Messaging for Administrators

Salesforce, Spring '23

@salesforcedocs

Last updated: April 14, 2023

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What's Service Cloud Messaging?

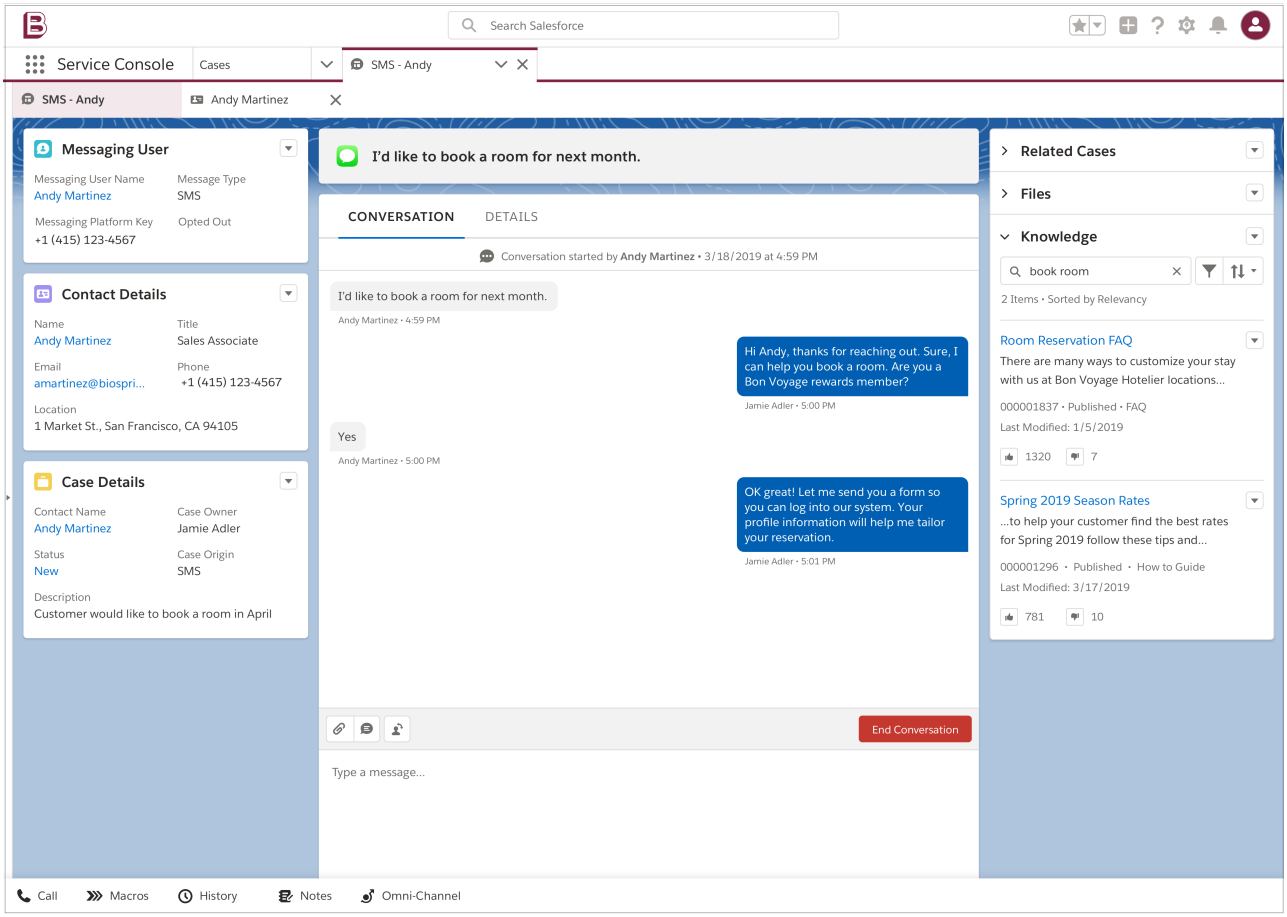
Help customers over their preferred messaging channels: Messaging for In-App and Web, WhatsApp, Facebook Messenger, or SMS. Agents can respond to incoming customer messages directly from the Service Console.

Messaging channels that this article applies to

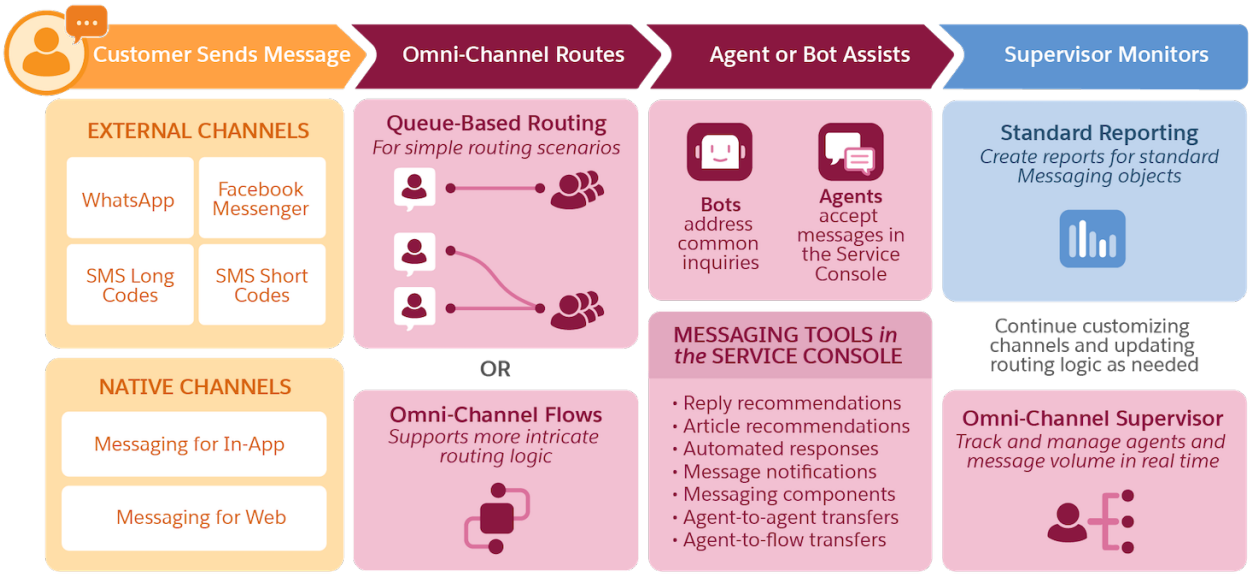
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

EDITIONS

Available in: Lightning Experience. View required editions. on page 5



Seventy-five percent of adults want to communicate with brands the same way they do friends & family—through messaging. Messaging in Service Cloud combines a few different puzzle pieces to create a smooth, efficient conversation experience for both your customers and your service agents.



Websites and Mobile Devices

Exchange messages with customers from your website, mobile app, Facebook page, WhatsApp account, or over text. You choose which channels to use to communicate with your customers—for example, you may prefer to only set up a WhatsApp channel.

Agents in some Messaging channels can also start conversations with customers through proactive outbound messages, or your company can set up processes to send automatic messages to customers. When a customer responds, their response is routed directly to the service console for agents to continue the conversation. Agent-initiated outbound messaging is available only in SMS channels, and as a beta feature in standard WhatsApp channels and standard Facebook Messenger channels.

Omni-Channel

Salesforce's routing tool assigns incoming messages to queues, bots, or agents. Queue-based routing is ideal for simple routing scenarios. Omni-Channel Flows lets you use Flow Builder to define routing rules and dynamically route messages to the most qualified, available agent.

Einstein Bots

Try creating a bot—or several—for your Messaging channels to gather information from customers and resolve inquiries. A bot can be associated with multiple channels. It can complete tasks like greeting customers, gathering the reason for their message, or routing messages based on the customer's preferred language.

Service Console

Incoming messages appear in the Omni-Channel widget, just like phone calls. Agents can accept a message and start chatting.

The Conversation component in the console shows current and past messages exchanged with the customer. Messaging user records, created for anyone who has exchanged messages with your company, show the user's related records and all of their messaging sessions for a particular channel.

In enhanced Facebook Messenger channels and Messaging for In-App and Web, you can create interactive components to help agents gather and share information faster using structured content. Components take the form of links with images, questions with

options, time selectors, and auto-responses. These channels also include extra functionality such as the ability to transfer a messaging session to another agent.

If a customer communicates with you over multiple channels—for example, WhatsApp and email—all conversations are visible from their contact record. This way, agents can quickly review a customer's history with your company; no sleuthing required.

IN THIS SECTION:

Service Cloud Messaging Limits and Considerations

Before you get started with Messaging for WhatsApp, SMS, Facebook Messenger, or Messaging for In-App and Web, review key limits and considerations.

Compare Messaging Channel Capabilities in Service Cloud

Explore the capabilities of standard and enhanced Messaging channels in Service Cloud. Going forward, new features are available exclusively in enhanced channels.

Messaging Glossary

When you're setting up a Messaging channel in Service Cloud, it's helpful to understand the terms that we use to talk about messaging in Salesforce.

Lifecycle of a Messaging Session in Service Cloud

Learn how Salesforce tracks messaging sessions, from the first message to the last. Understanding session statuses helps you design your routing logic and comply with service-level agreements.

SEE ALSO:

Trailhead: Salesforce Messaging

Service Cloud Messaging Limits and Considerations

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General Limits

Limit	Value
Maximum number of Messaging channels per org	2,000
Maximum simultaneous active messaging sessions	• Enhanced Messaging: 2,000 • Standard Messaging: No limit
Maximum messages or messaging sessions per second	• Standard Messaging for Salesforce Classic: 2 messages per second

Limit	Value
	• Standard Messaging for Lightning Experience: 6 new conversations per second, up to 100 messages per second thereafter • Enhanced Messaging: 4 messages per second

Channel-Specific Considerations

Review limits and considerations for specific Messaging channels and features.

- Considerations for Messaging for In-App and Web
- Considerations for Using WhatsApp in Service Cloud
- Considerations for Using Facebook Messenger in Service Cloud
- Considerations for Long Code Messaging Channels
- Considerations for Short Codes
- Considerations for Broadcast Messaging
- Considerations for Messaging Components

SEE ALSO:

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Web	**In-App**	**SMS (Standard)**	**Facebook (Standard)**	**WhatsApp (Standard)**	**Facebook (Enhanced)**	**WhatsApp (Enhanced)**
✅	✅	✅	✅	✅	✅	✅

Supported Editions in Messaging

Messaging for In-App and Web:

- Available in Lightning Experience only
- Available in **Enterprise** Edition for Service Cloud with the Digital Engagement and Messaging for In-App and Web add-on SKUs
- Available in Service Cloud **Performance** and **Unlimited** Editions with the Messaging for In-App and Web add-on SKU

Messaging for WhatsApp, Facebook Messenger, and SMS:

- Available in Lightning Experience only
- Available in **Enterprise**, **Unlimited**, and **Developer** Editions for Service Cloud or Sales Cloud with the Digital Engagement add-on SKU

- SMS short code channels available with the addition of the Short Codes add-on SKU
- Not supported in Government Cloud Plus

Supported Features in Messaging Channels

	SMS (Standard)	Facebook Messenger (Standard)	Facebook Messenger (Enhanced)	WhatsApp (Standard)	WhatsApp (Enhanced)	Messaging for Web	Messaging for In-App
Available with Sales Cloud	Yes**	Yes**	Yes	Yes	Yes	Yes	Yes
Provisioning Methods							
Long codes	Yes	N/A	N/A	N/A	N/A	N/A	N/A
Toll-free long codes (US)	Yes	N/A	N/A	N/A	N/A	N/A	N/A
Toll-free long codes (Canada)	Yes	N/A	N/A	N/A	N/A	N/A	N/A
Short codes (US)	Yes	N/A	N/A	N/A	N/A	N/A	N/A
Short codes (Canada)	Yes**	N/A	N/A	N/A	N/A	N/A	N/A
Setup and Routing							
Automated channel setup	No	Yes	Yes	No	Yes	Yes	Yes
Omni-Channel Flows routing	Yes**	Yes**	Yes	Yes	Yes	Yes	Yes
Queue-based routing	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Conversation Start and End							
Customer-initiated 1:1 inbound conversations	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Agent-initiated 1:1 outbound conversations	Yes	Yes	No	Yes (beta)	No	No	No
Outbound triggered messaging from field change on record	Yes	Yes	No	Yes	No	No	No

	SMS (Standard)	Facebook Messenger (Standard)	Facebook Messenger (Enhanced)	WhatsApp (Standard)	WhatsApp (Enhanced)	Messaging for Web	Messaging for In-App
Broadcast messaging	Yes	N/A	N/A	N/A	N/A	N/A	N/A
Agent can end conversation	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Agent can mark conversation inactive	No	No	Yes	No	Yes	Yes	Yes
Customer can end conversation	N/A	N/A	N/A	N/A	N/A	Yes	Yes
Customer Experience							
Typing indicator: customer side	N/A	No	Yes	No	No	Yes	Yes
Typing indicator: agent side	N/A	No	No	No	No	Yes	Yes
Read receipts: customer side	N/A	No	No	No	No	Yes	Yes
Read receipts: agent side	N/A	No	No	No	No	Yes	Yes
Delivered receipts: customer side	N/A	No	Yes	No	No	Yes	Yes
Delivered receipts: agent side	N/A	No	Yes	Yes	Yes	Yes	Yes
Estimated wait time for customers	N/A	N/A	N/A	N/A	N/A	Yes	Yes
Desktop application support	N/A	Yes	Yes	Yes	Yes	Yes	N/A
Window branding and customization	N/A	N/A	N/A	N/A	N/A	Yes	Yes
Rich Content							

	SMS (Standard)	Facebook Messenger (Standard)	Facebook Messenger (Enhanced)	WhatsApp (Standard)	WhatsApp (Enhanced)	Messaging for Web	Messaging for In-App
Emojis: customer to agent	Yes*	Yes*	Yes	Yes	Yes	Yes	Yes
Emojis: agent to customer	Yes*	Yes*	Yes	Yes	Yes	Yes	Yes
GIFs: customer to agent	Yes	Yes	Yes	No	Yes	Yes	No
GIFs: agent to customer	Yes	Yes	Yes	No	No	Yes	No
File sharing: customer to agent	Yes	Yes	Yes	Yes	Yes	Yes	Yes
File sharing: agent to customer	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Video messages	No	No	Yes	No	Yes	No	No
Audio messages	No	No	Yes	No	Yes	No	No
Enhanced link messaging components	No	No	Yes	No	No	Yes	Yes
Question with options messaging components	No	No	Yes	No	No	Yes	Yes
Time selector messaging components	No	No	Yes	No	No	Yes	Yes
Auto-response messaging components	No	No	No	No	No	Yes	Yes
Operations and Support							
Quick text	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Agent-to-agent transfer	No	No	Yes	No	Yes	Yes	Yes

	SMS (Standard)	Facebook Messenger (Standard)	Facebook Messenger (Enhanced)	WhatsApp (Standard)	WhatsApp (Enhanced)	Messaging for Web	Messaging for In-App
Agent-to-flow transfer	No	No	Yes	No	Yes	Yes	Yes
Flag raise	No	No	Yes	No	Yes	Yes	Yes
Supervisor whisper to agents	No	No	Yes	No	Yes	Yes	Yes
Conversation transcripts	Yes	Yes	Yes	Yes	Yes	Yes	Yes
After-conversation work timer	Yes	Yes	Yes	No	Yes	Yes	Yes
Einstein Bots integration	Yes**	Yes**	Yes	Yes	Yes	Yes	Yes
Sensitive data rules	Yes	Yes	No	Yes	No	No	No
Encryption at rest	Yes**	Yes**	Yes	Yes	Yes	Yes	Yes
Channel-object linking	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Consent Management							
Channel consent type: Implicit opt-in	Yes	Yes	Yes	Yes	Yes	N/A	N/A
Channel consent type: Explicit opt-in	Yes (short codes)	No	Yes	No	Yes	N/A	N/A
Channel consent type: Double opt-in	Yes (short codes)	No	No	No	No	N/A	N/A
Customers can opt out	Yes	Yes	Yes	Yes	Yes	N/A	N/A
Automated Responses							
Conversation acknowledgment	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Agent accept	Yes	Yes	Yes	Yes	Yes	Yes	Yes
After-hours response	Yes*	Yes*	No	No	No	No	No

	SMS (Standard)	Facebook Messenger (Standard)	Facebook Messenger (Enhanced)	WhatsApp (Standard)	WhatsApp (Enhanced)	Messaging for Web	Messaging for In-App
End session	Yes	Yes	Yes	Yes	Yes	Yes	Yes

* Available only in Salesforce Classic

** Channel available in both Salesforce Classic and Lightning Experience; feature available only in Lightning Experience

SEE ALSO:

- What's Service Cloud Messaging?
- Service Cloud Messaging Limits and Considerations
- Messaging for WhatsApp, Facebook Messenger, and SMS
- Set Up Messaging for In-App and Web

Messaging Glossary

When you're setting up a Messaging channel in Service Cloud, it's helpful to understand the terms that we use to talk about messaging in Salesforce.

EDITIONS

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✅	✅	✅	✅	✅	✅	✅

Business-Initiated Outbound Messaging

Messaging sessions initiated by an agent or automatic process in Salesforce—for example, an agent messages a customer in your WhatsApp channel ("agent-initiated outbound messaging"), or a flow sends an automatic notification or broadcast ("triggered outbound messaging"). Agent-initiated outbound messaging is available for SMS channels and in beta for standard WhatsApp and standard Facebook Messenger channels. It isn't available in enhanced Facebook Messenger channels, enhanced WhatsApp channels, or Messaging for In-App and Web. Triggered outbound messaging is available in standard Messaging channels and isn't supported in enhanced Messaging channels or Messaging for In-App and Web.

Channel

A way for customers to exchange messages with your business. Salesforce supports these channel types in Messaging: Facebook Messenger, WhatsApp, SMS, Messaging for In-App, and Messaging for Web. To connect an account—such as a WhatsApp account—to Salesforce, you create a Messaging channel in Setup. In your channel settings, you can customize the agent experience and add automation.

CORS Allowlist Entry

Cross-Origin Resource Sharing (CORS) lets web browsers request resources from other domains. When you add your top-level domain when setting up a Messaging for Web channel, the CORS allowlist prevents requests to Salesforce Lightning apps unless the request comes from your approved URL list.

Custom Parameter

A way to further customize the Messaging experience or routing for a particular channel. For example, create a custom parameter to share a customer's name and email address with an agent or to link a customer's pre-chat form values to a Messaging for In-App and Web channel. Manage custom parameters in your messaging channel's settings in Setup.

Embedded Service Deployment

Create deployments to implement Messaging on your app or website and control the functionality. Manage your deployments on the Embedded Service Deployment Settings page in Setup. There, you can edit your messaging settings, select branding, add pre-chat values, and install a JavaScript code snippet to deliver conversations to your website, download a configuration file to provide conversations from your mobile app, and more.

Enhanced Messaging

A new platform that supports a wider range of content formats and more efficient operations than Standard Messaging. Enhanced Messaging channels include enhanced Facebook Messenger and enhanced WhatsApp channels. Enhanced SMS channels aren't available. Enhanced channels have some differences from standard channels, so choose your channel type accordingly. After you create a channel, you can't change its type, but you can maintain both standard and enhanced channels in Salesforce.

Inbound Messaging

Messaging sessions initiated by your customer—for example, a customer sends you a message in Facebook Messenger.

Messaging Component

Structured content that agents can send to customers in a messaging session to share or gather information. Four types of messaging components are available: enhanced links, questions with options, time selectors, and auto-responses. These content formats help you standardize your external messaging and let customers and agents communicate in familiar ways.

Messaging Session

An exchange of one or more messages between your business and a customer that takes place over a Messaging channel.

Messaging User

A record representing a user who communicates with your company over a particular channel, such as Facebook Messenger. When a customer sends a message to your company, a messaging user record is created for the customer to track their activity in that messaging channel. Depending on which data is available, the record can include the customer's name, phone number or Facebook name, and consent status. You can link a messaging user record to a contact or other type of record so all the customer's messaging sessions are in one place. Messaging user records are required for your recipients, even if you're sending messages to contacts, employees, or person accounts.

Parameter Mapping

A way to map standard and custom parameters to flows or agent tasks. Manage your parameter mappings in your messaging channel's settings in Setup.

Pre-Chat Fields

A way to collect customer details before an agent starts a conversation in a Messaging for In-App and Web channel. Ask customers to fill out visible pre-chat fields, or use our API to fill in hidden pre-chat fields. Send this data to your agents using Omni Flow.

Routing

The logic that determines how customer inquiries in a Messaging channel are routed. The Salesforce routing tool is Omni-Channel, and you can configure it to route customer messages to queues, bots, or agents. Queue-based routing is ideal for simple routing scenarios, while Omni-Channel Flows lets you use Flow Builder to define routing rules and dynamically route messages to the most

qualified available agent. Flow unifies the routing setup for all supported channels, including voice calls, chats, messaging, cases, leads, and custom objects.

SEE ALSO:

- What's Service Cloud Messaging?
- Lifecycle of a Messaging Session in Service Cloud
- Messaging for WhatsApp, Facebook Messenger, and SMS
- Set Up Messaging for In-App and Web

Lifecycle of a Messaging Session in Service Cloud

Learn how Salesforce tracks messaging sessions, from the first message to the last. Understanding session statuses helps you design your routing logic and comply with service-level agreements.

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✅	✅	✅	✅	✅	✅	✅

A messaging session's participants can include a *messaging user*—also known as the customer—and an *agent* or *bot*. Some messaging session statuses are used only in enhanced channels.

Messaging Session Statuses

New

(Standard channels only) The messaging session was created. This status occurs when a messaging user, agent, or automatic process—such as a flow or Process Builder process—sends the opening message.

Waiting

The messaging user sent a message and is waiting for a response. This status occurs when a session is being routed or transferred and an agent or a bot hasn't yet accepted it. The following actions can cause a session's status to change to Waiting.

- A customer creates a messaging session by sending a message.
- An agent transfers an active messaging session.
- An agent goes offline during an active messaging session.
- After a messaging session is marked inactive, the customer resumes the conversation by sending a message.

Active

The messaging session is in progress. This status occurs when an agent or bot accepts a messaging session.

Consent

(Enhanced channels and Messaging for In-App and Web only) The messaging user has sent only consent keywords (opt-in, double opt-in, or help keywords) in the messaging session. For example, the messaging user has responded `Start` to agree to receive messages about new products, but hasn't sent a unique inquiry that requires the attention of a bot or agent. The Consent status value helps you design routing flows that exclude consent-related messaging sessions from routing.

Inactive

(Enhanced channels and Messaging for In-App and Web only) A previously active messaging user received a message, but stopped responding before their issue was resolved. Agents can mark a session inactive by closing the session tab and selecting **No Customer Response**. Marking a session inactive frees up the agent's capacity, and also serves as a way to put the messaging user on hold. When the messaging user sends a message after a session is marked inactive, the session status updates to Waiting and the session is rerouted to the next available agent. Inactive sessions switch to the Ended status after approximately 30 hours.

Error

(Enhanced channels and Messaging for In-App and Web only) Salesforce failed to create or update a messaging session or a messaging user record. Errors can be caused by misconfigured triggers or field requirements on the Messaging Session or Messaging User objects. Salesforce tracks these failed messaging sessions and their error reasons in the Error Reason field on the Messaging Session object.

If the same issue caused the messaging user's previous messaging session to end in an error, Salesforce updates the previous session's Last Modified Date field instead of logging a new failed session.

Ended

The messaging user is no longer communicating with an agent. Possible reasons for this status include:

- The messaging user opted out of receiving messages in the channel.
- The agent closed the messaging session tab and ended the session.

It's up to you to define when a session ends. For example, let your support team know when it's appropriate to inactivate a session rather than ending it. An agent can begin a new messaging session with a messaging user only after the user's previous session has ended with a status of Ended or Error.

Messaging sessions with a status of Ended or Error can be deleted. Sessions can't be mass-deleted, but you can delete individual sessions on the session record page.

SEE ALSO:

- What's Service Cloud Messaging?
- End or Transfer a Messaging Session
- Track Customer Consent in Messaging Channels
- Set Up Routing for Messaging Channels in Service Cloud

Add Flexibility and Power with Messaging for In-App and Web

Start a conversation with customers on your mobile app or website. Messaging for In-App and Web delivers enhanced pre-chat support to pinpoint customer needs and access records before the agent connects in the Service Console. Custom branding and mobile push notifications provide a modern experience.

Get Started

Enable

Increase Productivity

Modernize Communication with Your Customers Reimagine Messaging for Mobile and Websites Plan for Messaging for In-App and Web Messaging Glossary Considerations and Limitations Lifecycle of a Messaging Session	Prepare a Salesforce Org Configure a Messaging for Web Deployment Configure a Web Deployment for an Experience Builder site on page 27 Configure a Mobile Deployment Customize Pre-Chat Test Messaging for Web	Create a Pre-Chat Customer Flow on page 44 Respond with Messaging Components Persist Secure Messaging History Across Multiple Devices with User Verification Add a Web or Mobile Bot on page 176 Set Mobile Push Notifications Show Customers an Estimated Wait Time
 **Develop** In-App Developer Guide iOS SDK Release Notes Android SDK Release Notes iOS Examples & Reference Android Examples & Reference	 **Learn more...** Spring '23 Release Notes MIAW Demo Video	

IN THIS SECTION:

What's Messaging for In-App and Web?
Understand how your customer's information flows from a pre-chat form, to record generation and connection to the right agent.

Set Up Messaging for In-App and Web
Understand the four stages of setting up Messaging for In-App and Web. We recommend following them in order for a smooth experience.

Flow Recipes for Messaging for In-App and Web
Design Omni-Channel Flows to accomplish your Messaging for In-App and Web use case.

What's Messaging for In-App and Web?

Understand how your customer's information flows from a pre-chat form, to record generation and connection to the right agent.

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✓	✓	×	×	×	×	×

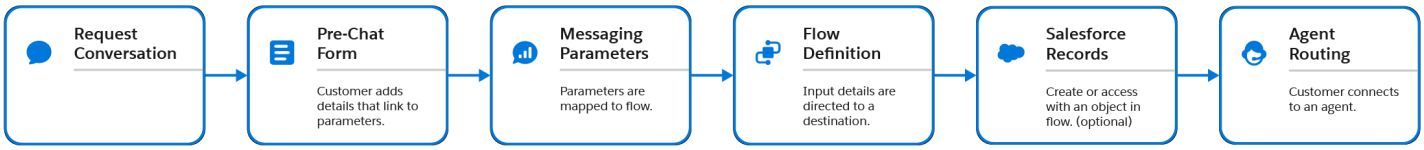
EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging for In-App and Web provides your customers with a personalized messaging experience from your mobile app or website to the Service Console.

A customer requests a messaging conversation and provides contact info and other details in a pre-chat form. Their form-field inputs travel in your new messaging channel and are mapped as parameters. The flow you set helps define where the inputs go, such as an email address or an order number. An agent connects and is ready to help with specific information at their fingertips. Optionally, a new Salesforce record can be created or updated as part of your enhanced flow.

Data Flow



IN THIS SECTION:

Plan for Messaging for In-App and Web

Before configuring a messaging experience, consider your organization's current support goals. This step helps you select the right Omni-Channel routing, pre-chat form fields, and custom parameters to personalize the experience.

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Messaging channels that this article applies to

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✓	✓	×	×	×	×	×

Planning Questions

To create an effective messaging system for a support team, answer these three questions.

1. How are your agents organized?
2. What details do they need before chatting with a customer?
3. Where do agents pull Salesforce records before connecting with a customer?

Table 1: Considerations and Messaging Options

Agents organized	Match segment for Omni routing type
• One group	• Routing with Queues

• Service type • Skill set • Support topics • Languages	• Routing with Skills
Details agents need • First name • Last name • Email • Custom information	**Use the pre-chat form** Collect details at the point of contact. Ask customers to fill out visible pre-chat fields or collect data behind-the-scenes with hidden pre-chat fields. Create the combination that works best for your organization.
Records pulled • Leads • Cases • Contacts	**Salesforce records** Link a record to a conversation based on how your database is set up. Connect your channel with an object.

Feature Checklist

We recommend following our entire set-up process. Some steps must be completed before others can be configured. Here's a preview of the features to select and customize during your setup experience:

- Pre-chat forms use visible and hidden fields to collect basic details and other essential information like an email address. These inputs can be set to parameters and travel through your channel for a specific outcome you set. Learn More
- Bots ease the messaging burden on your agents for routine requests. Add a bot for routine inquiries or use as a quick pre-chat setup experience. Learn More on page 176
- Omni-Channel allows you to direct customers in your channel with queue and skills-based routing using Omni Flow. Learn More on page 22
- Object lookup and creation added to your Omni Flow provides agents with customer records as leads, cases, or contacts, so they have everything they need at their fingertips. Learn More on page 36
- Branding, yes! You can customize the look and feel of your messaging experience for mobile and web channels. Pick colors and fonts and customize your window.
- Custom Labels can match the voice and tone of your website. Update your label text and add some zing to your messaging window for mobile or web.
- Push notifications for your mobile channel are an effective way to stay in touch with customers. Configure this feature as part of your deployment setup. Learn More
- Mobile SDK information is available for developers in our Messaging for In-App Developer Guide. Learn More

Considerations and Limitations for Messaging for In-App and Web

Before starting your setup process, review considerations and limitations for Messaging for In-App and Web.

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Web	**In-App**	**SMS (Standard)**	**Facebook (Standard)**	**WhatsApp (Standard)**	**Facebook (Enhanced)**	**WhatsApp (Enhanced)**
✅	✅	×	×	×	×	×

General

- Messaging for In-App and Web offers a persistent and asynchronous conversation experience that varies depending on your messaging type and the addition of user verification:

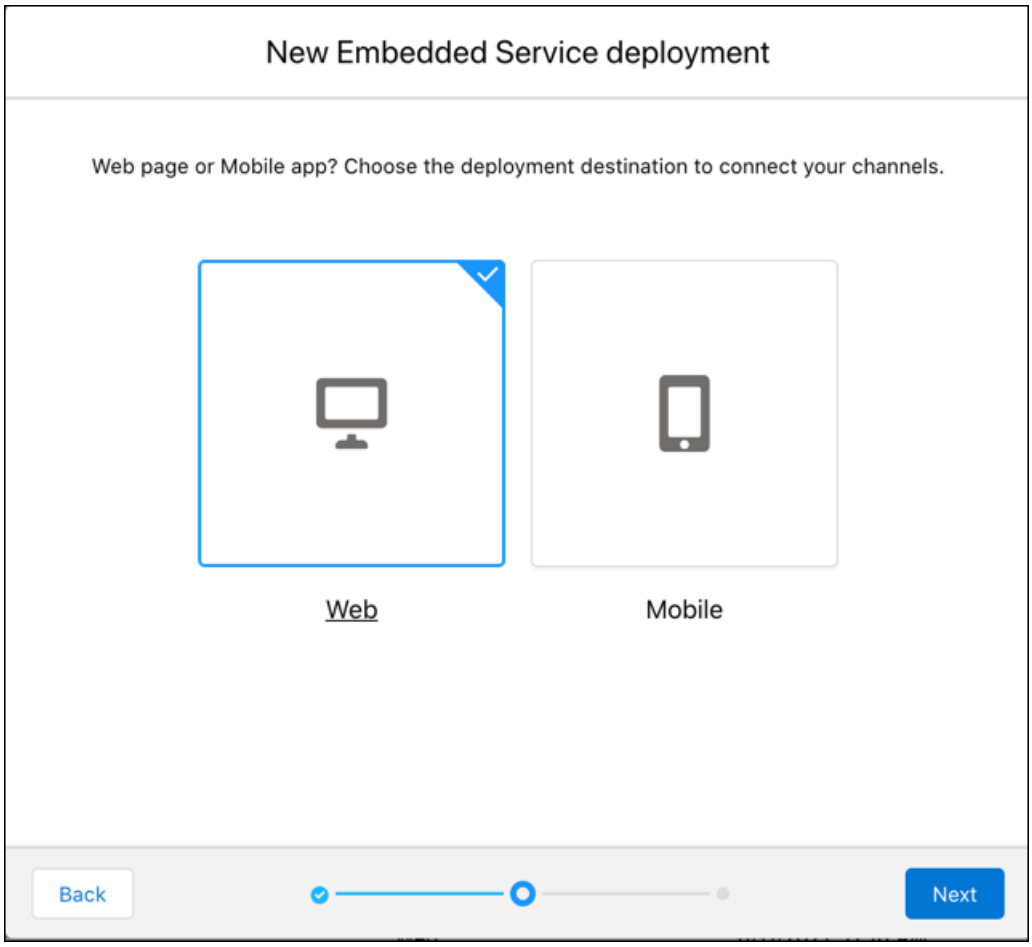
Messaging Type	User Verification Added?	Experience
Messaging for In-App	No	Messaging history persists in the conversation window indefinitely. The messaging session remains active until the agent clicks **End Chat**.
Messaging for Web	No	Messaging history disappears from the conversation window after six hours if the customer or the agent doesn't click End Chat. The messaging session remains active until the customer or agent clicks End Chat.
Messaging for In-App	Yes	Messaging history persists in the conversation window for verified users. A customer can log out, then log back in, and still see messaging history. The messaging session ends when the agent clicks End Chat. After user verification is added, users must log in to access messaging.
Messaging for Web	Yes	Messaging history persists in the conversation window for verified users. A customer can log out, then log back in, and still see messaging history. The messaging session ends when the agent clicks End Chat.

- User verification is supported on an external website, but it's not supported on Experience Cloud or Commerce Cloud sites.

Setup

- Some malware software tools that block malicious downloads also prevent HTML5 feature Server Sent Events (SSE) from working properly. As a result, messages don't appear to the customer in the conversation window. To resolve this issue, work with your IT team to allowlist the SSE connections.
- To have a working pre-chat form, a user must have the Routing Type set as Omni Flow and a flow that uses the pre-chat dataset in the related Messaging Channel.

- After you select a deployment type, web or mobile, you can't update the type later. Instead, create another deployment. Sites that are created with a deployment can't be deleted.



- If you create or edit a web or mobile deployment, click **Publish** on the Embedded Service Deployment Settings page. The changes can take up to 10 minutes to finish due to caching.
- After you add a messaging channel to your mobile or web deployment, you can't change to a different channel later.
- We don't support adding custom CSS to Messaging for In-App and Web deployments. If you have custom CSS in your embedded component, it's your responsibility to test your chat window each release to ensure that it functions properly.
- Alternate Header Color is configurable in Branding setup, but it's not supported in a messaging window.
- All field values set in a pre-chat form are passed to an Omni-Channel flow as a string-type variable, including checkboxes and numbers.
- If you create a custom pre-chat field, go to deployment settings to add a Custom Label as no default option is available. Find the new field by selecting **Pre-Chat** in the Label Group.
- A supported language is required in a Messaging for Web deployment for the web client to load. Salesforce offers three levels of language support. To use an end-user or platform-only language, enable the end-user or platform-only language and add a valid code for your language setting in the code snippet.
- A Messaging for Web deployment can be added to an external website, an Experience Cloud site, or a Commerce Cloud site. In Experience Cloud, we support Build Your Own (Aura), Customer Account Portal, Partner Central, Help Center, Customer Service, Build

Your Own (LWR), and Microsite (LWR) templates. In Commerce Cloud, we support B2B Commerce (LWR), B2C Commerce (LWR), and B2B Commerce (Aura) templates.

- To effectively use an iframe with your website and reduce JavaScript library conflicts, Messaging for Web creates a unique site that appears in your All Sites list in Setup. Don't reuse this generated site URL, which has reduced security, for other purposes. Don't modify this URL through Experience Builder or Workspace links.

Agent Experience

- To end a conversation, agents working in Service Console can click **End Chat** before closing the Messaging Session tab (MS-xxxxxxx). Closing the tab without clicking **End Chat** prevents future inbound messages from appearing in the Omni queue.
- Quick text is available to Messaging for In-App and Web agents. Messaging for In-App and Web doesn't support Quick text folders.
- Agents can send and receive the following file attachment types: PDF, .png, .jpeg, .jpg, .bmp, .gif, and .tiff.

Customer Experience

- A user sees delivery and read receipts when chatting with an agent. But if they reload a browser page, the sent, delivery, and read receipts are lost.
- If estimated wait time is less than 1 minute, we round it up to 1 minute.
- Customers can resend a failed message after an outage within the browser tab where the message was originally sent. If a customer has multiple tabs open, each showing the same messaging conversation, the resend option appears only in the tab where the message failed.
- When a user opens and chats across multiple tabs or windows, the browser is limited by a maximum number of open connections. If the maximum is reached, some tabs can't receive new conversation entries. Refer to a specific browser's SSE connection limits.
- When Firefox users open a new browser tab or window during a session, the conversation stops in the new location. Users must refresh the original tab to continue. If they try to use the new tab, they see the button to start a new conversation.
- Previews for attached image files aren't visible to your customers when they select the eye icon to view during a conversation.
- Customers can send and receive the following file attachment types: PDF, .png, .jpeg, .jpg, .bmp, .gif, and .tiff.
- Messaging for In-App and Web customers can send and receive attachments up to 5 MB.

Messaging for Web Cookies

Messaging for Web uses cookies for security and consent preferences. Salesforce doesn't provide functionality for end-user cookie consent management. The platform is compatible with many third-party solutions. We recommend that you work with your IT teams or consult your implementation partners to identify the right solution for your company's needs.

Cookie Name	Duration	Description
`BrowserId`	1 year	Used for security protections.
`BrowserId_sec`	1 year	Used for security protections.
`CookieConsentPolicy`	1 year	Used to apply end-user cookie consent preferences set by our client-side utility.

Cookie Name	Duration	Description
`LSKey-c$CookieConsentPolicy`	1 year	Used to apply end-user cookie consent preferences set by our client-side utility. Used with Lightning Locker.

SEE ALSO:

- Enhanced Bots Considerations
- Messaging for In-App iOS Known Issues
- Messaging for In-App Android Known Issues

Set Up Messaging for In-App and Web

Understand the four stages of setting up Messaging for In-App and Web. We recommend following them in order for a smooth experience.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

Important: Before setting up a new channel, see Reimagine Messaging for Mobile Apps and Websites and Planning Questions and Checklist to review your choices. Remember to test the experience in a sandbox before setting up in a production environment.

Follow the four stages of setup in order, as some steps depend on the completion of previous steps.

1. Prepare a Salesforce org	2. Configure a deployment	3. Set up a pre-chat form	4. Add a bot or push notifications
Set up Omni-Channel, create an Omni Flow, add a new messaging channel, and connect to the Service console.	Connect your channel with a new web or mobile deployment. Set branding and configure more features.	Create an optional pre-chat form with standard or custom fields to gather critical details for agents.	Set up an optional bot or mobile push notifications to supercharge your messaging channel.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:

- Customize Application

  AND Modify Metadata Through Metadata API Functions

To modify permission sets and profiles:

- Manage Profiles and Permission Sets

IN THIS SECTION:

1. Give Users Access to Messaging for In-App and Web

   To let agents message with customers, assign the Service Cloud User license, and create and assign a permission set.
2. Configure a Messaging for Web Deployment in an Experience Builder or Commerce Cloud site

   Use the Embedded Messaging component to add Messaging for Web to your Experience Builder or Commerce Cloud site.

3. Configure a Messaging for In-App Deployment
   Connect your messaging channel to a mobile app with a new embedded deployment. You create a mobile deployment, and set up additional features and push notifications for the customer experience.
4. Customize Pre-Chat for Messaging for In-App and Web
   Ask customers to fill out visible pre-chat fields before starting a messaging session, or auto-fill hidden pre-chat fields when the conversation begins. Add standard and custom fields to your pre-chat form.
5. Map Pre-Chat Values and Route for Omni-Channel Flow
   Omni Flow sends pre-chat form data to the messaging session for a more informed agent experience. Map visible and hidden fields from your pre-chat form to your Omni flow.
6. Test Your Messaging for Web Setup
   After adding Messaging for Web to your site, check the customer's experience.

Give Users Access to Messaging for In-App and Web

To let agents message with customers, assign the Service Cloud User license, and create and assign a permission set.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

1. Assign the Service Cloud User license to each messaging user.
2. Create a permission set for your messaging users.
3. Create a Presence Status for messaging.
4. Edit the permission set to enable the messaging presence status.
5. Edit the permission set under **Object Settings** > **Messaging Sessions**, and give your users the appropriate access for their role.
6. Edit the permission set under **Object Settings** > **Messaging Users**, and give your users the appropriate access for their role.
7. Assign the permission set.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To assign permission set licenses:
- Manage Users

To create permission sets:
- Manage Profiles and Permission Sets

To edit users:
- Manage Internal Users

To assign permission sets:
- Assign Permission Sets

Prepare a Salesforce Org for Messaging for In-App and Web

Build a strong foundation for your new messaging channel. Create a new Salesforce org, set up Omni-Channel and Omni Flow, and add your messaging channel. Connect to the Service console and configure your routing so the right agent responds to customers.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

Important: Before setting up a new channel, see Reimagine Messaging for Mobile Apps and Websites and Planning Questions and Checklist. Follow the setup process in order, as later steps depend on the completion of previous steps.

In this stage of Messaging for Web setup, you'll:

1. Set Up Omni-Channel.
2. Create an Omni Flow.
3. Add a Messaging Channel.
4. Prepare the Messaging Session Layout.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up Omni-Channel Flow and Messaging:
- Customize Application

To modify permission sets and profiles:
- Manage Profiles and Permission Sets

Set Up Omni-Channel

1. Enable Omni Channel.
2. Create a Service Channel for messaging.
3. Create a queue where you'd like to route incoming messaging sessions. Add Messaging Session as a supported object.
4. Assign the Service Cloud User license to each user who will work with messaging.
5. Create a Presence Status for messaging.
6. Give your agents access to presence statuses.

Create an Omni Flow

With Omni-Channel set up, you're ready to create an Omni-Channel Flow. This flow is required to route Messaging requests. Get up and running with a basic flow. After you set up your Pre-Chat Form, return to this flow to map pre-chat fields to your messaging channel.

Note: This section assumes that you understand how to create flows with FlowBuilder. If you don't, read Flow Builder documentation or take our Flow Builder Trailhead module.

1. From Setup, in the Quick Find box, enter `Flows`, and select **Flows**.
2. Create a **New Flow**.
3. In the **All + Templates** tab, select **Omni-Channel Flow**.
4. From the **Manager** tab, create a **New Resource**.
5. Select **Variable** as your **Resource Type**.
6. For the API Name, enter `recordId`. For the **Data Type**, specify **text**.

Important: The API name is case-sensitive and must be `recordId`. The messaging channel uses this value to pass information into this Omni-Channel flow.

7. Check **Available for input**, and then click **Done**.
8. From the **Elements** tab, select a **Route Work** action in your flow.
9. Name the **New Action**. Use `recordId` variable as the input value. Select **Messaging** for the **Service Channel**.
10. Specify **Queue** as the **Route To** value using the **Queue ID** for the queue where you want to direct the work.
11. Your simple flow looks like this.
12. Save and **Activate** your flow.

Add a Messaging Channel

After Omni-Channel and Omni Flow are set up in your Salesforce org, add your Messaging channel. Your Service Channel, which you previously created, allows your org to message with customers. Your Messaging Channel specifies what type of messaging you do (i.e. web, in-app, WhatsApp, Facebook, or SMS).

Note: You don't need to turn the Messaging toggle On before creating a Messaging for In-App or Web deployment. The Messaging toggle is for Facebook, WhatsApp, and SMS messaging only.

1. From Setup, in the Quick Find box, enter `Messaging Settings`, and select **Messaging Settings**.
2. On the **Messaging Settings** page, select **New Channel**.
3. Start the add channel process, and select the **Messaging for In-App and Web** type.
4. Enter your unique **Channel Name** and save your work.
5. On the next page, under Routing Type, select **Omni-Flow**. Select the Flow Definition and the Fallback Queue that you created earlier. Choosing Omni-Flow allows you to work with our Pre-Chat form and Bots enhancements.
6. Add additional customer experience enhancements like showing estimated wait time or automated conversation acknowledgment.

Prepare the Messaging Session Layout

For the conversation to appear in the Service Console, add the **Enhanced Conversation** component to the Messaging Session record page. You can extend this basic layout later.

1. From Setup, in the Quick Find box, enter `Lightning App Builder`, and select **Lightning App Builder**.
2. To create a Lightning page, select **New**.
3. Select the page type **Record Page**.
4. Name the page, and then select **Messaging Session** as the Object.
5. On the next screen, Select **CLONE SALESFORCE DEFAULT PAGE** and finish.
6. When you're inside the app builder, add the **Enhanced Conversation** component to the page.
7. Activate the page.

Configure a Messaging for Web Deployment

Connect your messaging channel to a website with a new embedded deployment. Create and customize your deployment, add it to your site, and set up security.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:
- Customize Application

  AND Modify Metadata Through Metadata API Functions

To modify permission sets and profiles:
- Manage Profiles and Permission Sets

In this stage of Messaging for Web setup, you'll:

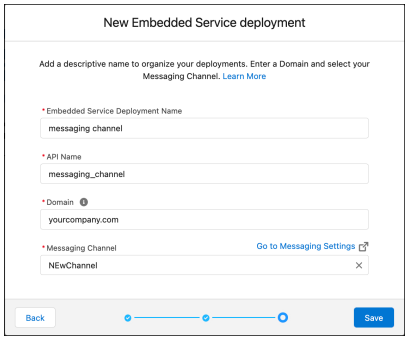
1. Publish a deployment.
2. Customize a deployment.
3. Add the deployment to your website.
4. Set security protocols for your deployment.

