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# Run Conversational Campaigns for SMS

Salesforce, Spring '24





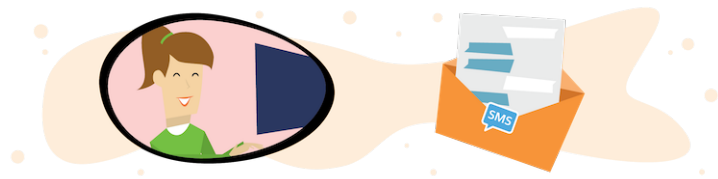
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# CONVERSATIONAL CAMPAIGNS FOR SMS

Link customers directly from marketing messages to a live SMS chat with your agent or chatbot for any questions about the product promotion.



## Get Started

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Explore system architecture related to this solution.

- [B2C Industry Blueprint](#)
- [B2C Reference Architecture](#)
- [B2C Solution Architectures](#)



Take Trailhead modules related to this solution.

- [Salesforce Solution Kits: Quick Look](#)
- [Customer 360 Guide for Retail: Quick Look](#)
- [Customer 360 Guides: Quick Look](#)

When you include a HELP keyword prompt with SMS, you provide customers with assistance that's one message away from the promotion. Your agents can secure sales from customers through personal interaction, while Service Cloud updates customer contacts for future engagement.

The Run Conversational Campaigns for SMS solution kit helps you:

- Include a keyword prompt as a footer in all promotional SMS messages.
- Store messaging history in Service Cloud.

## Required Products

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- Marketing Cloud (Corporate or Enterprise Edition)
- Mobile Activation SKU
- Sales Cloud (Enterprise or Unlimited Edition)
- Service Cloud (Enterprise or Unlimited Edition)
- Digital Engagement SKU (Excluding Government Cloud)
- Omni-Channel in Lightning Experience

[Workflow](#)

Learn how data flows through the configurations to run conversational campaigns for SMS.

[Configure Conversational Campaigns for SMS](#)

Use these configurations to run conversational campaigns for SMS.

[Design Considerations](#)

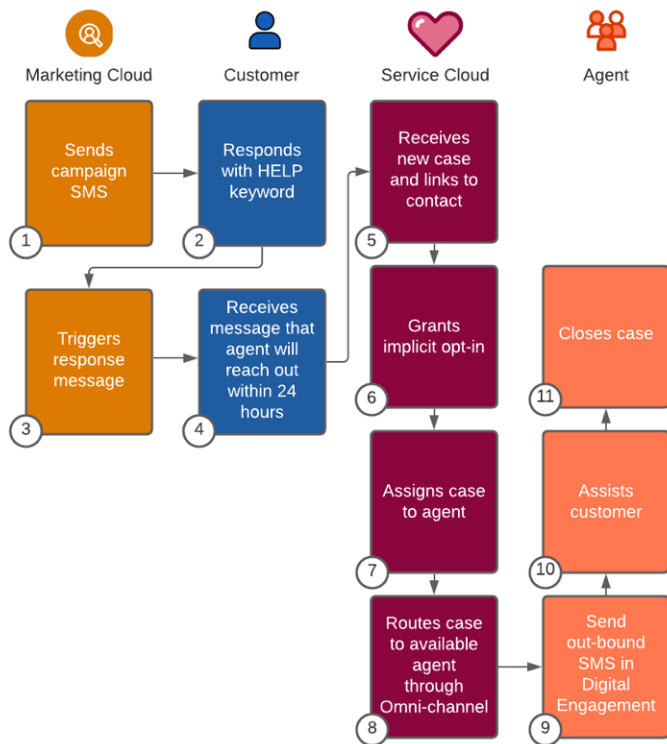
Keep these design considerations in mind when you run conversational campaigns for SMS.

[Customer Opt-In](#)

Conversational campaigns for SMS require different customer opt-in preferences. See opt-in settings for this solution.

## Workflow



Learn how data flows through the configurations to run conversational campaigns for SMS.



- Marketing Cloud sends a campaign SMS message. (1)
- The customer responds with the keyword *HELP*. (2)
- Marketing Cloud triggers a response message. (3)
- The customer receives a message notifying them that within 24 hours an agent is going to text them from another number. (4)
- Service Cloud receives the new case AMPscript created and links it to the existing contact or creates a one. (5)
- Service Cloud grants implicit opt-in. (6)
- Service Cloud assigns the case to the agent queue. (7)
- Service Cloud routes the case through Omni-Channel to available agents. (8)
- The agent sends an outbound SMS from a long or short code configured in Digital Engagement. (9)

- The agent assists the customer via a two-way conversation. (10)
- The agent closes the case after they have finished assisting the customer. (11)

