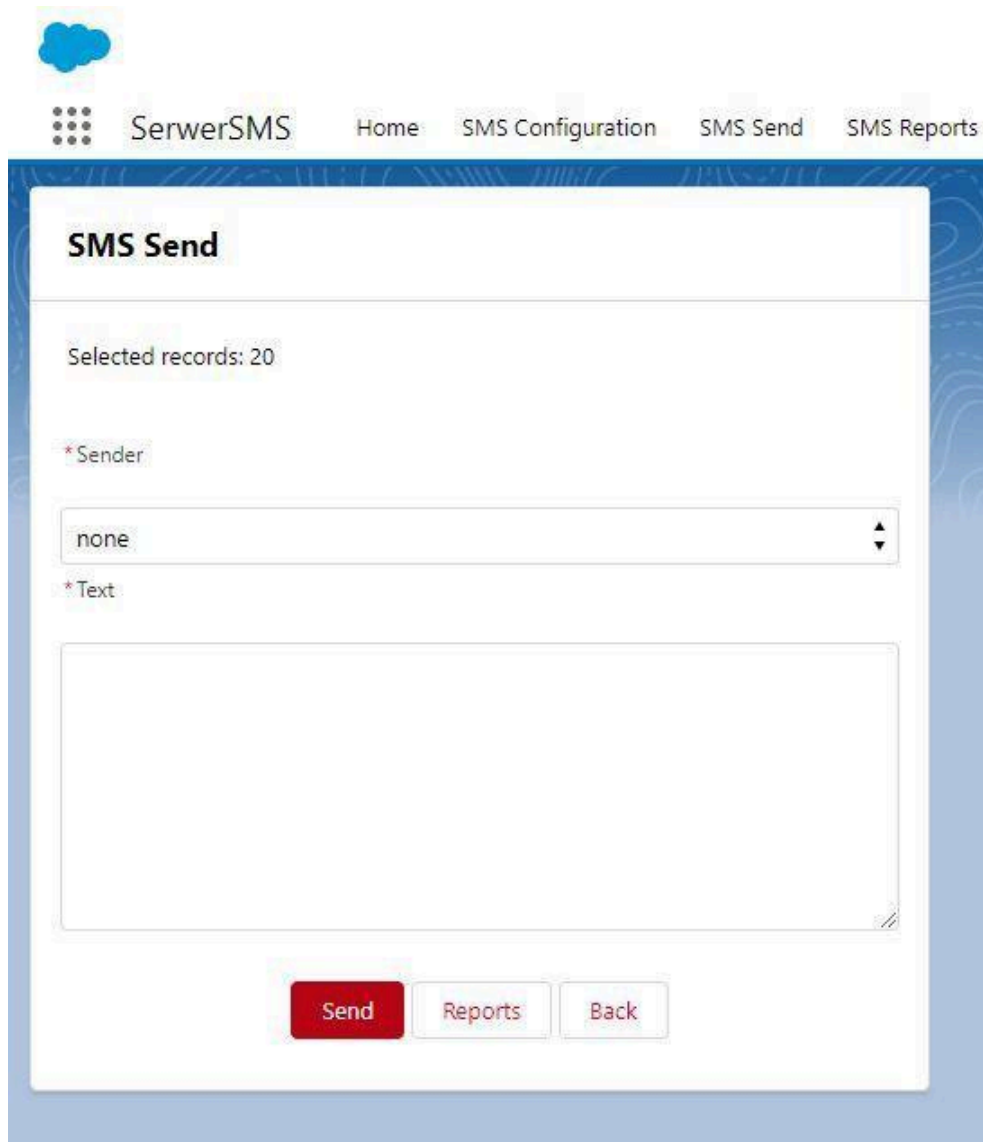
Then in Custom Buttons select Send SMS and add to Selected Buttons and save. Repeat the above operation for the Search Layouts for Salesforce -> List view -> Edit tab After correct configuration, we get the following view:



The screenshot shows a Salesforce list view interface. At the top, there is a toolbar with buttons for 'New', 'Import', 'Add to Campaign', 'Send List Email', and 'Printable View'. Below these is a search bar labeled 'Search this list...'. To the right of the search bar, there are icons for settings, a grid, and a refresh button. A 'Send SMS' button is visible in the toolbar, indicating that the custom button configuration is active. Below the toolbar is a table with two columns: 'Email' and 'Contact Owner Alias'. The table contains 15 rows of contact data, each with a dropdown arrow on the right side of the 'Contact Owner Alias' column.

Email	Contact Owner Alias
a_young@dickenson.com	PSobe
asong@uog.com	PSobe
ajames@uog.com	PSobe
agreen@uog.com	PSobe
b.levy@expressl&t.net	PSobe
efrank@genepoint.com	PSobe
jrogers@burlington.com	PSobe
	PSobe
jane_gray@uoa.edu	PSobe
bond_john@grandhotels.com	PSobe
j.davis@expressl&t.net	PSobe
lboyle@uog.com	PSobe
ldcruz@uog.com	PSobe
pat@pyramid.net	PSobe
rose@edge.com	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 within the SerwerSMS application. The navigation bar at the top includes 'SerwerSMS', 'Home', 'SMS Configuration', 'SMS Send', and 'SMS Reports'. The main form area is titled 'SMS Send' and indicates that 20 records are selected. It features two mandatory fields: '\* Sender', which is a dropdown menu currently showing 'none', and '\* Text', which is a large text input area. At the bottom of the form, there are three buttons: a prominent red 'Send' button, and two white buttons labeled 'Reports' and 'Back'.

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.

