



Merfantz Technologies Pvt. Ltd

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TextLocal/Twilio Integration with Salesforce

STORY:

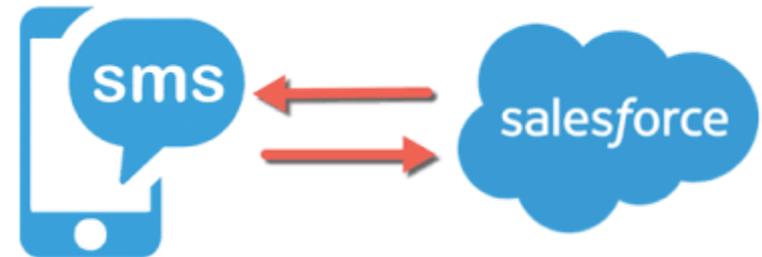
We have our customers in India and other countries those who are using Salesforce CRM to organize all of their business contacts, products, vendors and their leads.

According to Gardner, SMS campaigns achieve a remarkable 98% open rate and a 45% response rate. So, our Customer wants to conduct SMS campaign to their leads in Salesforce.

The Challenge:

- 👉 Our Customer prefers sending plain SMS which takes only a few min to create whereas emails are supposed to be well designed
- 👉 Salesforce doesn't have the standard feature for sending SMS
- 👉 Need a tool to send Promotional SMS (new product, exclusive sales and offers) as well as Transactional SMS (send OTPs, informational messages, booking and order alerts) to their registered customers in Salesforce.
- 👉 Need a bulk SMS service provider to send bulk SMS to different telecom operators with best delivery rate and low cost.
- 👉 The tool must be reliable, secure and not expensive (could be pay per use)

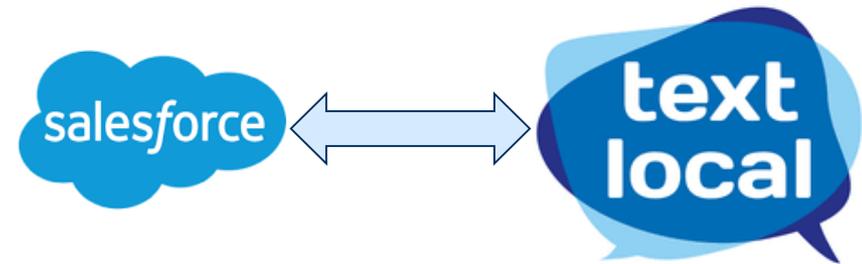
Process Flow



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The Solution for Local SMS:

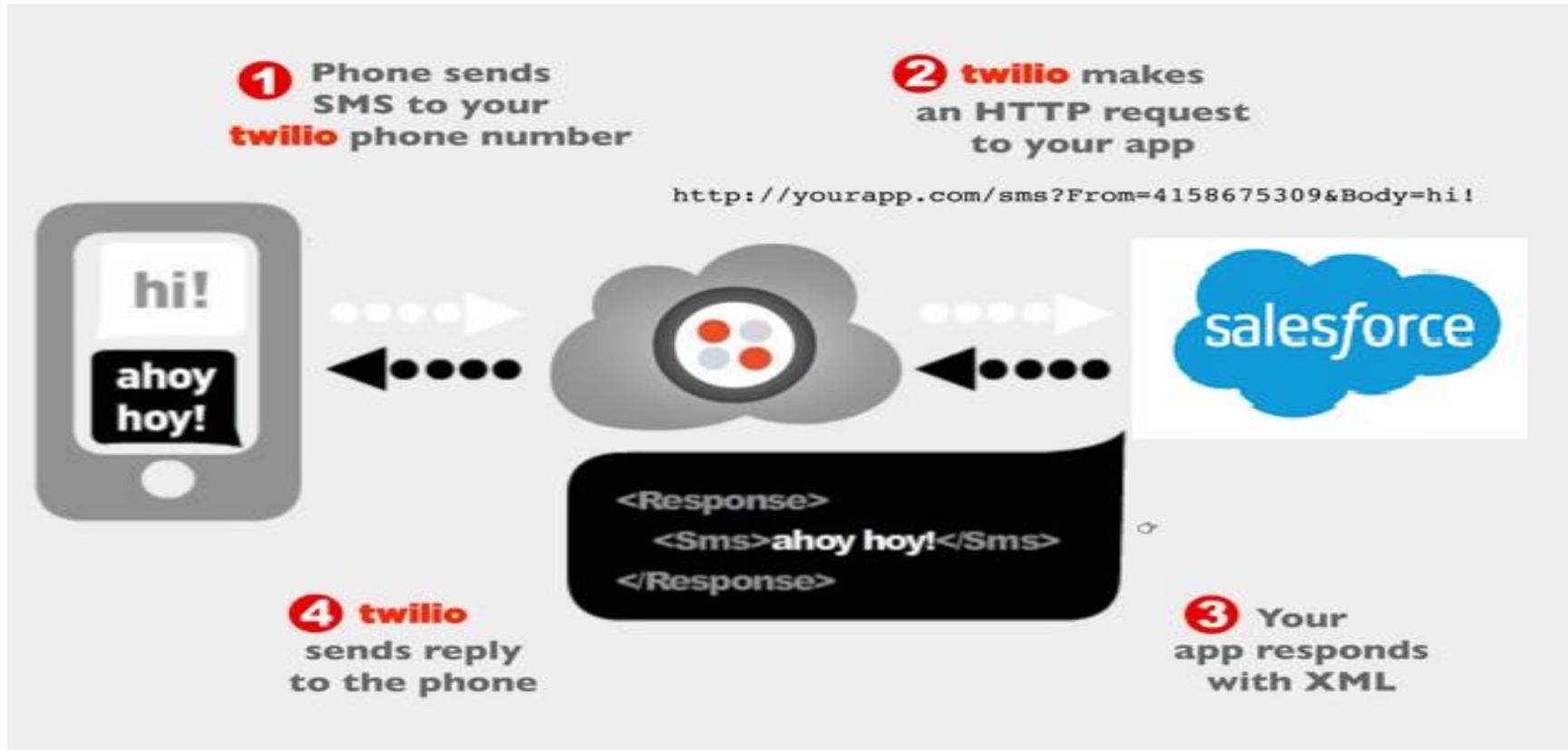
- There are lot of tools/ SMS providers available in the market to send SMS. We have chosen Textlocal SMS provider for our Indian Client and integrated with Salesforce
- Textlocal offers the most flexible and easily adaptable SMS API gateway allowing you to start sending SMS from any application/CRM in minutes
- You can send SMS with Textlocal in different ways from WebUI,SMS APIs, Email to SMS, Excel Plugin, Wordpress Plugin, Magneto Plugin etc..
- It also allows you to connect with your customers via WhatsApp
- Textlocal is the highest rated bulk SMS service platform with 94% reviews rating it 5.0/5.0 on Trustpilot
- Cost for each SMS is as low as from 14.5 paisa to 27 paisa per SMS
- It provides Lifetime validity for SMS credits. SMS Credits can be used for both Promotional & Transactional SMS
- Secure, reliable & scalable SMS APIs.



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Integrating Twilio with Salesforce

- 👤 Twilio provides a managed package for Salesforce that brings programmable communications to Salesforce environment



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Integrating Twilio with Salesforce

🤖 The Twilio for Salesforce package includes an Apex helper class that reduces the amount of code needed to interact with Twilio APIs.



🤖 While the Lightning Components in the package focus only on SMS, the helper class allows you to write custom Apex to interact with any of Twilio's API services, such as Voice and Chat

🤖 Twilio for Salesforce exposes two global Apex classes (Twilio Send SMS and Twilio Send to Studio) that you can easily use it in Process builder

🤖 **Twilio Send SMS Message** → This Apex class is useful for single message use cases such as alerts, reminder and notifications

🤖 **Twilio Send to Studio** → allows you to initiate SMS and Voice chatbots

🤖 We can update a Salesforce record with a Twilio function

🤖 It can push Inbound Messages and Status (such as Delivered, failed) Updates to Salesforce

🤖 Twilio supports messaging groups of any size, so you can connect with individuals and large audiences.