Note: Steps 3 and 4 depend on the type of site you add messaging to. Experience Builder and Commerce Cloud sites on page 27 have a unique set of instructions that differ from external web sites. Choose the correct set of instructions for your use case.

Publish a Deployment

To create a web deployment (don't reuse an old one), follow these steps. For mobile, see Configure a Mobile Deployment.

1. From Setup, in the Quick Find box, enter `Embedded Service Deployments`, and select **Embedded Service Deployments**.
2. Click the **New Deployment** button. Choose your conversation type, **Messaging for In-App and Web**.
3. Select **Web** as the deployment destination for your channel.
4. **Name** your Embedded Service deployment, which creates the **API Name**.



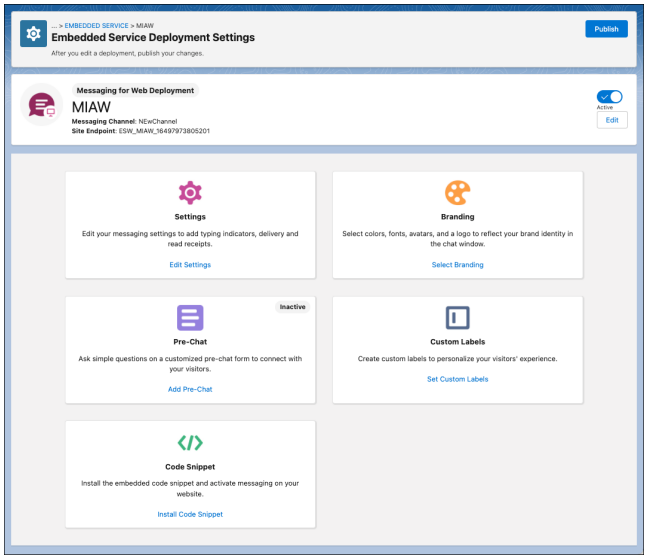
5. Enter the top level **Domain** name of the website, for example, yourcompany.com. This name covers any subdomains of the URL, such as help.yourcompany.com. For an Experience Builder or Commerce Cloud site on page 27 deployment, find the domain by searching for `All Sites` in Setup, clicking **All Sites**, then looking at the URL column for your site.
6. Select the **Messaging Channel** you created in Messaging Settings and add to the deployment. If you haven't created a channel, go to Messaging Settings.

7. Save your work.
8. Create and publish your new deployment, which takes a few minutes. Don't navigate away from the page until it's complete.

Customize Your Deployment

Mission control for your customer experience is the Embedded Service Deployment Settings page. Edit your messaging settings, select branding, add pre-chat values, and copy your code snippet to deliver conversations to your website.

After you create or edit a deployment, you must publish it again by clicking the Publish button on the settings page.



Optionally customize the following aspects of your deployment in Embedded Service Deployment Settings:

Customization Section	What's Possible	Additional Work Required
Settings	Check boxes to show delivery and read receipts to customers in their messaging window. Check a box to show typing indicators. Check a box to show the emoji keyboard to customers. Check a box to change the default behavior of the Enter or Return key from sending a messaging to starting a new line of text.	None
Branding	Set colors and fonts, and upload avatars to match your branding in the customer-facing messaging window. We recommend using an avatar image that's 40 x 40 pixels. We don't support adding custom CSS to your deployment.	Avatar images are sourced from a web page. Generate the URL for each image.
Pre-Chat	Select the standard and custom fields that customers should fill out before messaging with an agent. Add hidden pre-chat fields	To add visible or hidden fields to your pre-chat form, create a custom parameter on the messaging channel for the

Customization Section	What's Possible	Additional Work Required
	to collect information automatically, behind the scenes.	deployment. See Customize Pre-Chat for Messaging for In-App and Web on page 32.
Custom Labels	Write your own labels for fields and alt text in your messaging experience. Select the language you'd like each label to appear in.	To create labels in more than one language, first enable translation workbench, add your supported languages, and assign your translators. See Enable Translation Workbench and Add Translated Languages and Translators.
Code Snippet	Copy the code snippet to add the messaging deployment to your website. Skip this if embedding messaging in an Experience Builder or Commerce Cloud site. See next section to add messaging to your website.	Embed messaging in an Experience Builder or Commerce Cloud site with the Embedded Messaging component, not a code snippet. See next section to Add Messaging to your external website.

Add Messaging to Your Website

If embedding messaging on an external website, follow these steps to add your code snippet. If using an Experience Builder or Commerce Cloud site instead of a website, add messaging via the Embedded Messaging component. You don't need a code snippet to complete the task. See Configure a Messaging for Web Deployment in an Experience Builder or Commerce Cloud Site on page 27.

1. From Deployment Settings, select **Install Code Snippet**.
2. To select your code, click **Copy the Clipboard**.
3. Paste the code before the closing body tag `(</body>)` on each web page where you want the messaging button to appear. Don't place the code in your header. Make sure you've added a valid language code for your language setting in the snippet.
4. Optionally, include the Meta Tag Code Snippet in the head element to make your page responsive to all devices. If your page already has the meta tag, adding this snippet isn't necessary. The code is the only one that goes in the header section of each web page where embedded messaging appears.

Set Security Protocols for Your Deployment

After completing setup, add your domain to the CORS allowlist.

- If using an external website, add your CORS allowlist entries of URLs for the pages where you deploy messaging. The page you add is where customers access the messaging window. The origin URL pattern must include the HTTP or HTTPS protocol and a domain name. The wildcard character (*) is supported and must be in front of a second-level domain name. For example, https://*.example.com (https://%2A.example.com/) adds all subdomains of example.com (http://example.com/) to the allowlist.
- If using an Experience Builder or Commerce Cloud site, visit the instructions for adding security to that type of site here on page 27.

1. From Setup, enter *CORS* in the Quick Find box, and then select **CORS**.
2. Select **New**.
3. Enter an origin URL pattern.

4. Save your work.

SEE ALSO:

Configure a Messaging for Web Deployment in an Experience Builder or Commerce Cloud site

Configure a Messaging for Web Deployment in an Experience Builder or Commerce Cloud site

Use the Embedded Messaging component to add Messaging for Web to your Experience Builder or Commerce Cloud site.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:
- Customize Application

  AND Modify Metadata Through Metadata API Functions

To modify permission sets and profiles:
- Manage Profiles and Permission Sets

To add the Embedded Messaging component to an Experience Builder site:
- Create and Setup Experiences

Note the following considerations before you begin.

- We support the following Experience Builder templates: Build Your Own (Aura), Customer Account Portal, Partner Central, Help Center, Customer Service, Build Your Own (LWR), and Microsite (LWR).
- We support the following Commerce Cloud templates: B2B Commerce (LWR), B2C Commerce (LWR), and B2B Commerce (Aura).
- If you use the Embedded Service or Channel Menu components on your Experience Builder site, remove them. Use the Page Structure panel to find and remove the extra components.
- To effectively iFrame your website and reduce JavaScript library conflicts, Messaging for Web creates a unique site that appears in your All Sites list in Setup. Don't reuse this generated site URL, which has reduced security, for other purposes. Don't modify this generated site through Builder or Workspace links.

In this stage of Messaging for Web setup, you'll:

1. Publish a deployment in your Experience Builder or Commerce Cloud site.
2. Set security protocols for your deployment.
3. Learn where to add additional code when using the Messaging for Web JavaScript API.

Publish Your Messaging for Web Deployment in an Experience Builder Site

1. Complete these steps for Set Up Messaging for In-App and Web.
2. From the Experience Builder Components list, select the **Embedded Messaging** component and drag it onto the footer of the Experience Builder or Commerce Cloud site template.
3. On the page, click to highlight the **Embedded Messaging** component.
4. In the property editor, configure properties for the component:

Property	Details
Embedded Web Deployment	Choose your Embedded Service Deployment for Messaging for Web.
Enhanced Service URL	Select the URL from your Messaging for Web setup, which matches the `scrt2` field in your code snippet.
Site Endpoint	Select the site endpoint, which matches the site endpoint on the Embedded Service Deployment Settings page for your deployment.

After publishing your site, the conversation and active messaging button appears on your site.

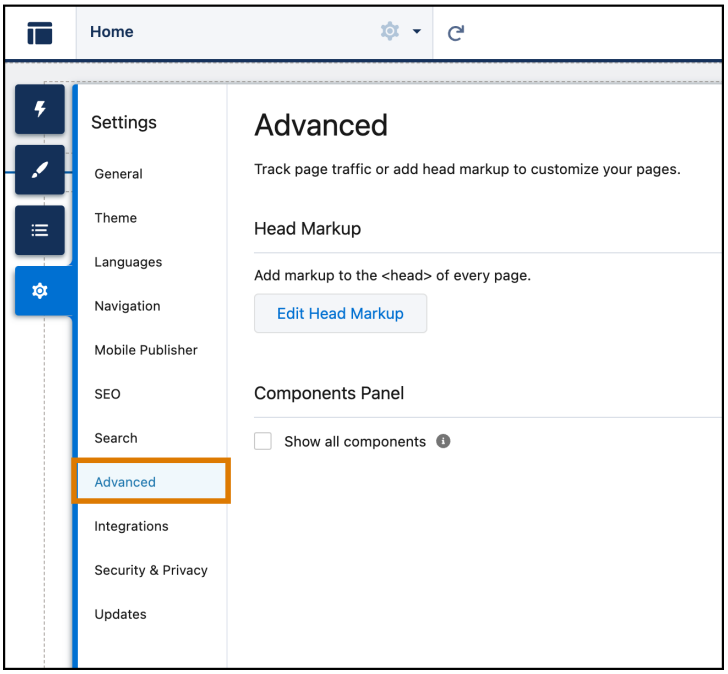
Set Security Protocols for Your Messaging for Web Deployment

After completing setup, add your Experience Builder site domain to your CORS allowlist. If notice an issue with the *.live-preview domain, add that to the CORS allow list.

1. To confirm your site domain, from Setup, enter *Digital Experiences* in the Quick Find box, and then select **Settings**. Copy the URL from the Domain section.
2. From Setup, enter *CORS* in the Quick Find box, and then select **CORS**.
3. Select **New**.
4. Enter an origin URL pattern.
5. Save your work.

Learn Where to Add Messaging for Web Code

When working with developers on your site, place any additional Messaging for Web code in the head markup section. You can find this area from the Advanced tab of the Experience Builder Settings.



Click **Edit Head Markup** and then add your JavaScript code within a <script> tag.

SEE ALSO:

Messaging for Web Developer Guide

Configure a Messaging for In-App Deployment

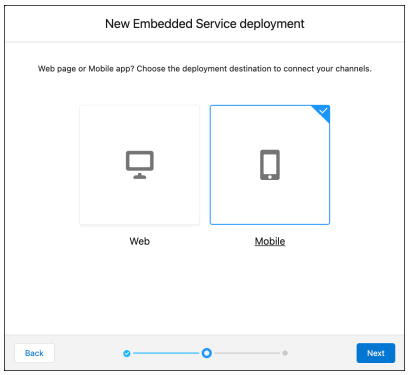
Connect your messaging channel to a mobile app with a new embedded deployment. You create a mobile deployment, and set up additional features and push notifications for the customer experience.

Messaging channels that this article applies to

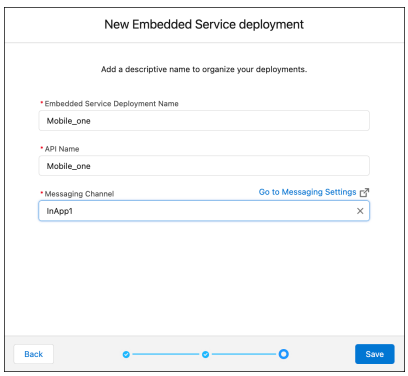
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	×	×

To create a new mobile app deployment, follow these steps. For website deployments, see Configure a Messaging for Web Deployment.

1. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and then select **Embedded Service Deployments**.
2. Click the **New Deployment** button. Choose your conversation type, **Messaging for In-App and Web**.
3. Select **Mobile** as the deployment destination for your channel.



4. Name your Embedded Service deployment, which generates the API Name.



EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:

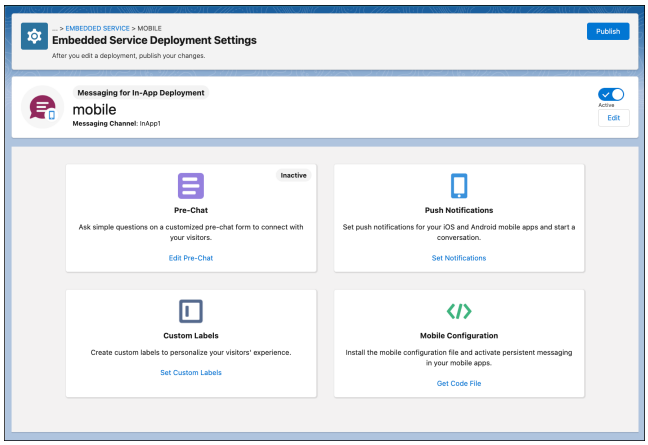
- Customize Application

  AND Modify Metadata Through Metadata API Functions

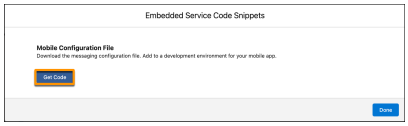
To modify permission sets and profiles:

- Manage Profiles and Permission Sets

5. Select the **Messaging Channel** that you created in Messaging Settings, and add it to the deployment. If you haven't created a channel, go to Messaging Settings.
6. Save your work.
7. Adjust your new deployment from the deployment settings page.



8. Optionally, prepare a pre-chat form that customers should fill out before messaging with an agent.
   a. Click **Edit Pre-Chat** to select the standard and custom fields for the form. See Customize Pre-Chat for Messaging for In-App and Web on page 32.
   b. Click **Set Custom Labels** to write your own labels for fields, alt text in your messaging experience, and select the language you'd like each label to appear in. To create labels in more than one language, first enable translation workbench, add your supported languages, and assign your translators. See Enable Translation Workbench and Add Translated Languages and Translators.
9. Optionally, set up push notifications for your mobile apps. See Set Push Notifications for Messaging for In-App on page 154.
10. In the **Mobile Configuration** section of deployment settings, click **Get Code File** to download the JSON configuration file, `configFile.json`.



11. After you create or edit a deployment, you must click the **Publish** button on the deployment settings page.

Note: If you're building an Android project, save this JSON file in your assets folder. For iOS, add the JSON file to your project so that you can access the contents from your code. See the In-App Developer Guide for more details.

SEE ALSO:

Customize Pre-Chat for Messaging for In-App and Web

Customize Pre-Chat for Messaging for In-App and Web

Ask customers to fill out visible pre-chat fields before starting a messaging session, or auto-fill hidden pre-chat fields when the conversation begins. Add standard and custom fields to your pre-chat form.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:
- Customize Application

  AND Modify Metadata Through Metadata API Functions

To modify permission sets and profiles:
- Manage Profiles and Permission Sets

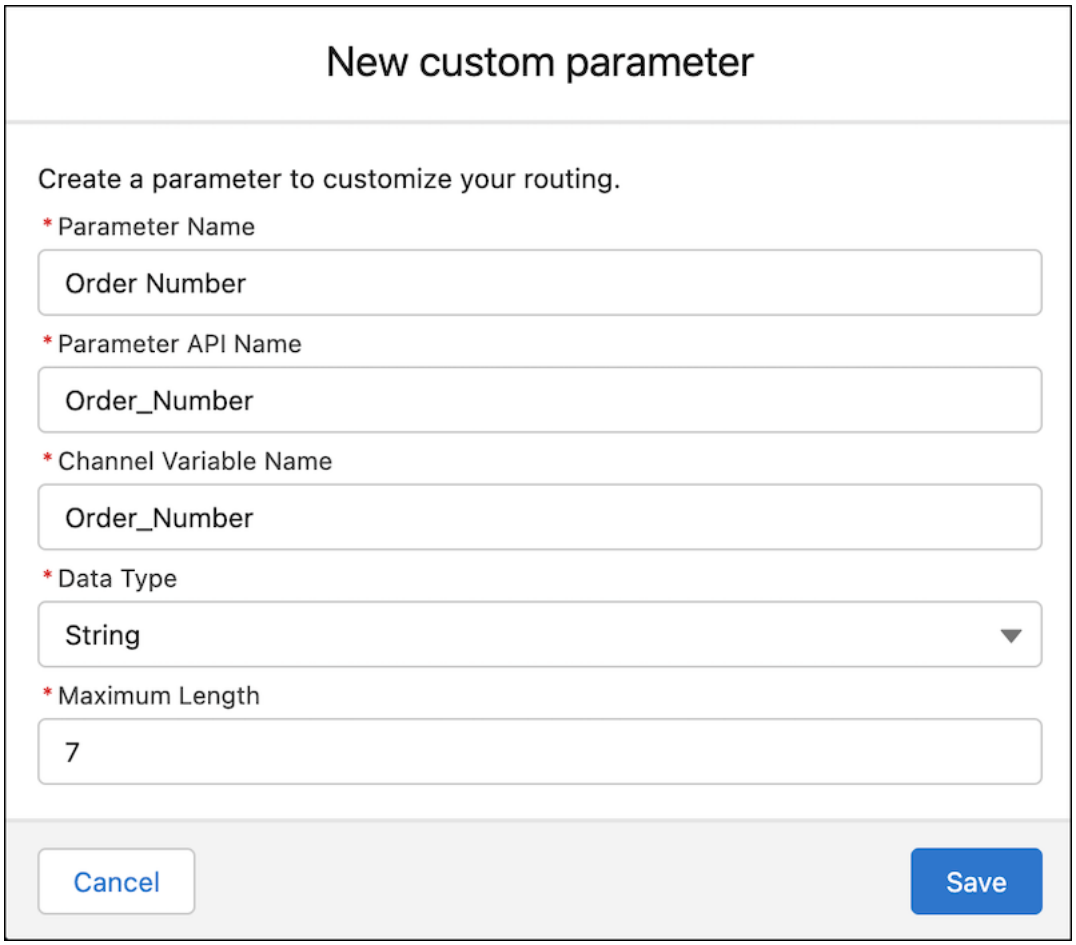
In this stage of Messaging for In-App and Web setup, you:

1. Create custom parameters, which help map your pre-chat form to your flow.
2. Add visible fields to your pre-chat form.
3. Add hidden fields to your pre-chat form.

Create Custom Parameters for Pre-Chat

1. From Setup, in the Quick Find box, enter `Messaging Settings`, and then select **Messaging Settings**.
2. Click the name of your messaging channel.
3. Under Custom Parameters, click **New**.
4. Fill in the details of your parameter. To make mapping easy and transparent, match the parameter name and channel variable name. Channel Variable Name appears as a selection when adding custom fields to your pre-chat form. Think of each custom parameter as the link between your pre-chat form's custom fields (both hidden and visible) and your flow.

   Note: String is the only option for Data Type. While the pre-chat form lets you show visible fields formatted as text, email, phone, number, and checkbox fields, a flow automatically converts these fields to string fields. If you use a flow to send information from a pre-chat field to another record, the output appears as a string field. While most letters, numbers, and special characters allowed by the original field type are allowed by a string field, differences sometimes occur. For example, the flow converts a checkbox field to a string statement of true or a string statement of false in the resulting flow output.



5. Save your changes, and create additional custom parameters for each hidden or visible field that you plan to add to your pre-chat form.

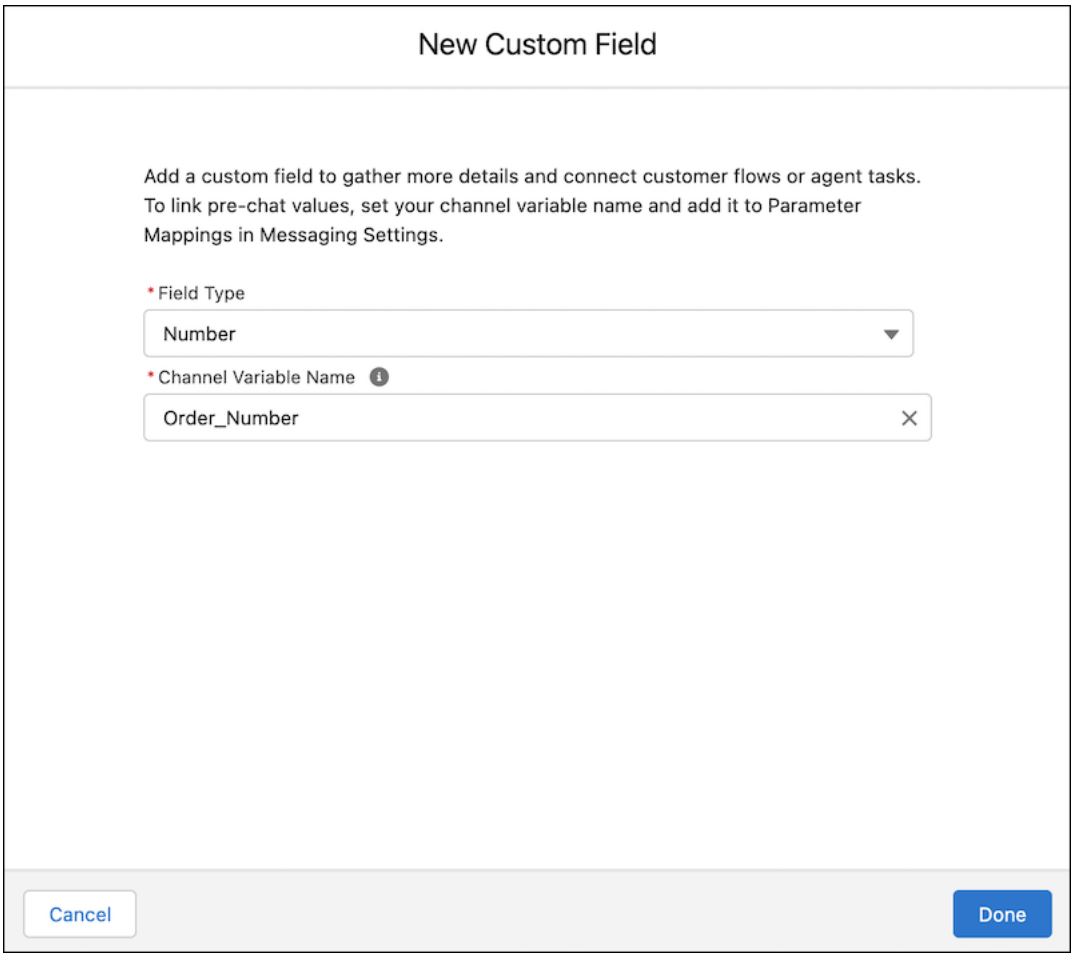
Add Visible Fields to Your Pre-Chat Form

Note: A hidden field and a visible field that exist on the same pre-chat form can't have the same parameter name. For the best experience, add no more than 5 or 6 visible pre-chat fields.

1. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and then select **Embedded Service Deployments**.
2. Select **View** from the dropdown menu for your deployment.
3. Click **Edit Pre-Chat**.
4. Select **Activate the pre-chat feature**.
5. To add a standard field to your form:
   a. Under Visible Pre-Chat Fields, click **Add Field**, and then select the field that you want to show.
   b. Save your changes.
6. To add a custom field to your form:
   a. Under Visible Pre-Chat Fields, click **Add Field**, and then select **Custom**.

b. To determine how the information appears, select your field type.

c. Find and set the channel variable name of the custom parameter.



d. Click **Done**.

e. Save your changes to the pre-chat form.

f. To create a custom label for a custom field, return to the deployment settings page and click **Set Custom Labels**.

g. Select **Pre-Chat** as the chat group.

h. Enter a custom label for your custom field, and then click **Finish**.

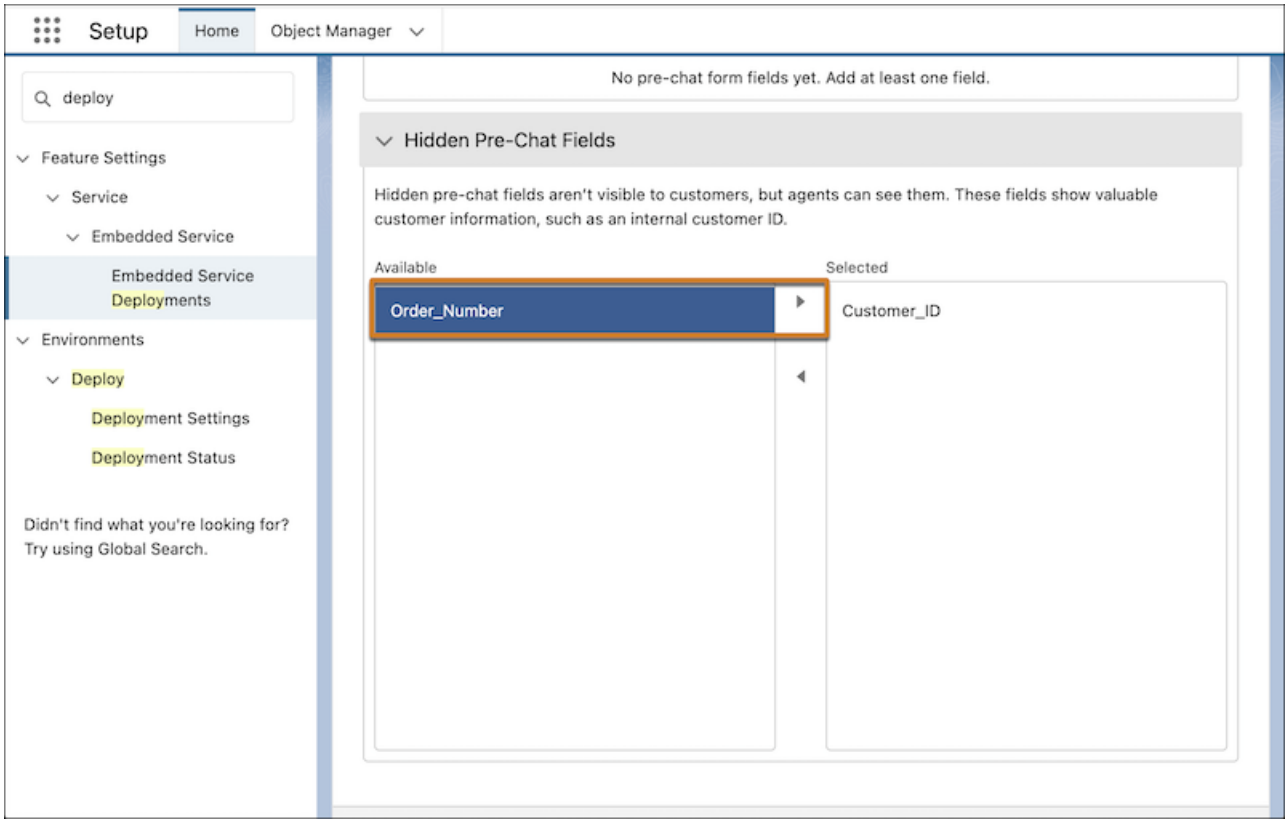
7. Return to the deployment settings page and click Publish.

Add Hidden Fields to Your Pre-Chat Form

Tip: Update your privacy policy to include what data you collect with hidden fields. Consider linking to the policy with a Messaging Component in the conversation. Collect the minimum amount of data needed for an agent to do their job, and only store this data for as long as it's needed to close the case. Learn how to delete data.

1. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and then select **Embedded Service Deployments**.

2. Select **View** from the dropdown menu for your deployment.
3. Click **Edit Pre-Chat**.
4. Select **Activate the pre-chat feature** if it's not already selected.
5. Under Hidden Pre-Chat Fields, click to highlight a custom parameter from the Available list. Custom parameters appear if they're associated with the messaging channel for this deployment and if they're not already in use as a visible or hidden field on this deployment. A hidden pre-chat field must be a Text type field and can't be required.
6. To move your field to the Selected list, click the arrow pointing toward the Selected list.



7. Save your changes.
8. Work with your developer to pass these values programmatically from your website or mobile app to Salesforce (Web, iOS, Android). The pre-chat field names in the code must be identical to what is specified in Setup.

SEE ALSO:

Use Pre-Chat with an Enhanced Bot

Messaging for Web Developer Guide

Messaging for In-App Developer Guide

Map Pre-Chat Values and Route for Omni-Channel Flow

Omni Flow sends pre-chat form data to the messaging session for a more informed agent experience. Map visible and hidden fields from your pre-chat form to your Omni flow.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	×	×

In this stage of Messaging for In-App and Web setup, you:

- Map pre-chat fields to Omni flow variables.
- Update your Omni-Channel flow to set field values for the messaging session after they're filled out in the pre-chat form.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up Omni and Messaging:

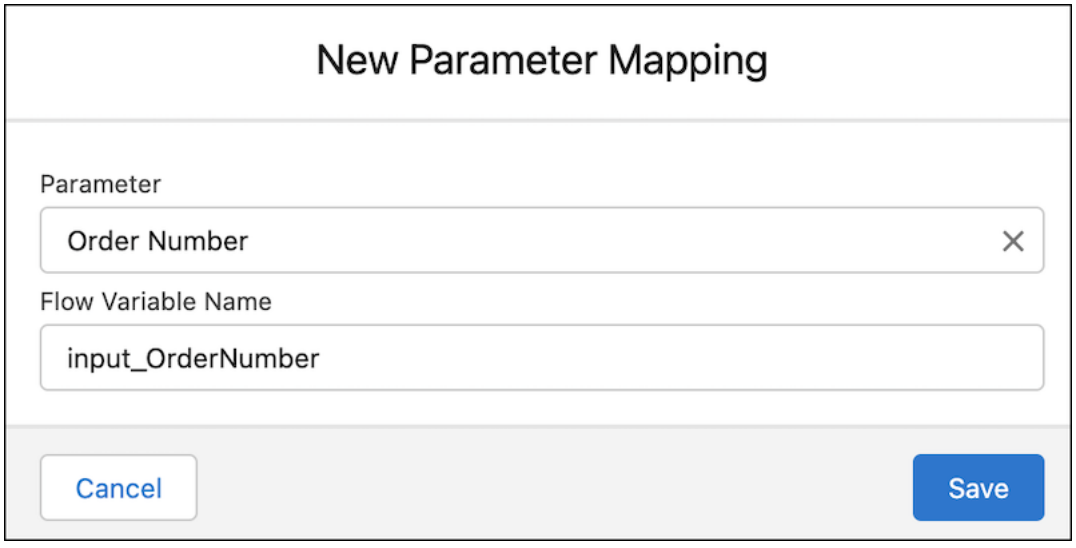
- Customize Application

To modify permission sets and profiles:

- Manage Profiles and Permission Sets

Map Pre-Chat Fields to Omni Flow Variables

1. From Setup, in the Quick Find box, enter *Messaging Settings*, and then select **Messaging Settings**.
2. Select your channel name.
3. In the Parameter Mapping section, click **New**.
4. In the **Parameter** field, select an item from your pre-chat form.
5. Add a flow variable name that describes the action. You reference the flow variable name in your flow later.



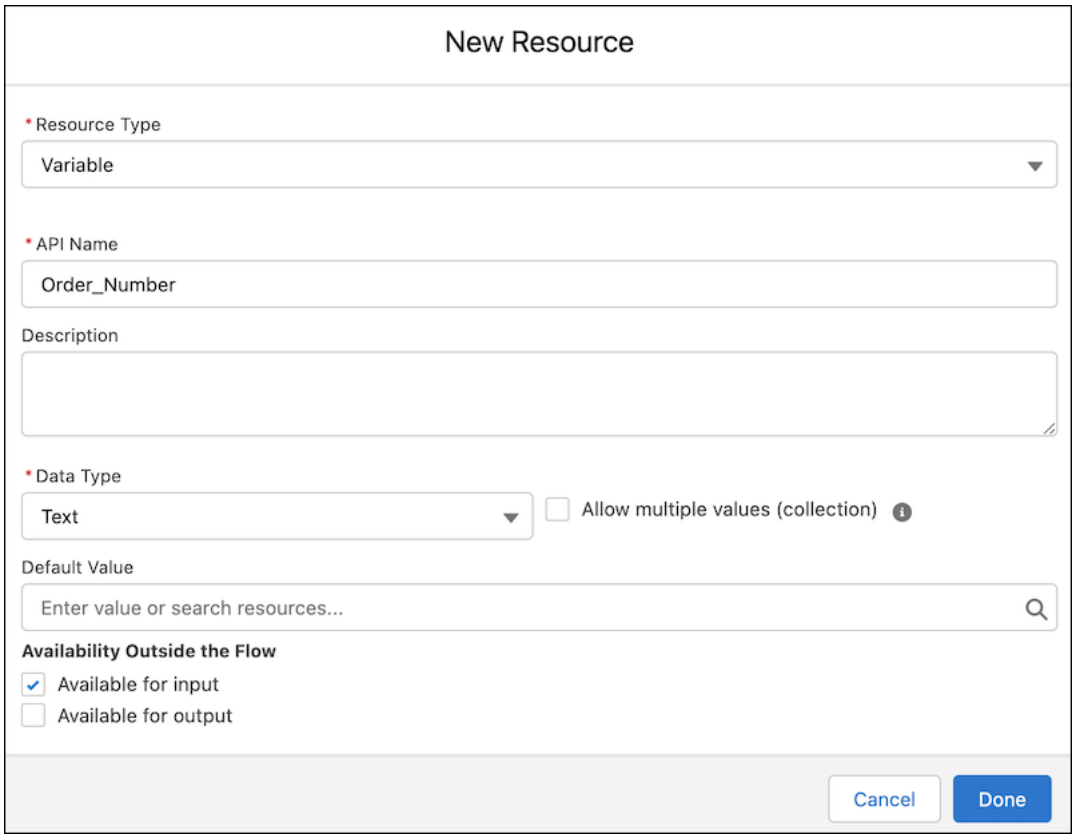
6. Save your changes.
7. Continue the process with each standard and custom field in your pre-chat form.

Update Your Omni-Channel Flow to Set Field Values in the Messaging Session

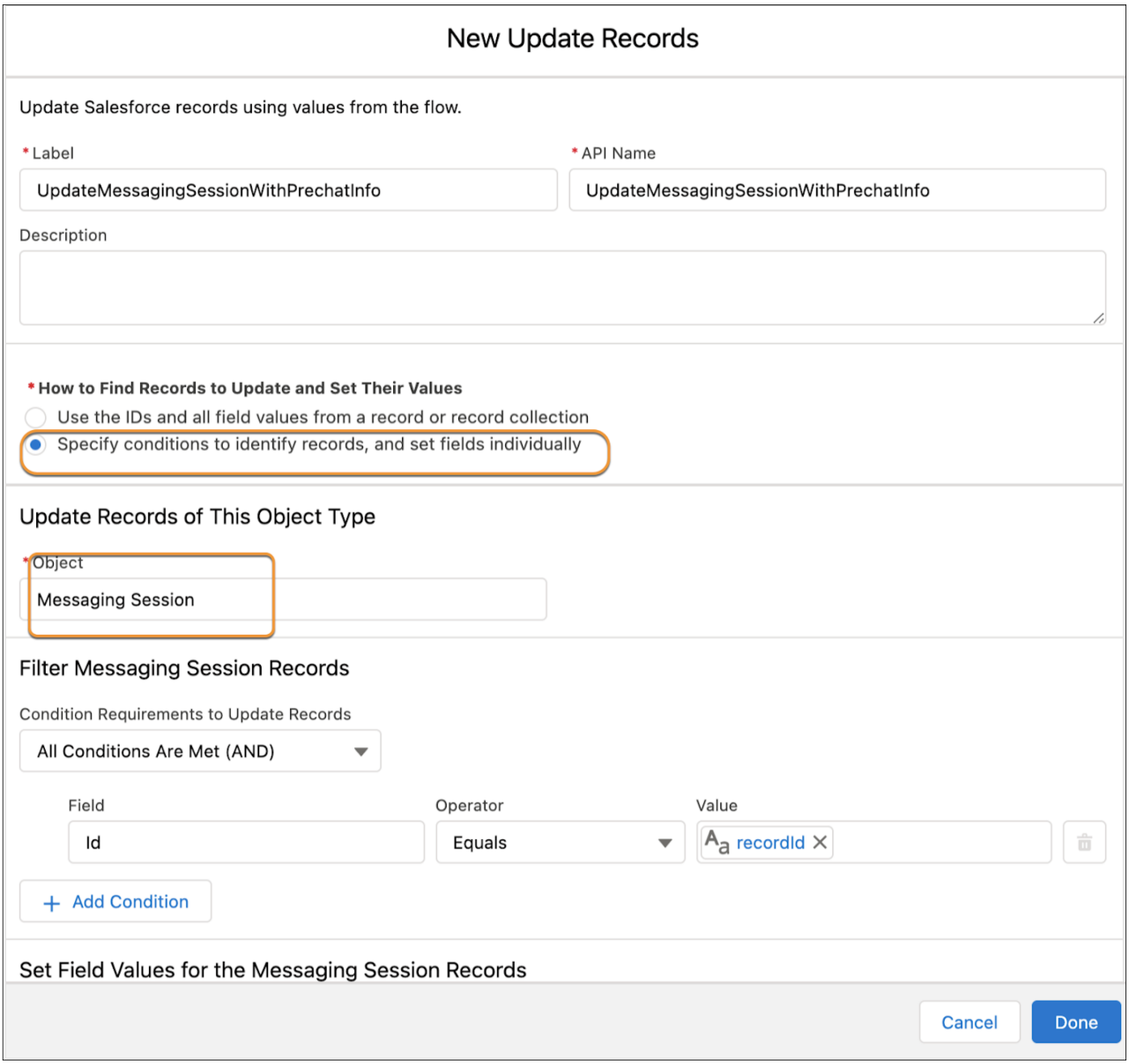
Return to the Omni-Channel Flow that you created in the first stage of setup on page 22. Add one more element to store your pre-chat fields.

Note: While the pre-chat form lets you show visible fields formatted as text, email, phone, number, and checkbox fields, a flow automatically converts these to string fields. If you use a flow to send information from a pre-chat field to another record, the output appears as a string field. While most letters, numbers, and special characters allowed by the original field type are allowed by a string field, differences sometimes occur. For example, the flow will convert a checkbox field to a string statement of true or a string statement of false in the resulting flow output.

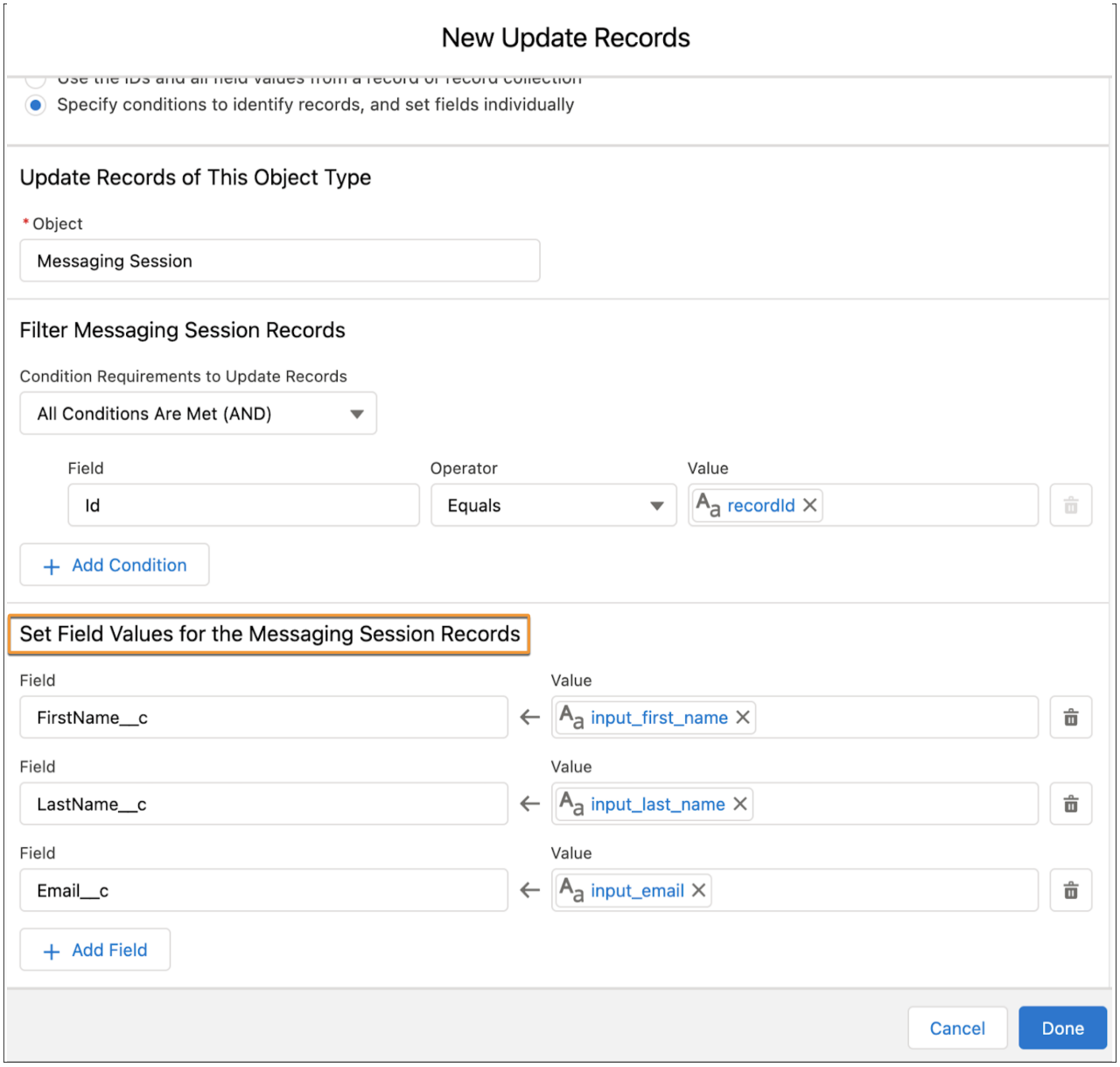
1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Find and select your previous flow from the list.
3. Add an input variable for each pre-chat field.
   - The API Name must be identical to the Flow Variable Name from Parameter Mappings.
   - The Data Type must be set to **Text**.
   - The variable must be **Available for input**.



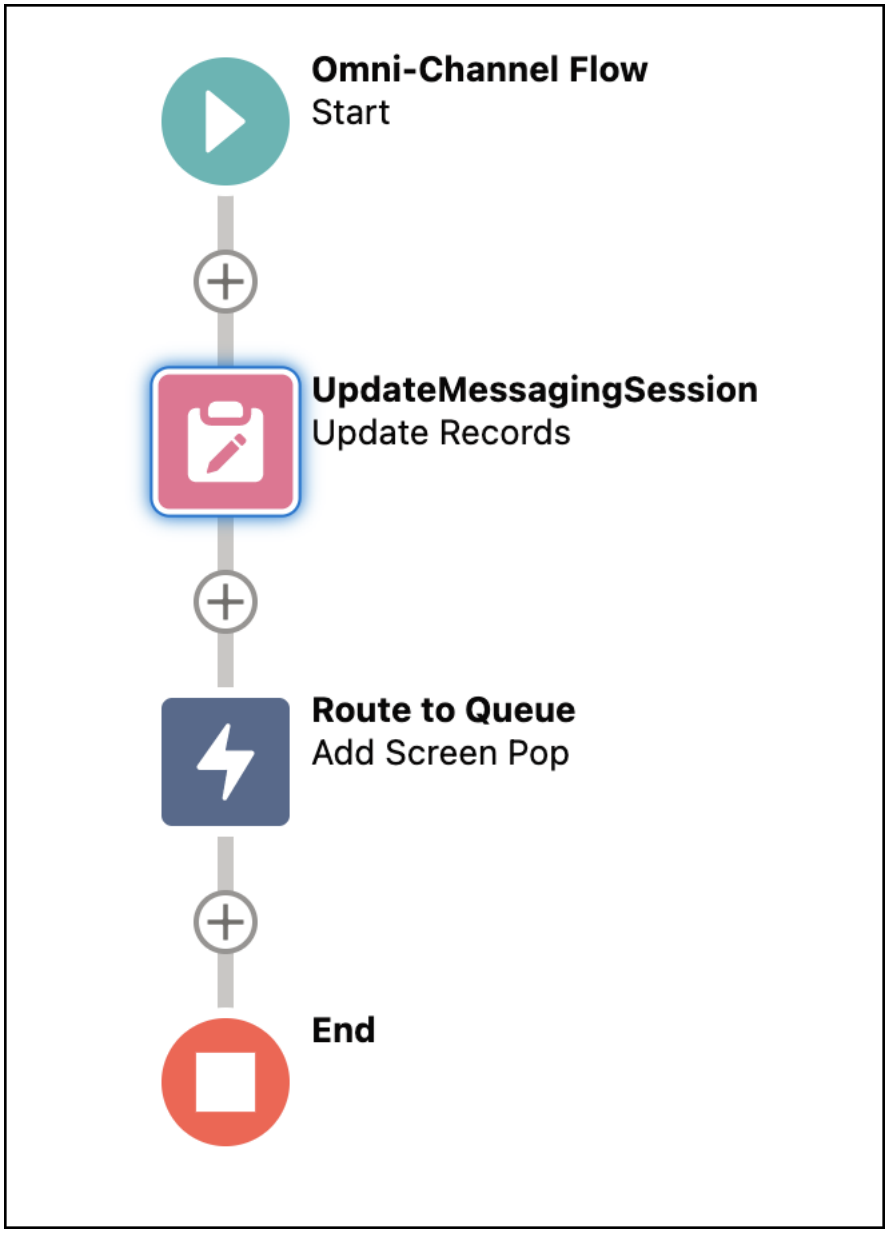
4. Create an Update Records element before the Route Work element in your flow. Specify conditions to identify records and set fields individually. Select Messaging Session as the object. In the Filter Records section, filter based on the `recordId` value.