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

Campaign test

Type: Other Status: Planned Start Date: End Date:

Related Details

Campaign Hierarchy (0)

Attachments (0) Upload Files

Upload Files  
Or drop files

Opportunities (0) New

Campaign Members Add Leads Add Contacts

Number of Members

399

View All



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.

SMS Send

\*Sender: salesforce

\*Text: {ej} (firstname)

17 characters entered. 1 SMS to be sent.

Personalization fields:

- {name} - first and last name of the client
- {firstname} - first name of the client
- {lastname} - last name of the client
- {phone} - phone of the client
- {mobile} - mobile phone of the client
- {email} - e-mail address of the client

Unicode

Sending date:

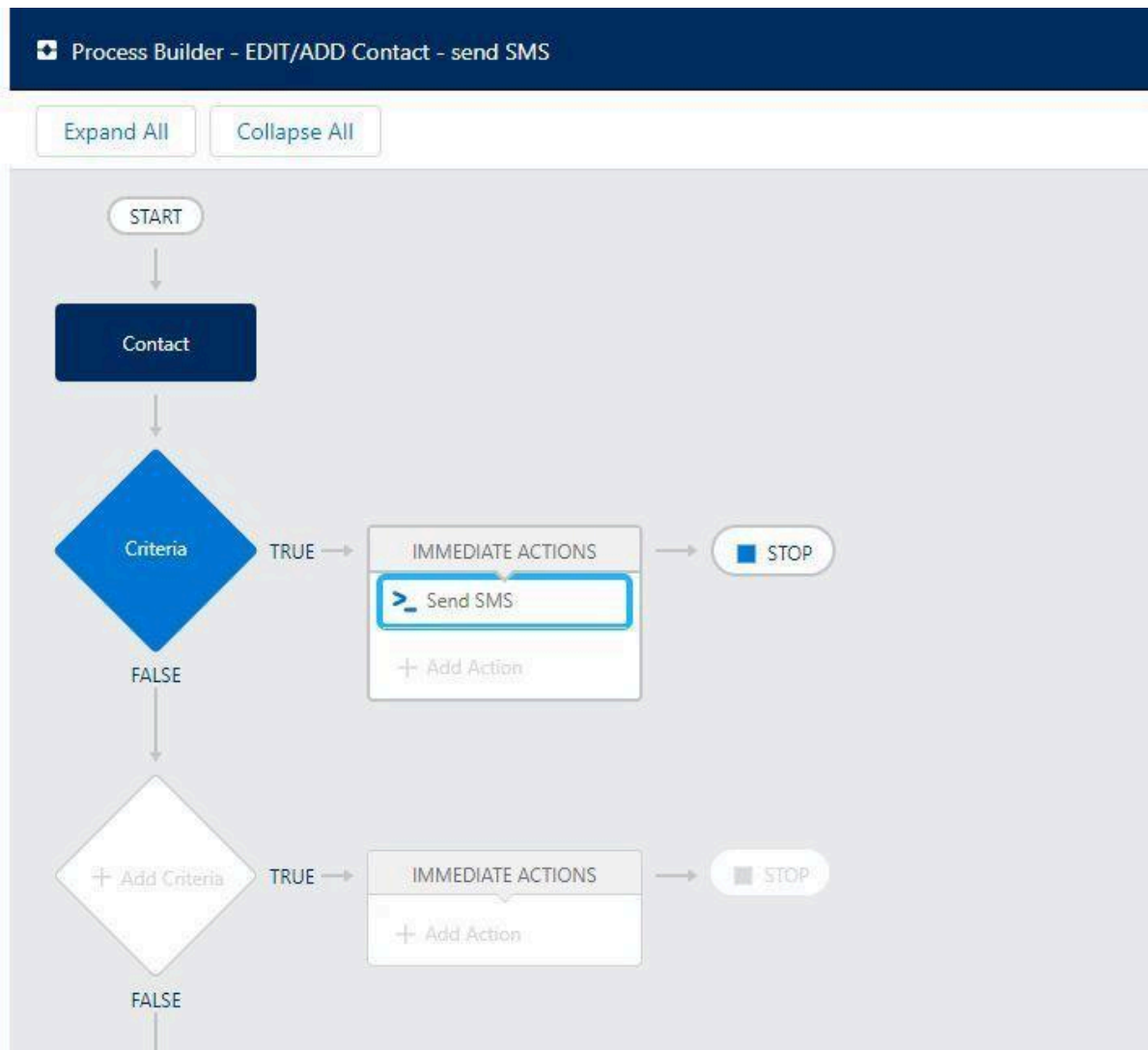
Immediately

At a specified time

Date: 1 Oct 2021 Time: 12:30

Send Reports

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\* ⓘ

Send SMS

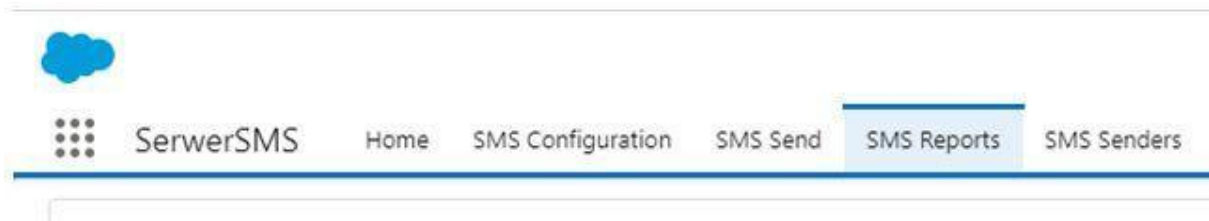
Apex Class\* ⓘ

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 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
024efeeae85	+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