## Related Content

	Review this solution's use case and purpose. <ul style="list-style-type: none"><li>• <a href="#">Conversational Campaigns for SMS</a> on page 1</li></ul>
	Take the next steps in this implementation. <ul style="list-style-type: none"><li>• <a href="#">Configure Conversational Campaigns for SMS</a></li><li>• <a href="#">Design Considerations</a></li><li>• <a href="#">Customer Opt-In</a></li></ul>

## SEE ALSO:


- [Connect Customers to Support from an Outbound Text Campaign](#)
- [Lightning Service Console](#)
- [Set Up Routing for Messaging Channels in Service Cloud](#)
- [Messaging in Service Cloud](#)
- [OAuth Authorization Flows](#)
- [REST API Case Object Resources](#)
- [MobileConnect](#)
- [Marketing Cloud QueueMO API](#)
- [Channel-Object Linking \(Beta\)](#)
- [B2C Services Best Practices](#)

## Configure Conversational Campaigns for SMS

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Use these configurations to run conversational campaigns for SMS.

1. Set up [Lightning Service Console](#).
2. Set up [Omni-Channel Routing for Messaging](#).
3. Set up [Salesforce Messaging](#).
4. Set up Marketing Cloud SMS code in [MobileConnect](#).
5. Create a data extension to manage tokens for the Connected App.
6. Activate and enable SMS code for Digital Engagement.
7. Set up [Customer Support from an Outbound Text Campaigns](#).

	Review earlier steps in this solution. <ul style="list-style-type: none"><li>• <a href="#">Workflow</a></li></ul>
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Take the next steps in this implementation.

- [Design Considerations](#)
- [Customer Opt-In](#)

#### SEE ALSO:

- [Connect Customers to Support from an Outbound Text Campaign](#)
- [Lightning Service Console](#)
- [Set Up Routing for Messaging Channels in Service Cloud](#)
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- [OAuth Authorization Flows](#)
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- [Marketing Cloud QueueMO API](#)

## Design Considerations

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Keep these design considerations in mind when you run conversational campaigns for SMS.

### Marketing Cloud Sending Options

- To record messaging history, send marketing SMS messages through the Journey Builder or MobileConnect application.
- Set the trigger that creates a support case. Use the standard *HELP* keyword, or set a unique keyword. You can also set the sales case to only open for non-keyword responses that otherwise trigger error messages.

### Add Customer Contact to Service Cloud

- If the customer doesn't have a contact record, Service Cloud uses their SMS phone number to create a user record in the Messaging object. Your agent must ask the customer for their first and last name and manually add it to the contact record.
- [Channel-Object Linking \(Beta\)](#) matches a contact record and the messaging user record by SMS phone number. If you use Marketing Cloud Connect, Channel-Object Linking records this session in the contact's history.
- If you don't use Channel-Object Linking, use APEX triggers to match the Messaging User object record to a contact record by email or phone number. If no record exists, create a contact record and relationship.

### Related Content



Review earlier steps in this solution.

- [Workflow](#)
- [Configure Conversational Campaigns for SMS](#) on page 3





Take the next steps in this implementation.

- [Customer Opt-In](#)

SEE ALSO:

[Connect Customers to Support from an Outbound Text Campaign](#)

[MobileConnect](#)

[Channel-Object Linking \(Beta\)](#)

[B2C Services Best Practices](#)

## Customer Opt-In

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Conversational campaigns for SMS require different customer opt-in preferences. See opt-in settings for this solution.

### Marketing Cloud Opt-In Considerations

Outbound SMS messages can only be sent to subscribers who opted in to receive them.

- The initial outbound SMS message sent through MobileConnect uses the customer's existing Marketing Cloud SMS opt-in status.
- If you created a MobileConnect subscriber from SMS-Opt-In, they are managed as a separate Marketing Cloud contact from the Service Cloud contact.
- If you created a MobileConnect subscriber from API using the Service Cloud Contact ID as the subscriber key, one contact can use the same consent flags.

### SMS Session Opt-In

- The Messaging Session Object opt-in flag is not a mobile opt-in for general SMS or other Messaging activities.
- The customer implicitly opts in to the Service Messaging Session by texting *HELP*.
- The customer's opt-in is session-specific. A standard session lasts up to 24 hours from the customer's last message.
- The opt-in flag is stored in Service Cloud on the Messaging Session Object.

### Related Content



Review earlier steps in this solution.

- [Workflow](#)
- [Configure Conversational Campaigns for SMS](#) on page 3

- [Design Considerations](#)

SEE ALSO:

[MobileConnect](#)

[Marketing Cloud QueueMO API](#)

[Channel-Object Linking \(Beta\)](#)

[B2C Services Best Practices](#)