5. Under Set Field Values for the messaging session records, enter each field name under Field, and enter its corresponding flow variable name under Value.



6. Click Done. The complete flow looks like this.



7. Save this flow as a new version, and verify that it's activated.

Note: When the agent clicks End Chat, the messaging session ends. If the customer continues the conversation, another session is created. By default, pre-chat data isn't carried over to this new session.

SEE ALSO:

Use Pre-Chat with an Enhanced Bot

Test Your Messaging for Web Setup

After adding Messaging for Web to your site, check the customer's experience.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	×	×

To ensure that Messaging for Web is set up properly, follow these steps.

1. Open the Service Console app, and go to the Omni-Channel utility bar at the bottom of the console, provided it's installed. Go online as the agent assigned to the messaging button.

2. This step depends on the type of website you use:
   a. For non-Salesforce websites: In another browser tab or window, open the web page where you placed the code snippet. Check that the chat button is available. Press to start the conversation.
   b. For Experience Builder sites: In another browser tab or window, open the site page where you placed the embedded messaging component. Check that the chat button is available. Press to start the conversation.
3. Verify that your pre-chat form, if added, and chat window open. Check your branding changes on the customer side.
4. In the console tab, verify that you received a conversation request. Accept the request and try sending a message.

If set up properly, you're able to request a chat and complete the form as the customer. Also, the pre-chat information is sent to the agent before the conversation begins.

Tip: To turn on and customize Messaging for In-App and Web in your sandbox, contact your account executive for the Messaging for In-App and Web add-on SKU. Match your sandbox licenses to your production org by refreshing your sandbox, creating a new sandbox, or using the license-matching method. Then, Set Up Messaging for In-App and Web in sandbox.

SEE ALSO:

Developer Guide: Test Messaging for In-App

Update Your Messaging for Web Deployment After Upgrading to Enhanced Domains

To ensure that your Messaging for Web deployment remains active after you enable enhanced domains, republish your deployment. If you use Messaging for Web in an Experience Builder site, update your allowlisted URLs.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	×	×

Enhanced domains were enforced sandboxes and non-production orgs in Winter '23 unless you enabled an org-level setting that postponed that enforcement until Spring '23. They're enforced in all orgs in Winter '24.

After enhanced domains are enabled, a Messaging for Web deployment that was previously published no longer appears to your customer. Admins must take additional steps to republish all pre-existing deployments. These steps differ between messaging that's embedded in a third-party website and messaging that's embedded in an Experience Builder site.

Note: A new Messaging for Web deployment that is published for the first time after the upgrade to enhanced domains will go live to customers. No additional steps are required.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:
- Customize Application

  AND Modify Metadata Through Metadata API Functions

To modify permission sets and profiles:
- Manage Profiles and Permission Sets

To add the Embedded Messaging component to an Experience Builder site:
- Create and Setup Experiences

Republish Your Website After Upgrading to Enhanced Domains

After upgrading to enhanced domains, republish any Messaging for Web deployments that were live in your website.

Take these steps if you meet the following criteria:

- You enabled enhanced domains, or Salesforce enforced enhanced domains in your org.
- Your website site had a published Messaging for Web deployment before enhanced domains were enabled.

1. From Setup, in the Quick Find box, enter `Embedded Service Deployments`, and then click **Embedded Service Deployments**.
2. Click the edit button to the right of your deployment, and then select **View**.
3. Click **Publish**.

Republish Your Experience Builder Site After Upgrading to Enhanced Domains

After upgrading to enhanced domains, republish any Messaging for Web deployments that were live in your Experience Builder site.

Take these steps if you meet the following criteria:

- Your Salesforce org was upgraded to enhanced domains.
- Your Experience Builder site had a published Messaging for Web deployment prior to the upgrade to enhanced domains.

1. Update the Experience Builder to use the new enhanced domain.
   a. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites.**
   b. Click the **Builder** link for your site.

c. Click **Page Structure**, and then select **Embedded Messaging** from the dropdown.

d. Select the URL presented in the Enhanced Service URL dropdown, and then select the URL presented in the Site Endpoint dropdown.

2. Add the new enhanced service URL to the CSP Trusted Sites list for your Experience Builder site.

   a. In Experience Builder, highlight and copy the enhanced service URL from the Enhanced Service URL dropdown. If it's difficult due to URL length, copy it from the code snippet in the Embedded Service Deployments Settings page for your messaging for web deployment.

   b. From Setup, in the Quick Find box, enter `CSP Trusted Sites`, and then select **CSP Trusted Sites**.

   c. Click **New Trusted Site**.

   d. Name it, and then paste the copied URL into the Trusted Site URL field.

   e. Select **Allow Site for Connect-Src**.

   f. Save your changes.

3. Republish your Experience Builder site.

   a. From Setup, in the Quick Find box, enter`All Sites`, and then select **All Sites**.

   b. Click the **Builder** link for your site.

   c. Click **Publish**, and then click the second **Publish** button that appears in the pop-up.

4. Add the new enhanced service URL to the CSP Trusted Sites list for Salesforce.

   a. In Experience Builder, click **Settings**.

   b. Select **Security & Privacy**.

   c. Click **+ Add Trusted Site**.

   d. Name it, and again paste your enhanced service URL into the URL field.

   e. Click **Add Site**.

5. Update your embedded service deployment to use the new enhanced domain.

   a. Return to the All Sites landing page, and copy the domain portion of the URL for your site.

   b. From Setup, in the Quick Find box, enter`Embedded Service Deployments`, and then click **Embedded Service Deployments**.

   c. Click the edit button to the right of your deployment, and then select **Edit**.

   d. Paste the domain you just copied into the Domain field, and then save your changes.

6. Republish your embedded service deployment.

   a. Click the edit button to the right of your deployment, and then select **View**.

   b. Click **Publish**.

7. Add the new enhanced domain to your CORS allowlist.

   a. From Setup, in the Quick Find box, enter `cors`, and then click **CORS**.

   b. Click **New**.

   c. Paste the domain that you previously copied into the Origin URL Pattern field, and then save your changes.

Flow Recipes for Messaging for In-App and Web

Design Omni-Channel Flows to accomplish your Messaging for In-App and Web use case.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

IN THIS SECTION:

Create Customer Flows for Messaging for In-App and Web
Messaging for In-App and Web offers a powerful method to gather pre-chat details from your customer before the agent connects. Standard Pre-Chat form fields you select, such as first name and last name, and new custom fields like account numbers, drive the experience. Here's an example of how to create your first customer flow for efficient conversations.

Persist Pre-Chat Inputs Across Messaging Sessions
A Messaging for In-App or Web session ends when the agent selects End Chat. If a customer continues to send messages, a new session is created. The conversation continues seamlessly from the customer's perspective, but the agent loses access to the original pre-chat data. These instructions allow agents to access pre-chat data across sessions. It's not necessary to set this up if you're already using User Verification to persist messaging history.

Create Customer Flows for Messaging for In-App and Web

Messaging for In-App and Web offers a powerful method to gather pre-chat details from your customer before the agent connects. Standard Pre-Chat form fields you select, such as first name and last name, and new custom fields like account numbers, drive the experience. Here's an example of how to create your first customer flow for efficient conversations.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

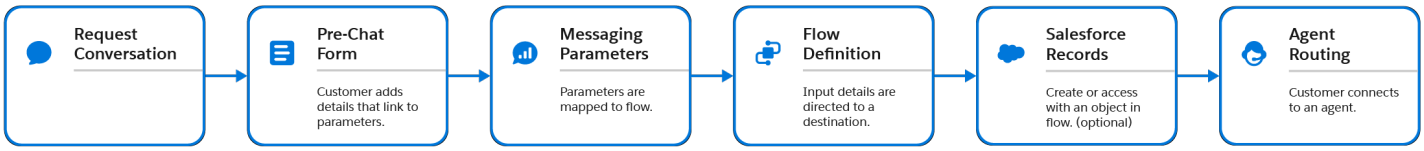
To set up Omni-Channel Flow and Messaging:
- Customize Application

To modify permission sets and profiles:
- Manage Profiles and Permission Sets

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	×	×

Before getting started, let's review how data passes through a messaging channel in a customer flow. This diagram shows each stage of the process.



A customer requests a messaging conversation and provides their contact info and other details in a Pre-Chat form. Their form-field inputs travel in your new messaging channel and are mapped as parameters. The flow you define guides where the inputs go, such as an email address or an order number. An agent connects with specific information about the customer at their fingertips. Optionally, a new Salesforce record can be created or updated as part of your enhanced flow

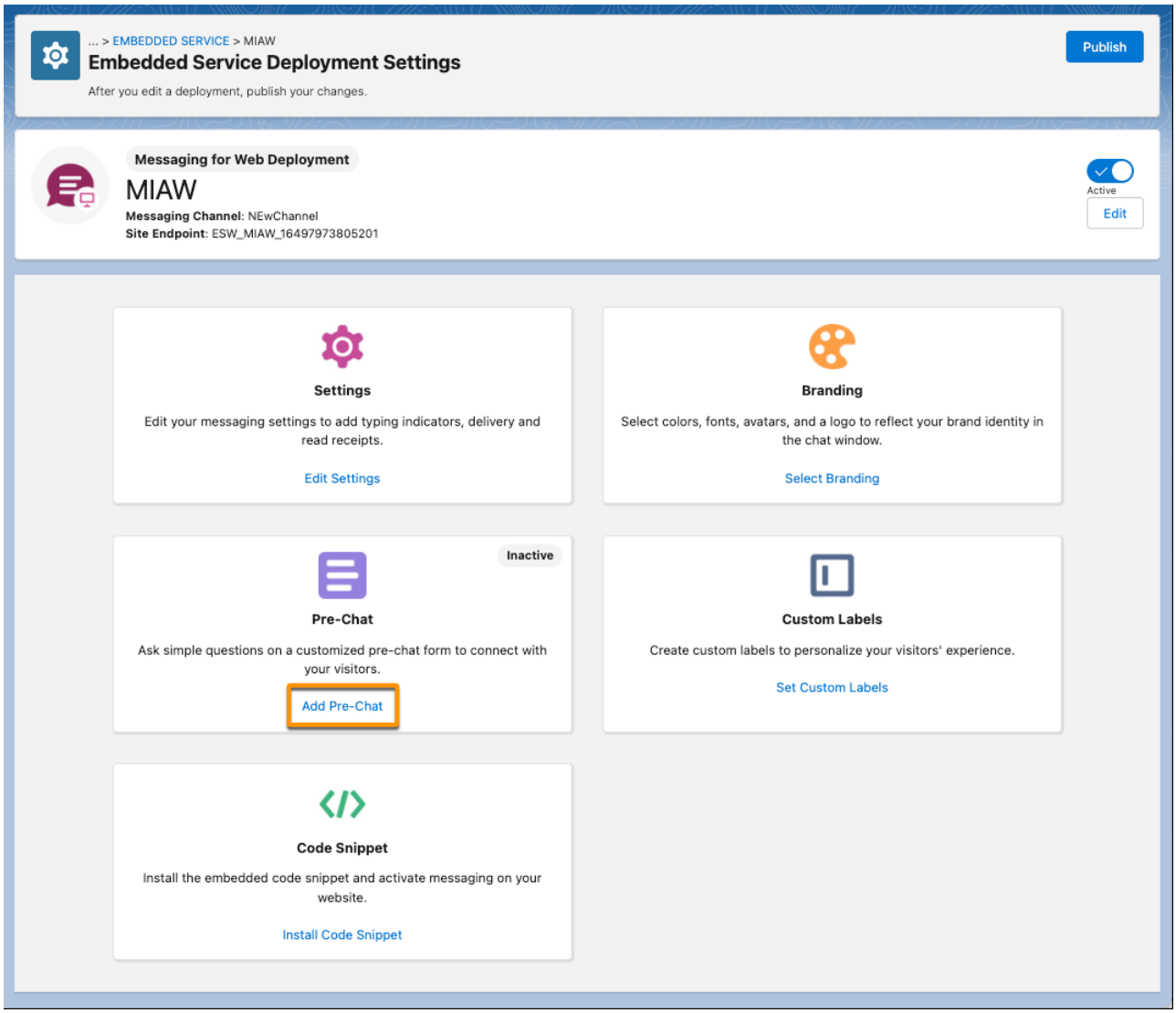
If you're new to messaging, read the requirements and then follow the steps to Prepare a Salesforce Org for Messaging for In-App and Web with Omni-Channel, Omni Flow, and a new Messaging channel. Then configure your Messaging for In-App Deployment or configure your Messaging for Web Deployment.

Decide on the combination of standard and custom fields, which link as parameters to your flow. Pick the standard fields for your use case. If you need specific information for your agents, create your own custom fields. We recommend a maximum of 5-6 total fields.

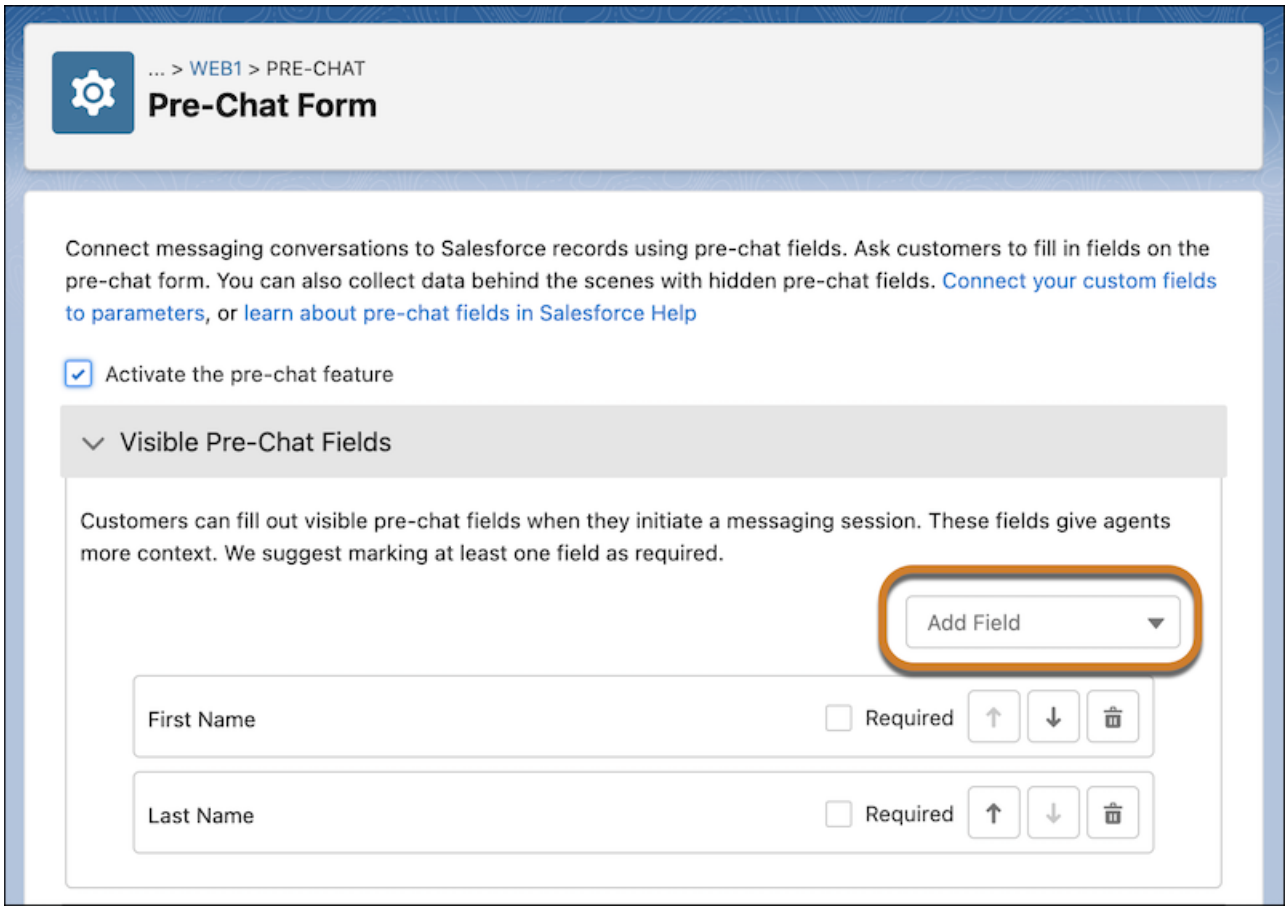
Standard Field choices	Custom Field Examples
First Name	Account Number
Last Name	Order Number
Email	Service Request
Subject	Your Custom Requirement

Follow these steps to create your Pre-Chat form.

1. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and then click to select.
2. Find your deployment and select **Edit**.
3. From the Deployment Settings page for your new web or mobile deployment, select **Add Pre-Chat**.

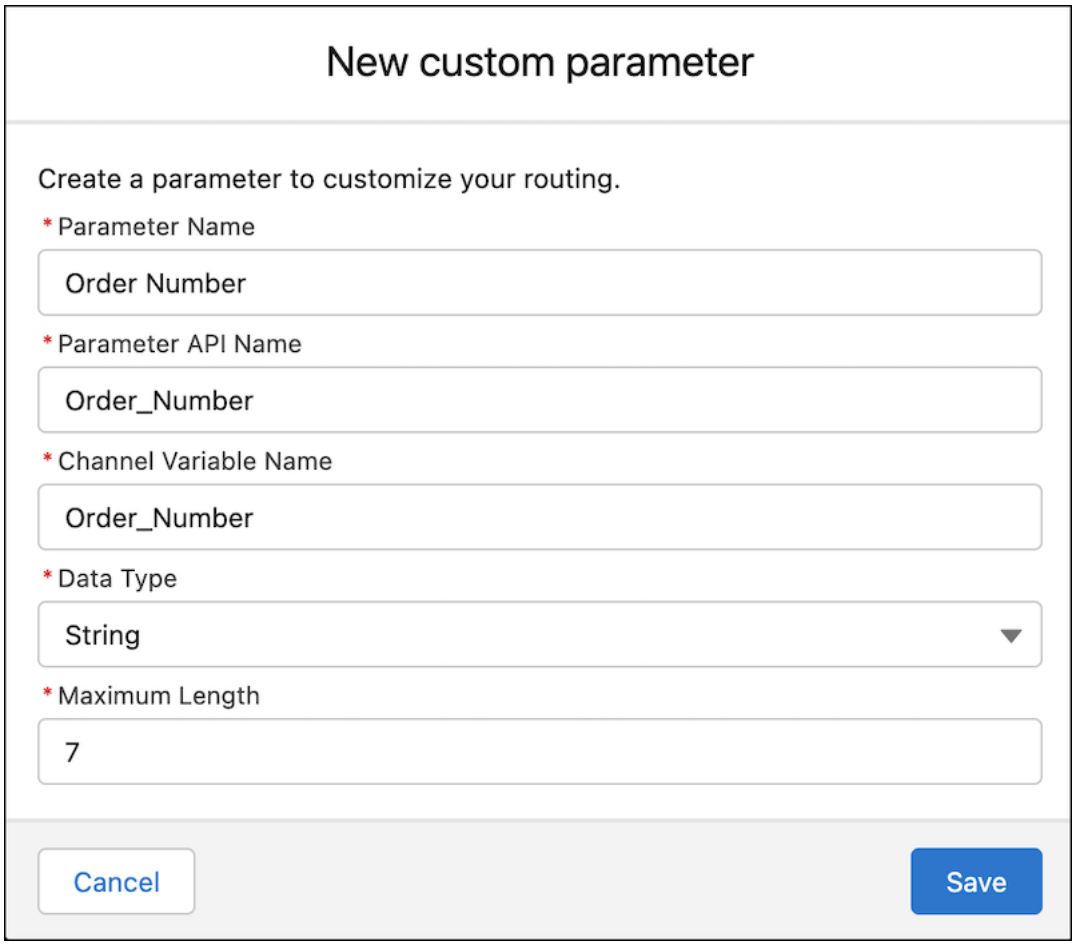


4. For this example, use **Add Field** to select **First Name** and then **Last Name**, which are standard fields.

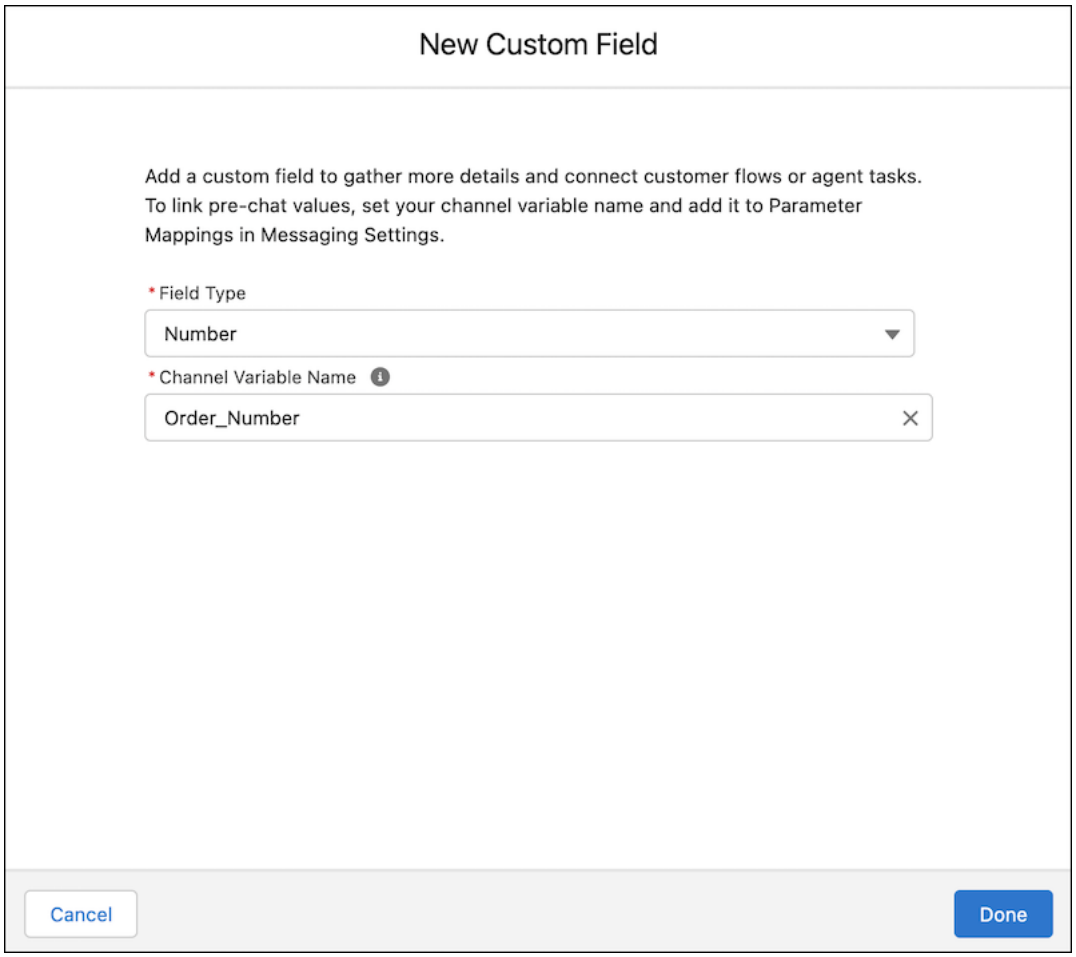


5. Save your work.
6. To add your custom field, you first must create a custom parameter in Messaging Settings. This process sets a **Channel Variable Name**, which you need for your Pre-Chat form.
7. From Setup, in the Quick Find box, enter `Messaging Settings`, and then click to select.
8. Find the **Messaging Channel Name** that you set up for your Messaging for In-App or Web deployment from the list and select it.
9. In the Custom Parameters section, click **New**.
10. Note: String is the only option for Data Type. While the pre-chat form allows you to display text, email, phone, number, and checkbox fields, a flow automatically converts them to string fields. If you use a flow to populate another record with the output of a pre-chat form field, the output renders as a string field. While most letters, numbers, and special characters allowed by the original field type are also allowed by a string field, you might notice slight differences. For example, the flow converts a checkbox field to a string statement of "true" or a string statement of "false" in the resulting flow output.

    Name your parameter `CustomerAccountNumber`, select the type, and character maximum limit for your customer's input.



11. Save your work.
12. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and then click to select.
13. Return to your previous deployment settings page and edit the Pre-Chat form.
14. From the **Add Field** list, select **Custom**.
15. In the New Custom Field window, select **Field Type** and **Text** for your customer account number field. Find the **Channel Variable Name** that you set in Messaging Settings, `CustomerAccountNumber`, and select it.



16. If you want the customer to complete the fields, check the **Required** box.

17. Review the Pre-Chat form order, set the toggle to **Active**, and save your work.

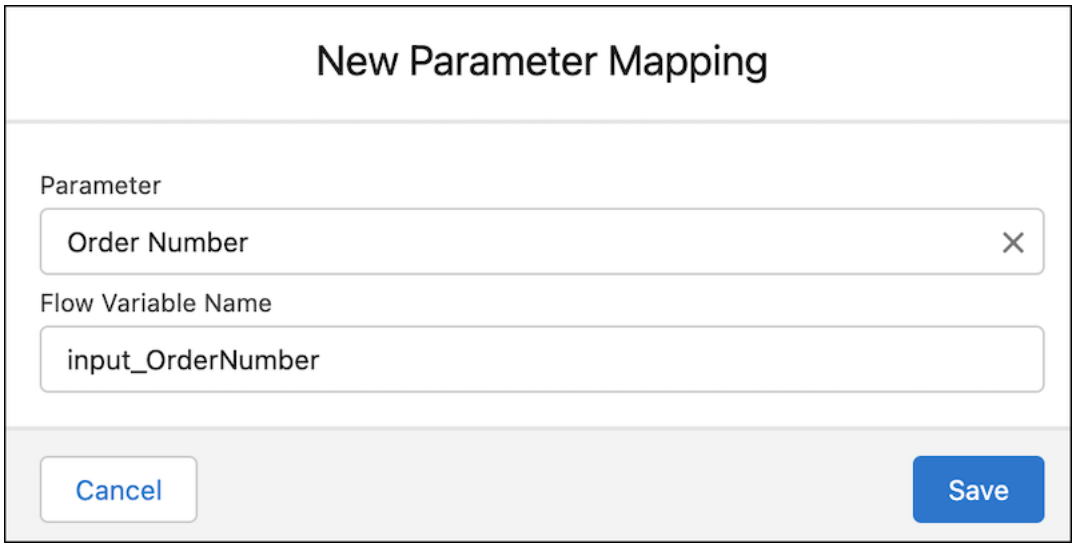
Note: To create a custom label for pre-chat fields, return to the deployment settings page and select the Custom Labels section. Find your custom field in the **Label Group** Pre-Chat. All custom fields require a custom label because there's no default label.

Important: To use the Custom Label panel, the admin must authorize a logged-in user as a translator in the Salesforce User language and the translated label language. Then, the user can customize the words or phrases.

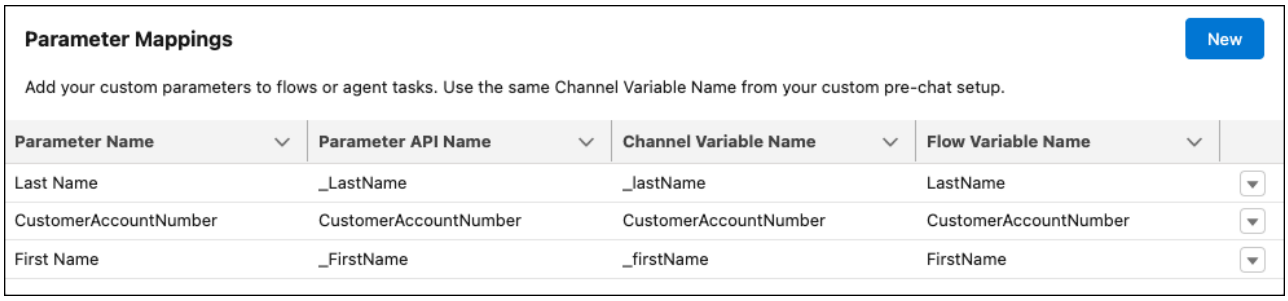
Note: If you edit a deployment, you must click the Publish button on the Embedded Service Deployment Settings page. The changes can take up to 10 minutes to complete.

Parameters are the connection point between your pre-chat form and the flow. To map your standard and custom Pre-Chat field values, follow these steps.

1. From Setup, in the Quick Find box, enter `Messaging Settings`, and then click to select.
2. Find the **Messaging Channel Name** you set up for your Messaging for In-App or Web deployment from the list and select it.
3. In the Parameter Mapping section, click **New**.
4. In the **Parameter** field, select an item for your Pre-Chat form.
5. Add a **Flow Variable Name** that describes the action. The Flow Variable Name matches what you use for Omni-Flow.



6. Save your work.
7. Continue the process with each standard and custom field in your Pre-Chat form. When finished, you have a parameter-mappings list.

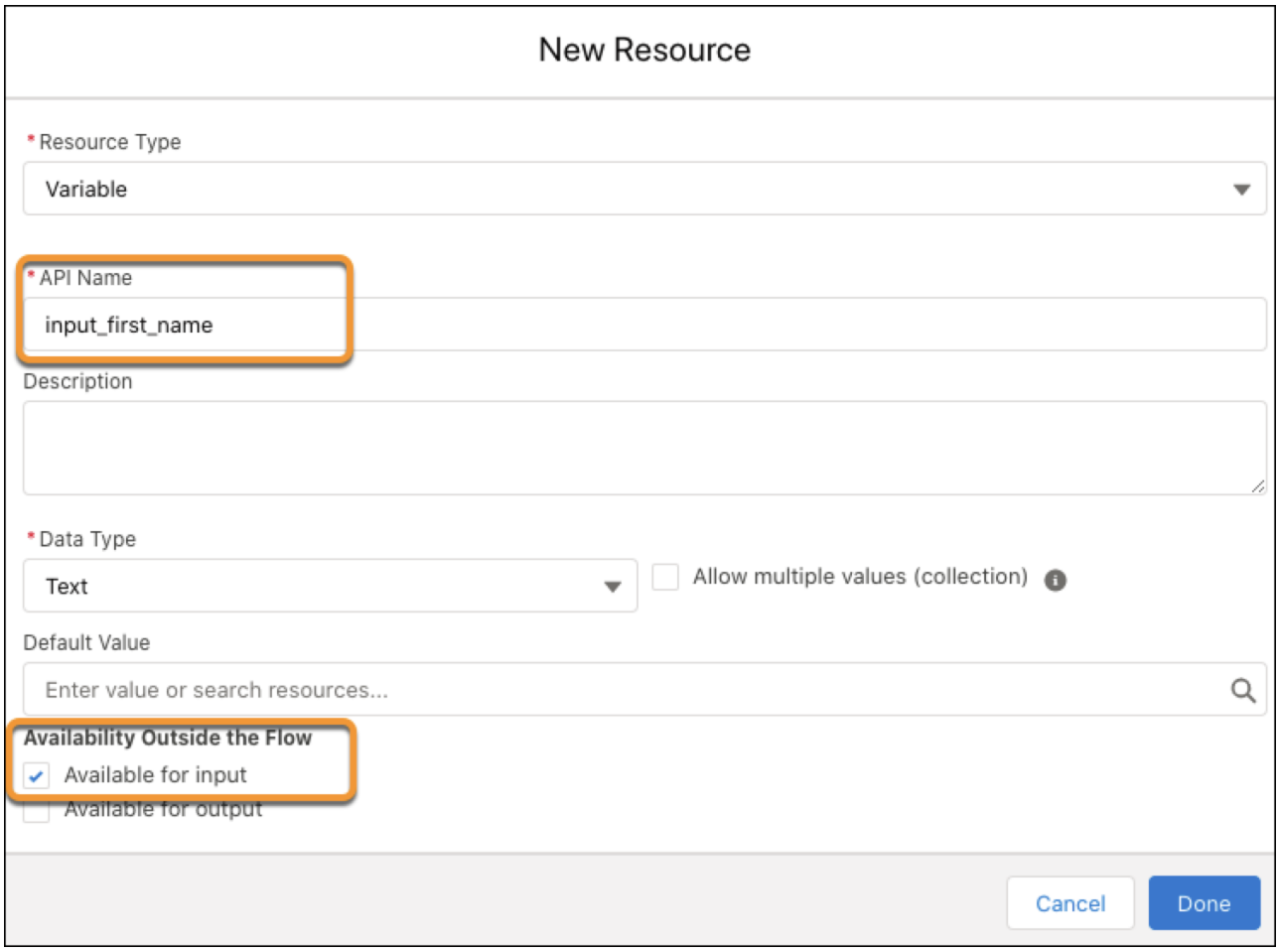


Note: Standard Parameter API Names, such as first name and last name, have an underscore and no spaces. For example, `_FirstName` and `_LastName`. Custom Parameters don't have underscores.

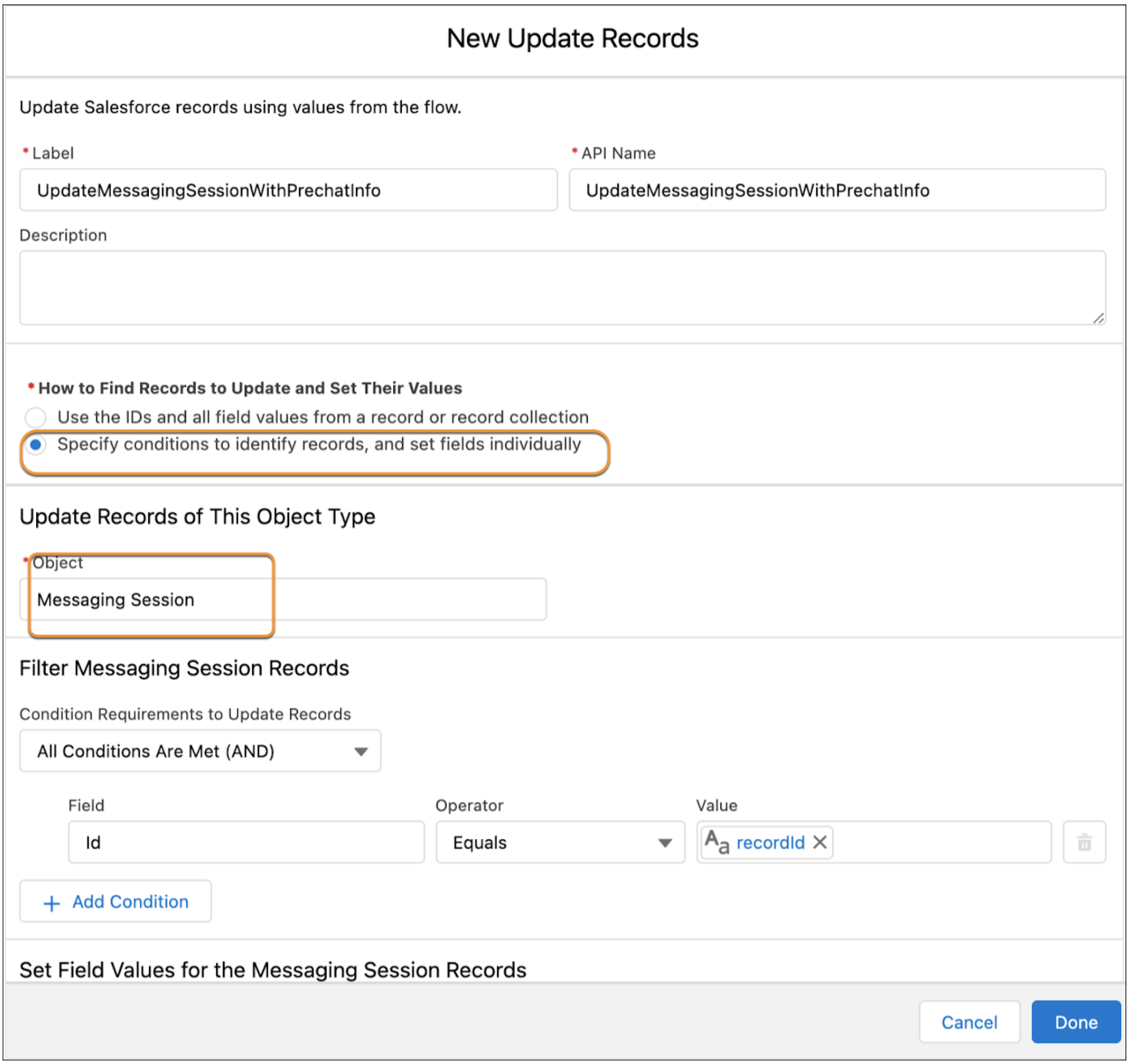
Return to the Omni-Channel Flow that you created when you set up your Salesforce org on page 22. Previously, you selected the Route To Queue action to direct a customer request to the right queue. In this section, we add one more element to store your pre-chat fields.

Before starting, you must create three custom fields on the Messaging Session object, `FirstName`, `LastName`, and `CustomerAccountNumber`. See Create Custom Fields.

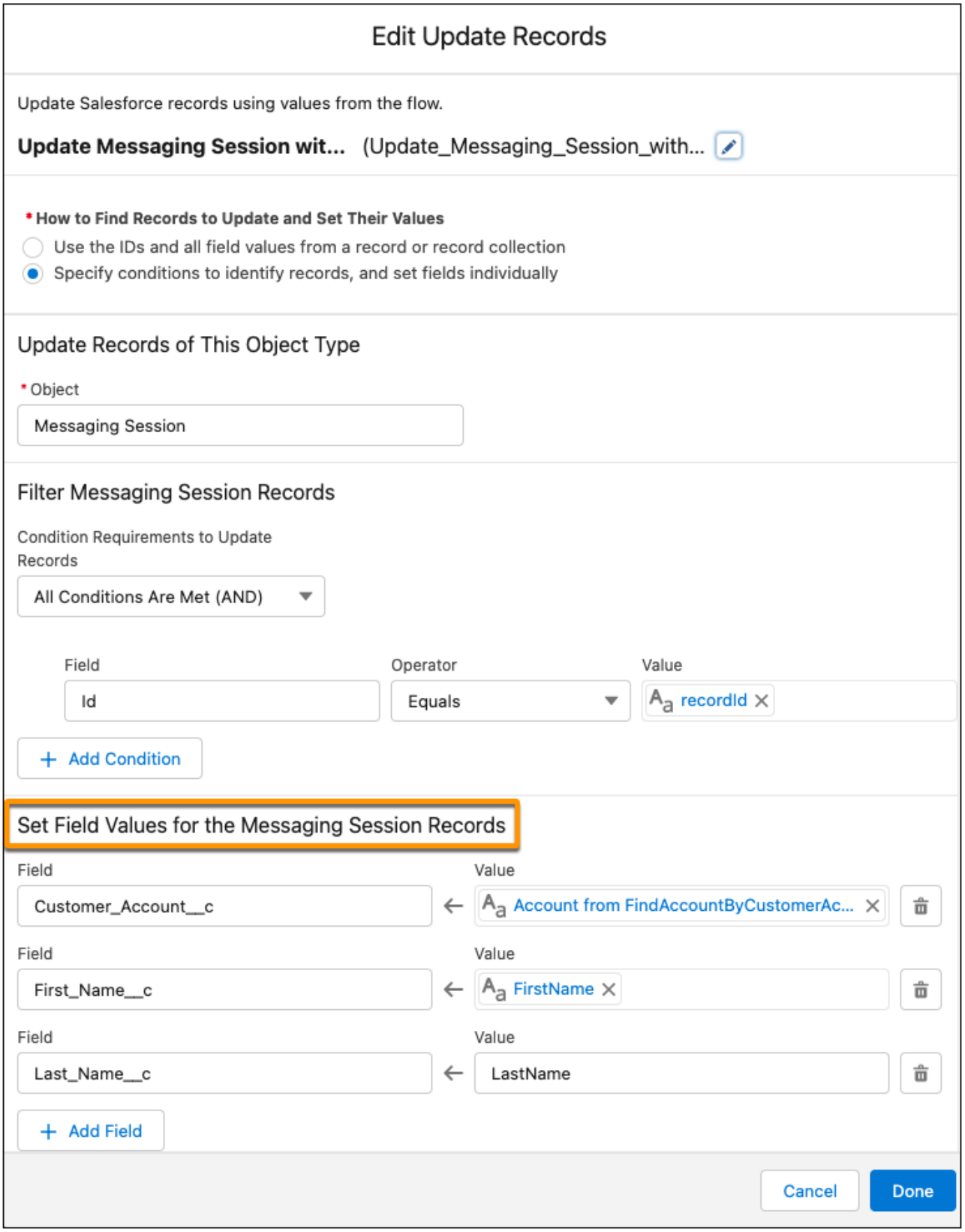
1. From Setup, in the Quick Find box, enter *`Flows`*, and then click to select.
2. Find and select your previous flow from the list.
3. Add an input variable for each pre-chat field. The **API Name** must be identical to the **Flow Variable Name** from Parameter Mappings. The variable must be **Available for input**.



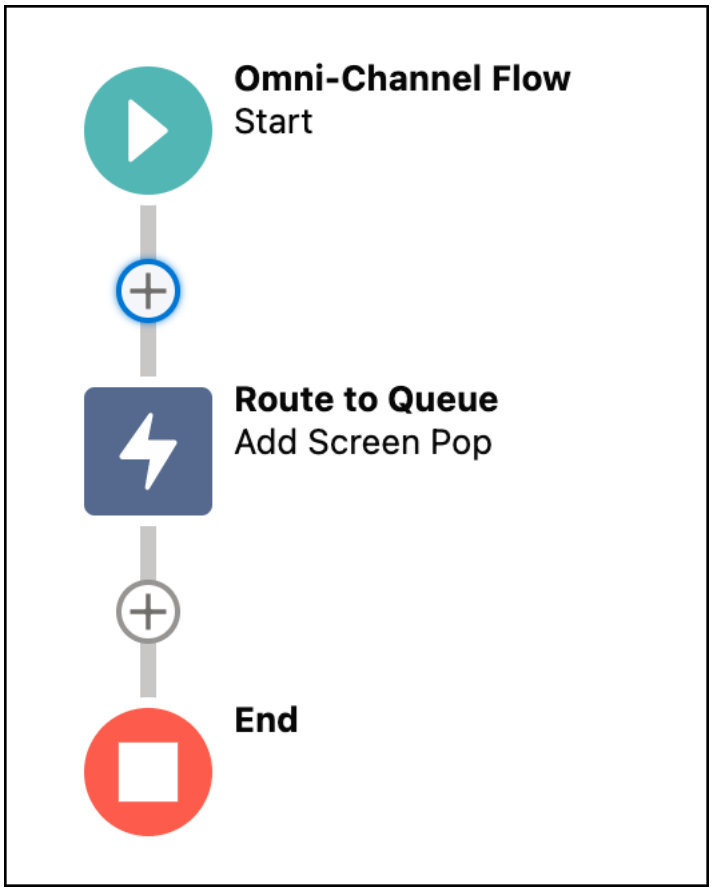
4. Create an **Update Records** element before the Route Work element in your flow. Select **Specify conditions to identify records and set fields individually**. Select **Messaging Session** as the object. In the **Filter Records** section, filter based on the **recordId** value.



5. **Set the Field Values for the Messaging Session Records** so that the fields match the custom field names, which in this case is associated with the Messaging Session.


Edit Update Records
Update Salesforce records using values from the flow.
Update Messaging Session wit... (Update_Messaging_Session_with...
* How to Find Records to Update and Set Their Values
Use the IDs and all field values from a record or record collection
Specify conditions to identify records, and set fields individually
Update Records of This Object Type
* Object
Messaging Session
Filter Messaging Session Records
Condition Requirements to Update Records
All Conditions Are Met (AND)
Field
Operator
Value
Id
Equals
recordId
Add Condition
Set Field Values for the Messaging Session Records
Field
Value
Customer_Account__c
Account from FindAccountByCustomerAc...
Field
Value
First_Name__c
FirstName
Field
Value
Last_Name__c
LastName
Add Field
Cancel
Done

6. The **Value** matches the input variables for the flow.
7. Click **Done**. The complete flow looks like this.



With this flow, an agent sees the customer's pre-chat inputs of first name, last name, and customer account number in the Session record as they connect.

Persist Pre-Chat Inputs Across Messaging Sessions

A Messaging for In-App or Web session ends when the agent selects End Chat. If a customer continues to send messages, a new session is created. The conversation continues seamlessly from the customer's perspective, but the agent loses access to the original pre-chat data. These instructions allow agents to access pre-chat data across sessions. It's not necessary to set this up if you're already using User Verification to persist messaging history.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up Omni-Channel Flow and Messaging:
- Customize Application

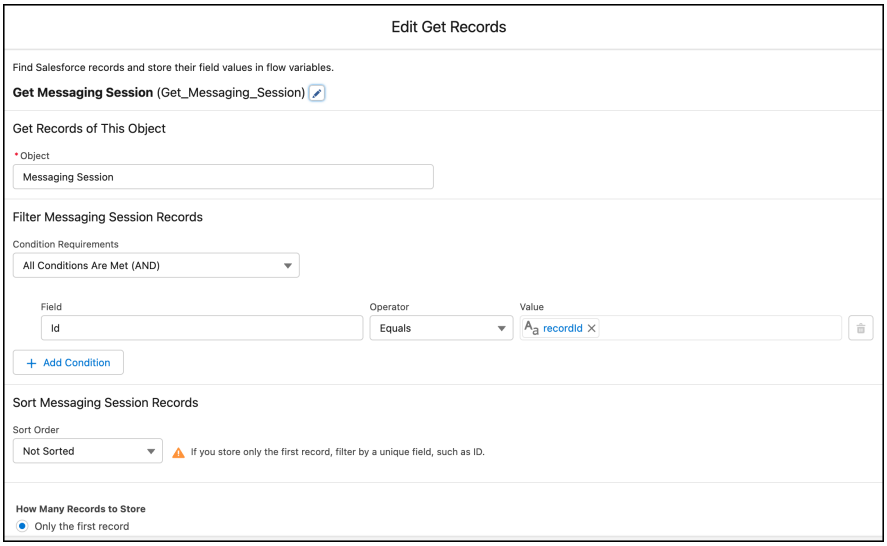
To modify permission sets and profiles:
- Manage Profiles and Permission Sets

Before you begin, you must have an Omni-Channel flow that already handles pre-chat data. To learn more, see Map Pre-Chat Values and Route for Omni-Channel Flow.

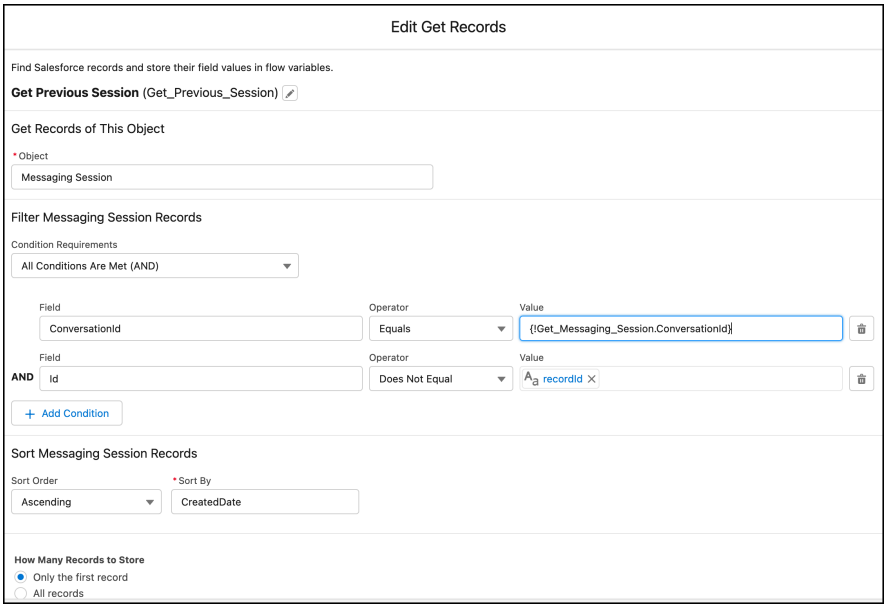
Since pre-chat data isn't stored across sessions by default, you must store this data in a Salesforce record during the first session. Then, update your Omni-Channel flow to access this data from subsequent sessions. Your updated flow looks up this information using the `ConversationId` field of the Messaging Session record, which is the same across sessions.

Important: This scenario is more likely to occur in Messaging for In-App where a customer can continue a conversation long after the agent has ended the chat. However, it can also occur with Messaging for Web customers when the customer sends more messages from the same messaging window.

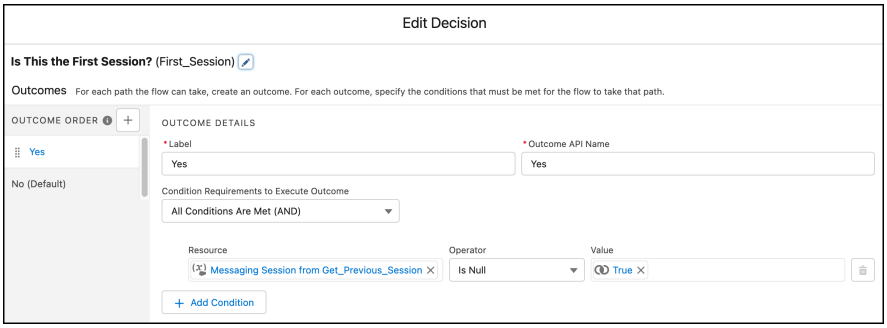
1. From Setup, in the Quick Find box, enter *`Flows`*, and then select **Flows**.
2. Find and select your previous flow from the list.
3. Before handling the pre-chat input variables or routing the work, add a check to determine if we have a pre-existing session from the same conversation. If so, we use that information to repopulate the input variables.
   a. Use a **Get Records** element to get the current messaging session using the `recordId` input.



b. Use a **Get Records** element to find a pre-existing messaging session with the same `ConversationId` as the current messaging session. We also make sure that the `Id` isn't the same as the current messaging session. In this example, we sort the results by creation date so that we can ensure that the first result is the first session. We then only return the first result.

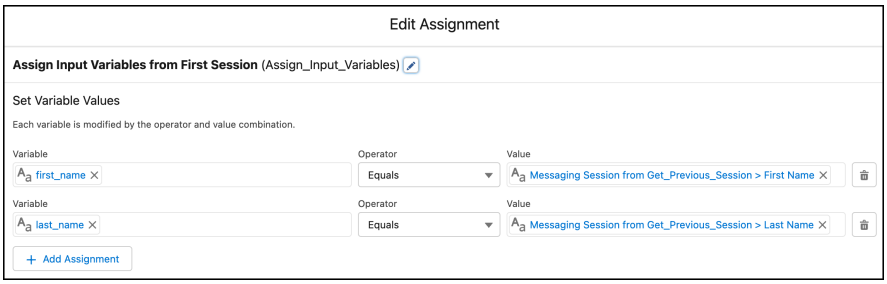


c. To determine if this session is the first messaging session, use a **Decision Tree** element and check if the previous result is null.



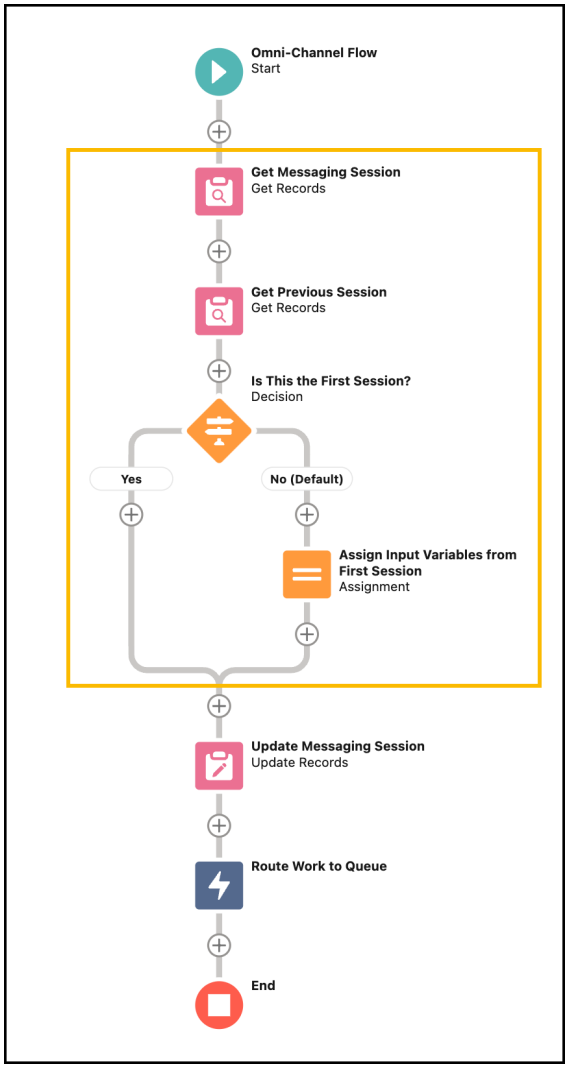
d. If this session is the first messaging session, no action is necessary.

e. If this session *isn't* the first messaging session, extract the pre-chat information from wherever you previously stored it and put it in the correct input variables. In this example, we extract the values from custom fields in the original Messaging Session record.



f. After this new logic, you can handle the pre-chat input variables and route the work in just the same way as you did in your original flow.

4. The following screenshot illustrates what your new flow could look like. The new logic is highlighted.



5. Click **Done**.

6. Save this flow as a new version, and verify that it's activated in your org.

SEE ALSO:

Persist Secure Messaging History Across Multiple Devices with User Verification

Messaging for WhatsApp, Facebook Messenger, and SMS

Set up Messaging channels in Service Cloud to communicate with your customers over WhatsApp, Facebook Messenger, or SMS.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	✅	✅

IN THIS SECTION:

Prepare for Messaging for WhatsApp, Facebook Messenger, and SMS

Turn on Messaging in Service Cloud and give agents and supervisors access. Then, configure message routing in Omni-Channel and customize the agent experience by adding Messaging to the Service Console.

Create a WhatsApp Channel in Service Cloud

Create a Messaging channel to let your support team help customers over WhatsApp. Customers message your company from the WhatsApp mobile or desktop app, and agents reply from the Service Console.

Create a Facebook Messenger Channel in Service Cloud

Let customers communicate with your business using Facebook Messenger. Customers send messages to your Facebook page, and agents reply from the Service Console. To control how incoming messages are routed, link an Omni-Channel flow or routing configuration to your Facebook Messenger channel.

Set Up SMS Channels in Messaging

Communicate with customers over text using a new or existing number. With Messaging channels for SMS, you can also set up automation to send individual and mass updates over text.

Prepare for Messaging for WhatsApp, Facebook Messenger, and SMS

Turn on Messaging in Service Cloud and give agents and supervisors access. Then, configure message routing in Omni-Channel and customize the agent experience by adding Messaging to the Service Console.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	✅	✅

IN THIS SECTION:

Turn On Messaging in Service Cloud

Turn on Messaging in Service Cloud so that agents can communicate with customers over WhatsApp, Facebook Messenger, and SMS.

User Permissions Needed

To set up and edit Messaging channels:	Configure Messaging
To view channels:	View Setup and Configuration

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	✅	✅

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

1. From Setup in Lightning Experience, enter `Messaging` in the Quick Find box, and select **Messaging Settings**.
2. Select **Messaging**.

Turning on Messaging creates Messaging permissions, setup pages, and objects, such as the MessagingSession and MessagingEndUser objects. It also allows you to create Messaging channels so your service team can communicate with customers over WhatsApp, Facebook Messenger, and SMS. This step isn't needed for Messaging for In-App and Web.

After you turn on Messaging, it can take a few minutes for the other Messaging pages to appear in the Setup menu. Refresh your browser to see them. Then, it's time to create at least one Messaging channel using the New Channel guided setup flow on the Messaging Settings page.

Note: If you request that Salesforce enables a phone number for use with Messaging, phone numbers are activated after the Messaging setup instructions are completed. Upon receipt of the signed Letter of Authorization, enablement of a phone number occurs within 3 business days for 1-800 numbers and within 1 business day for all other numbers. This letter is provided in the Messaging setup instructions. Not all phone numbers can be enabled.

Give Users Access to Messaging in Service Cloud

For WhatsApp, Facebook Messenger, or SMS channels, assign the Messaging User permission set license to all users who will participate in messaging sessions or supervise messaging agents. Then, create and assign permission sets for the agents and admins.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	✅	✅

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To assign permission set licenses:
- Manage Users

To create permission sets:
- Manage Profiles and Permission Sets

To edit users:
- Manage Internal Users

To assign permission sets:
- Assign Permission Sets

Assign the Messaging Permission Set License

All users who will engage with customers in messaging sessions or supervise messaging agents need the Messaging permission set license.

1. From Setup, enter `Users` in the Quick Find box, and select **Users**.
2. Select the user you want to assign the permission set license to.
3. In the Permission Set License Assignments related list, click **Edit Assignments**.
4. Enable the **Messaging User** permission set license.
5. Click **Save**.
6. Repeat this process for all users that require Messaging.

Assign Messaging Permission Sets

With the Messaging permission sets, agents can exchange messages with customers and admins can customize the Messaging experience for agents. Admins require some additional permissions that agents don't need.

1. Verify that the users who will use Messaging have a Sales Cloud or Service Cloud license.
   a. From Setup, enter `Users` in the Quick Find box, and select **Users**.
   b. Select the name of the user.
   c. Click **Edit**.
   d. Verify that **Sales Cloud User** or **Service Cloud User** is selected. If not, select one of them and save your changes.
2. Create a Messaging permission set for agents.
   a. From Setup, enter `Permission Sets` in the Quick Find box, and select **Permission Sets**.
   b. Click **New**.
   c. For Label, enter a name for the permission set. The API Name is automatically filled.
   d. Skip the section about user licenses.

      Important: If you select a user license, App Permissions aren't available.

   e. Click **Save**.
   f. In the details page, select **Service Presence Statuses Access** and click **Edit**.
   g. Move your Messaging presence status to the Enabled Service Presence Statuses list, and click **Save**.

h. Go back to the permission set overview page, and select **Object Settings** > **Messaging Sessions**.
i. Click **Edit**, give view access to all, and the appropriate access for your users or roles.
j. Click **Save**.
k. Go back to the Object Settings page and select **Messaging Users**.
l. Click **Edit**, give view access to all, and the appropriate access for your users or roles.
m. Click **Save**.
n. Go back to the Object Settings page and select **App Permissions**.
o. Click **Edit**, then enable `End Messaging Session`, `Agent Initiated Outbound Messaging`, and `Messaging Agent`.
p. Click **Save**.

3. Create a Messaging permission set for admins.
   a. From the Permission Sets page, clone the permission set you created for agents and give it a distinct name.
   b. From the details page of the cloned permission set, select **App Permissions**.
   c. Click **Edit**.
   d. Select `Configure Messaging` to allow admins to set up channels, add queues, and perform other administrative tasks.
   e. Click **Save**.
4. Assign the permission sets.
   a. From Setup, enter *`Users`* in the Quick Find box, and select **Users**.
   b. Select the name of the user that you want to assign the permission set to. Start with yourself; otherwise, you can't assign it to your agents.
   c. Click **Edit Assignments**.
   d. In the Permission Set Assignment page, move the permission set that you created to the Enabled Permission Sets list.
   e. Click **Save**.

SEE ALSO:

Set Up Routing for Messaging Channels in Service Cloud

Set Up Routing for Messaging Channels in Service Cloud

Omni-Channel routes customer inquiries sent over Facebook Messenger, WhatsApp, or SMS to a queue, bot, or qualified support agent. Queue-based routing is ideal for simple routing scenarios. Alternatively, create an Omni-Channel flow to define routing rules and dynamically route messages.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	✅	✅

Whether you plan to use queue-based routing or an Omni-Channel flow, Omni-Channel is your routing tool. To get started, take care of some basic Omni-Channel setup. Then, move on to defining your routing logic for your Messaging channel.

IN THIS SECTION:

Route Service Cloud Messaging Sessions with Omni-Channel Flows

Dynamically route customer messages sent over Facebook Messenger, WhatsApp, or SMS to the right agent, queue, or bot. Build a flow in Flow Builder, and then assign it to one or more Messaging channels.

Route Service Cloud Messaging Sessions to Queues

Route customer messages sent over Facebook Messenger, WhatsApp, or SMS to the appropriate queue using an Omni-Channel routing configuration. Queue-based routing, an alternative to Omni-Channel Flows, is ideal for simple routing scenarios.

SEE ALSO:

Add the Omni-Channel Utility to a Lightning Console App

Omni-Channel Utility for Lightning Console Apps

Route Service Cloud Messaging Sessions with Omni-Channel Flows

Dynamically route customer messages sent over Facebook Messenger, WhatsApp, or SMS to the right agent, queue, or bot. Build a flow in Flow Builder, and then assign it to one or more Messaging channels.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	✅	✅

1. On the Omni-Channel Settings page in Setup, enable and configure Omni-Channel.

Step	Instructions
Enable Omni-Channel.	Enable Omni-Channel
Create one service channel for all of your Messaging channels.	Create Service Channels
Create an Omni-Channel queue to use as your fallback routing strategy. Add Messaging Session as a supported object.	Create Queues
Create presence statuses for Messaging. If you're not sure which statuses to create, start with these three: `Available - Messaging`, `On Break`, `Busy`.	Create Presence Statuses
Give your agents access to the presence statuses.	Set Access to Presence Statuses

2. Create an Omni-Channel flow. The Omni-Channel flow is associated with a Messaging channel in the channel's settings. Create one flow to provide routing for all your Messaging channels, or create a series of flows to meet your channels' different routing needs. It's fine to use one flow for both standard and enhanced channels.

3. Create your Messaging channels. If your channel already exists, skip this step.
   a. From Setup in the Quick Find box, enter *Messaging*, and then select **Messaging Settings**.
   b. Under Channels, click **New Channel** to add a channel.
   c. Run through the wizard to create your SMS, enhanced WhatsApp, or standard or enhanced Facebook Messenger channel. For SMS and standard WhatsApp channels, you must file a case with Salesforce Support so they can create the channel for you.
   d. (Facebook Messenger and enhanced WhatsApp only) Select **Stop the setup flow and manually connect to a queue or Omni-Channel Flow**. The flow ends.
4. On the Messaging Settings page, find your newly created channel in the list. In the channel's action menu, select **Edit**.
5. Under Routing, edit your routing properties.

Field	Instructions
`Enable Advanced Routing`	Select this option to route this channel's messaging sessions based on the logic in the specified Omni-Channel flow. If it's not selected, sessions are routed to a specific queue.
`Flow Definition`	Select your Omni-Channel flow for this channel.
`Fallback Queue`	Select a queue to receive messaging sessions that the Omni-Channel flow is unable to route.

6. Save your changes.

SEE ALSO:

How Does an Omni-Channel Flow Work?

Route Service Cloud Messaging Sessions to Queues

Route customer messages sent over Facebook Messenger, WhatsApp, or SMS to the appropriate queue using an Omni-Channel routing configuration. Queue-based routing, an alternative to Omni-Channel Flows, is ideal for simple routing scenarios.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	✅	✅

Set Up Queue-Based Routing for a New Messaging Channel

If your Messaging channel doesn't exist yet, create the channel and set up queue-based routing at the same time.

1. From Setup in the Quick Find box, enter *Messaging*, and then select **Messaging Settings**.
2. Under Channels, click **New Channel** to add a channel.
3. Run through the wizard to create your SMS, enhanced WhatsApp, or standard or enhanced Facebook Messenger channel. For SMS and standard WhatsApp channels, you must file a case with Salesforce Support so they can create the channel for you.

4. (Facebook Messenger and enhanced WhatsApp only) Select **Create a new queue**. Follow the prompts to:
   a. Create a queue.
   b. Create a routing configuration.
   c. Adjust the agent messaging workload.
   d. Exit the setup flow.
5. On the Messaging Settings page, find your newly created channel in the list. In the channel's action menu, select **Edit** to view and, optionally, update your routing settings for the channel.

Set Up Queue-Based Routing for an Existing Messaging Channel

If you've already created your Messaging channel, here's how to set up queue-based routing for it.

1. On the Omni-Channel Settings page in Setup, enable and configure Omni-Channel.

Step	Instructions
Enable Omni-Channel.	Enable Omni-Channel
Create one service channel for all of your Messaging channels.	Create Service Channels
Create an Omni-Channel queue to use as your fallback routing strategy. Add Messaging Session as a supported object.	Create Queues
Create presence statuses for Messaging. If you're not sure which statuses to create, start with these three: `Available - Messaging`, `On Break`, `Busy`.	Create Presence Statuses
Give your agents access to the presence statuses.	Set Access to Presence Statuses
Set up a routing configuration. If a routing configuration isn't associated with your queue, your customers' messages aren't routed.	Create Routing Configurations for Your Queues

2. On the Messaging Settings page in Setup, find your channel in the list. In the channel's action menu, select **Edit**.
3. Under Routing, edit your routing properties.

Field	Instructions
`Enable Advanced Routing`	Don't select this option, which is used with Omni-Channel Flows.
`Routing Type`	Select **Omni-Channel**.
`Queue`	Select the queue that will receive and prioritize this channel's messaging sessions.

4. Save your changes.

SEE ALSO:

Route to a Queue

Add Messaging to the Service Console

Configure the Service Console so agents can engage with customers over WhatsApp, Facebook Messenger, or SMS Messaging channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	✓	✓	✓

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To create or edit a console app:

- Customize Application

  AND View Setup and Configuration

1. From Setup in Lightning Experience, enter `App Manager` in the Quick Find box, and then select **App Manager**.
2. Click **Edit** next to the app that you want to add Messaging to—usually, this is your Service app.
3. If it's not already there, add Omni-Channel to the utility bar in the Service Console footer. Agents use the Omni-Channel utility to accept messages sent via a Messaging channel.
   a. In the Utility Items section, click **Add Utility Item**.
   b. Select **Omni-Channel**.
   c. Leave the Omni-Channel properties as is, and save your changes.
4. In the Navigation Items section, select **Messaging Sessions** and move it to the Selected Items list. Save your changes.
5. In the User Profiles section, verify that the user profiles who need access to Messaging are in the Selected Profiles list. Save your changes.

SEE ALSO:

- Show Messaging Components in the Service Console
- Create and Edit a Custom Lightning Console App
- Omni-Channel Utility for Lightning Console Apps
- Who Can Access Lightning Console Apps?

Create a WhatsApp Channel in Service Cloud

Create a Messaging channel to let your support team help customers over WhatsApp. Customers message your company from the WhatsApp mobile or desktop app, and agents reply from the Service Console.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	×	×	✅	×	✅

If you're creating a standard WhatsApp channel, you submit a request to have Salesforce create the channel for you. If you're creating an enhanced WhatsApp channel, you can do it yourself in Setup.

Important: WhatsApp channels in Service Cloud and WhatsApp channels in Marketing Cloud require separate WhatsApp business accounts. For help with setting up a Marketing Cloud WhatsApp channel, see Marketing Cloud WhatsApp Messaging.

EDITIONS

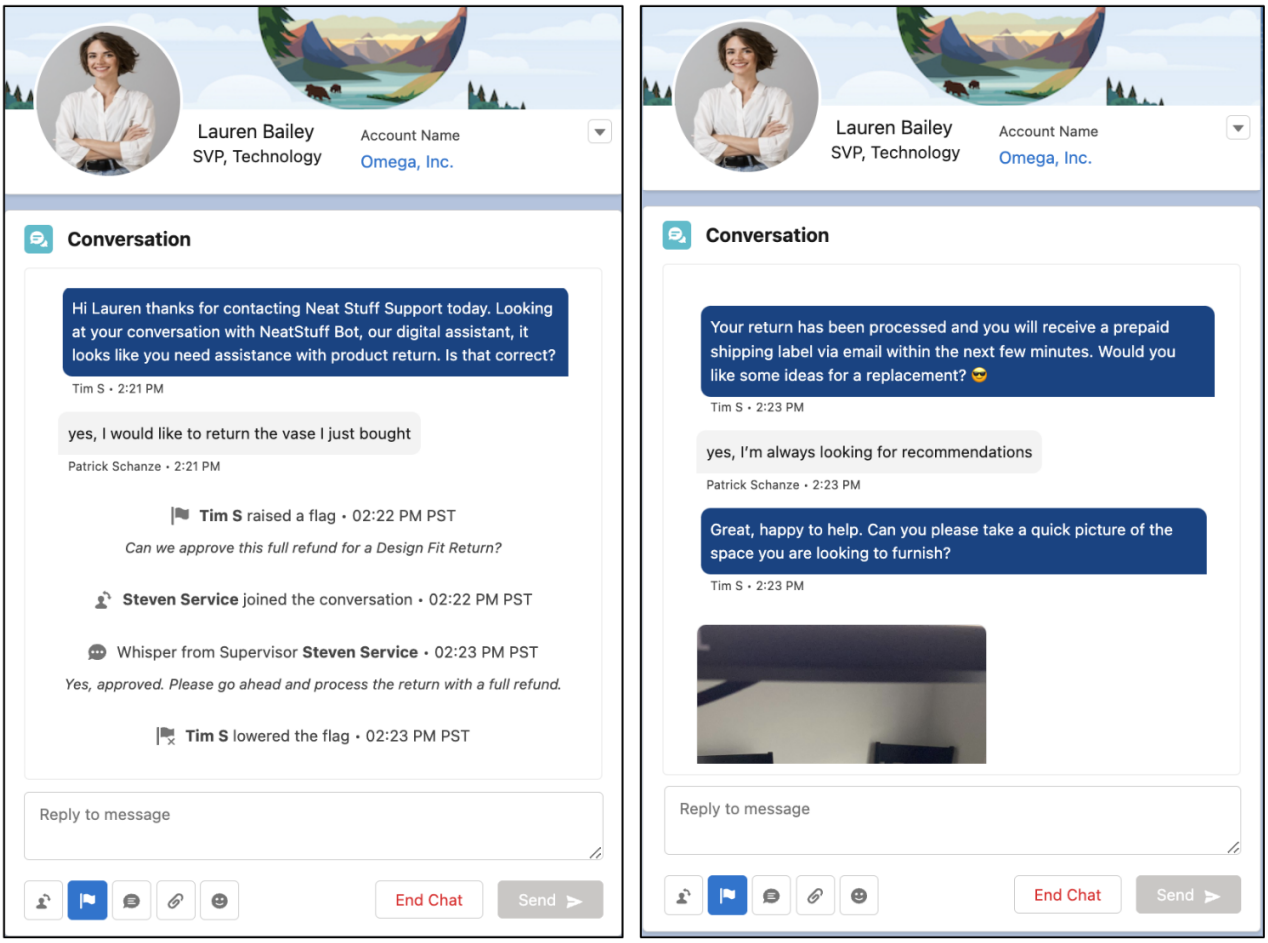
Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up Messaging:
- Configure Messaging

To authorize WhatsApp:
- Customize Application AND Manage Auth. Providers

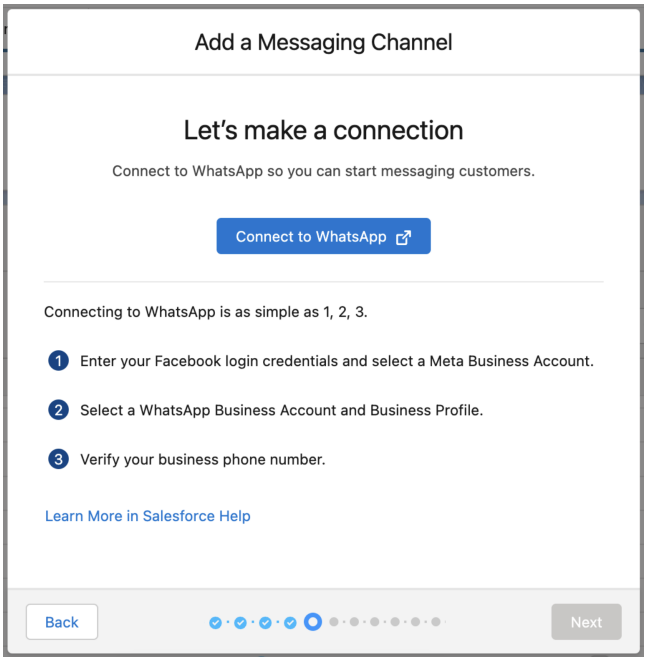
To view channels:
- View Setup and Configuration



Create an Enhanced WhatsApp Channel

Set up an enhanced WhatsApp channel yourself in Setup. Enhanced channels include features such as messaging session transfers, more messaging session statuses, and agent-supervisor collaboration options. You can also connect enhanced bots to your channel to address common inquiries.

1. Review WhatsApp phone number criteria, channel limitations, and other considerations. See Considerations for Using WhatsApp in Service Cloud. For example, in enhanced WhatsApp channels, message templates and triggered and agent-initiated outbound messaging aren't supported.
2. In Setup, enter *Messaging* in the Quick Find box, and then select **Messaging Settings**.
3. Click **New Channel**, and then click **Start**.
4. Click **WhatsApp**, select **Enhanced**, and then click **Next**.
5. Review and accept the terms and conditions, and then click **Next**.
6. Disable any pop-up blockers. Then, click **Connect to WhatsApp**.



7. In the window that appears, enter your Facebook login credentials.
8. Follow the prompts to:
   a. Create or select a Meta Business Account.
   b. Create or select a WhatsApp Business Account.
   c. Create or select a WhatsApp Business Profile.
   d. Verify your WhatsApp Business phone number by text or voice call.
9. When a message notifies you that you're ready to chat, click **OK**.
10. In Salesforce Setup, the channel setup flow shows that your WhatsApp account is connected. Click **Next**. If you selected a WhatsApp Business Account that can't be used, we'll let you know here.
11. Select your WhatsApp number and click **Next**.
12. Enter your chat acknowledgment message and click **Next**. If needed, you can edit this auto-response and others later in your channel settings.
13. Choose how to route incoming messages to agents. To use an Omni-Channel flow to control routing, select **Stop the setup flow and manually connect to a queue or Omni-Channel Flow**. To use a routing configuration, select **Create a new queue and routing configuration**. If you select **Create a new queue...**, the flow takes you through the steps to:
    a. Create a queue.
    b. Create a routing configuration.
    c. Adjust the agent messaging workload.
    d. Exit the flow.
14. If you select **Stop the setup flow...,** the flow ends. The channel is created, but you must still configure its routing.
15. (For Omni-Channel Flows routing only) On the Messaging Settings page, find your new WhatsApp channel and click **Edit**. Under Routing, update your routing properties and save your changes.

Field	Instructions
`Enable Advanced Routing`	Select this option.
`Flow Definition`	Select your preferred Omni-Channel flow.
`Fallback Queue`	Select a queue to receive messaging sessions that the Omni-Channel flow can't route.

16. Customize the user experience for agents and customers who communicate in your WhatsApp channel. See Increase Messaging Productivity.

Create a Standard WhatsApp Channel

If you want to link your WhatsApp channel to a phone number that's in use with another business service provider, a standard WhatsApp channel can be a good option.

When you work with Salesforce to create a standard WhatsApp Messaging channel, Salesforce activates your number for WhatsApp on your behalf or migrates it from your current business service provider. We recommend that you don't activate a number for WhatsApp on your own, because it prolongs the setup process. After a WhatsApp number is activated with Salesforce, it can be associated with only one org—sandbox or production—at a time. We recommend requesting separate numbers for sandbox and production to make the rollout easier.

1. Review WhatsApp phone number criteria, channel limitations, and other considerations. See Considerations for Using WhatsApp in Service Cloud.
2. Go to https://business.facebook.com and log in to your Facebook Business Manager account. If you don't have one, create it now.
3. Go to **Facebook Business Manager** > **Business Settings** > **Business Info**. Find your Business Manager ID at the top of the page.
4. Send an email to whatsappenablement@salesforce.com with the subject "WhatsApp Number Setup." Include this information.
   - Salesforce org ID—sandbox or production
   - Facebook Business Manager ID
   - The name associated with the Facebook Business Manager ID
   - The phone number you want to use for WhatsApp, plus:
     - The name and email address for a point of contact to validate ownership of the phone number
     - The company name you want to show within WhatsApp
     - Whether the phone number is a landline or a mobile phone
     - Whether the number is registered with a WhatsApp Business Account for another business service provider
   - Optionally, some extra details for your WhatsApp company record:
     - Your company description (maximum 138 characters)
     - Your logo, either as a URL or as a file (.png or .jpeg, at least 640x640 pixels)
     - Your website URL

   Your Facebook Business Manager admin can access and accept invitations through the Requests tab in Facebook Business Manager. If another department in your company manages Facebook operations, work with them to locate your account information.

   After a few days of processing, Salesforce contacts you to finalize your WhatsApp Messaging channel.
5. When you're notified that your channel was created, configure its settings and incorporate your WhatsApp number into your Omni-Channel routing logic.

a. In Setup, enter `Messaging` in the Quick Find box, and then select **Messaging Settings**.

b. In the Channels section, refresh the list of channels to view your new WhatsApp channel.

c. To edit the channel settings, such as automated responses and routing details, click **Edit** in the channel's action menu.

d. Customize the user experience for agents and customers who communicate in your WhatsApp channel. See Increase Messaging Productivity.

IN THIS SECTION:

Considerations for Using WhatsApp in Service Cloud

WhatsApp Business lets businesses communicate with users of the WhatsApp messaging app. Review important considerations before creating a WhatsApp channel in Service Cloud.

Create Notification Templates for WhatsApp in Service Cloud

Initiate WhatsApp conversations with customers through outbound notifications. If a customer opts in to receive them, you can send notifications more than 24 hours after your last exchange with the customer.

WhatsApp Notification Types in Service Cloud

Send business-initiated, pre-approved, templated notifications at any time in standard WhatsApp channels. There are 10 notification types, each with allowed use cases.

Test Your WhatsApp Channel in Service Cloud

Test your WhatsApp channel to ensure that it's working the way you expect. Using a sandbox is optional, but a good idea.

SEE ALSO:

Customize Auto-Responses in Service Cloud Messaging Channels

Update Service Cloud Messaging Channel Settings

Create Notification Templates for WhatsApp in Service Cloud

Considerations for Using WhatsApp in Service Cloud

WhatsApp Business lets businesses communicate with users of the WhatsApp messaging app. Review important considerations before creating a WhatsApp channel in Service Cloud.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	×	×	✅	×	✅

Account Limits

- Your Meta Business Manager account can be associated with multiple WhatsApp Business Accounts (WABA). Across all of the WABAs associated with your Meta Business Manager account, you can use up to 20 WhatsApp phone numbers. This limit may differ if WhatsApp considers one of your numbers an Official Business Account, which is a label reserved for notable brands. And if you maintain WhatsApp channels with another business service provider in addition to Salesforce, those channels also count against your limit. Here's how to request a change to this limit:

  - If you're using only standard WhatsApp channels, email the Salesforce WhatsApp enablement team at whatsappenablement@salesforce.com.
  - If you're using enhanced WhatsApp channels and manage your own WABA in Meta Business Manager, contact WhatsApp Direct Support. Select **Ask a question**, select the topic **WABiz: Account & WABA**, and select **Request type: Increase phone number limit**.
- You can create and use up to 250 templates per WABA. Keep in mind that templates aren't supported in enhanced WhatsApp channels.
- For each new WhatsApp channel, WhatsApp applies a messaging limit. This limit determines the number of unique users that your org can send outbound messages to in a 24-hour period, using WhatsApp-approved templates. This limit doesn't apply to the number of messages you send or to responses to user-initiated messages. See Capacity and Messaging Limits in the WhatsApp documentation.

Enhanced Messaging for WhatsApp

- Some features in standard WhatsApp channels aren't available in enhanced WhatsApp channels, and vice versa. To compare the channel types, see Compare Messaging Channel Capabilities in Service Cloud.
- While a WhatsApp channel can't be converted from standard to enhanced or vice versa, you can maintain both standard and enhanced channels in Salesforce. For example, if you've established a standard WhatsApp channel, you can keep using that channel and create an additional enhanced channel.

Content Sharing

You can send several types of content in WhatsApp channels.

Content Type	Standard WhatsApp	Enhanced WhatsApp
Text	Supported, up to 1,600 characters	Supported, up to 4,096 characters. Inbound text-only messages over 9 MB are sent as an attachment.
Emojis	Supported	Supported
Images	Supported, up to 5 MB: .jpg, .jpeg, .png	Supported, up to 5 MB inbound and 25 MB outbound: .jpeg, .png Images must be 8-bit, RGB, or RGBA. Outbound images that are 5–25 MB are sent as a link.
PDFs	Supported, up to 5 MB	Supported, up to 30 MB inbound and 25 MB outbound. Outbound PDFs that are 16–25 MB are sent as a link.
Documents	Not supported	Supported, up to 30 MB inbound and 25 MB outbound: .txt, .ppt, .pptx, .pps, .ppsx, .doc, .docx, .xls, .xlsx, .csv Supported for inbound only: .zip, .tiff Outbound documents that are 16–25 MB or of type .txt, .json, .xml, .csv, .ppsx, and rtf are sent as a link.

Content Type	Standard WhatsApp	Enhanced WhatsApp
Audio files	Not supported	Supported, up to 16 MB inbound and 25 MB outbound: .aac, .amr Supported for inbound only: .mp3, .ogg Only opus codecs are supported. Base audio/ogg isn't supported. Outbound audio files that are 16–25 MB are sent as a link.
Video files	Not supported	Supported, up to 16 MB inbound and 25 MB outbound: .mp4, .3gp Only H.264 video codec and AAC audio codec is supported. Videos with a single audio stream or no audio stream are supported. Outbound video files that are 16–25 MB or of type .3gp are sent as a link.
GIFs	Not supported	Supported for inbound only

WhatsApp has these limitations related to sharing content.

- The following content types and interactions aren't supported in standard or enhanced channels: Stickers, locations, contacts, polls, tap-back reactions, and message deletion.
- If a customer sends unsupported content such as a sticker or location, an error message notifies agents that the customer sent a message with unsupported content. Agents can ask the customer to share the information another way.
- When a customer sends an image, the agent sees a preview in the Service Console and can download the image. File previews aren't supported, but agents can download files.
- If a customer replies to a previous message in the WhatsApp chat, agents see the reply but not the original message that the customer was replying to.

Customer Care Window

The 24 hours after a customer sends a message to your business is considered the *customer care window*, in which an agent or bot assists the customer with their inquiry. After the customer care window passes, an agent can respond to a customer only using pre-approved templates. Any messaging other than these templates must be sent within the customer care window. WhatsApp imposes this response time limit to prevent outbound marketing.

Pricing

You can send some types of WhatsApp messages to customers at no charge, while other types incur charges. Talk to your Salesforce account executive to understand when you'll be charged for sending a message in WhatsApp.

Business-Initiated Outbound Messaging

Businesses can interact with their customers over WhatsApp in two ways: customer care interactions and notifications.

Communication Type	Standard WhatsApp	Enhanced WhatsApp
Customer Care Interactions: Customer-initiated conversations that require a response from your team within 24 hours	Supported	Supported
Notifications: Business-initiated, preapproved, templated messages that can be sent at any time by agents (agent-initiated outbound messaging) or via automation (triggered outbound messaging)	Partially supported: Agent-initiated outbound messaging is in beta.	Not supported

WhatsApp requires you to proactively and explicitly receive an end user's consent before sending them outbound notifications. You must receive this consent outside of WhatsApp. You can receive it from another communication channel, such as email or text message, or as part of your company's normal business processes. After you receive an end user's consent outside of WhatsApp, you can use this information to send outbound notifications. See WhatsApp Business Policy.

End users don't have to provide advance, explicit consent to initiate an inbound customer care interaction. To learn more about how customers opt in and out of communication, see Track Customer Consent in Messaging Channels.

Acquiring a Phone Number for Your WhatsApp Channel

To create a WhatsApp channel in Salesforce, you need a phone number to associate with your channel. Your phone number must meet these requirements.

- Owned by you.
- Has a valid country code and area code (fixed-line or mobile). You can't use SMS short codes with WhatsApp, but you can use toll-free numbers.
- Able to receive text messages, voice calls, or both.
- Fits the criteria below for number reuse.

The phone number you use acts as an identifier for your WhatsApp Messaging channel. Registering a number with WhatsApp doesn't limit your everyday usage behavior. You can still use it for standard business purposes like calling or texting. While you can use the same number for communication in multiple countries, we recommend designating a separate number for each country to avoid confusion or the appearance of fraud.

If you don't have a phone number that meets these criteria, you can request one from your telephony provider or web-based CPaaS provider.

Number Reuse and Migration

Some types of phone numbers can't be associated with WhatsApp Messaging channels.

Phone Number Type	Standard WhatsApp	Enhanced WhatsApp
Numbers in use with another business service provider	OK to use. When the Salesforce WhatsApp enablement team creates your WhatsApp channel, they instruct you to ask your current provider to turn off two-step	Can't be used.

Phone Number Type	Standard WhatsApp	Enhanced WhatsApp
	verification so your number can be migrated to Salesforce.	
Numbers in use in a Marketing Cloud WhatsApp channel, or numbers whose WABA is linked to a Marketing Cloud WhatsApp channel	Can't be used. For help with using WhatsApp with Marketing Cloud, see Marketing Cloud WhatsApp Messaging.	Can't be used. For help with using WhatsApp with Marketing Cloud, see Marketing Cloud WhatsApp Messaging.
Numbers already activated or previously used on WhatsApp	OK to use. We recommend that you don't activate a number for WhatsApp on your own, because it prolongs the setup process.	Can't be used.
Numbers already activated in a standard WhatsApp channel	OK to use. After a WhatsApp number is activated with a Messaging channel, it can be associated with only one org—sandbox or production—at a time. While Salesforce Customer Support can move a WhatsApp number from a standard channel in sandbox to a standard channel in production, we recommend requesting separate numbers to make the rollout easier.	Can't be used.

Note: The WhatsApp messaging channel involves integrations with one or more Non-SFDC Applications, including Twilio, Inc. and WhatsApp, as further detailed in the Messaging Notices and Licensing Information Documentation, available here. By activating the WhatsApp messaging channel, you're affirming that you have the authority to bind your company/organization to any Non-SFDC Application terms and conditions that are set forth in the Messaging Notices and Licensing Information Documentation.

SEE ALSO:

- Test Your WhatsApp Channel in Service Cloud
- Create Notification Templates for WhatsApp in Service Cloud
- What's Service Cloud Messaging?
- Service Cloud Messaging Limits and Considerations

Create Notification Templates for WhatsApp in Service Cloud

Initiate WhatsApp conversations with customers through outbound notifications. If a customer opts in to receive them, you can send notifications more than 24 hours after your last exchange with the customer.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

User Permissions Needed	
To create, edit, or view processes:	Manage Flow AND View All Data
To view channels:	View Setup and Configuration

User Permissions Needed	
To set up Messaging:	Configure Messaging

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	×	×	✅	×	×

This feature requires the WhatsApp Outbound Messages SKU. You can create and use up to 250 templates for one WhatsApp Business Account. In enhanced WhatsApp channels, notification templates and triggered and agent-initiated outbound messaging aren't supported.

1. Submit your WhatsApp template for approval by sending an email to the WhatsApp Enablement Team. This team will create a tracker document that allows you to submit your template content for review and collaborate on revisions. Depending on the quantity and complexity of your templates, this process can take 2–5 business days.
2. After WhatsApp approves your template, it is ready to deploy in your org. From Setup, enter `Messaging Template` in the Quick Find box, and select **New**.
3. Cut and paste the approved template while replacing the parameter placeholders with your merge fields. Other than the merge fields, the template content must match your WhatsApp submission exactly, including spaces and line breaks.
4. Click **Save**.
5. From Setup, enter `Process Builder` in the Quick Find box, and select **Process Builder**.
6. Click **New**.
   a. In the Process Name field, enter a name for this process.
   b. In the API Name field, enter an API name for this process.
   c. Select the event that triggers the process from the menu. For example, select **Status is changed to Closed**.
   d. To specify an object that triggers the process, click **Add Object**. For example, select **Case**.
   e. To specify the conditions that trigger the process, click **Add Criteria**.
   f. In Immediate Actions, click **Add Action**.
      - In the Action Type menu, select **Messaging Notifications**.
      - In the Action Name field, enter a name for the action.
      - In the Messaging Template field, select a template.
      - In the Channel field, select **WhatsApp channel**.
   g. In the Send To field, select **Messaging User**.
   h. In the Messaging User Record ID field, select the ID field of the Messaging User record.
7. Click **Save**.
8. In the confirmation window, click **Confirm**.

9. When the conditions are met, the process runs and sends the message.

SEE ALSO:

Considerations for Using WhatsApp in Service Cloud

WhatsApp Notification Types in Service Cloud

Send business-initiated, pre-approved, templated notifications at any time in standard WhatsApp channels. There are 10 notification types, each with allowed use cases.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	×	×	✓	×	×

Each template is language- and country-specific. WhatsApp processes each approval request for a new template or an update to an existing template. Approvals can take up to four business days.

Note: WhatsApp notifications don't support the following use cases:

- Product or marketing surveys
- Media files (videos, images, GIFs)
- Recurring content or subscription messaging
- Notifications to multiple customers simultaneously
- Requests to rate or review an app

In enhanced WhatsApp channels, notification templates and triggered and agent-initiated outbound messaging aren't supported.

Template	Allowed Use Case	Examples
ACCOUNT_UPDATE	Notify the message recipient of a change to their account settings	• Profile has changed • Preferences have been updated • Settings have changed • Membership has expired • Password has changed
PAYMENT_UPDATE	Notify the message recipient of a payment update for an existing transaction	• Send a receipt • Send an out-of-stock notification • Notify that an auction has ended • Notify that the status on a payment transaction has changed
PERSONAL_FINANCE_UPDATE	Confirm a message recipient's financial activity	• Bill-pay reminder • Scheduled payment reminder

Template	Allowed Use Case	Examples
		• Payment receipt notification • Funds transfer confirmation or update • Other transactional activities in financial services
SHIPPING_UPDATE	Notify the message recipient of a change in shipping status for a product that has already been purchased	• Order has shipped • Status changes to in-transit • Order is delivered • Shipment is delayed
RESERVATION_UPDATE	Notify the message recipient of updates to an existing reservation	• Itinerary change • Location change • Hotel booking is canceled • Cancellation is confirmed • Car rental pickup time changes • Room upgrade is confirmed
APPOINTMENT_UPDATE	Notify the message recipient of a change to an existing appointment	• Appointment time changes • Appointment location changes • Appointment is canceled
TRANSPORTATION_UPDATE	Notify the message recipient of updates to an existing transportation reservation	• Flight status changes • Ride is canceled • Trip is started • Ferry has arrived
TICKET_UPDATE	Send the message recipient updates or reminders for an event for which a person already has a ticket	• Concert start time changes • Event location changes • Show is canceled • A refund opportunity is available
ISSUE_RESOLUTION	Notify the message recipient of an update to a customer service issue that was initiated in a Messenger conversation, following a transaction	• Issue is resolved • Issue status is updated • Issue requires a request for additional information
ALERT	Notify the message recipient of something informational	• Business hours • Business address

Template	Allowed Use Case	Examples
AUTO_REPLY	Send automatic replies to customers when your business isn't online	• Notify that agents aren't currently available • Send business hours • Send alternative contact information

Test Your WhatsApp Channel in Service Cloud

Test your WhatsApp channel to ensure that it's working the way you expect. Using a sandbox is optional, but a good idea.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	×	×	✓	×	✓

We highly recommend designating separate numbers for sandbox and production. A number can be associated with only one org at a time. While you can move a number from sandbox to production, using separate numbers makes your channel rollout easier. It also gives you more freedom to experiment in your sandbox in the future.

Action	Instructions
(Optional) Set up Messaging in your sandbox.	1. Contact your account executive for the Digital Engagement add-on SKU. 2. Match your sandbox org licenses to your production org by refreshing your sandbox, creating a new sandbox, or using the license-matching method. 3. Complete the steps in Prepare for Messaging for WhatsApp, Facebook Messenger, and SMS. 4. Create your WhatsApp channel. For standard channels, when you file your case with Salesforce Customer Support, request separate numbers for sandbox and production. For enhanced channels, when you create your channel, just enter the number you designated for sandbox testing.
Test your channel in sandbox or production.	1. Log into Salesforce as an agent. 2. From the app launcher, open the app that contains Messaging. This is usually the Service Console. 3. Click the Omni-Channel utility in the footer of your screen. 4. Change your Omni-Channel presence status so that you're online and available to receive messages.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To send and receive messages in Messaging:
- View Setup and Configuration

To end Messaging sessions:
- End Messaging Session

Action	Instructions
	5. From a separate WhatsApp account, send a message to the number associated with your channel. 6. Look for the incoming message in the Omni-Channel utility. Click the check mark icon to accept the message and open the chat window. 7. Exchange messages in the channel. Experiment with sending images, files, and quick text, and test the auto-responses that you've configured. 8. When you're done, click **End Chat**.
(Optional) Switch from sandbox to production.	If you need to move your WhatsApp channel implementation or number from sandbox to production, here's how. 1. Create a change set to move your Messaging implementation from sandbox to production, or manually repeat the setup steps in production. 2. If you couldn't designate a separate number for your sandbox, move the number from sandbox to production. For standard channels, file a case with Salesforce Customer Support to move the number to a new channel in production. For enhanced channels, just enter the number when you create your channel in production. It takes up to 15 minutes for the number to transfer from your sandbox channel.

SEE ALSO:

Sandboxes: Staging Environments for Customizing and Testing

Create a Facebook Messenger Channel in Service Cloud

Let customers communicate with your business using Facebook Messenger. Customers send messages to your Facebook page, and agents reply from the Service Console. To control how incoming messages are routed, link an Omni-Channel flow or routing configuration to your Facebook Messenger channel.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	×	✓	×	✓	×

Before you start, you need a Facebook account, Facebook username and password, and a Facebook page. Use this information to authenticate, or log in, to Facebook so that you can select the Facebook pages to use with Messaging. You must be the administrator of the Facebook page to add the page to Messaging.

1. From Setup in Lightning Experience, enter `Messaging` in the Quick Find box, and select **Messaging Settings**.
2. In the Channels section, click **New Channel** > **Start** > **Facebook Messenger**.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up Messaging:
- Configure Messaging

To authorize Facebook:
- Customize Application AND Manage Auth. Providers

To view channels:
- View Setup and Configuration

3. Choose whether to create a standard or enhanced channel. For help with deciding which type of channel to create, see Compare Messaging Channel Capabilities in Service Cloud. After a channel is created, you can't change its type.
4. Follow the prompts to log into Facebook and select a Facebook page to use with Messaging. You can select only one Facebook page at a time. To set up more Facebook pages, repeat the flow.
5. Click **Next**.
6. In the Chat Acknowledgment field, enter a message that's sent in response to a customer's initial message. For example, thank the customer and let them know you're reviewing their message.
7. Click **Next**.
8. Choose how to route incoming messages to agents. To use an Omni-Channel flow to control routing, select **Stop the setup flow and manually connect to a queue or Omni-Channel Flow**. To use a routing configuration, select **Create a new queue and routing configuration**.

   If you select *Create a new queue...*, the flow takes you though the steps to:

   a. Create a queue.

   b. Create a routing configuration.

   c. Adjust the agent messaging workload.

   d. Exit the flow.

   If you select *Stop the setup flow...*, the flow ends. The channel is created, but its routing must still be configured.
9. (For Omni-Channel Flows routing only) On the Messaging Settings page, find your newly created Facebook Messenger channel and click **Edit**. Under Routing, update your routing properties and save your changes.

Field	Instructions
Enable Advanced Routing	Select this option.
Flow Definition	Select your preferred Omni-Channel flow.
Fallback Queue	Select a queue to receive messaging sessions that the Omni-Channel flow is unable to route.

10. Now that you've set up your channel, take advantage of other features to customize the messaging experience for agents and customers.
    - Set up notifications for your channel
    - Set keywords that customers can use to request help or opt in and out of receiving messages, and create custom auto-responses
    - Add an Einstein bot

    ...and more! For details, see Increase Messaging Productivity.

IN THIS SECTION:

Considerations for Using Facebook Messenger in Service Cloud

Review these considerations before creating a standard or enhanced Facebook Messenger channel.

Test Your Facebook Messenger Channel in Service Cloud

Test your Facebook Messenger channel to ensure that it's working the way you expect. Using a sandbox is optional, but a good idea.

Considerations for Using Facebook Messenger in Service Cloud

Review these considerations before creating a standard or enhanced Facebook Messenger channel.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	×	✅	×	✅	×

General Considerations

- Third-party bots are supported with Facebook Messenger. To learn more, see Deploy Your Bot to Your Channels.
- Facebook doesn't allow a business to respond to an end user's message that is more than 7 days old. Businesses are encouraged to respond within 24 hours.
- Salesforce Messaging uses the `HUMAN_AGENT` Facebook Message tag to ensure that you have 7 days to respond. To learn more, refer to the Facebook documentation: Message Tags.
- Conversations don't end after a customer sends a stop keyword. Manually end conversations with the **End Chat** button.
- The following limitations exist related to Facebook Messenger's automated response features:
  - In standard Facebook Messenger channels, automated responses configured in Facebook Messenger—rather than the responses configured for your channel on the Messaging Settings page in Salesforce—aren't visible to agents in Salesforce. For example, if a customer sends a message to your business that causes Facebook Messenger to send an automated response, the agent can't see the response in the conversation transcript.
  - If a customer starts a conversation with your business by clicking an FAQ in the Facebook Messenger menu, a messaging session isn't created in Salesforce. The customer must manually enter and send a message for the session to be created and routed, but the FAQ and automated response aren't visible to agents.

High-Volume Messages

Facebook imposes a per-day rate limit of 200 times the number of people the business can message using Facebook Messenger. Facebook also has a maximum send rate of 250 requests per second.

When a Facebook page experiences a high volume of messages over a short period or is sending or receiving messages with many threads concurrently, Facebook may automatically change the page to a high-MPS (messages per second) page.

Pages that receive more than 40 MPS convert automatically to high-MPS pages and drop access to Facebook's Page Inbox tool feature. To manually enable the Page Inbox tool, page administrators can select **Retain Access to Page Inbox** in the Facebook Page settings.

To avoid conversion to a high-MPS page:

- Send your messages that aren't time sensitive consistently throughout the day
- Don't send large volumes of messages at the same time

See Pages with High Volume Messages in the Facebook developer documentation for more details.

Enhanced Messaging for Facebook Messenger

- Some features in standard Facebook Messenger channels aren't available in enhanced Facebook Messenger channels, and vice versa. See Compare Messaging Channel Capabilities in Service Cloud.

- While you can't convert a Facebook Messenger channel from standard to enhanced or vice versa, you can maintain both standard and enhanced channels in Salesforce. For example, if you established a standard Facebook Messenger channel, you can keep using that channel and create an additional enhanced channel.
- Outbound messages in enhanced Facebook Messenger channels can't exceed 2,000 characters, excluding attachments.
- In enhanced Facebook Messenger channels, customer messages larger than 9 KB are sent as attachments. Agents can click an attachment in the Conversation component to view the message.
- Triggered outbound messaging isn't supported in enhanced Facebook Messenger channels. Any automatic message notifications triggered by flows or processes aren't sent in enhanced channels.

Content Sharing

You can send several types of content in Facebook Messenger channels. Enhanced Facebook Messenger channels support more content types than standard Facebook Messenger channels do.

Channel Type	Supported File Types	Maximum File Size
Standard Facebook Messenger	.jpg, .jpeg, .png, .gif	25 MB
Enhanced Facebook Messenger	.pdf, .png, .bmp, .tiff, .gif, .jpeg, .jpg, .xbm, .xpm, .mp3, .mp4	25 MB inbound 10 MB outbound

SEE ALSO:

What's Service Cloud Messaging?
Service Cloud Messaging Limits and Considerations
Test Your Facebook Messenger Channel in Service Cloud

Test Your Facebook Messenger Channel in Service Cloud

Test your Facebook Messenger channel to ensure that it's working the way you expect. Using a sandbox is optional, but a good idea.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	×	✅	×	✅	×

We recommend creating a separate Facebook page for testing purposes that you associate with a sandbox. This way, even after your channel is live in production, you can use your sandbox to test further changes.

A Facebook page can technically be associated with messaging channels in more than one Salesforce org. However, we don't recommend linking the same Facebook page to both your sandbox and production orgs. Doing so can lead to duplicate auto-responses and a confusing customer experience.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To send and receive messages in Messaging:
- View Setup and Configuration

To end Messaging sessions:
- End Messaging Session

Action	Instructions
(Optional) Set up Messaging in your sandbox.	1. Contact your account executive for the Digital Engagement add-on SKU. 2. Match your sandbox org licenses to your production org by refreshing your sandbox, creating a new sandbox, or using the license-matching method. 3. Complete the steps in Prepare for Messaging for WhatsApp, Facebook Messenger, and SMS.
Test your channel in sandbox or production.	1. Log into Salesforce as an agent. 2. From the app launcher, open the app that contains Messaging. This is usually the Service Console. 3. Click the Omni-Channel utility in the footer of your screen. 4. Change your Omni-Channel presence status so that you're online and available to receive messages. 5. In another browser, log into a Facebook account that's not associated with your channel. 6. In Facebook Messenger, send a message to the Facebook page that is associated with your channel. 7. Look for the incoming message in the Omni-Channel utility. Click the check mark icon to accept the message and open the chat window. 8. Exchange messages in the channel. Experiment with sending images, files, and quick text, and test the auto-responses that you've configured. 9. When you're done, click **End Chat**.
(Optional) Switch from sandbox to production.	If you need to move your Facebook Messenger channel implementation or number from sandbox to production, here's how. 1. Create a change set to move your Messaging implementation from sandbox to production, or manually repeat the setup steps in production. 2. If you didn't designate a separate Facebook page for your sandbox, move the page to production. a. Log in to Facebook and navigate to the Facebook page that you want to migrate. b. Select **Settings** > **Advanced Messaging**. c. Under Connected Apps, select **Remove** next to the Salesforce Service Cloud listing. d. Log in to your Salesforce production org. e. In Setup, enter `Messaging` in the Quick Find box, and select **Messaging Settings**. f. Click **New Channel** and add the Facebook page as a channel.

SEE ALSO:

Sandboxes: Staging Environments for Customizing and Testing

Change Sets

Set Up SMS Channels in Messaging

Communicate with customers over text using a new or existing number. With Messaging channels for SMS, you can also set up automation to send individual and mass updates over text.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

IN THIS SECTION:

SMS Terminology in Service Cloud

To make the right decisions when setting up an SMS channel in Service Cloud, get to know terms such as P2P, A2P, short codes, long codes, and segmentation.

SMS Number Types in Service Cloud

Select the ideal type of phone number for providing customer service over text. Whether you choose a short code, long code, or both depends on your business needs.

SMS Carrier Filtering in Service Cloud

Carrier filtering is the practice where carriers block the delivery of some or all of the messaging from a specific number or business. To provide the best messaging solution for your customers, you must understand how and when carrier filtering occurs.

Create SMS Long Code Channels in Service Cloud

Let customers communicate with support agents using SMS text messaging. Customers can send text messages to your company, and agents can reply from the Service Console.

Create SMS Short Code Channels in Service Cloud

Use short code phone numbers to send recurring messages and one-time alerts to your US and Canadian customers. When customers respond, they can have two-way conversations with support agents. Short codes have high throughput, which means you can send one-to-many messages and high volumes of one-to-one messages.

Test Your SMS Channel in Service Cloud

Test your new short code or long code Messaging channel to ensure that it's working the way you expect. Using a sandbox is optional, but a good idea.

Set Up Broadcast Messaging in Service Cloud

Broadcast Messaging lets you send one-to-many SMS text messages to contacts, employees, person accounts, and messaging users. To get started, configure your broadcasters' access and create message templates.

SEE ALSO:

Update Service Cloud Messaging Channel Settings

Customize Auto-Responses in Service Cloud Messaging Channels

SMS Terminology in Service Cloud

To make the right decisions when setting up an SMS channel in Service Cloud, get to know terms such as P2P, A2P, short codes, long codes, and segmentation.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

Message Types

Person-to-Person (P2P)

P2P describes conventional two-way SMS or MMS messaging between individuals. P2P messaging is lower-volume. The expectation is for one outbound message to every inbound message, with no more than a 3-to-1 ratio. P2P messages typically use long codes, though this practice can vary by country.

Application-to-Person (A2P)

A2P generally refers to anything that isn't considered P2P, including chatbots and automated campaigns. Sometimes A2P messaging is referred to as enterprise or business messaging. A2P messaging has higher expected volumes than P2P and is typically outbound. However, depending on the number, A2P can include two-way conversational messaging. A2P messages typically use short codes (toll-free is available for the U.S. only). Account permissions limit throughput for A2P messages and rate limits apply.

Message Use Case

The message use case is relevant when determining a solution that is right for your company.

Inbound

A message sent from a customer to your company's number.

Inbound-Initiated

A conversation initiated by a customer.

Outbound

A message sent from your company's number to a customer. Outbound messages can be initiated by an agent, sent through a campaign, initiated by a chatbot, and triggered by an application.

Outbound-Initiated

A conversation initiated by an agent.

Automated Outbound

Bulk or outbound messages triggered by an action in Salesforce or with a bot. A Salesforce admin can trigger an outbound message based on a record change in their org. Examples include messages alerting customers of changes to their case or order, messages acknowledging a request for more information from a new lead, and service alerts.

Outbound Campaign (Broadcast)

A message sent to a list, most commonly used for service-related initiatives. These messages are medium-to-high volume and typically one way, although the product allows outbound messaging to convert to a conversation when a recipient replies to the message.

Number Types

Your company can send messages using several different types of numbers. It's important to understand these terms, particularly because several of them overlap with each other conceptually. For instance, a toll-free number is a type of long code.

Long Codes
These numbers are standard phone numbers like landlines, mobile numbers, and toll-free numbers that can be different lengths based on the country. Typically, long codes are used for interactive conversations or P2P messaging.

A2P Long Code
A number used specifically for A2P communication.

Short Codes
These numbers are shorter than a long code, between 4–8 digits depending on the country of origin. These codes are used for sending high-volume A2P messages, such as automated campaigns, surveys, and announcements. They can support message volumes of 10–500 messages/second. The specific volume limit is country-specific and doesn't translate to the platform throughput. Short codes are registered with the local carrier for use case approval

Toll-Free Number
A type of long code that uses a toll-free number.

Mobile Number (or MSISDN)
A phone number used to identify a mobile subscriber.

Other Terms

Short Message Service (SMS)
SMS messages are sent over a cellular network and support text content. An SMS message can contain 140 bytes of content.

Multimedia Messaging Service (MMS)
MMS messages are sent over a cellular network and can be used to send pictures, video, audio, and phone contacts.

GSM-7
This type of character encoding requires 7 bits per character.

Unicode
This type of character encoding is a more flexible and powerful standard than GSM-7. UTF-8 is the most common unicode encoding type. It uses 1 byte for the first 128 characters and up to 4 bytes for other characters.

Segmentation
If an SMS message is more than 140 bytes, it is segmented into multiple messages. In this case, each segmented message can contain up to 133 bytes. The remaining 7 bytes are used for the header that describes the segment order. Up to six segmented messages can be grouped together.

SMS Number Types in Service Cloud

Select the ideal type of phone number for providing customer service over text. Whether you choose a short code, long code, or both depends on your business needs.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

Review the terms on page 85 and filter guidelines on page 88 before continuing.

For number availability by country basis, see Messaging Regulations by Country. Salesforce will text-enable numbers on behalf of its customers. Depending on the country, customers can use their existing number or a number provided by Salesforce.

The following table details the number type available for the most common use cases.

	Land Line (Long Code)	Toll Free (Long Code)	Short Code	A2P Long Code (Salesforce Provided)	Mobile/MSISDN (Salesforce Provided)
United States	Inbound Initiated Outbound Initiated	Inbound Initiated Outbound Initiated Automated Outbound	Inbound Initiated Outbound Initiated Automated Outbound Campaigns	Not Available	Not Available
Canada	Inbound Initiated Outbound Initiated	Inbound Initiated Outbound Initiated	Inbound Initiated Outbound Initiated Automated Outbound Campaigns	Not Available	Not Available
Other Countries	Not Available	Not Available	Outbound Initiated Automated Outbound Campaigns	Inbound Initiated Outbound Initiated Automated Outbound Campaigns	Inbound Initiated Outbound Initiated Automated Outbound

The following table provides more details about the different number types.

	Standard Long Code	Toll Free Long Code	Short Code
Format	7–15 digit number Standard 10 digit	1–8XX number	4–8 digit number
Throughput	1–2 msgs/sec 1:1 message ratio; 3:1 max* 15K msgs/month max	10–100 msgs/sec (U.S. only), all other follow Long Code P2P Avoid URLs**	10–500 msgs/sec
Message Delivery Quality/Trust	Low	Medium	High
Setup Time	Minutes	Less than 3 days	Weeks

	Standard Long Code	Toll Free Long Code	Short Code
Pre-Approval / Regulatory Compliance Requirements	No	No	Yes

* Ratio of outbound to inbound

** Avoid URLs: If you intend to include a link, relevancy and frequency are important. Particularly problematic are shortened URLs, which have a high potential for getting marked as SPAM.

When choosing a number type, consider these number type limitations, your country's messaging regulations, and the carrier filtering rules on page 88 that can affect your desired use cases.

For more information, see our Digital Engagement knowledge articles, which go into more detail about Salesforce Messaging.

SMS Carrier Filtering in Service Cloud

Carrier filtering is the practice where carriers block the delivery of some or all of the messaging from a specific number or business. To provide the best messaging solution for your customers, you must understand how and when carrier filtering occurs.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	×	×	×	×

Why is filtering used?

The following are some of the main reasons for filtering:

1. To comply with the carrier's policies, or with state, local, or country-specific regulations. Compliance can relate to the message's content or frequency.
2. To enforce rules and regulations that protect mobile subscribers from unwanted or unsolicited messaging, such as SPAM and messages that are abusive, fraudulent, or of questionable content.
3. To prevent P2P messages from being sent through A2P streams, and to prevent A2P messages from using P2P routes. Incorrect routing can affect the line of business (carrier and subscriber) indicated by number type.
4. To reduce the potential for dissatisfied customers who file complaints, take legal action, seek damages, or switch to another carrier for loss of business.

To familiarize yourself with country rules and regulations, refer to SMS Regulations by Country. Because regulations can change, we recommend a legal review of the regulatory bodies that govern the telecommunications systems in the country or territory where you plan to do business.

How are messages filtered?

Filtering techniques can vary from one carrier and country to the next. Filters can be triggered any number of ways, such as from a defined list of terms or from advanced logic with the use of adaptive software systems and machine learning.

Carriers can look at content or volume and, through algorithms, use a scoring system that triggers filtering or blocking when a threshold is met. Scoring can be based on a particular time period, message similarity, message frequency, or when content is deemed as possible SPAM or A2P, such as when content contains a URL.

Machine learning helps these systems adapt constantly as different messages pass through them. As a result, it can be difficult to determine why or how a message was filtered. Upon request, some carriers provide information verifying that a message was blocked, while others don't. Some carriers simply report messages as undelivered to protect the analysis and replication of their filtering algorithms.

Filtering techniques and practices are proprietary and kept strictly confidential by carriers to ensure that they can't be reverse-engineered or circumvented. Just as spammers continuously adapt their approach, carriers continuously change their heuristics to protect subscribers from spammers.

What are some best practices to protect against filtering?

Learn the rules and regulations of your target market. And consider periodically validating your use case, phone numbers, and content for any changes that could impact message delivery. Also, you can apply the following best practices no matter the regulatory logic for a particular market.

1. **Provide clear and easy opt-out instructions.** Message recipients can reach out to their carriers for many reasons. For instance, perhaps a recipient believes that they were contacted in error, that it wasn't clear how to opt out, or that their privacy wasn't respected. In any of these cases, they can request that the carrier block messages.
2. **Avoid URLs.** If you intend to include a link, relevancy and frequency are important. Particularly problematic are shortened URLs, which have a high potential for getting marked as SPAM. If you plan to include a link, they should be associated with a single web domain owned by the customer. Although a full domain is preferred, a URL shortener may be used to deliver custom links. You should avoid common, public, or shared domain shorteners. For example: Bit.ly, Goo.gl, Tinyurl.com, Tiny.cc, Lc.chat, Is.gd, Soo.gd, S2r.co, Clicky.me, budurl.com, Bc.vc.
3. **Personalize the content.** Using identical messages from the same name is a sure way to get flagged and blocked by filtering algorithms. Identical messages don't indicate typical P2P behavior.
4. **Limit the amount and ratio of messaging for P2P.** A significant number of messages within a short period of time from the same number isn't typical human behavior. If there's an expectation of larger-than-normal personalized messages, using multiple numbers can mitigate the risk.
5. **Understand the messaging hours of operation of the target audience.** Guidelines for allowable business messaging can vary from country to country. If you're unclear, limit messaging to the expected hours of operation of your target audience, and consider their time zone.
6. **Keep messaging professional and clearly identify the sender.** By identifying the business, you remind the recipient who you are and that they gave you consent to message them.

What if my messages were incorrectly blocked or filtered?

Messages blocked by filtering result in the associated number being added to the carrier's blocked list. The number is only removed after the carrier's defined (automated) period of time. Carrier's don't unblock the number unless it's clearly blocked in error, which is difficult to validate due to the proprietary nature of filtering.

Long codes blocked for legitimate reasons aren't eligible for, and Salesforce can't request, unblocking or adding the number(s) to the allowed list.

Short codes are pre-registered with the local carrier for use case approval, which results in pre-approved allowed listing. But this allowed listing is limited to a particular type of pre-approved traffic.

Verify that messages aren't blocked by each of the major carriers.

To confirm filtering, test against all major carriers. We know of instances where one carrier blocks an SMS message, but another provider received the message. For example, in the US, test with AT&T, Verizon, and T-Mobile/Sprint to verify that messages are received on the mobile device.

Create SMS Long Code Channels in Service Cloud

Let customers communicate with support agents using SMS text messaging. Customers can send text messages to your company, and agents can reply from the Service Console.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

SMS Long Code messaging is available in Australia, Austria, Belgium, Brazil, Canada, Denmark, Finland, France, Germany, Hong Kong, Hungary, Ireland, Malaysia, Norway, the Philippines, Poland, Portugal, Singapore, Spain, Sweden, Switzerland, Taiwan, the United Kingdom, and the United States.

You can use most existing US or Canadian numbers for SMS channels, or you can request a new number from Salesforce for any supported country. Either way, to create your channel, you must file a case with Salesforce Customer Support.

Note: Messaging doesn't support mobile or Voice Over IP phone numbers.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up and edit Messaging channels:
- Configure Messaging

To view channels:
- View Setup and Configuration

1. Complete the steps in Prepare for Messaging for WhatsApp, Facebook Messenger, and SMS.
2. From Setup in Lightning Experience, in the Quick Find box, enter *Messaging*, and then select **Messaging Settings**.
3. In the Channels section, click **New Channel** to open the guided setup flow.
4. Click **Start**.
5. Click **SMS**.
6. If you plan to use an existing US or Canadian landline phone number for your SMS channel, download and complete the Letter of Authorization (LOA) form. The LOA lets Salesforce enable your phone number for your channel. If you plan to use a new number, it isn't necessary to complete the LOA.
7. Click **Finish** to end the setup flow.
8. Request the creation of your SMS channel by filing a case with Salesforce.
   a. From Salesforce Help & Training, click **Contact Support** in the top left corner. Log in, if needed.
   b. On the Support home page, click **Create a Case** > **Product or Technical Support**.
   c. Provide these details in your case.

Use an existing number (US and Canada only)	Request a new number (supported countries only)
• Product: *Service* • Topic: *Digital Engagement*	• Product: *Service* • Topic: *Digital Engagement*

Use an existing number (US and Canada only)	Request a new number (supported countries only)
• Case Subject: `Create SMS channel with existing phone number` • Sandbox or production org ID for the new channel • Time zone of the contact person • Severity level (typically 3 or 4) • Email addresses of any case collaborators • Attach the signed LOA, including your full Customer Legal Number, account number, and the phone number you want to use for your SMS channel.	• Case Subject: `Phone number request for [country name]` • Sandbox or production org ID for the new channel • Time zone of the contact person • Severity level (typically 3 or 4) • Email addresses of any case collaborators • If you're participating in the Enhanced Messaging pilot, indicate whether the channel should be a standard or enhanced channel. Enhanced channels require a new number. After a channel is created, you can't change its type. • Attach a completed Digital Engagement Phone Number Request form, which you can download from SMS Regulations by Country.

9. Click **Create Case**.
10. Sit tight while Salesforce processes your SMS channel request, which can take some time.

> **Important:** Registering a new toll-free phone number in the US and Canada can take up to 8 weeks. Salesforce Customer Support provides new toll-free numbers, but has no control over number registration. Your case will be closed once your toll-free number is assigned to your org. You will receive an email confirmation when your number is submitted for registration. If you need further help, respond to that email.

When you receive a confirmation email from Salesforce that your channel is ready, go to the Messaging Settings page in Setup. Find your channel in the list, and then customize its settings.

IN THIS SECTION:

Considerations for Long Code Messaging Channels

Use text messaging to help agents connect with customers even when they're on the go. Review these considerations before creating an SMS channel in Messaging in Service Cloud.

SMS Regulations by Country

Regulations for SMS communication differ by country and carrier. Before you set up an SMS channel in Service Cloud Messaging, review your country's messaging regulations to avoid fines or blocked messages.

SEE ALSO:

Update Service Cloud Messaging Channel Settings

Considerations for Long Code Messaging Channels

Use text messaging to help agents connect with customers even when they're on the go. Review these considerations before creating an SMS channel in Messaging in Service Cloud.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

General Considerations

- SMS messages are subject to carrier filtering. This means that messages may not be delivered if they break country- or network-specific rules, or if they're flagged as spam. To avoid filtering, make sure that your messages follow the guidelines of the country that you're sending them in.
- The maximum length of a single message is approximately 840 characters. The maximum length can vary depending on the language and characters used in the message, because most non-English-based characters are considered double-byte and require more capacity to send. Messages over 840 characters aren't sent.
- For more industry-specific considerations about message deliverability, refer to Digital Engagement SMS Messaging Reference.

Non-US/Canada Considerations

- Salesforce only supports "in-country messaging," that is, a phone number of one country messaging a phone number from the same country. If you want to message international customers, request a number from their country.
- The rate applied for international messages is based on the phone number location not your geographical location.

Message Length

A single text message has a 140-byte limit. When using a 7-bit character encoding, such as GSM7, a single message can be up to 160 characters long. However, if you use non-GSM7 characters, such as Asian characters, they can be encoded using UCS-2, which requires 2 bytes per character. A message with multibyte characters can contain fewer total characters per message.

Segmenting

If a message is more than 140 bytes, it is segmented into multiple messages. In this case, each segmented message can contain up to 133 bytes. The remaining 7 bytes are used for the header that describes the segment order. Up to six segmented messages can be grouped together.

Content Sharing

You can send several types of content in SMS channels that are associated with a long code phone number.

Channel Type	Supported File Types	Maximum File Size
SMS long codes	.jpg, .jpeg, .png, .gif	• AT&T: 1 MB • T-Mobile: 1 MB • Verizon: 1.2 MB

Channel Type	Supported File Types	Maximum File Size
		• Sprint: 2 MB • US cellular: 500 KB
SMS toll-free long codes	.jpg, .jpeg, .png, .gif	525 KB

SEE ALSO:

Service Cloud Messaging Limits and Considerations

What's Service Cloud Messaging?

SMS Regulations by Country

Regulations for SMS communication differ by country and carrier. Before you set up an SMS channel in Service Cloud Messaging, review your country's messaging regulations to avoid fines or blocked messages.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

You can use most existing US or Canadian numbers for SMS channels, or you can request a new number from Salesforce for any supported country. Either way, to create your channel, you must file a case with Salesforce Customer Support.

If you request a new long code phone number for SMS, sometimes you're required to attach country-specific messaging forms to your case. To view your country's messaging regulations, click your country's name, and then download the forms attached at the end of each article. If you don't see an attachment, no form is required.

Note: The following articles are available only in English.

Australia (AU)
Austria (AT)
Belgium (BE)
Canada (CA)
Denmark (DK)
Finland (FI)
France (FR)
Germany (DE)
Hong Kong (HK)
Hungary (HU)
Ireland (IE)
Malaysia (MY)
Norway (NO)
Philippines (PH)
Poland (PL)
Portugal (PT)
Singapore (SG)
Spain (ES)
Sweden (SE)
Switzerland (CH)
Taiwan (TW)
United Kingdom (UK)

United States (US)

Create SMS Short Code Channels in Service Cloud

Use short code phone numbers to send recurring messages and one-time alerts to your US and Canadian customers. When customers respond, they can have two-way conversations with support agents. Short codes have high throughput, which means you can send one-to-many messages and high volumes of one-to-one messages.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

Want to see short codes in action? Watch our video.

Watch a video

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up Messaging:
- Configure Messaging

To view channels:
- View Setup and Configuration

1. To request the Short Code add-on SKUs, contact your Salesforce account executive.
2. After you acquire the Short Code add-on SKUs, see Messaging Short Code Application Process for details on how to get your short code phone number acquired and approved.

   Important: The short code channel approval and provisioning process takes 10–16 weeks.

3. When your short code channel is approved, log in to Salesforce.
4. Complete the steps in Prepare for Messaging for WhatsApp, Facebook Messenger, and SMS.
5. From Setup in Lightning Experience, enter `Messaging` in the Quick Find box, and select **Messaging Settings**.
6. In the Channels section, refresh your list of channels. A short code channel appears in the Messaging channels list view.
7. Click the dropdown arrow next to your short code Messaging channel, then click **Edit**.
8. Under Automated Responses, fill in the fields. Keep in mind that short code channels have specific compliance requirements. Here are the fields that are specific to short codes. To learn more, see Customize Auto-Responses in Service Cloud Messaging Channels.
   a. Opt-In Keywords
   b. Opt-In Confirmation
   c. Opt-Out Confirmation
   d. Opt-In Prompt
   e. Require Double Opt-In
   f. Double Opt-In Keywords
   g. Double Opt-In Prompt
   h. Help Keywords
   i. Help Response
   j. Custom Keyword

k. Custom Response

Important: When you use short codes, your business is required to follow carrier compliance requirements, industry standards, and applicable law. The CTIA sometimes audits short code Messaging channels. To learn more, see the CTIA Short Code Monitoring Handbook and Canadian Common Short Codes.

9. Click **Save**.

IN THIS SECTION:

Considerations for Short Codes
Short code Messaging can unlock new potential for your business, but with great power comes great responsibility. When you use short codes, your business is required to follow carrier compliance requirements, industry standards, and applicable laws.

Considerations for Short Codes

Short code Messaging can unlock new potential for your business, but with great power comes great responsibility. When you use short codes, your business is required to follow carrier compliance requirements, industry standards, and applicable laws.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

What Are Short Codes?

Short codes are 5- or 6-digit phone numbers. Unlike long code phone numbers, short codes have few limits on throughput, volume, or inbound-to-outbound ratios. That's why we recommend them for high-volume use cases, like recurring messages and alerts.

You can use short codes for single-message and recurring-message programs. We currently support only service use cases—not marketing promotions.

Your company's automated responses can be a maximum of 160 characters.

For more information about using short codes in the US, see the CTIA Short Code Monitoring Handbook.

How Are Short Code Messages Routed?

Short code channels use the same Omni-Channel routing as your other channels. If a customer responds to an agent-initiated outbound message, their message is routed to the agent who started the conversation. Otherwise, inbound messages are added to the queue or skill and assigned to an available agent. To learn more about Omni-Channel routing, see Omni-Channel for Administrators.

Opting in to Messages

Customers must opt in to receiving messages before your business can start sending them. For example, customers can:

- Enter their phone number in an online form
- Sign up at a point-of-sale location
- Send a text to your short code number

This type of opt-in is called *explicit opt-in*. When a customer sends a text to your short code, we send them your opt-in prompt. You can customize this text, along with your other short code responses, by navigating to **Setup** > **Messaging Settings** > **Edit** > **Opt-In Confirmation**.

Tip: Your opt-in prompt must contain certain details. Here's an example:

```
To subscribe to [Campaign Name] [Description] Alerts, reply YES. Reply HELP for
help. Reply STOP to cancel at any time. Msg&data rates may apply.
```

When they respond with an opt-in keyword, we mark the Messaging User object as explicitly opted in and send them a confirmation text. You can customize this response for every language you support.

Tip: Here's an example:

```
You're now subscribed to [Campaign Name] [Description] Alerts. Reply HELP for help.
Reply STOP to cancel at any time. Call [toll-free number] for support. Msg&data
rates may apply.
```

Optionally, you can require customers to verify that they want to receive texts from your businesses. This extra step is called *double opt-in*. You can add this requirement for your short code channel by navigating to **Setup** > **Messaging Settings** > **Edit** > **Required Double Opt-In**. Write your double opt-in keywords and a double opt-in prompt. You can customize this response for every language you support.

Tip: Here's an example:

```
To confirm your subscription to [Campaign Name] [Description] Alerts, reply START.
Reply HELP for help. Reply STOP to cancel at any time. Msg&data rates may apply.
```

Opting Out of Messages

To stay compliant, you must allow Messaging users to opt-out of receiving text messages from your short code. Messaging users can opt out by texting the keywords **STOP**, **STOPALL**, **CANCEL**, **END**, **QUIT**, and **UNSUBSCRIBE** to your short code. They can also opt out during a Messaging session by communicating that intention to a support agent, who can manually opt them out.

When a Messaging user texts an opt-out keyword, the Messaging channel must opt out the user and respond with a compliant opt-out confirmation text. You can customize this response for every language you support.

Tip: We suggest keeping your opt-out confirmation text short. Here's an example:

```
You are unsubscribed from [Campaign Name] [Description] Alerts. No more messages
will be sent. Reply HELP for help or call (toll free number).
```

Anyone who texts an opt-out keyword to your short code receives this response, even if they aren't subscribed to your messages.

Requesting Help

You're required to send a compliant response when a Messaging user texts a help keyword to your short code. You can customize the response text by navigating to **Setup** > **Messaging Settings** > **Edit** > **Help Response**. You can customize this response for every language you support.

Tip: Your help response must contain certain details. Here's an example:

```
[Campaign Name] [Description] Alerts: Help at [source of help] or [toll free number].
Msg&data rates may apply. [Message frequency]. Text STOP to cancel.
```

Anyone who texts a help keyword to your short code receives this response, even if they aren't subscribed to your messages.

To stay compliant, your help response must contain these details:

- Campaign name—The name of your company or organization
- Description—A single word or phrase to define the alerts, such as “Account Alerts”
- Help sources—You **must** provide a toll-free phone number or a support email address, in addition to any other forms of help
- Disclaimer—Msg&data rates may apply.
- Message frequency—Must be specific, but can be any interval, such as “1 message per day,” “2 messages per month,” or “1 message per transaction.” "Message frequency varies" is also acceptable.

Using Custom Responses

Use custom keywords and responses to account for country-specific regulations, or to share other information specific to your company. You can customize your keywords and responses by navigating to **Setup** > **Messaging Settings** > **Edit** > **Custom Responses**. You can also customize this response for every language you support.

Using Short Codes in Canada

Because Canada has two official languages—English and French—short code keywords and automated responses must account for both languages. Canada has five mandatory keywords for short codes: **HELP**, **INFO**, **AIDE**, **STOP**, and **ARRET**. When a customer texts one of these keywords to your short code, they must receive an automated response. These responses must be sent in the same language as the corresponding keyword—for example, **STOP** returns an English response and **ARRET** returns a French response.

SEE ALSO:

Service Cloud Messaging Limits and Considerations

Test Your SMS Channel in Service Cloud

Test Your SMS Channel in Service Cloud

Test your new short code or long code Messaging channel to ensure that it’s working the way you expect. Using a sandbox is optional, but a good idea.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To send and receive messages in Messaging:

- View Setup and Configuration

To end Messaging sessions:

- End Messaging Session

To create an SMS channel in either sandbox or production, you must file a case with Salesforce Support. When you file the case, we recommend requesting separate numbers for sandbox and production. A number can only be associated with a single org at a time. While Salesforce Support can move your number from sandbox to production, using separate numbers makes your channel rollout easier. It also gives you more freedom to experiment in your sandbox org in the future.

If you’re testing a short code channel, you might decide to use the same short code number for both orgs, and ask Salesforce Support to move it from sandbox to production when you're done testing. Talk with your account executive to understand the cost of short code numbers. SMS messages sent through your sandbox org are treated as normal messages and deducted from your total conversation allowance.

Action	Instructions
(Optional) Set up Messaging in your sandbox.	1. Contact your account executive for the Digital Engagement add-on SKU. 2. Match your sandbox org licenses to your production org by refreshing your sandbox, creating a new sandbox, or using the license-matching method. 3. Complete the steps in Prepare for Messaging for WhatsApp, Facebook Messenger, and SMS.
Test your channel in sandbox or production.	1. Log into Salesforce as an agent. 2. From the app launcher, open the app that contains Messaging. This is usually the Service Console. 3. Click the Omni-Channel utility in the footer of your screen. 4. Change your Omni-Channel presence status so that you're online and available to receive messages. 5. From your phone, send a text message to the phone number that is associated with this channel. 6. Look for the incoming message in the Omni-Channel utility. Click the check mark icon to accept the message and open the chat window. 7. Exchange messages in the channel. Experiment with sending text and images, and test the auto-responses that you've configured. 8. When you're done, click **End Chat**.
(Optional) Switch from sandbox to production.	If you need to move your SMS channel implementation or number from sandbox to production, here's how. 1. Create a change set to move your Messaging implementation from sandbox to production, or manually repeat the setup steps in production. 2. If you didn't designate a separate phone number for your sandbox, file a case with Salesforce Support to move the number to a new channel in your production org.

SEE ALSO:

Sandboxes: Staging Environments for Customizing and Testing

Change Sets

Set Up Broadcast Messaging in Service Cloud

Broadcast Messaging lets you send one-to-many SMS text messages to contacts, employees, person accounts, and messaging users. To get started, configure your broadcasters' access and create message templates.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	×	×	×	×

Before you start, create a Messaging channel for text messages associated with a working phone number. You can use a short code or toll free number. Then, associate your channels with a queue.

Note: If you request that Salesforce enables a phone number for use with Messaging, phone numbers are activated after the Messaging setup instructions are completed. Upon receipt of the signed Letter of Authorization, enablement of a phone number occurs within 3 business days for 1-800 numbers and within 1 business day for all other numbers. This letter is provided in the Messaging setup instructions. Not all phone numbers can be enabled.

Unused conversations and triggered and bulk messages are forfeited at the subscription's end date. To purchase additional conversations or triggered and bulk messages, contact your Salesforce representative.

Now, let's review key broadcasting terms.

Broadcaster
The user or users who send bulk messages. Admins can be included in the broadcasters group.

Recipients
The people receiving your message. They can be customers, employees, or any other group you want to contact.

Sender Number
The number or numbers that you're sending your message from. A sender number can be a short code or toll free number. Don't use a long number for broadcast messages, as carriers impose limits for bulk text messages from long numbers.

Opt In
Opting in is how your recipients provide consent to receive messages from you. We send messages only to recipients who explicitly opted in. You can view someone's consent status on their Messaging User record.

When Broadcast Messaging is turned on, a few things happen.

- You receive custom list views named Bulk SMS Contacts, Bulk SMS Employees, and Bulk SMS Messaging End Users. These views help you manage your recipient lists.
- The "Send One-to-Many Messages" user permission can be assigned to users.
- The Broadcast Messages tab can be added to a standard or console app so broadcasters can view sent broadcast messages.

To set up Broadcast Messaging, you will follow these steps.

1. Assign broadcasting permissions and help your team view Messaging information for recipients.
2. Create messaging users so you can track recipients' opt-in status. Messages can't be sent without creating messaging users first.
3. Create required messaging templates so your broadcasters can send messages.
4. Add the Broadcast Messages tab to the Service Console so your team can view sent broadcast messages.

Note: For usage restrictions that apply to this product, see this document.

For information on the features included in the Digital Engagement subscription, see our pricing docs.

IN THIS SECTION:

Considerations for Broadcast Messaging
Review considerations and tips regarding Broadcast Messaging.

Create and Assign a Broadcaster Permission Set
Give broadcasters permission to send one-to-many messages in an SMS messaging channel. Optionally, set them up with Messaging and Omni-Channel permissions to have one-to-one conversations with recipients.

Write Effective Broadcast Messages
Broadcast informative, useful messages to customers and employees in your SMS channel in Messaging.

Add the Broadcast Messages Tab to an App

If you're using broadcasting in your SMS messaging channel, let your broadcasters view your company's sent messages on the Broadcast Messages tab.

Send Broadcast Messages

Send a bulk SMS from a contact, employee, person account, or messaging user list view. View your company's sent broadcast messages in the Broadcast Messages tab.

Considerations for Broadcast Messaging

Review considerations and tips regarding Broadcast Messaging.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

- SMS is the only supported channel type for Broadcast Messaging.
- Don't use a long number for broadcast messages, as carriers impose limits for bulk text messages from long numbers.
- Messaging templates are required to send a message. Create messaging templates for broadcasters before they attempt to send messages.
- Messaging User records are required for your recipients, even if you're sending a message from another object type. Messaging User records contain the recipient's consent status..
- You can use Broadcast Messaging for employees only if you've purchased Work.com. Otherwise, use contacts, person accounts, or messaging users.
- It's possible to go over your SMS allotment. If you send more messages than you've paid for, our team will help you make another payment.
- We don't search for duplicate recipients when sending broadcast messages. If you send a broadcast message from multiple sender numbers, and a recipient is opted into more than one of those numbers, they receive multiple messages.
- Broadcast Messaging and Messaging can be used together, and sometimes a broadcast message can appear in an active Messaging session. If the active session and the broadcast message use the same sender number, a broadcast message sent during the active session appears in the conversation.
- Be mindful of the values you store about your recipients. We recommend that you avoid collecting information that you don't need and any vulnerable information that could be used for discrimination. To learn more, see our Acceptable Use and External-Facing Services Policy.

Create and Assign a Broadcaster Permission Set

Give broadcasters permission to send one-to-many messages in an SMS messaging channel. Optionally, set them up with Messaging and Omni-Channel permissions to have one-to-one conversations with recipients.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

EDITIONS

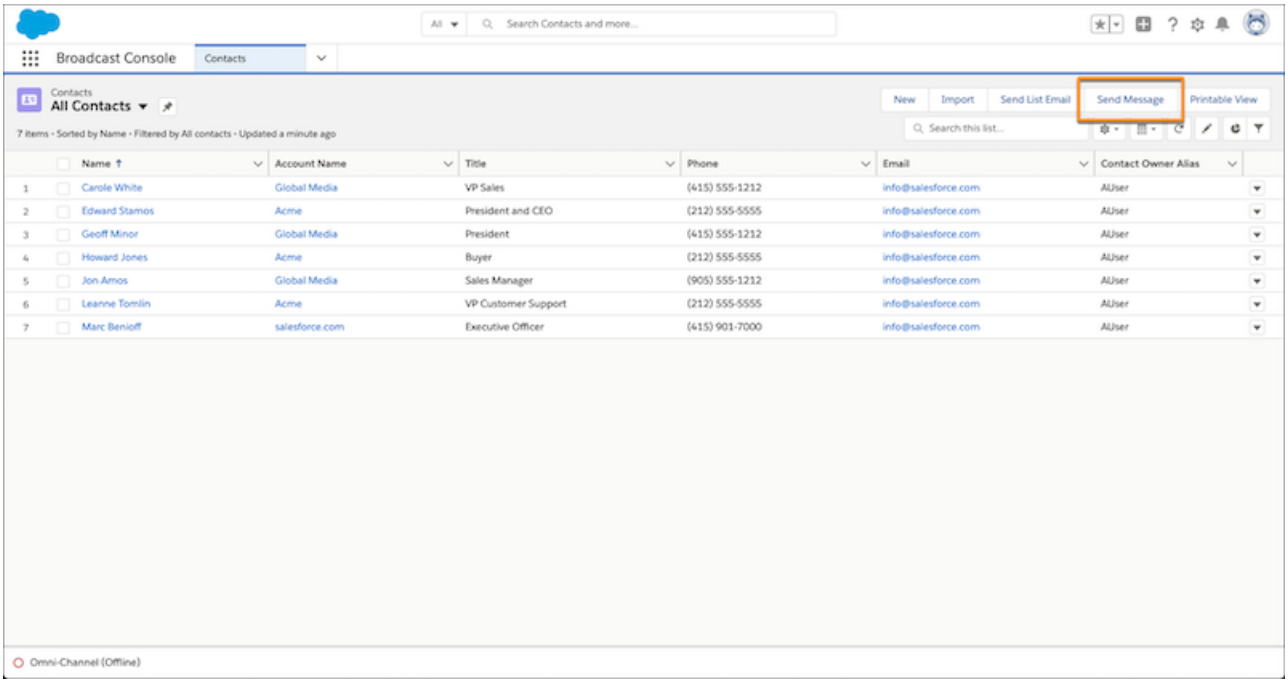
Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign permission sets:
- Assign Permission Sets

1. Create a permission set for broadcasters.
   a. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
   b. Click **New**.
   c. For Label, enter a name for the permission set. The API Name is automatically filled.
   d. Skip the section about user licenses. If you select a user license, App Permissions aren't available.
   e. Save your changes.
   f. In the details page, select **Object Settings** > **Messaging Sessions**.
   g. Click **Edit**, give view access to all, and then give the appropriate access for your users or roles.
   h. Click **Save**.
   i. Go back to the Object Settings page and select **Messaging Users**.
   j. Click **Edit**, give view access to all, and then give the appropriate access for your users or roles.
   k. Click **Save**.
   l. Go back to the Permission Set Overview page and select **App Permissions**.
   m. Click **Edit**, then enable *Agent Initiated Outbound Messaging*, *Messaging Agent*, and *Send One-to-Many Messages*.
   n. Click **Save**.
2. Assign the permission set you created.
   a. From Setup, in the Quick Find box, enter *Users*, and select **Users**.
   b. Select the name of the user that you want to assign the permission set to.
   c. Under Permission Set Assignments, click **Edit Assignments**.
   d. Move the permission set that you created to the Enabled Permission Sets list.
   e. Save your changes.
   Users with the broadcaster permission set see the **Send Message** button in any contact, person account, employee, and messaging user list view.



Note: Users with these permissions can send one-to-many SMS and one-to-one SMS, assuming that Omni-Channel is enabled and your broadcasters are added to a messaging queue. If you want your broadcasters to send one-to-one messages, in addition to these steps, you must set up Service Presence Status Access and enable End Messaging Session.

Write Effective Broadcast Messages

Broadcast informative, useful messages to customers and employees in your SMS channel in Messaging.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

Create Broadcast Messaging Templates

Write messages for broadcasters to send to recipients. Broadcasters can't create templates or send a message without a template, so create as many templates as you think your team needs. For instructions, see Create Templates for Automatic Message Notifications.

Tip: To visually group your broadcast messages and help your team find what they're looking for, add a prefix to your template names. For example, name your waitlist-related message templates "Waitlist - Joined," "Waitlist - 10 Min Warning," and "Waitlist - Removed."

Mind the Character Limit

Text messages are limited to 160 characters for most carriers. If your message exceeds your carrier's limit, your message is sent in multiple text messages. Keep your message short to avoid paying for extra messages.

Stay On Topic
Your recipients opted in to your messages for a specific purpose. Avoid sending frequent, off-topic messages or sharing information that's better suited for email. If recipients feel like you're oversharing, they opt out.

Personalize Sparingly
It's great to include your recipient's name in a message here and there with a merge field. But too much personalization can be overwhelming, and it can use up your character count.

Use a Link Shortener
If you include links in your messages, use a link shortener to save space. Links count against the 160-character limit.

Include a Call to Action
A call to action makes your message more useful to recipients. For example:

- When you send an informational message, consider including a link they can visit to learn more.
- When you remind recipients about an event or appointment, provide a text reply or phone number they can use to confirm or cancel.
- When you notify recipients about their spot on a wait-list, tell them how they can remove their name if they change their mind.

Examples of Broadcast Messages

See example text messages that can be send using Broadcast Messaging.

Bulk Customer Service Updates

Send bulk updates to your customers when you have a widespread service-related announcement.

Service Outage
Service maintenance window: we'll be offline for maintenance from `1am–2am` in your area.

Change in Customer Service Availability
Our service reps are working reduced hours due to `a weather event`. Expect response time up to `48 hours`.

Queue Notifications

To manage a queue, we recommend sending a text when the recipient joins the list, when they are at the top of the list, and when they remove themselves from the list.

Recipient Joined the List
You're in line for `Business Name`. We'll send an update when you're next in line. Text CANCEL to cancel.

Recipient is at the Top of the List
You're next in line to shop at `Store Name`! You have `10 min` to check in. Text CANCEL to cancel.

Recipient Left the List
You've been removed from the list. We hope to see you another time.

Appointment Reminders

Send confirmations and reminders for appointments. We recommend letting the recipient know that they've scheduled their appointment and what they can do to cancel or reschedule. Consider moving appointment confirmations to text so your staff can respond to other phone calls.

Appointment was Scheduled or Rescheduled
Your appointment is scheduled for `WED 7/1 @ 11am`. Text YES to confirm. Call `000–000–0000` to reschedule.

Appointment Confirmation with Instructions
Confirmed! Arrive *15 min* before your appt. Call *000-000-0000* for help.

Updates for Hospitality Guests

Send updates to your hospitality guests so they know when there are changes in your facility.

Improved Hygiene Process
We introduced new cleaning and safety standards according to CDC and county guidance. Learn more: *shortlink*

Facility is Closed
Hotel guests: The pool is closed for cleaning until *10am tomorrow*.

Get your workout in ASAP! The gym is closed for construction starting *THU 7am*.

Reduced Amenity Hours
The *Hotel Name* restaurant and bar is reducing hours to *5pm-8pm*. Room service is available *24/7*.

Education Facility Updates

Send updates about your school's facilities to students and their families.

School Facility is Closed
The cafeteria is converting to contactless pickup. Download the app to order ahead: *shortlink*

Publicly-Accessible Location is Restricted
Our public gym is restricting hours and capacity due to city restrictions. More info: *shortlink*

Employee Messages

Communicate important information to your employees. The Employee object is available only if you've purchased Work.com.

Wellness Survey Notification
This week's wellness survey is ready for you. Please respond by *11/9*: *shortlink*

Temporary Location Closure
We're temporarily closing the *Main St.* location *1/4-1/24*. Call *000-000-0000* to request a transfer.

Add the Broadcast Messages Tab to an App

If you're using broadcasting in your SMS messaging channel, let your broadcasters view your company's sent messages on the Broadcast Messages tab.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	×	×	×	×

The Broadcast Messages tab displays the name, template, content, and number of recipients for each sent message. You can add the tab to both standard and console navigation apps.

1. Go to **Setup** > **Apps** > **App Manager**.
2. Open the menu next to a Lightning app, and click **Edit**.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

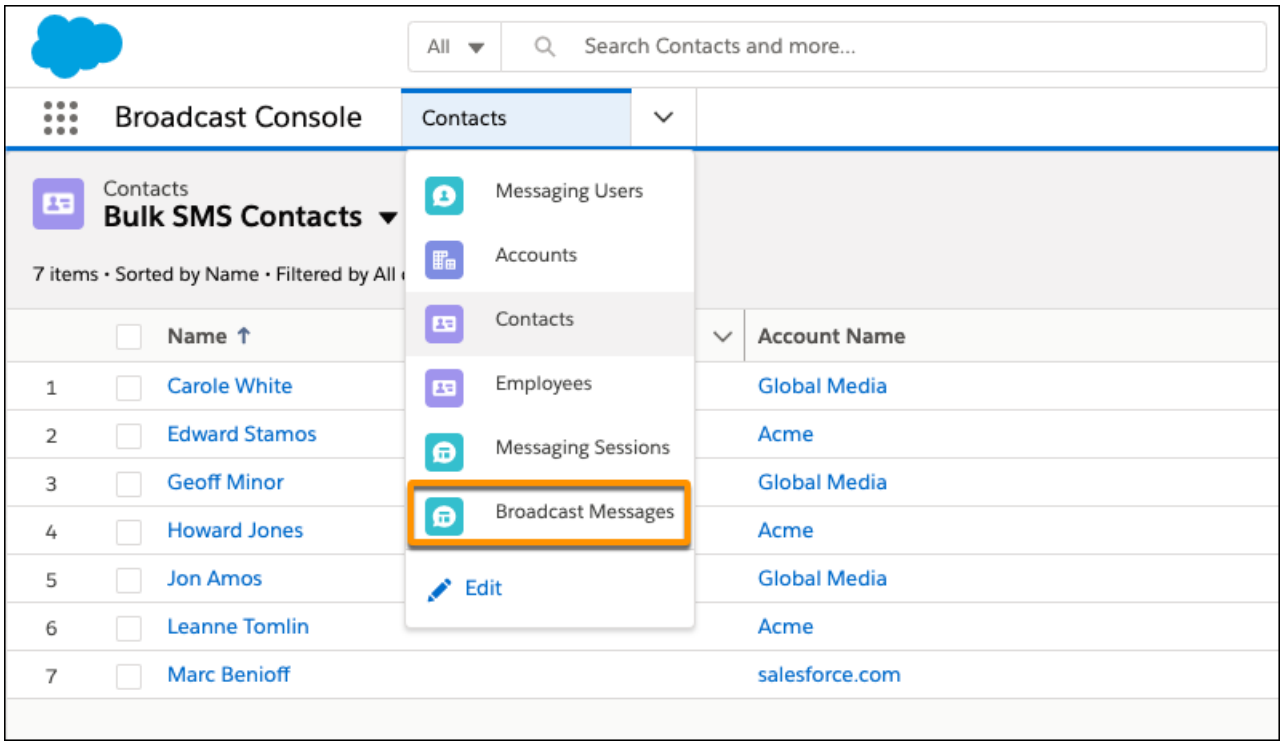
USER PERMISSIONS

To view apps:
- View Setup and Configuration

To manage apps:
- Customize Application

3. In Lightning App Builder, click **Navigation Items**.
4. Select **Broadcast Messages**, and move it to the Selected Items list.
5. Click **Save**.
6. To return to the App Manager page, click **Back**.

To confirm that Broadcast Messages was added to your app, open the app using the App Launcher. You can open Broadcast Messages from the navigation menu.



Send Broadcast Messages

Send a bulk SMS from a contact, employee, person account, or messaging user list view. View your company's sent broadcast messages in the Broadcast Messages tab.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	×	×	×	×

1. Open a contact, employee, person account, or messaging user list view. Employee is available only if your company purchased Work.com.

   If you want to message only a subset of people in the list view, select them. If you select no one, then your message is sent to everyone in the list view.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

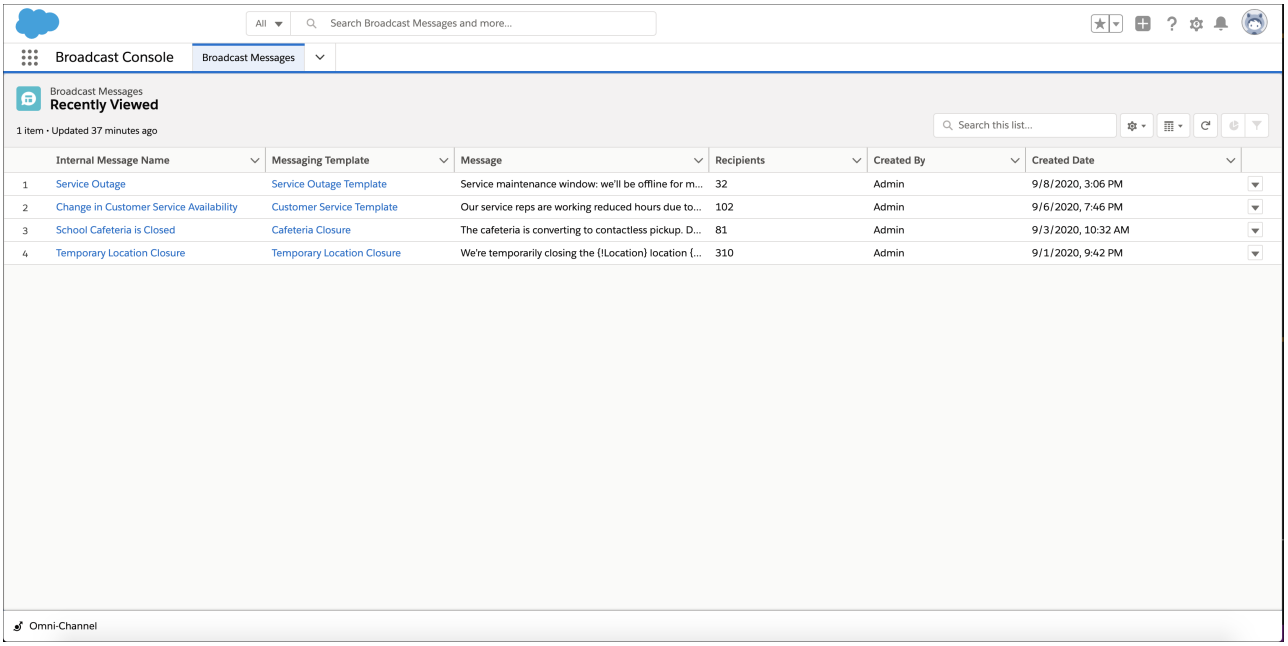
USER PERMISSIONS

To send one-to-many messages:

- Send One-to-Many Messages

2. Click **Send Message**.
3. Confirm the sender numbers that you want to send this message from, and click **Next**.
4. Give your message an internal name.
5. Select a messaging template. If you don't see one that fits, ask your Salesforce admin to create one for you.
6. Click **Next**.
7. Review your message, and click **Send**.

To see sent broadcast messages, open the app containing the Broadcast Messages tab. Then select **Broadcast Messages** from the navigation menu. You can see each message name, the template used, the message content, and the number of recipients.



Increase Messaging Productivity

After you set up the basics of your Messaging for In-App and Web, WhatsApp, Facebook Messenger, or SMS channels, get started with efficiency-boosting features such as auto-responses, triggered outbound message notifications, and messaging components.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

IN THIS SECTION:

Interactive Messaging Components

Help support agents and customers exchange information faster in enhanced Facebook Messenger channels and Messaging for In-App and Web using structured content. Share links, questions with predefined options, available time slots, post-conversation surveys, and more.

Set Up Automatic Message Notifications in Service Cloud

Send SMS, WhatsApp, or Facebook Messenger messages to customers based on certain events. For example, notify customers about the status of their case: "John, your case <Case Number 123456> has been resolved." Also known as triggered outbound messaging, this feature is supported only in standard Messaging channels.

Customize Auto-Responses in Service Cloud Messaging Channels

Customize auto-responses for common scenarios in messaging sessions, and set keywords that customers can use to perform actions like opting out of receiving messages. Some auto-response options are available only in enhanced Messaging channels.

Update Service Cloud Messaging Channel Settings

Configure your settings for WhatsApp, Facebook Messenger, or SMS Messaging channels.

Persist Secure Messaging History Across Multiple Devices with User Verification

Securely connect your customers to their messaging history and persist conversations across devices with user verification.

Considerations for Using Enhanced Bots in Messaging Channels

To take your use of AI to the next level, add an enhanced bot to your Messaging for In-App and Web channels or enhanced Messaging channels.

Track Messaging Users in Salesforce

What a customer messages your company, Salesforce creates a messaging user record for them. The messaging user record can include the customer's name, phone number or Facebook name, and consent status. Messaging user records are required for your recipients, even if you're sending messages to contacts, employees, or person accounts.

Report on Messaging Activity in Service Cloud

To track your service team's messaging activity in WhatsApp, Facebook Messenger, or SMS channels, create custom report types on Messaging objects.

Set the Enter or Return Key to Insert a New Line of Text Instead of Send a Message in Messaging for Web

By default, Messaging for Web is configured so that the Enter or Return key sends a message. To make it start a new line of text instead, change the deployment settings.

Show the Emoji Keyboard in Messaging for Web

Choose to allow messaging for web customers to send emojis to agents in messaging conversations. On the Embedded Service Deployment Settings page, turn on the keyboard.

Show Customers an Estimated Wait Time in the Messaging Conversation Window

Automatically tell customers how many minutes they'll wait before being connected to an agent. Build customer trust by setting expectations.

Move Your Messaging Channels from Salesforce Classic to Lightning Experience

Messaging in Salesforce Classic depends on the LiveMessage managed package, while Messaging in Lightning Experience uses standard Salesforce objects and features. Learn how to move your SMS or Facebook Messenger channels to Lightning Experience.

Protect Customer Data and Privacy in Service Cloud Messaging

Honor your Messaging customers' special requests regarding the handling of their personal data.

Messaging channels that this article applies to						
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

How Messaging Data is Stored

Salesforce automatically creates and saves a transcript for each messaging session. Messages exchanged with a bot are also stored in the conversation transcripts. To be transparent with your customers, you can include this information in the auto-response shown when customers send a message to your company. Here are a few sample Conversation Acknowledgment messages:

Thanks for your message. An agent will be with you shortly. Just so you know, we may record and track conversations to help improve your experience.

Before we get started, note that your conversations may be stored for quality, training, or other purposes.

This article isn't legal advice, so to make sure that you address any compliance considerations related to the storage or use of messaging transcripts, check with your legal counsel.

How You Can Protect Customer Data

Salesforce lets companies add new fields to objects associated with data privacy. To learn how to add these fields, see Fields in Data Privacy Records.

Customers might ask your company to handle their data in the following ways.

- Delete personal data associated with a customer who has messaged your company via Messaging.
- Track customers' approval for how your company interacts with them via Messaging.
- Restrict how Messaging processes personal data.
- Export customer-related data.

You can address their requests in the following ways.

- If data privacy fields were added to objects, admins can search for those fields and manually delete personal data. You can also perform global searches for customer data on each object.
- To delete personal data associated with a customer who has sent messages to your company in a Messaging channel, admins can delete the customer's messaging user records. When the messaging user record is deleted, all related messaging sessions and transcripts are also deleted.

Encryption at Rest

In standard Messaging channels with Lightning Experience, the following fields can be encrypted at rest.

- LiveChatTranscript fields: `Body`, `SupervisorTranscriptBody`
- MessagingEndUser fields: `Name`, `MessagingPlatformKey`, `ProfilePictureUrl`
- ConversationEntry fields: `ActorName`, `Message`

In enhanced Messaging channels and Messaging for In-App and Web, these fields can be encrypted at rest.

- MessagingEndUser fields: `Name`, `MessagingPlatformKey`, `ProfilePictureUrl`
- ConversationContextEntry fields: `CustomDetailContextKey`, `CustomDetailContextValue`
- ConversationEntry fields: `ActorName`, `Message`, `Payload`, `EntryPayload`
- ConversationParticipant fields: `ParticipantDisplayName`

Encryption at rest isn't supported in standard Messaging channels with Salesforce Classic.

IN THIS SECTION:

Block Sensitive Data in Messaging Channels
Create sensitive data rules to block specific patterns, such as credit card, Social Security, phone and account numbers, or profanity, in standard Messaging channels. You can choose to remove the text or replace it with your preferred characters.

Track Customer Consent in Messaging Channels
With the help of consent keywords, your customers tell you when and whether you can message them on a particular Messaging channel in Service Cloud.

Delete Messaging Customer Data
For compliance reasons, Salesforce admins can delete a customer's personal identifiable information (PII) from enhanced Messaging channels and Messaging for In-App and Web channels. The PII is removed when their messaging user records and all associated conversations are deleted.

SEE ALSO:

Store Customers' Data Privacy Preferences
Customize Auto-Responses in Service Cloud Messaging Channels
Encrypt New Data in Standard Fields

Block Sensitive Data in Messaging Channels

Create sensitive data rules to block specific patterns, such as credit card, Social Security, phone and account numbers, or profanity, in standard Messaging channels. You can choose to remove the text or replace it with your preferred characters.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	✓	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To create sensitive data rules:
- Customize Application

Sensitive data rules apply to auto-greetings and quick text sent from the agent's side, as well as to text sent by customers. They don't apply to the agent name or other standard text in the chat window. Sensitive data rules also function only in standard Messaging channels, and aren't enforced in enhanced Messaging channels.

1. In Setup, enter *`Sensitive Data`* in the Quick Find box, then select **Sensitive Data Rules**.
2. Click **New** or **New Sensitive Data Rule**.
3. Write each pattern as a JavaScript regular expression (regex), and choose your preferred settings. The regex is case-sensitive.

4. Test your pattern.
   a. Enter some text in the format of the data you want to block, such as 123-45-6789 for a Social Security number.
   b. To ensure that the rule is working correctly, preview your results.
5. Select the roles for which you want to enforce this rule.

   Note: Rules are enforced on the author. Therefore, if a rule that hides phone numbers is enforced on visitors, when a visitor enters their phone number, agents and supervisors can't see it.
6. Set a priority for the rule. Lower numbers are executed first.
7. Click **Save**.

You can block the text from agents, supervisors, customers, or all three. When a rule is triggered, it logs one or more of these chat transcript events:

- Sensitive data blocked (Agent)
- Sensitive data blocked (Supervisor)
- Sensitive data blocked (Visitor)

Updates to sensitive data rules take effect in 60 seconds.

Track Customer Consent in Messaging Channels

With the help of consent keywords, your customers tell you when and whether you can message them on a particular Messaging channel in Service Cloud.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	✓	✓	✓

Respect Your Customers' Preferences

In most Messaging channels, customers who start a conversation by sending a message to your company are deemed to consent to communication. There are a few exceptions to this rule: in short code channels, customers must send one or more keywords to explicitly opt into receiving messages. And in enhanced Facebook Messenger and enhanced WhatsApp channels, you can choose to require customers to explicitly opt in.

Customers' consent levels for a channel range from Opt-Out—meaning no messages are allowed—to Double Opt-In—meaning the customer verified twice that your company can message them on that channel.

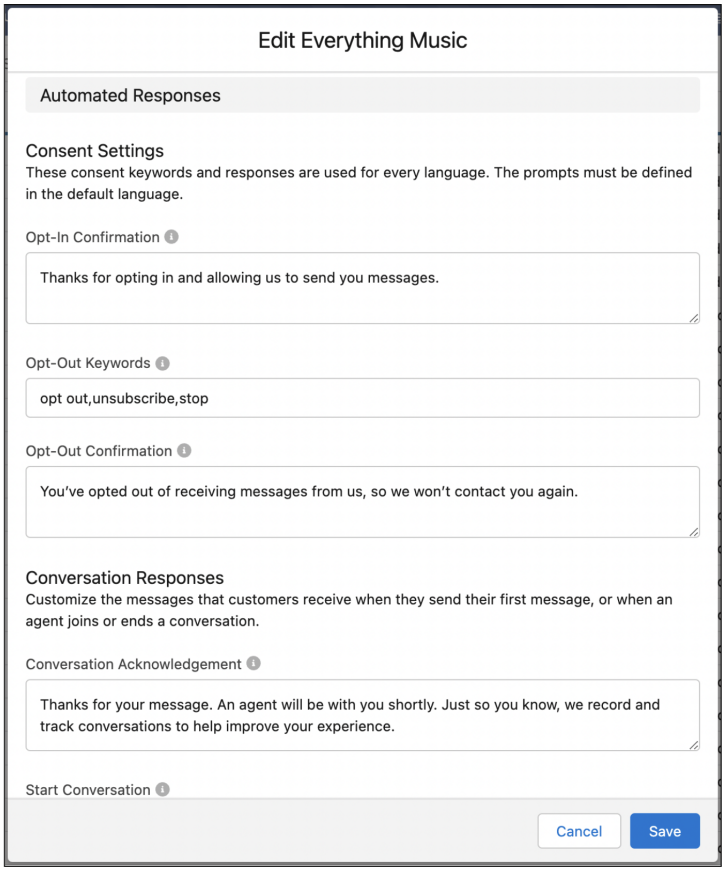
In Salesforce, each customer's communication preference is tracked in the Messaging Consent Status field on their messaging user record. Because messaging user records relate to a single Messaging channel, a customer can have different consent statuses across different channels. For example, a customer can explicitly opt into communication on your Facebook Messenger channel and opt out on your SMS channel.

Just as customers have their own consent level for a channel, you choose a required consent level for each channel that you create. When a customer's consent level for a channel meets the required consent level, they can receive messages on the channel.

Consent Level	Description
Implicit Opt-In	By sending your company a message, the customer indicates that they consent to receive messages on this channel. In enhanced channels, customers don't receive an automatic opt-in message when they're implicitly opted in to receive messages.
Explicit Opt-In	The customer explicitly consents to receive messages from your company. Here's what that might look like: • Customer: Hi, I need help with an order. • You: *(Opt-in prompt)* Thanks for connecting with us! To opt in to receiving messages, respond Yes. • Customer: *(Opt-in keyword)* Yes • You: *(Opt-in confirmation)* Thanks for opting in and allowing us to send you messages. I'll connect you with someone who can help.
Double Opt-In	(Not supported in enhanced channels) The customer explicitly consents to receive messages from your company, and then confirms their consent. Here's what that might look like: • A customer signs up for text alerts. • You: *(Opt-in prompt)* Thanks for connecting with us! To opt in to receiving messages, respond Yes. • Customer: *(Opt-in keyword)* Yes • You: *(Double opt-in prompt)* To confirm your response, respond Start. • Customer: *(Double opt-in keyword)* Start • You: *(Opt-in confirmation)* Thanks for opting in and allowing us to send you messages. I'll connect you with someone who can help.
Opt-Out	The customer sends an opt-out keyword, such as STOP. When a customer opts out, they receive an opt-out confirmation message. They then stop receiving messages, and all of their open chats are closed. If a customer blocks your company on Facebook Messenger, agents can't contact that customer again. If a customer deletes the Facebook Messenger message thread, agents can't contact that customer again until the customer resumes the conversation.

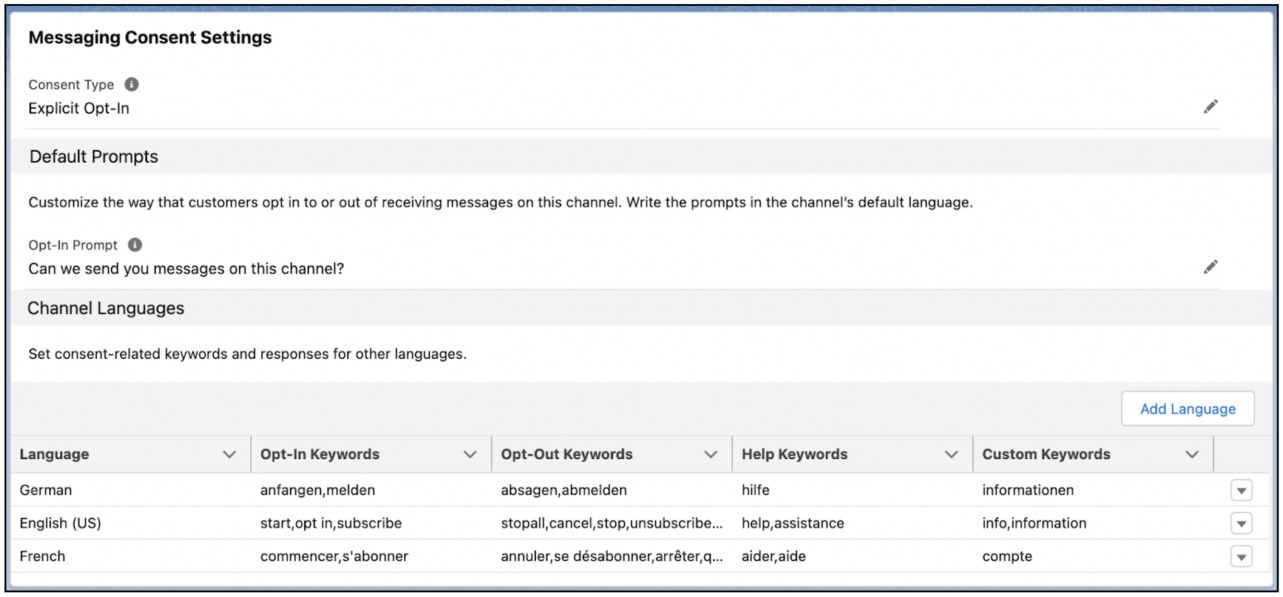
Customize Your Consent Conversations

We get you started with some default opt-in and opt-out keywords, but you can replace these keywords with your own. To customize consent settings for a standard Messaging channel, go to the Messaging Settings page in Setup and click **Edit** in the channel's action menu.



To customize the consent settings for an enhanced Messaging channel, go to the Messaging Settings page in Setup and click your channel's name. There, you can:

- Set your channel's required consent level in the Consent Type field.
- Write an opt-in prompt.
- Set keywords that customers can use to opt into receiving messages, opt out of receiving messages, ask for help, or make a custom request.
- Write the auto-responses that customers receive when they send keywords. The keyword must be the only content of the message for it to trigger an auto-response.
- Set keywords and responses for languages other than your default language. A keyword can be used only once across the languages you add.



SEE ALSO:

- Customize Auto-Responses in Service Cloud Messaging Channels
- Messaging User Fields
- Object Reference: MessagingEndUser

Delete Messaging Customer Data

For compliance reasons, Salesforce admins can delete a customer's personal identifiable information (PII) from enhanced Messaging channels and Messaging for In-App and Web channels. The PII is removed when their messaging user records and all associated conversations are deleted.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	✅

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To delete enhanced Messaging conversations:

- End Messaging Session

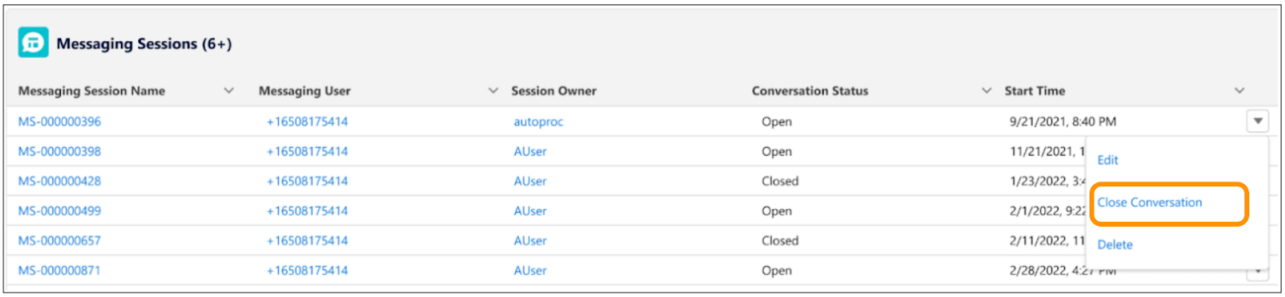
Complete these steps for each messaging user record associated with the customer.

Important: This process applies only for customers using enhanced Messaging channels or Messaging for In-App and Web. In standard channels, deleting a customer's messaging sessions and messaging user records deletes their PII.

1. Go to the messaging user record found in the Messaging Users tab or Messaging Users related list.
2. Close any open conversations associated with the messaging user. A conversation consists of one or more messaging sessions. It's possible that all conversations are already closed.
   a. As an admin, log in to Omni-Channel.

b. Scroll to the Messaging Sessions related list on the messaging user record.

c. Find a messaging session whose action menu shows the Close Conversation action. Click **Close Conversation** to close the conversation and its related messaging sessions. If the conversation is already closed, this action isn't visible.



d. Find and copy the record ID of the messaging session. The record ID is the messaging session record URL's alphanumeric series between MessagingSession/ and /view.

e. Execute a SOQL query to get the messaging session record's parent Conversation record ID. Enter: `SELECT ConversationId FROM MessagingSession WHERE Id='<TARGET_MESSAGING_SESSION_RECORD_ID>'`

f. Allow a few minutes for processing.

g. In Workbench, delete the Conversation record.

From the Data tab, select **Delete**. Select **Single Record**, and then enter the Conversation ID. Click **Next** and the **Confirm**.

h. Refresh the page showing the Messaging Sessions related list. Messaging sessions that were part of the conversation you just deleted no longer appear in the list.

i. Repeat steps c through h until the Close Conversation action isn't visible on any of the messaging user's messaging sessions.

3. After all conversations are closed, delete the messaging user record.

a. In the record action menu in the messaging user record select **Delete**.
If a confirmation message appears, the messaging user and its associated conversations are deleted.

Interactive Messaging Components

Help support agents and customers exchange information faster in enhanced Facebook Messenger channels and Messaging for In-App and Web using structured content. Share links, questions with predefined options, available time slots, post-conversation surveys, and more.

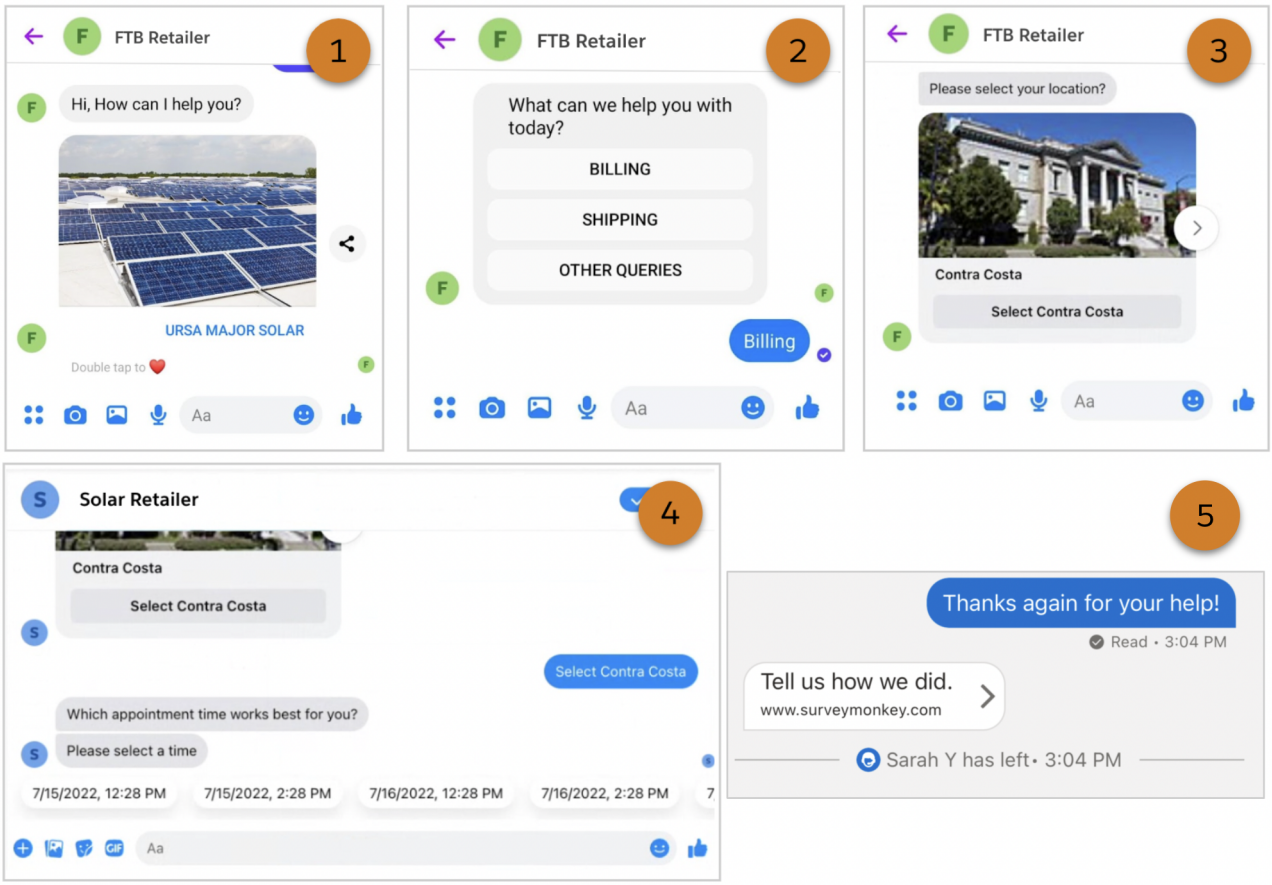
Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging components come in several flavors: enhanced links (1), questions with static (predefined) options (2), questions with dynamic (customer-specific) options (3), time selectors (4), and auto-responses (5).



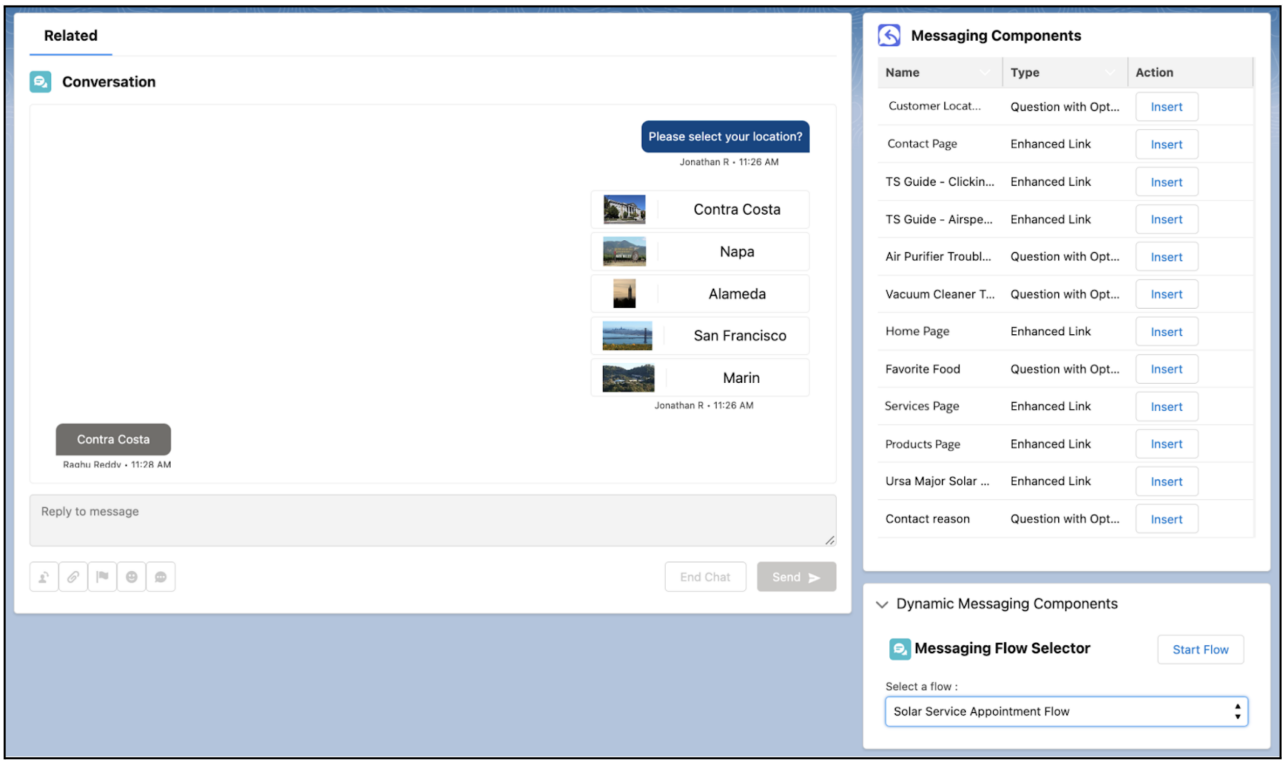
Here are some ways that messaging components can help you create a consistent, familiar, and fast service experience for customers.

Agent's Goal	Solution
Direct the customer to a web page that describes your newest service.	Create an enhanced link component with an appealing image and link to the page.
Find out what the customer needs help with.	Create a question with static options component that shows the customer a list of common topics to choose from, such as billing and troubleshooting.
Determine which order the customer is inquiring about.	Create a question with dynamic options component that shows the customer a list of their recent orders to choose from.
Find an open appointment time that works for the customer.	Create a time selector component that shows the customer a list of available time slots to choose from.
At the end of a messaging session, automatically send a link to a customer satisfaction survey.	Create an auto-response component that includes a personalized survey link.

Create and manage messaging components on the Messaging Components page in Setup.

Here's how agents send messaging components to customers.

- To send a messaging component with static content during a messaging session, agents can select and send the component in the Messaging Components section of the Service Console.
- To send a messaging component that contains dynamic content—for example, a list of open time slots or recent orders—agents can run a custom flow in the Service Console. When the flow completes, the component is sent to the customer.
- Auto-response components are sent automatically, rather than by an agent. In the settings of a Messaging for In-App and Web channel, admins can select an auto-response component in the Conversation Acknowledgment, Start Conversation, and End Conversation fields. The appropriate component is sent when the customer sends an opening message, the agent joins, or the session ends.



IN THIS SECTION:

Messaging Component Types and Formats

With messaging components, you can send structured content such as questions with options in enhanced Facebook Messenger channels and Messaging for In-App and Web. Learn the purpose, format, and setup process of each messaging component type.

Create a Messaging Component: Enhanced Links

An enhanced link is a web page link that includes an image and custom link text. Create enhanced link messaging components to let agents share web pages with customers during enhanced Facebook Messenger or Messaging for In-App and Web sessions.

Create a Messaging Component: Questions with Static Options

Create questions with static options to help agents quickly gather information from customers. For example, create a question that asks customers to select the reason for their inquiry. Agents can send the question component to customers in enhanced Facebook Messenger or Messaging for In-App and Web channels.

Create a Messaging Component: Questions with Dynamic Options

Create questions with dynamic, session-specific options to help agents quickly locate the record that the customer is contacting you about. For example, ask customers to choose from a list of their recent orders or cases. Agents can run a flow to send the question component to customers in enhanced Facebook Messenger or Messaging for In-App and Web channels.

Create a Messaging Component: Time Selectors

Prompt customers to select from a list of time slots. For example, ask customers to select a time for a service visit or delivery. With the help of a flow and an Apex class, agents can send the time selector component to customers in enhanced Facebook Messenger or Messaging for In-App and Web channels.

Create a Messaging Component: Auto-Response

An auto-response is a text or link response sent when a customer initiates a messaging session, an agent joins, or a session ends. Add auto-response messaging components to your Messaging for In-App and Web channels.

Use Formulas to Add Dynamic Content to Messaging Components

When you create messaging components for agents to use in enhanced Facebook Messenger or Messaging for In-App and Web channels, you can use formulas to add dynamic, session-specific content to the component.

Show Messaging Components in the Service Console

Customize the Service Console so agents can send enhanced links, questions with options, and time selectors in enhanced Facebook Messenger and Messaging for In-App and Web channels.

Considerations for Messaging Components

Before creating messaging components for agents to send in messaging sessions, review important considerations.

Messaging Component Types and Formats

With messaging components, you can send structured content such as questions with options in enhanced Facebook Messenger channels and Messaging for In-App and Web. Learn the purpose, format, and setup process of each messaging component type.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	✓	×

A messaging component's appearance varies depending on two things.

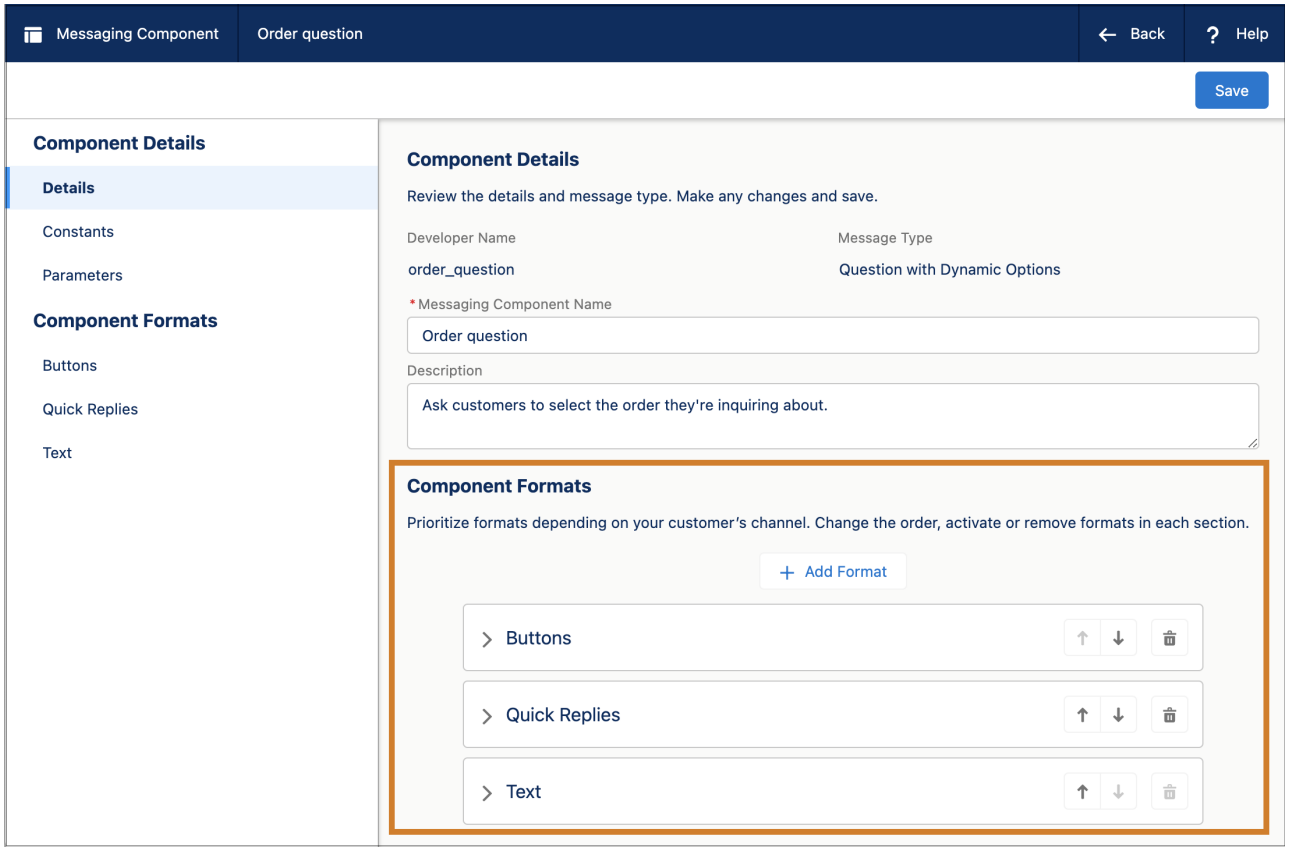
- The type of channel where it's used—for example, an enhanced Facebook Messenger channel.
- The format you select when you create the component. You can add and customize one or more formats to control how a component appears to customers. If you don't add any formats, your component uses the default text-only format.

Component Type	Description	Ideal For	Supported Channel Types	Supported Formats	Setup
Enhanced link	Web page link that includes an image and custom link text	Sharing frequently visited web pages, such as your company's home page or a product profile.	Enhanced Facebook Messenger Messaging for In-App and Web	In Facebook Messenger: • Media • Text (default) In Messaging for In-App and Web: • Rich Link • Text (default)	Basic (under 5 minutes). Enter the link details, upload an image, and configure your channel-specific format preferences.
Question with static options	Question with a list of predefined choices	Standardizing the structure of chats. For example, ask customers to select the reason for their inquiry.	Enhanced Facebook Messenger Messaging for In-App and Web	In Facebook Messenger: • Buttons • Card Carousel • Quick Replies • Text (default) In Messaging for In-App and Web: • Buttons • Quick Replies • Text (default)	Intermediate (about 5 minutes). Enter your question and options and configure your channel-specific format preferences.
Question with dynamic options	Question with a list of customer-specific choices	Identifying the record that the customer is asking about. For example, ask customers to choose from a list of their recent orders or cases.	Enhanced Facebook Messenger Messaging for In-App and Web	In Facebook Messenger: • Buttons • Card Carousel • Quick Replies • Text (default) In Messaging for In-App and Web: • Buttons • Quick Replies • Text (default)	Advanced (30 or more minutes). Enter your question and options and configure your channel-specific format preferences. Then, create a flow so that agents can send the question to customers, and add the flow to the Service Console.
Time selector	Prompt with a list of dynamic time slots	Scheduling appointments. For example, ask customers to select a time for a service visit or delivery.	Enhanced Facebook Messenger Messaging for In-App and Web	In Facebook Messenger: • Buttons • Quick Replies • Text (default)	Advanced (30 or more minutes). Enter your prompt and configure the time slot selection method. Then,

Component Type	Description	Ideal For	Supported Channel Types	Supported Formats	Setup
				In Messaging for In-App and Web: • Buttons • Quick Replies • Text (default)	create an Apex class and flow so that agents can send the time selector to customers, and add the flow to the Service Console.
Auto-response	Text or web page link that's sent automatically in specific scenarios	Sending standard greetings, goodbyes, and links to personalized surveys or messaging terms and conditions	Messaging for In-App and Web	In Messaging for In-App and Web: • Web Page • Text (default)	Intermediate (about 5 minutes). Enter your text and link and configure your format preferences. Then, select the auto-response in your channel settings.

If you add multiple formats to a messaging component, Salesforce uses the most suitable format while trying to respect your priority order.

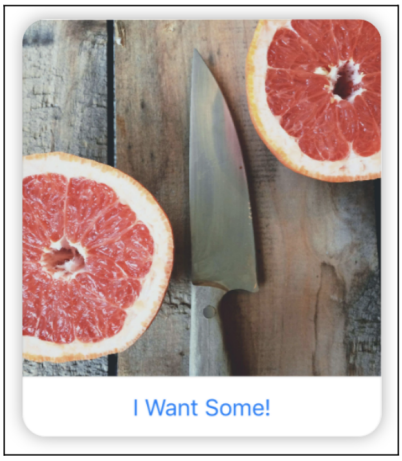
Example: Create a question with options component with 5 options. Add the Buttons and Quick Replies formats, with Buttons as the highest-priority format. In a Facebook Messenger conversation, the component appears in the Quick Replies format because the Buttons format supports only 3 options. If the component includes only 3 options, the higher-priority format is used.



Here's what the available formats look like to customers.

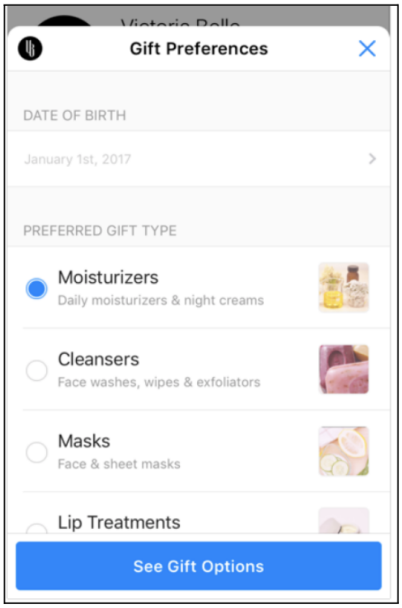
Media

Shows a link name with an image.



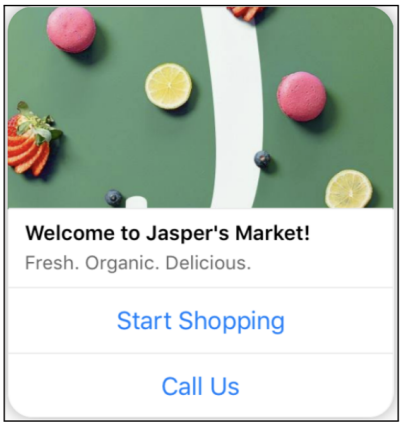
Buttons

Shows up to 3 text options.



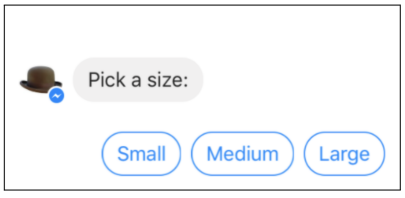
Card Carousel

Rotates through screens of up to 3 options with unique images.



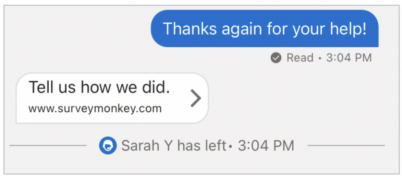
Quick Replies

Shows 3–13 text options.



Web Page

Shows intro text, a link title, and a URL.



Rich Link
Shows text, a link, and a link preview.

SEE ALSO:

- Supported Functions in Messaging Component Formulas
- *Facebook Documentation:* Quick Replies
- *Facebook Documentation:* Buttons
- *Facebook Documentation:* Generic Template (Carousel)
- *Facebook Documentation:* Media Template

Create a Messaging Component: Enhanced Links

An enhanced link is a web page link that includes an image and custom link text. Create enhanced link messaging components to let agents share web pages with customers during enhanced Facebook Messenger or Messaging for In-App and Web sessions.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	×

1. From Setup, enter `Messaging Components` in the Quick Find box, and then select **Messaging Components**.
2. Click **New Component**, and then click **Next**.
3. Select **Enhanced Link**.
4. Enter your link text and URL, and then upload an image.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

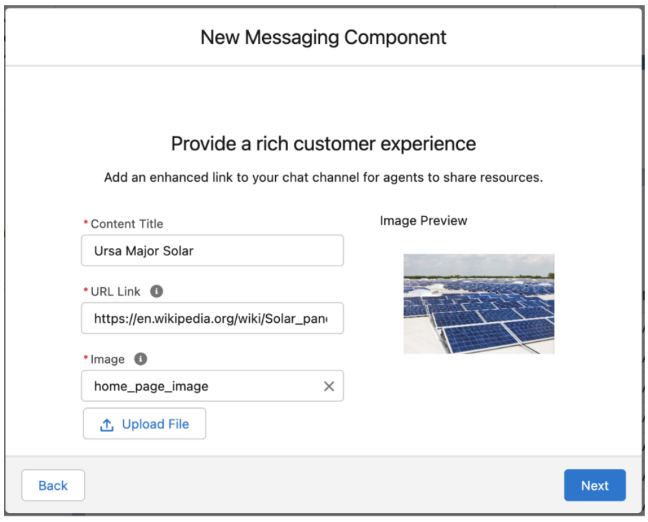
USER PERMISSIONS

To create messaging components:
- View Setup and Configuration

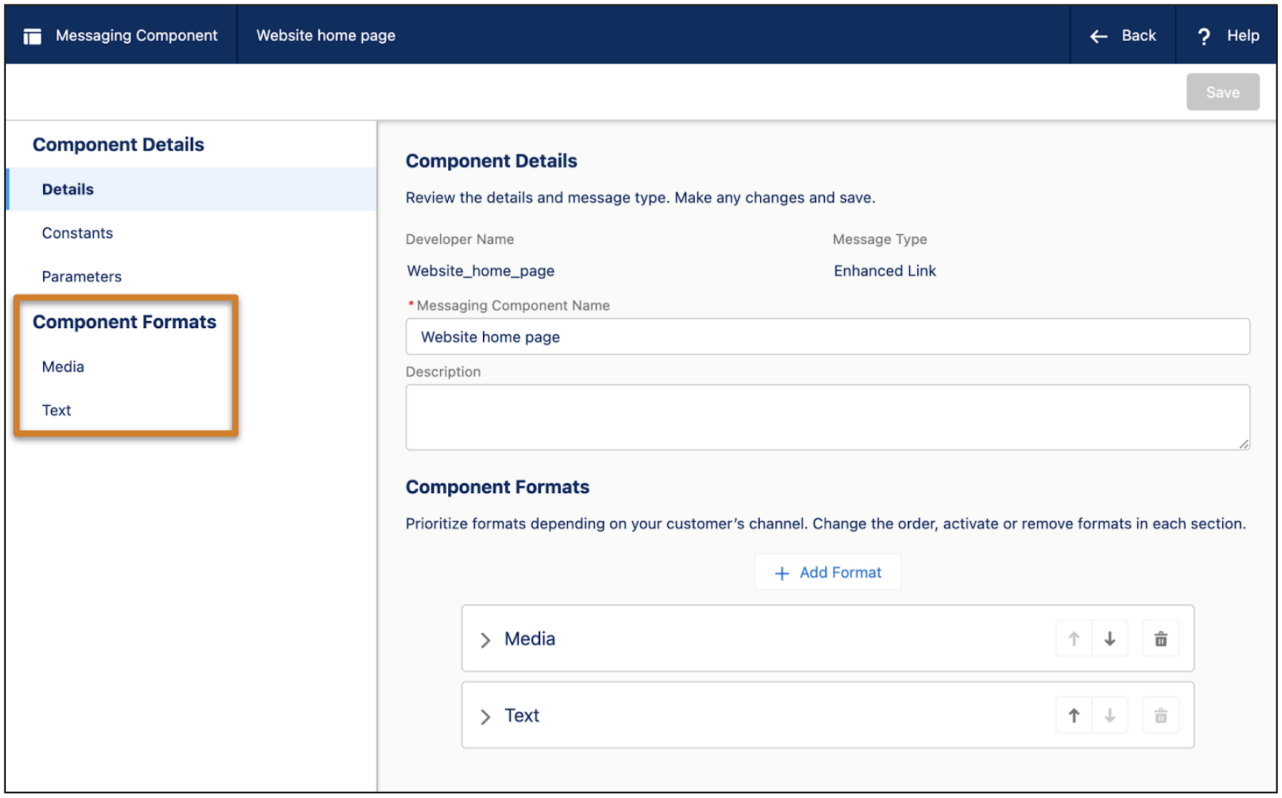
  OR System Administrator

  OR Customize Application

To send and receive messages in Messaging:
- Messaging Agent



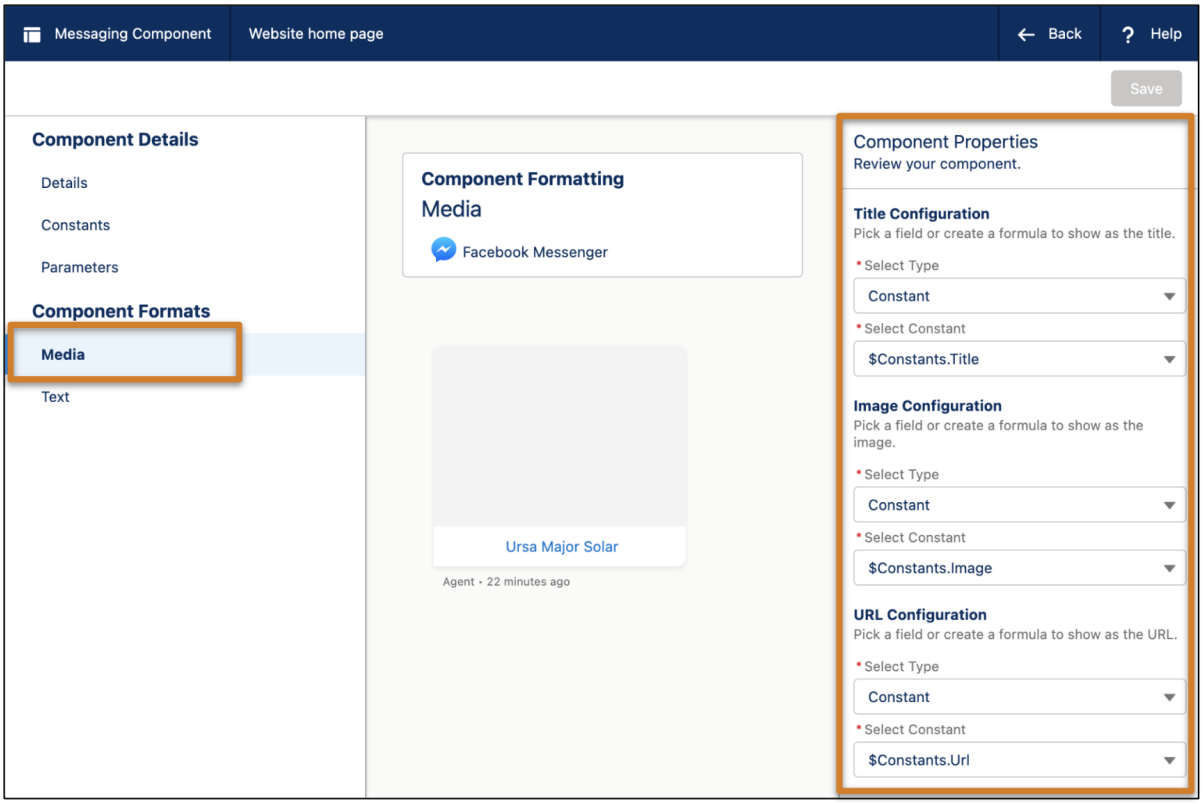
5. Enter a name and description for your enhanced link—for example, `Company Home Page` or `Services Website`.
   These values aren't visible to customers, but agents see the name in the list of messaging components in the Service Console. Assign a name that indicates the link's destination and purpose so agents know when to use it.
6. Click **Done**.
   The Messaging Component Builder opens.
7. On the Component Details page, further customize your enhanced link.



a. In the Component Formats section, control the way your link appears in each type of Messaging channel. Click **Add Format**, select a supported format, and then click **Done**. In the screenshot, the Media format is added.

b. In the left-hand sidebar, click a format type to customize its properties.

c. In the Component Properties pane, configure your title, image, and URL for each format. To keep it simple, select **Constant** for each Type field and select the only available constant, which comes from the information that you entered a few steps ago. Then, click **Save**.



d. Arrange the formats you selected in priority order. If a component can't be shown in the highest-priority format, the next format is used.

e. When you're done editing your component, click **Save** > **Back** to exit the Messaging Component Builder.

8. Test the component in a messaging session. Here, we'll test in a Facebook Messenger session.

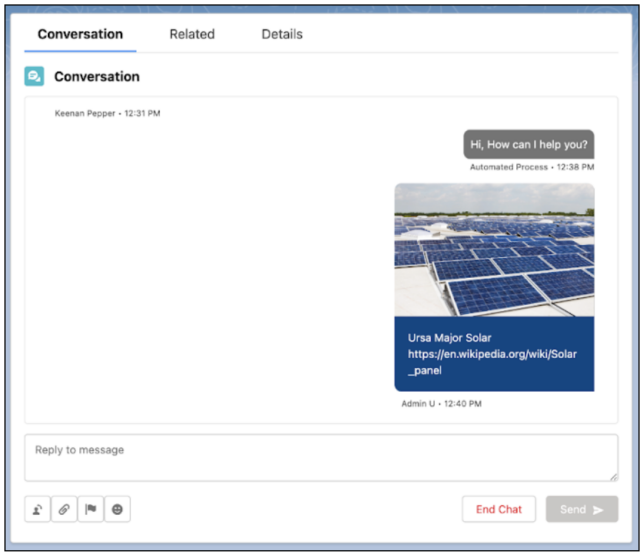
a. From a personal Facebook account, send a message to your company to initiate a messaging session.

b. In Salesforce, log in to Omni-Channel and accept the message.

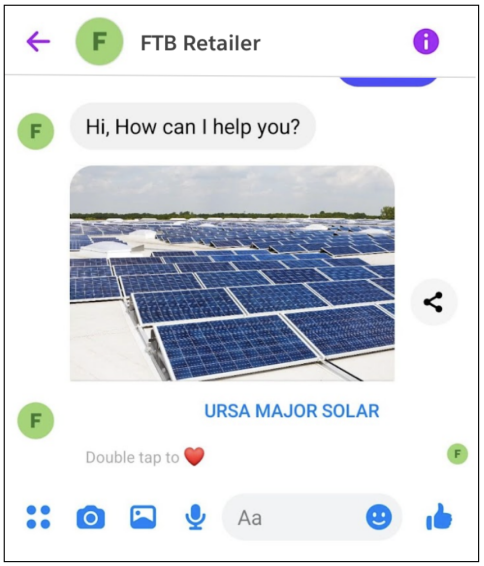
c. Find the enhanced link in the Messaging Components section of the page, and then click **Insert**. A placeholder appears below the message field. No preview of the component is available.

d. Click **Send**, and then verify that the link works as intended from the customer side and agent side.

The agent sees:



The customer sees:



Tip: You can configure an enhanced link component to use dynamic inputs—for example, to show different images or lead to different URLs depending on the nature of the messaging session. However, using constants is more straightforward. To view, edit, or create constants, click **Constants** in the left-hand sidebar.

SEE ALSO:

Messaging Component Types and Formats

Create a Messaging Component: Questions with Static Options

Create questions with static options to help agents quickly gather information from customers. For example, create a question that asks customers to select the reason for their inquiry. Agents can send the question component to customers in enhanced Facebook Messenger or Messaging for In-App and Web channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	✓	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To create messaging components:

- View Setup and Configuration

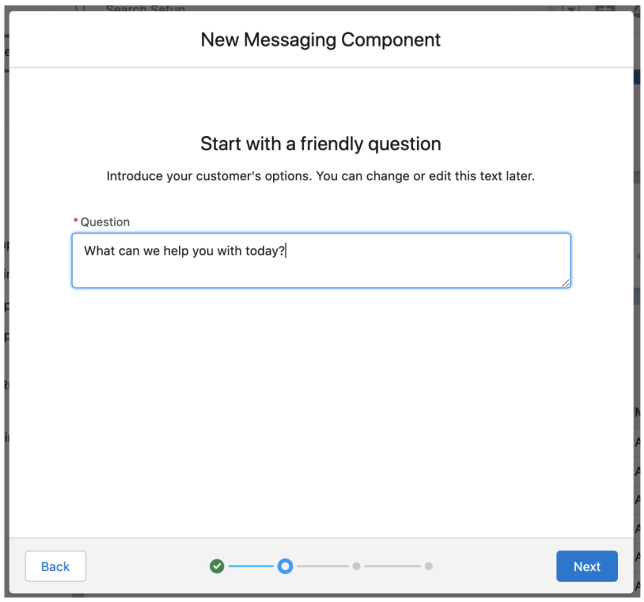
  OR System Administrator

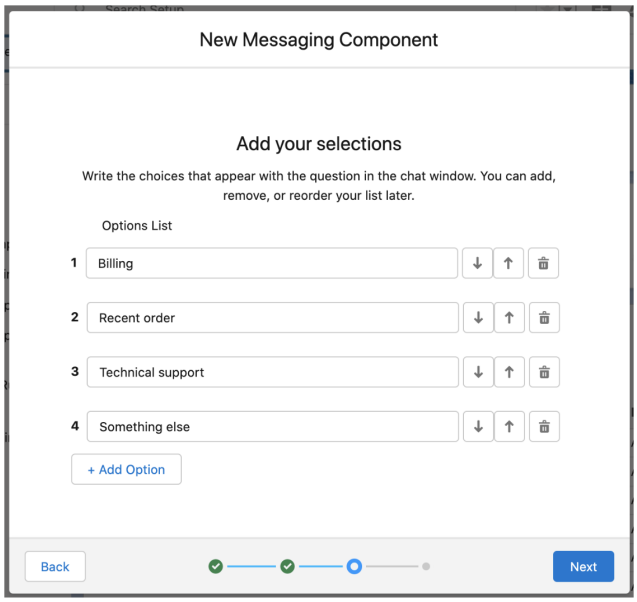
  OR Customize Application

To send and receive messages in Messaging:

- Messaging Agent

1. From Setup, in the Quick Find box, enter `Messaging Components`, and then select **Messaging Components**.
2. Click **New Component**, and then click **Next**.
3. Select **Question with Options**, and then select **Static Options**.
4. Enter your question and options.



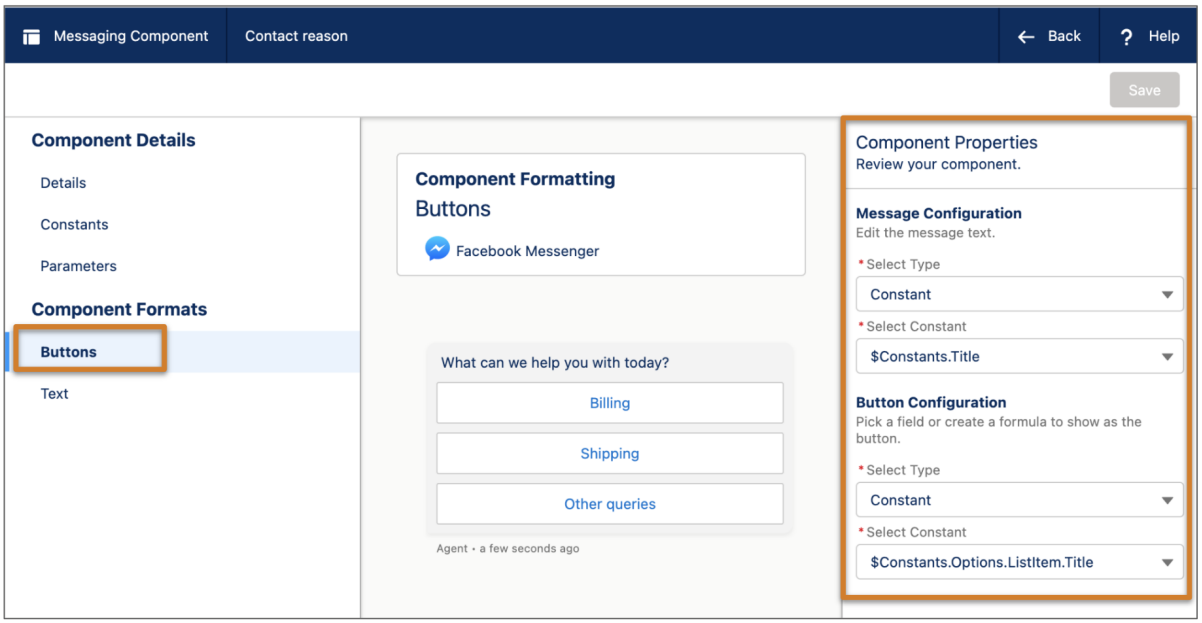


5. Enter a name and description for your question.

   These values aren't visible to customers, but agents see the name in the list of messaging components in the Service Console. Assign an informative name so agents know when to use the component.

6. Click **Done**.
   The Messaging Component Builder opens.
7. On the Component Details page, further customize your component.

a. In the Component Formats section, control the way your component appears in each type of Messaging channel. Click **Add Format**, select a supported format, and then click **Done**. In the screenshot, the Buttons format is added.



b. In the left-hand sidebar, click a format type to customize its properties.

c. In the Component Properties pane, configure each format's properties. To keep it simple, select **Constant** for each Type field and select the only available constant, which comes from the information that you entered a few steps ago. Then, click **Save**.

d. Arrange the formats you selected in priority order. If a component can't be shown in the highest-priority format, the next format is used.

e. When you're done editing your component, click **Save** > **Back** to exit the Messaging Component Builder.

8. Test the component in a messaging session. Here, we'll test in a Facebook Messenger session.

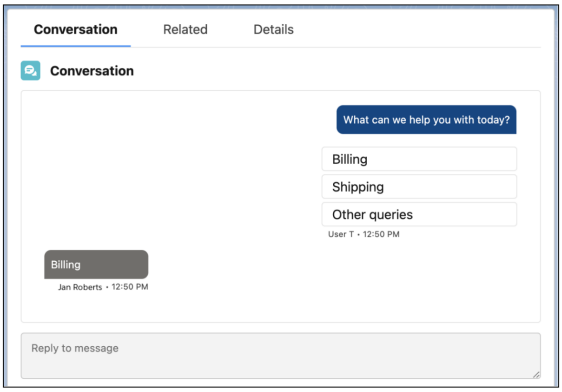
a. From a personal Facebook account, send a message to your company to initiate a messaging session.

b. In Salesforce, log in to Omni-Channel and accept the message.

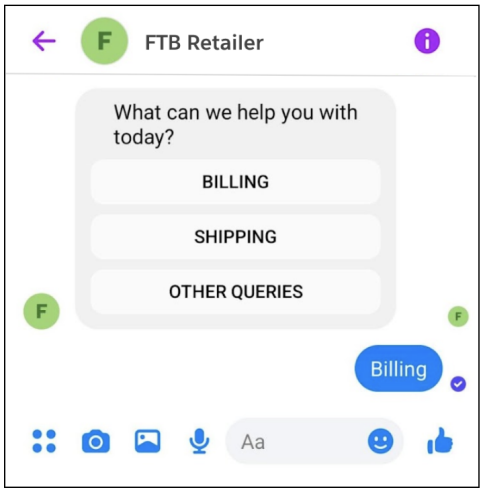
c. Find the question component in the Messaging Components section of the page, and then click **Insert**.
A placeholder appears below the message field. No preview of the component is available.

d. Click **Send**, and then verify that the component works as intended from the customer side and agent side.

The agent sees:



The customer sees:



SEE ALSO:

Messaging Component Types and Formats

Create a Messaging Component: Questions with Dynamic Options

Create questions with dynamic, session-specific options to help agents quickly locate the record that the customer is contacting you about. For example, ask customers to choose from a list of their recent orders or cases. Agents can run a flow to send the question component to customers in enhanced Facebook Messenger or Messaging for In-App and Web channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	✓	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To create messaging components:

- View Setup and Configuration

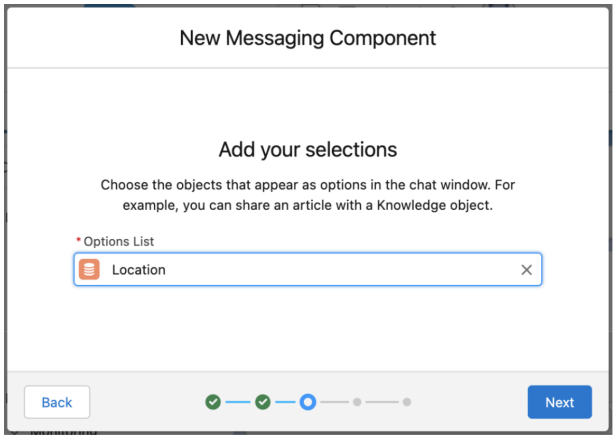
  OR System Administrator

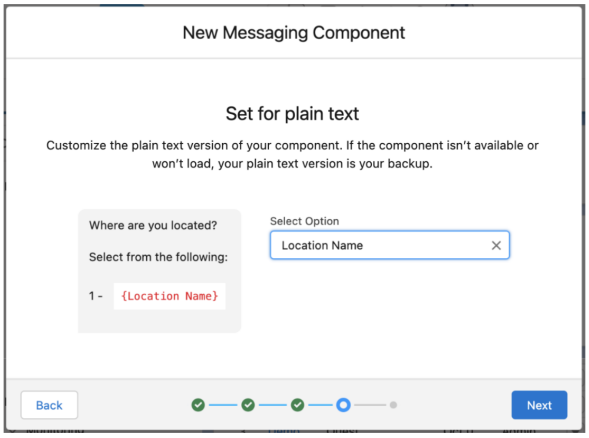
  OR Customize Application

To send and receive messages in Messaging:

- Messaging Agent

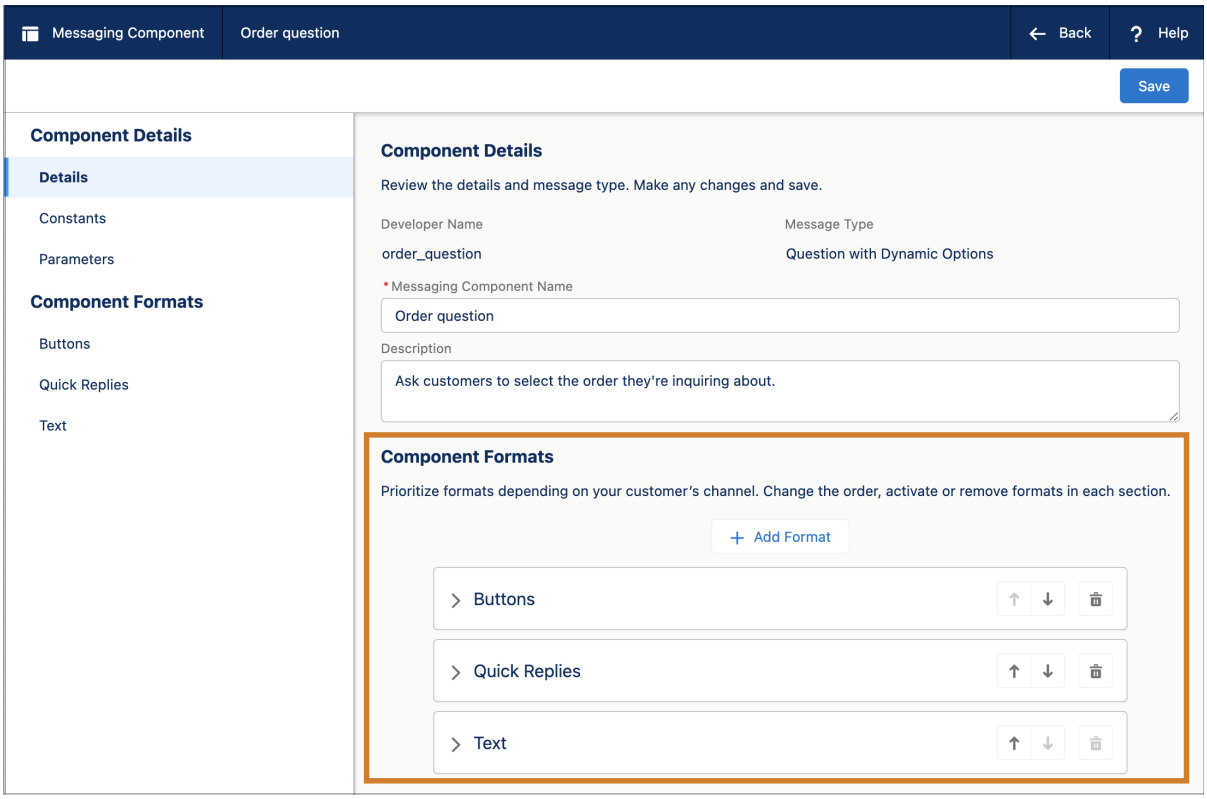
1. From Setup, in the Quick Find box, enter `Messaging Components`, and then select **Messaging Components**.
2. Click **New Component**, and then click **Next**.
3. Click **Question with Options**, and then select **Dynamic Options**.
4. Enter your question. For example, `Where are you located?`
5. Select an object, such as Location.
6. From the list of object fields, select the plain text display field. For example, select the Location Name field to show a list of location names.





7. Enter a name and description for your question.
   These values aren't visible to customers, but agents see the name in the Service Console.
8. Click **Done**.
   The Messaging Component Builder opens.
9. On the Component Details page, further customize your component.
   a. In the Component Formats section, control the way your component appears in each type of Messaging channel. Click **Add Format**, select a supported format, and then click **Done**. In the screenshot, the Buttons and Quick Replies formats are added.
   b. In the left-hand sidebar, click a format type to customize its properties.

c. In the Component Properties pane, configure each format's properties. To keep it simple, use the auto-created constant for the question and the auto-created parameter to show records by field value, such as Location Name. Then, click **Save**.



d. Arrange the formats you selected in priority order. If a component can't be shown in the highest-priority format, the next format is used.

e. When you're done editing your component, click **Save** > **Back** to exit the Messaging Component Builder.

After you create your component, it's time to link it to a flow that agents can use to send it to a customer. Then, add the flow to the Service Console and test it.

IN THIS SECTION:

Create a Flow to Send Question Messaging Components

To let agents send a question with dynamic options in a messaging session, create a flow and associate it with your question component. Then, add the flow to the Service Console.

SEE ALSO:

Messaging Component Types and Formats

Use Formulas to Add Dynamic Content to Messaging Components

Create a Flow to Send Question Messaging Components

To let agents send a question with dynamic options in a messaging session, create a flow and associate it with your question component. Then, add the flow to the Service Console.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

User Permissions Needed	
To open, edit, or create a flow in Flow Builder:	Manage Flow
To create or edit a console app:	Customize Application AND View Setup and Configuration

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	✓	×

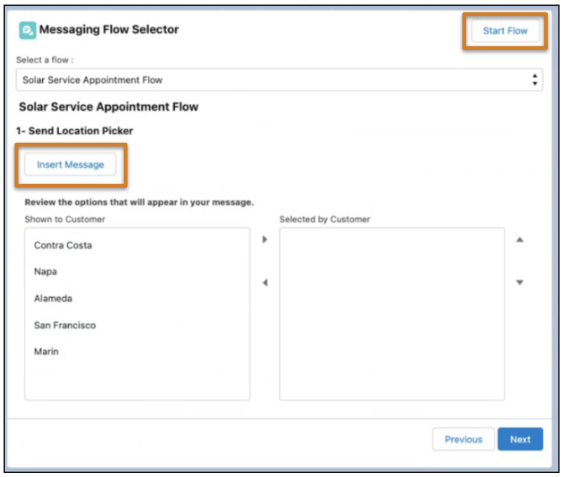
1. In Flow Builder, create a screen flow.
2. Create a Variable resource of data type Text, called `recordId`, and make it available for input. This resource will store the ID of the messaging session.
3. Add your own custom flow logic.
   a. To add a Record Collection Variable and show a collection of records, select **Allow multiple values (collection)**. The flow must populate the variable with the same object type that the messaging component needs. For example, if your messaging component shows a list of cases, your flow should produce a variable that is a collection of Case records.
   b. Add a Get Records element and define conditions to get the records of interest. For example, if your messaging component shows a list of cases, create an element that gets cases with a high priority and a status of New.
4. Add a Screen flow component. Within that screen, add an Enhanced Message component.
   a. For Messaging Session ID, enter the recordId Variable that you created in step 2.
   b. Select the messaging component that you want to use.
   c. For Record Variable, enter the Record Collection Variable described in step 3.
5. Save and activate the flow.
6. Add the flow to the Service Console so agents can send the component during messaging sessions. See Show Messaging Components in the Service Console.
7. Test the question in a Facebook Messenger session.
   a. From a personal Facebook account, send a message to your company to initiate a messaging session.
   b. In Salesforce, log into Omni-Channel and accept the message.
   c. In the Service Console, find and start the flow to send the component. Your admin configures the flow's location and start button label.
      a. Run the flow.
      b. Click **Insert Message**. A placeholder appears below the message field; no preview of the component is available.

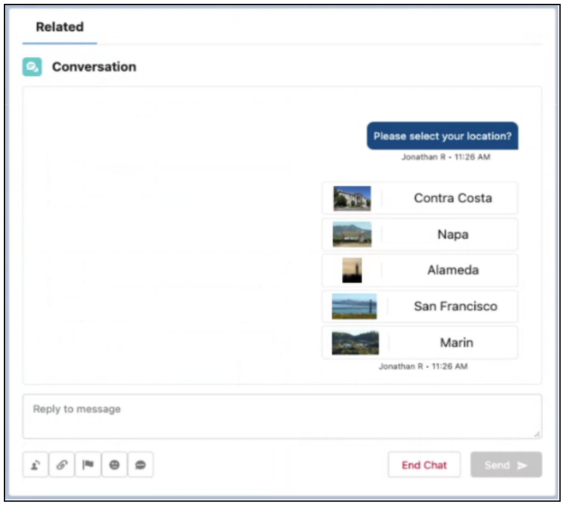
c. Click **Send** to send the question and list of options to the customer.

d. When the customer selects an option, move their selection to the Selected by Customer column and complete the flow.

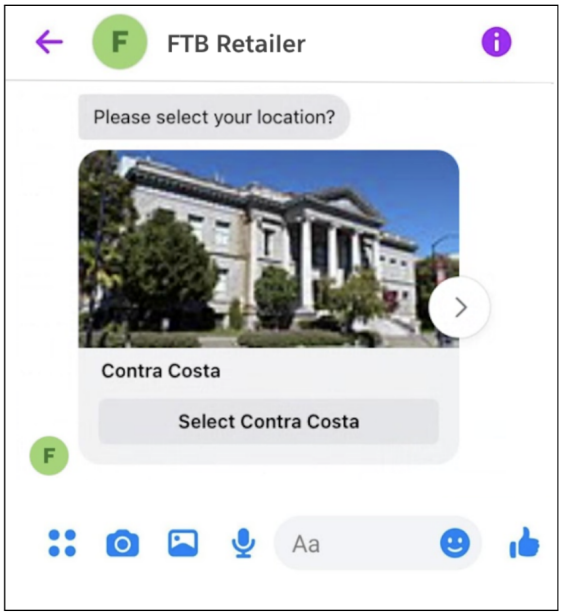
d. Verify that the component works as intended from both the customer side and agent side.

The agent sees:

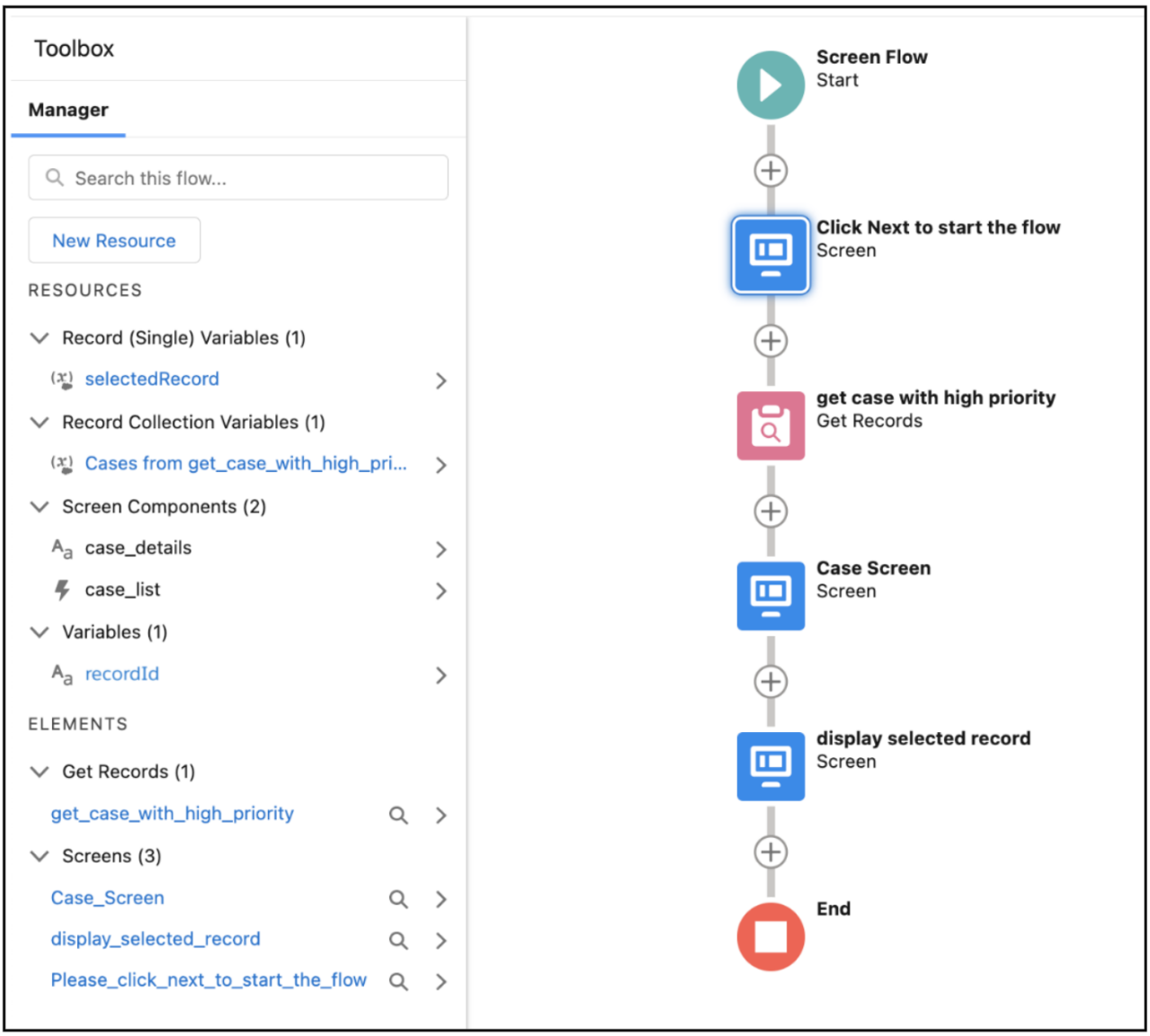




The customer sees:



Example: This flow sends a question with options component that prompts the customer to select the case that they're inquiring about. The component is linked to the flow on the screen labeled Case Screen.



SEE ALSO:

Flow Builder

Flow Screen Input Component: Enhanced Message

Create a Messaging Component: Time Selectors

Prompt customers to select from a list of time slots. For example, ask customers to select a time for a service visit or delivery. With the help of a flow and an Apex class, agents can send the time selector component to customers in enhanced Facebook Messenger or Messaging for In-App and Web channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To create messaging components:

- View Setup and Configuration

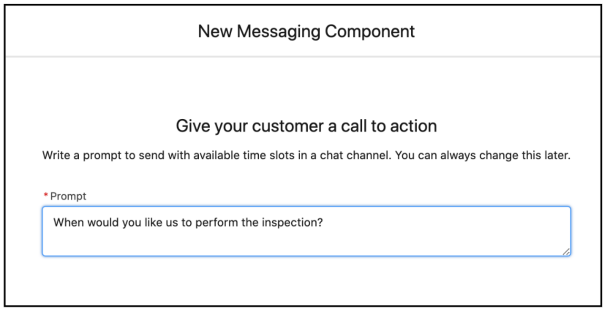
  OR System Administrator

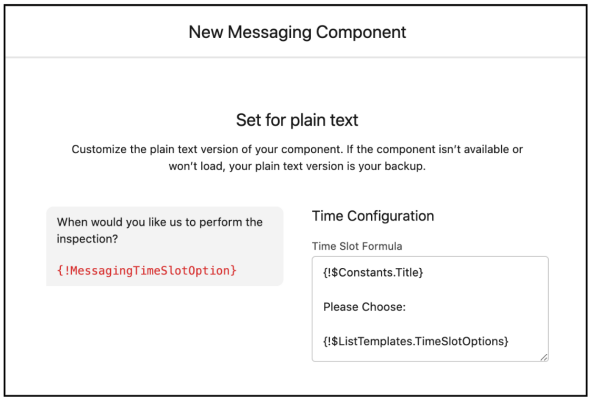
  OR Customize Application

To send and receive messages in Messaging:

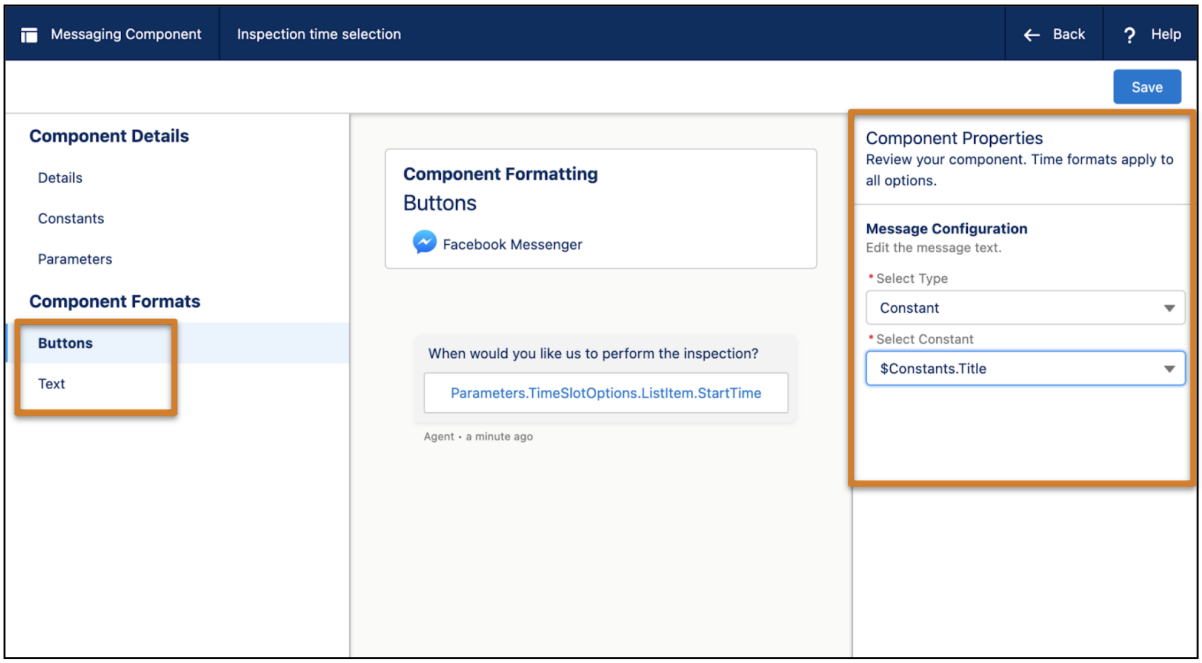
- Messaging Agent

1. From Setup, in the Quick Find box, enter `Messaging Components`, and then select **Messaging Components**.
2. Click **New Component**, and then click **Next**.
3. Click **Time Selector**.
4. Enter a prompt and a plain text option, and then click **Next**.





5. Enter a name and description for your time selector component.
   These values aren't visible to customers, but agents see the name in the Service Console.
6. Click **Done**.
   The Messaging Component Builder opens.
7. On the Component Details page, further customize your component.
   a. In the Component Formats section, control the way your component appears in each type of Messaging channel. Click **Add Format**, select a supported format, and then click **Done**. In the screenshot, the Buttons format is added.
   b. In the left-hand sidebar, click a format type to customize its properties.
   c. In the Component Properties pane, configure each format's properties. To keep it simple, use the auto-created constant for the question. Then, click **Save**.



d. Arrange the formats you selected in priority order. If a component can't be shown in the highest-priority format, the next format is used.

e. When you're done editing your component, click **Save** > **Back** to exit the Messaging Component Builder.

After you create your component, it's time to link it to a flow that agents can use to send it to a customer. The flow must also reference an Apex class that provides the list of available time slots. Then, add the flow to the Service Console and test it.

IN THIS SECTION:

Create a Flow to Send Time Selector Messaging Components

To let agents send a time selector component in an enhanced Facebook Messenger or Messaging for In-App and Web channel, create a screen flow and associate it with your component and an Apex class.

Example: Apex Class for Time Selector Messaging Components

Time selector messaging components send customers a prompt and a list of available time slots for them to choose from. To generate the list of time slots each time the component is sent, create an Apex class. The Apex class determines the time slot start time, duration, and time zone.

Create a Flow to Send Time Selector Messaging Components

To let agents send a time selector component in an enhanced Facebook Messenger or Messaging for In-App and Web channel, create a screen flow and associate it with your component and an Apex class.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

User Permissions Needed

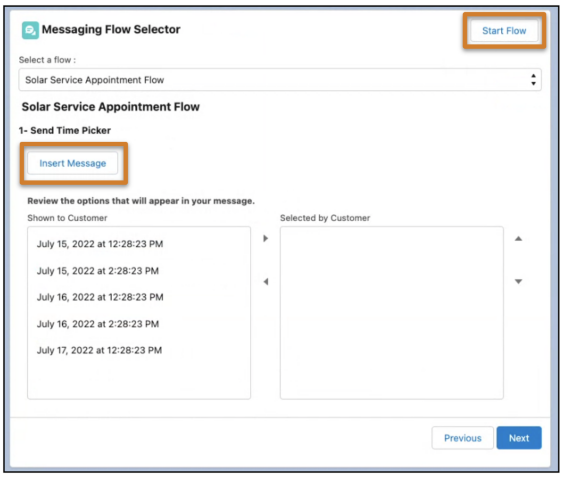
To open, edit, or create a flow in Flow Builder:	Manage Flow
To create or edit a console app:	Customize Application AND View Setup and Configuration

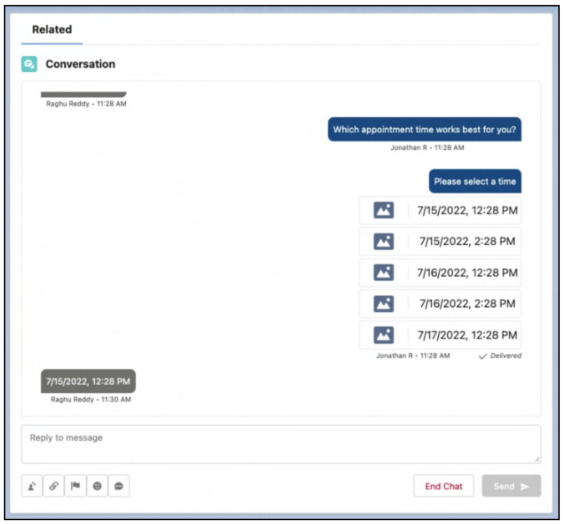
Messaging channels that this article applies to						
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	✓	×

1. In Flow Builder, create a screen flow. See the example for guidance.
2. Add the flow to the Service Console so agents can send the component during messaging sessions. See Show Messaging Components in the Service Console.
3. Test the time selector in a messaging session. Here, we'll test in a Facebook Messenger session.
   a. From a personal Facebook account, send a message to your company to initiate a messaging session.
   b. In Salesforce, log in to Omni-Channel and accept the message.
   c. In the Service Console, find and start the flow to send the component. Your admin configures the flow's location and start button label.

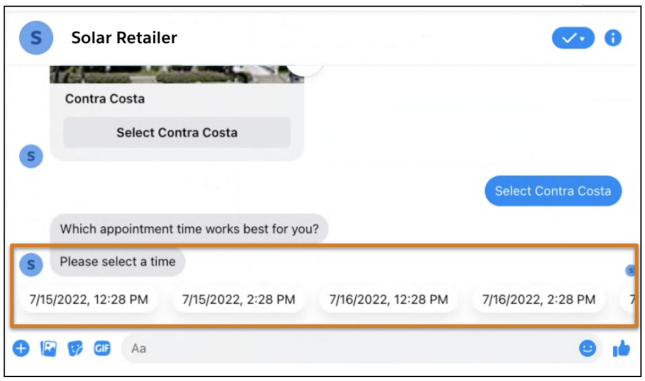
      Click **Insert Message**. A placeholder appears below the message field. No preview of the component is available. Then, click **Send** to send the question and time slots to the customer. When they select a time slot, move their selection to the Selected by Customer column and complete the flow.
   d. Verify that the component works as intended from the customer side and agent side.

   The agent sees:

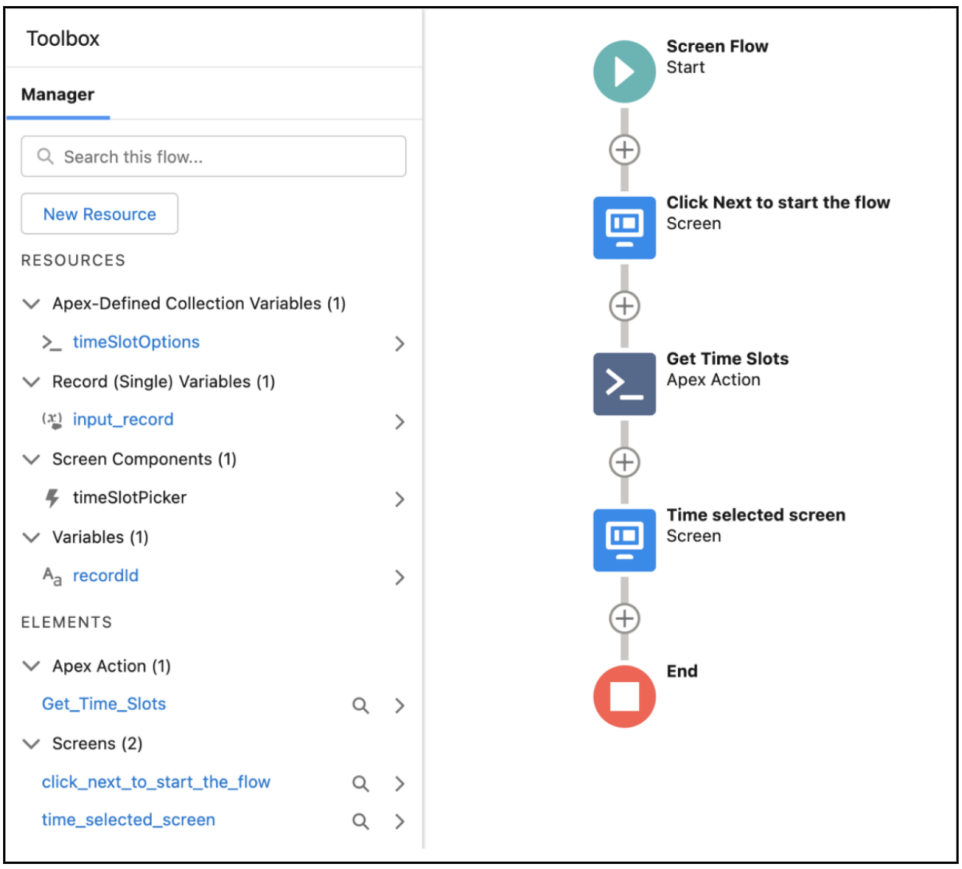




The customer sees:



Example: This flow sends a time selector component and asks the customer to select a time slot for an appointment. The component is linked to the flow on the screen labeled Time selected screen.



SEE ALSO:

- Flow Builder
- Flow Screen Input Component: Enhanced Message
- Create a Flow to Send Question Messaging Components
- Example: Apex Class for Time Selector Messaging Components

Example: Apex Class for Time Selector Messaging Components

Time selector messaging components send customers a prompt and a list of available time slots for them to choose from. To generate the list of time slots each time the component is sent, create an Apex class. The Apex class determines the time slot start time, duration, and time zone.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

This Apex class provides example time slots at several intervals, each set by a pair of Datetime statements.

Example:

```
public with sharing class MessagingTimeSlotOptions {

    @InvocableMethod
    public static List<List<RichMessaging.TimeSlotOption>> getTimeSlotOptions(){
        List<List<RichMessaging.TimeSlotOption>> result = new
List<List<RichMessaging.TimeSlotOption>>();
        List<RichMessaging.TimeSlotOption> options = new
List<RichMessaging.TimeSlotOption>{
            new RichMessaging.TimeSlotOption(
                Datetime.now().addHours(1),
                Datetime.now().addHours(2)),
            new RichMessaging.TimeSlotOption(
                Datetime.now().addHours(3),
                Datetime.now().addHours(4)),
            new RichMessaging.TimeSlotOption(
                Datetime.now().addHours(25),
                Datetime.now().addHours(26)),
            new RichMessaging.TimeSlotOption(
                Datetime.now().addHours(27),
                Datetime.now().addHours(28))
        };

        result.add(options);
        return result;
    }
}
```

SEE ALSO:

Apex Code Overview

Create a Messaging Component: Auto-Response

An auto-response is a text or link response sent when a customer initiates a messaging session, an agent joins, or a session ends. Add auto-response messaging components to your Messaging for In-App and Web channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

With auto-response messaging components, you can automate common actions. For example:

- At the start of each messaging session, send a welcome message with a link to your Terms and Conditions web page.
- At the end of each messaging session, send a link to a page showing your current promotions.
- At the end of each messaging session, send a personalized link to a customer satisfaction survey.

To use auto-response components, create the component in Setup. Then, add the component to a Messaging for In-App and Web channel and specify when it's sent.

1. From Setup, enter *Messaging Components* in the Quick Find box, and then select **Messaging Components**.
2. Click **New Component**, and then click **Next**.
3. Select **Auto-Response**, and then click **Next**.
4. Enter the auto-response. For example: *Thanks for letting us help you today!*
   If you plan to include a link, enter the introductory text only. You can add the link in a minute. For example:
   - *Will you take our survey?*
   - *View our terms and conditions.*
   - *See our current promotions.*
5. Enter a name and description for your component, and click **Done**.
   The Messaging Component Builder opens.
6. On the Component Details page, further customize your auto-response.
   a. If your auto-response is text-only, you're all set. Skip to step 7.
   b. To add a link to your auto-response, click **Add Format** and select **Web Page**.
   c. Click **Web Page** in the left-hand menu, and complete the fields as follows.
      - Under Title Configuration, select **Constant** and **$Constants.Title**.
      - Under URL Configuration, select **Literal** and enter the link URL.
      - Under Display Configuration, select **Chat Message** or **Popup**. All auto-responses in Messaging for In-App channels appear as chat messages.
      - (Optional) Under Web Page Parameters, create parameters specific to the messaging session, web page, or app, and include your parameters in your component.

EDITIONS

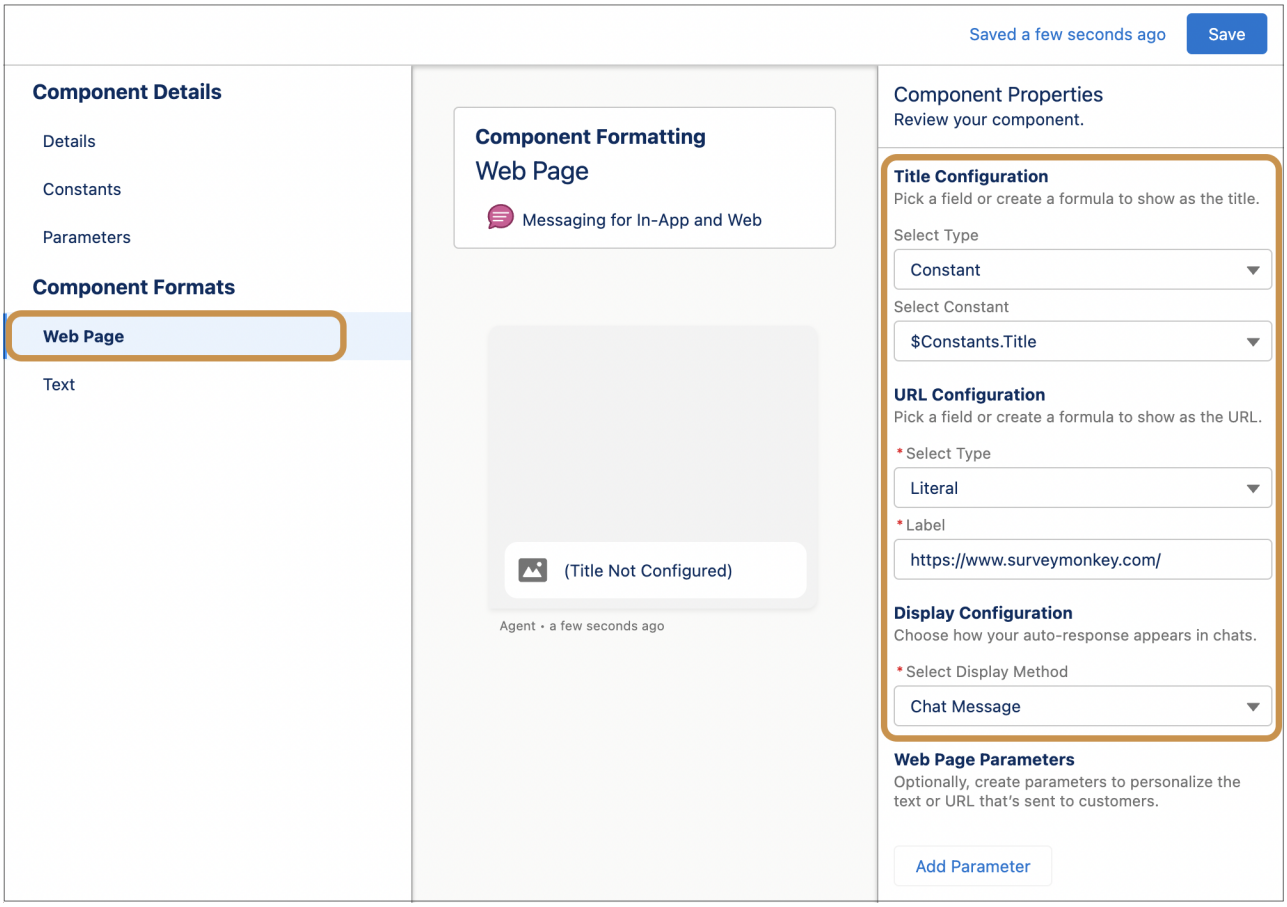
Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To create messaging components:
- View Setup and Configuration
  OR System Administrator
  OR Customize Application

To set up and edit Messaging channels:
- Configure Messaging

To view channels:
- View Setup and Configuration

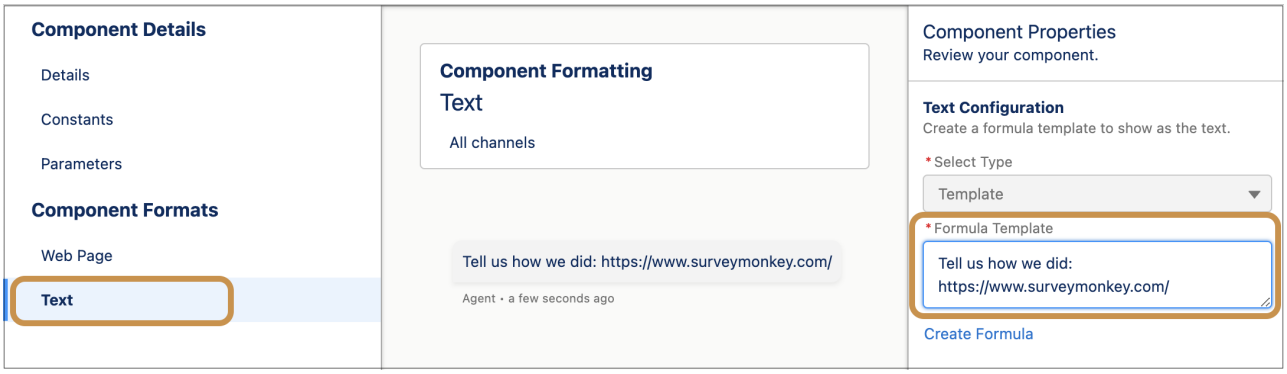


d. Click **Save**.

e. Configure the plain text version of your auto-response to include the URL.

a. Click **Text** in the left-hand menu.

b. Edit the Formula Template field to include the URL.



c. Click **Save**.

7. Add the component to your Messaging for In-App and Web channel.

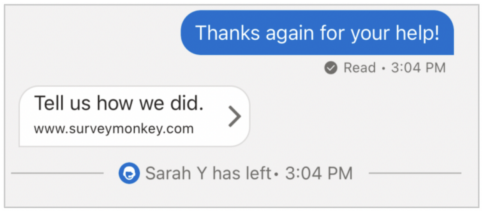
a. From Setup, enter *Messaging Settings* in the Quick Find box, and then select **Messaging Settings**.

b. Find your channel in the list, and click **Edit** in its action menu.

c. In the Conversation Acknowledgment, Start Conversation, and End Conversation fields, select an auto-response component. You can use the same component for multiple fields.

8. (Optional) Use the Messaging for In-App or Web APIs (Web, iOS, Android) to send additional parameter values to the component.

9. Test the component in a Messaging for In-App and Web session.
The customer sees:



Note:

- Auto-response messaging components aren't supported in enhanced Facebook Messenger channels.
- When an auto-response component is sent in a Messaging for In-App and Web channel, agents see a generic placeholder in the chat transcript. Agents can't see the content of the auto-response.
- Auto-response components don't support surveys created in Salesforce Feedback Management.

SEE ALSO:

Use Formulas to Add Dynamic Content to Messaging Components

Customize Auto-Responses in Service Cloud Messaging Channels

Messaging for Web Developer Guide

Messaging for In-App Developer Guide

Use Formulas to Add Dynamic Content to Messaging Components

When you create messaging components for agents to use in enhanced Facebook Messenger or Messaging for In-App and Web channels, you can use formulas to add dynamic, session-specific content to the component.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	×

Formulas fall into two categories: formula templates and sObject formulas. You can use both to customize different parts of a messaging component.

- *Formula templates* consist of a text body with possible merge fields. When a message that includes a formula template is sent, the merge fields are replaced with contextual information such as an order number or customer name. Use formula templates to customize the Text version of a messaging component.
- *sObject formulas* are object-specific formulas that create field values based on contextual data. Use sObject formulas to customize any supported format of a messaging component except for Text.

Formula templates and sObject formulas can contain both plain text and contextual data from a data source. Two types of data sources are supported: constants and parameters.

Data Source	Definition	How to Reference
Constant	Metadata that is defined as part of the messaging component. Constants support multiple data types, including text, URL, and image.	`$Constants.<constant_name>` In this syntax, replace `<constant_name>` with the name of a constant. For example: `$Constants.Title`
Parameter	Metadata that is defined as part of the messaging component, with the data that it contains provided dynamically when a message is rendered. Parameters support the same data types as constants and references to records such as cases or products.	`$Parameters.<parameter_name>` In this syntax, replace `<parameter_name>` with the name of a parameter. For example: `$Parameters.MyCaseParam`

IN THIS SECTION:

Customizing Messaging Components with Formula Templates

When you create a messaging component, you can add and configure one or more formats to control the component's appearance in different Messaging channels. The default format of messaging components is Text, which is a plain text version of the component.

Messaging channels that this article applies to

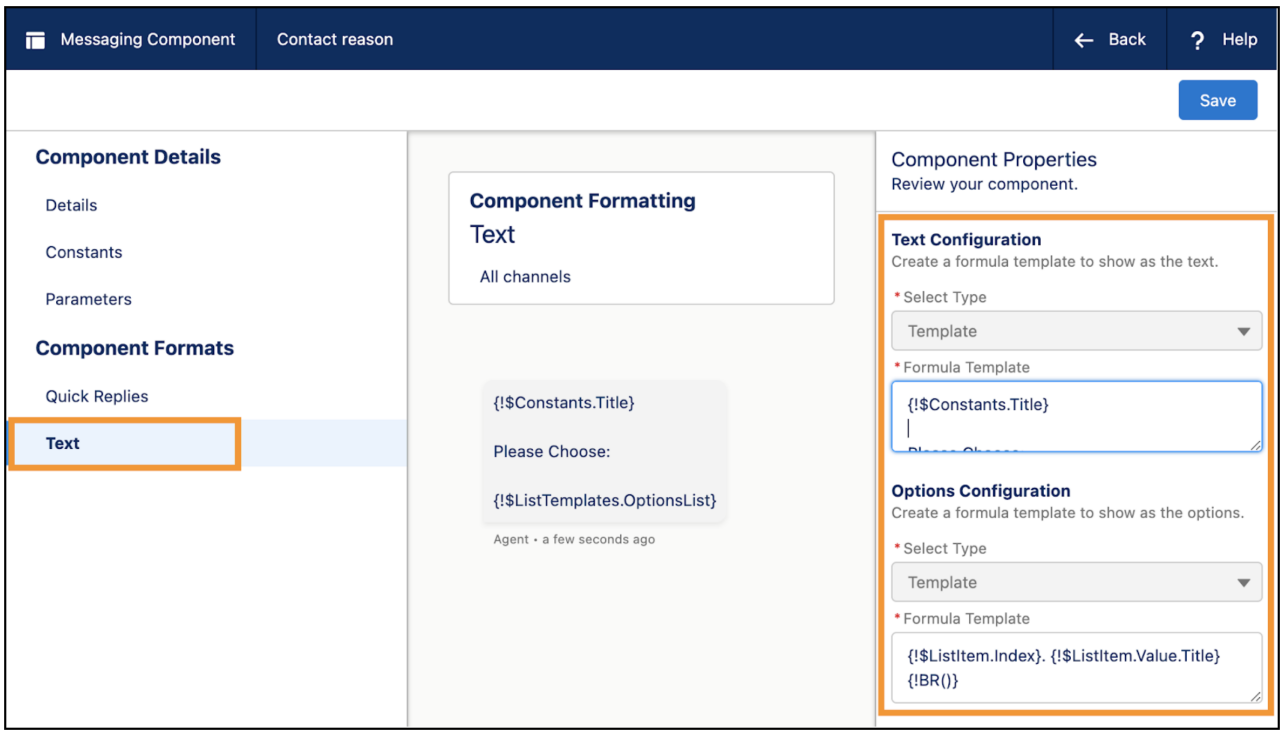
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

We generate the Text version of a component for you when you create the component. However, you can use formula templates to modify the Text version and create a personalized message for your customers.

To edit the Text version of a messaging component, click the component name on the Messaging Components page in Setup. The component opens in the Messaging Component Builder. Then, click the Text format in the left-hand sidebar to customize it.



The center of the Messaging Component Builder shows a preview of the component in the selected format. In the properties panel on the right, you can edit the formula template for any fields with a type of Variable.

Use Merge Fields to Show a Single Value

Example: In this message, merge fields are used to show record field values. A `MyCase Param` parameter of type *`Case Record ID`* is referenced to show the Case Number and Subject fields in the content of the message.

```
Your reference number for this case is:
 {$Parameters.MyCaseParam.CaseNumber}{!BR()}.
The subject of your case is: "{!$Parameters.MyCaseParam.Subject}"
```

Use Merge Fields to Show Multiple Values

Merge fields also let you present multiple values in a list. For example, for questions with options components, the options are provided by a list constant (for static options) or by a list parameter (for dynamic options).

To insert a list of values into the plain text version of a component, use a custom List Template merge field in the message definition. The definition of the merge field includes:

- A unique name
- The data source of type list that provides the list data to be generated at sending time
- A separate formula template that defines the content for each entry in the list

Use the List Template merge field in the formula template with this syntax:

```
$ListTemplates.<list_template_name>
```

Replace `<list_template_name>` with the unique name of the merge field.

The merge field's formula template (used to generate list items) can reference any constant, parameter, and any of these merge fields related to the list item being generated.

- `$ListItem.Index`—the current index of the entry of the list being created.
- `$ListItem.Value`—the actual value of the current entry of the list being created.
- `$ListItem.IsFirst`—true when the first list item is being created, and false otherwise.
- `$ListItem.IsLast`—true when the final list item is being created, and false otherwise.

Use `$ListItem.IsFirst` and `$ListItem.IsLast` to apply special logic to the first or last list item.

Example: Here's a formula template for the Text format of a question component with static options. The formula template uses an `OptionsList` List Template merge field to show the list of options.

```
{!$Constants.Title}{!BR()}
Select an option:{!BR()}
{!$ListTemplates.OptionsList}
```

The definition of the `OptionsList` merge field references the Options list constant and includes the following formula template to generate each list item:

```
{!$ListItem.Index}. {!$ListItem.Value.Name}{!IF(NOT($ListItem.IsLast),BR(),"")}
```

The definition is structured to insert a line break after all list items except the last one.

Each item in the list is a complex type with multiple fields (Name, Image, and Subtitle). In this example, only the Name field of the Option entry is used to create list values.

When the formula templates are evaluated and the list items are created, the plain text version of the messaging component appears as follows, depending on how the constants are set up:

```
What do you need help with?
Select an option:
1. Cancel my order
2. Change my shipping address
3. Change the delivery date
```

Customizing Messaging Components with sObject Formulas

Control the way that your messaging components appear in the Buttons, Card Carousel, Media, Web Page, Rich Link, and Quick Replies formats.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	×

While you can use formula templates to customize the Text version of messaging components, sObject formulas customize all other supported formats—Buttons, Card Carousel, Media, Web Page, Rich Link, and Quick Replies. sObject formulas create values that are

related to parameters of the RecordId type. For example, in a question component with dynamic options where each option references a record, use sObject formulas to create the values for the options' titles or images.

sObject formulas in messaging components behave similarly as they do elsewhere in Salesforce, such as with custom formula fields. They can include parameters and constants.

Example: This sObject formula shows the title of a dynamic option for a list of case records. It consists of the case number, a dash, and the case subject: `CaseNumber & " - " & Subject`

Because the formula is specific to the case object and can't be applied to other objects, it directly references case field names without adding the `Case.` prefix.

Here's how a list item using this formula appears in a messaging session:

```
00001006 - Generator assembly instructions unclear
```

Supported Functions in Messaging Component Formulas

Before you customize components in the Messaging Component Builder, review which functions are and aren't supported.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	×

Supported Functions

- +
- -
- *
- /
- ^
- =
- <>
- <
- >
- <=
- >=
- AND
- NOT
- OR
- &
- TEXT
- DATE
- DAY

- MONTH
- YEAR
- TODAY
- NOW
- TIMENOW
- TIMEVALUE
- HOUR
- MINUTE
- SECOND
- MILLISECOND
- ADDMONTHS
- WEEKDAY
- DATEVALUE
- DATETIMEVALUE
- ISNUMBER
- ISNULL
- ISBLANK
- ISPICKVAL
- NULLVAL
- BLANKVALUE
- MOD
- MAX
- MIN
- ROUND
- GEOLOCATION
- ABS
- SQRT
- CEILING
- FLOOR
- MCEILING
- MFLOOR
- LOG
- EXP
- LN
- DISTANCE
- VALUE
- LEN
- LEFT
- MID
- RIGHT

- BEGINS
- CONTAINS
- SUBSTITUTE
- TRIM
- LPAD
- RPAD
- UPPER
- LOWER
- FIND
- CURRENCYRATE
- IF
- CASE
- INCLUDES
- CASESAFEID
- BR
- TRUE
- FALSE
- NULL
- NOUNESCAPE_STRING_LITERAL
- STRING_LITERAL
- TEMPLATE_STRING_LITERAL
- NUBMER
- IDENT

Unsupported Functions

HTML-generating functions aren't supported.

- IMAGE
- HYPERLINK
- GETSESSIONID
- PREDICT
- DYNAMIC_REF ("[]")
- DYNSAMICREF_IDENT

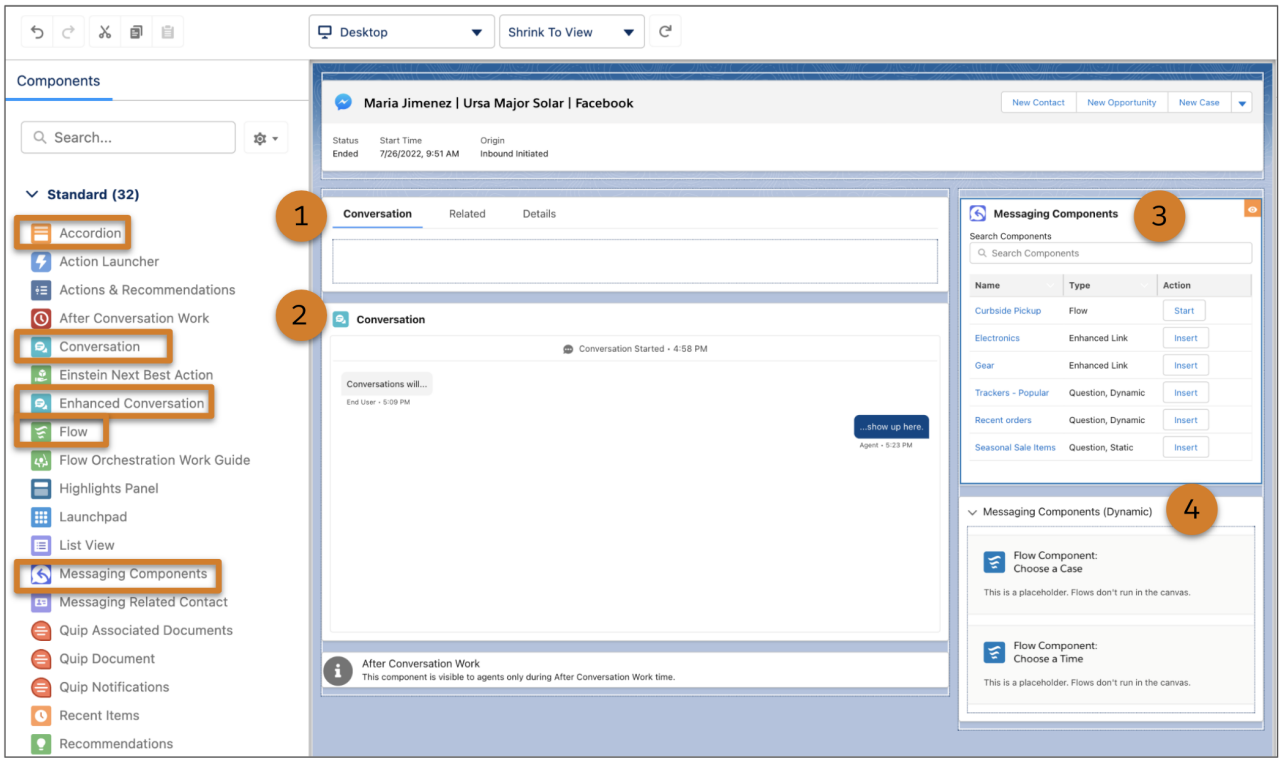
Show Messaging Components in the Service Console

Customize the Service Console so agents can send enhanced links, questions with options, and time selectors in enhanced Facebook Messenger and Messaging for In-App and Web channels.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to						
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	✓	×



1. In the Object Manager in Setup, click **Messaging Session** > **Lightning Record Pages**.
2. Click **New** to create a Lightning page. If a page already exists, click the page name and skip to step 6.
3. Select the page type **Record Page**.
4. Name the page, and then select **Messaging Session** as the object.
5. Select **CLONE SALESFORCE DEFAULT PAGE** on the next page, and then click **Finish**.
6. When you're inside the App Builder, add the following components to the page.
   - Conversation (1): Automatically visible only in standard Messaging sessions
   - Enhanced Conversation (2): Automatically visible only in enhanced Messaging sessions
   - Messaging Components (3): Used only in enhanced Messaging sessions
   - Any related lists that agents need while chatting with customers
7. Some types of messaging components don't appear in Messaging Components. To let agents send time selectors or questions with dynamic options during enhanced Messaging sessions, add a special section to the page (4).
   a. Drag an Accordion component onto the page. This component will contain multiple Flow components, each linked to a dynamic messaging component.

b. To help agents understand the purpose of the accordion component, enter a custom section label—for example, `Messaging Components (Dynamic)`.

c. Drag one or more Flow components into the accordion. Each Flow component can be associated with one flow. In the flow component's settings:

   a. Select a flow that references a dynamic messaging component.

   b. For the record ID variable in the flow, select **Pass record ID into this variable**. The flow variable must match the variable that is included in the Rich Message (Pilot) flow component.

d. After adding all messaging component flows to your accordion component, save your changes.

8. Activate the page.

Note: Auto-response messaging components, which are available only for Messaging for In-App and Web, aren't sent from the Service Console. Instead, they're selected in the channel's settings. The components are sent to the customer automatically when a messaging session starts or ends, or when an agent joins.

SEE ALSO:

Create a Flow to Send Time Selector Messaging Components

Create a Flow to Send Question Messaging Components

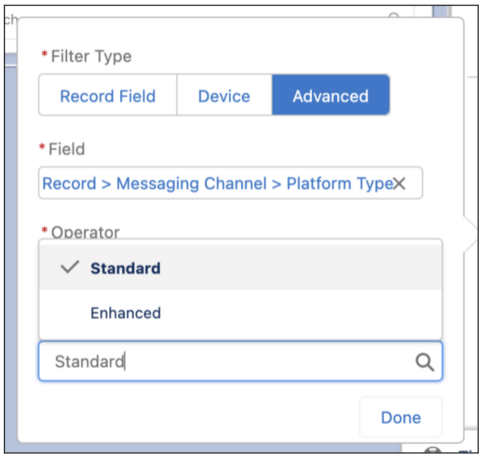
Add Filters to Show or Hide Page Components

If you have both standard channels and enhanced Facebook Messenger or Messaging for In-App and Web channels, add a filter to hide the Messaging Components and Flow page components in standard channels. Since messaging components aren't supported in standard channels, hiding them gives agents a clean user experience.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	✅

1. In the Object Manager in Setup, click **Messaging Session** > **Lightning Record Pages** and select the page you want to edit.
2. Click the Messaging Components component.
3. In the component properties pane, under Set Component Visibility, click **Add Filter** > **Advanced**.
4. Click **Select** to select a field, and then click **Record** > **Messaging Channel** > **Platform Type**.
5. Click **Done**.
6. Leave the operator set to Equal, and select **Enhanced**.



7. Save the filter. Repeat these steps to add a filter to the Accordion component that contains messaging component flows.
8. Activate the page.

Considerations for Messaging Components

Before creating messaging components for agents to send in messaging sessions, review important considerations.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	✓	×

- Messaging components are supported only in enhanced Facebook Messenger and Messaging for In-App and Web channels.
- Translation of messaging components isn't supported.
- Enhanced bots can send messaging components only of the enhanced link type.
- Auto-response messaging components are supported only in Messaging for In-App and Web.
- When an auto-response component is sent in a Messaging for In-App and Web channel, agents see a generic placeholder in the transcript. Agents can't see the content of the auto-response.
- Auto-response components don't support surveys created in Salesforce Feedback Management.

Set Up Automatic Message Notifications in Service Cloud

Send SMS, WhatsApp, or Facebook Messenger messages to customers based on certain events. For example, notify customers about the status of their case: "John, your case <Case Number 123456> has been resolved." Also known as triggered outbound messaging, this feature is supported only in standard Messaging channels.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to						
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	✓	×	×

Create *messaging templates* to define the message content. You can add merge fields to your templates to include personalized data, such as the customer's name or case status. A template can be used for one or multiple types of Messaging channels—keep in mind that templates used in WhatsApp channels must go through an extra review process.

After you create templates, set up flows to send the template-based messages. The flow defines the conditions that trigger the sending of the message. While you can also send automatic message notifications using processes created in Process Builder, we recommend using flows, which support more complex use cases.

When a flow or process sends an automatic message notification to a customer, Salesforce does two things. First, if a Messaging User record for the recipient doesn't exist, Salesforce creates one. Second, Salesforce creates a Messaging Session record that contains a transcript of the sent message. Errors related to automatic messages are added to an error log for you to review.

Note: For SMS channels, automatic message notifications are supported only within the country that the channel's phone number is associated with. For example, if your channel has a US phone number (+1), you can send automatic messages only to recipients with US phone numbers (+1). In enhanced Messaging channels, automatic message notifications triggered by flows or processes aren't sent.

IN THIS SECTION:

Set Push Notifications for Messaging for In-App

Set push notifications for your iOS or Android mobile apps and start a conversation in your Messaging for In-App channel.

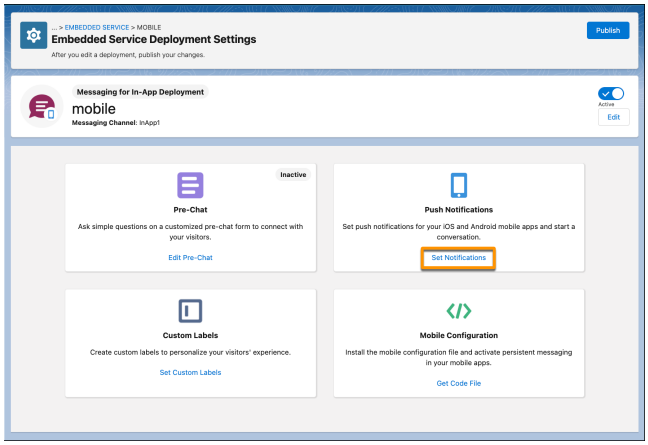
Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	✓	×	×	×	×	×

Before you set up push notifications, review and prepare platform-specific information. To learn about notifications for iOS devices, see the Notifications Overview from Apple. For Android devices, see the Notifications Overview from Google. Also, you need access to the Apple credentials for iOS or Firebase credentials for Android.

With your platform information ready, follow these steps.

1. From Setup, in the Quick Find box, enter `Embedded Service Deployments`, and then select **Embedded Service Deployments**.
2. **View** your Embedded Service deployment.
3. From the **Push Notifications** section, click **Set Notifications**.



4. Enter the information for your push notifications by platform.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

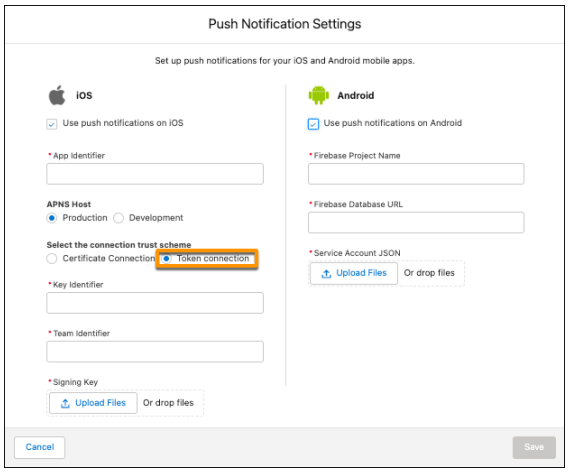
To set up this feature:

- Customize Application

  AND Modify Metadata Through Metadata API Functions

To modify permission sets and profiles:

- Manage Profiles and Permission Sets



Here's an overview of the required iOS fields.

field	PURPOSE/Limitation
App Identifier	The application bundle of your iOS app.
APNS Host	Select the host that matches your application build, either production or development.
Connection Trust Scheme	Only token connections are supported.
Key Identifier	The 10-character key ID from Apple for your encryption key.
Team Identifier	The 10-character team ID for developing your company's apps.
Signing Key	Upload the token connection `.p8` signing key file provisioned in the Apple Developer account associated with your application.
Password	Not used for token connection.

Here's an overview of the required Android fields.

field	PURPOSE/Limitation
Firebase Project Name	The name of the Firebase project associated with your Android app.
Firebase Database URL	The Firebase URL for the database associated with your app. Usually in the form `https://<project-name>.firebase.com`.
Service Account JSON	The service account file provisioned from the Firebase Project associated with your application. Contains project information and a private signing key for authorization to FCM services.

5. Save your work.

Note: Each deployment contains a pair of Apple and Android notification credentials. The deployment's `developerName` must be configured in the mobile SDK to ensure the mobile app uses the correct credentials.

Create Templates for Automatic Message Notifications

Create messaging templates to send routine customer notifications over SMS, WhatsApp, or Facebook Messenger. Then, create a flow to define the conditions for sending the template message.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	✓	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

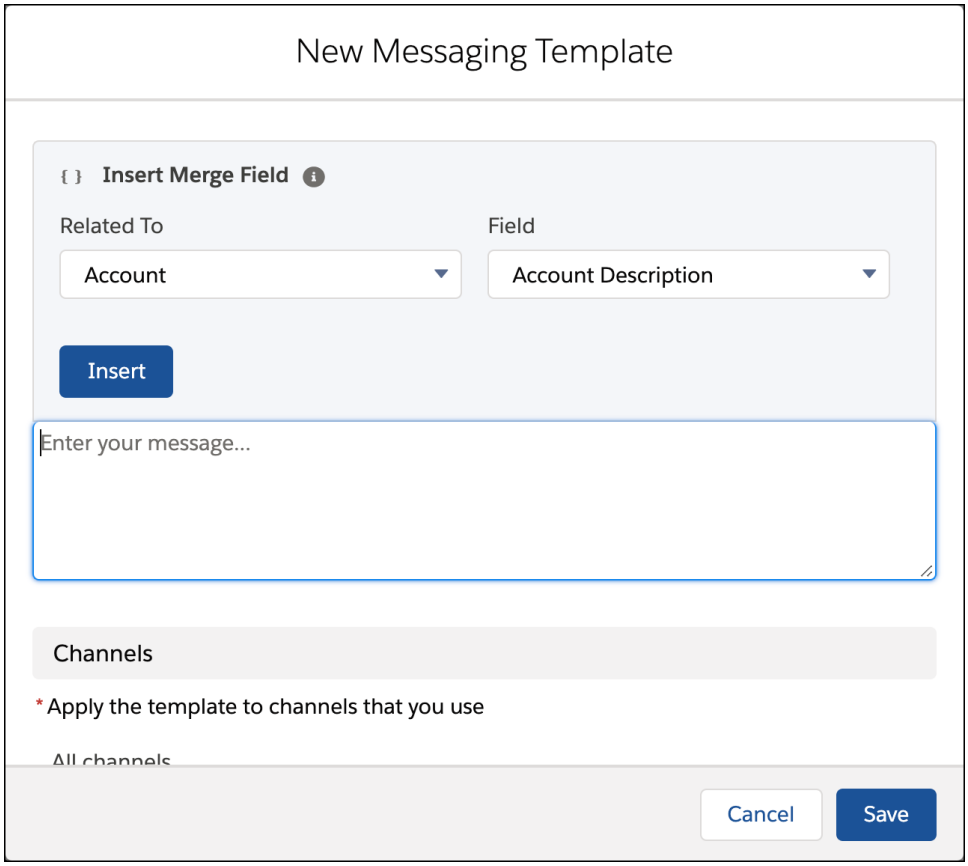
To create messaging templates and view errors:
- Configure Messaging

To view channels:
- View Setup and Configuration

A template can be used for multiple types of standard Messaging channels. Before you create a template for standard WhatsApp channels, submit the template for approval. Follow the WhatsApp Message Template Guidelines and send your template to the WhatsApp enablement team. Templates aren't supported in enhanced WhatsApp channels.

1. From Setup in Lightning Experience, enter *`Messaging`* in the Quick Find box, and select **Messaging Templates**.
2. Click **New**. The New Messaging Template window opens.
3. Enter a name and description for your template.
4. In the Message field, enter your message.

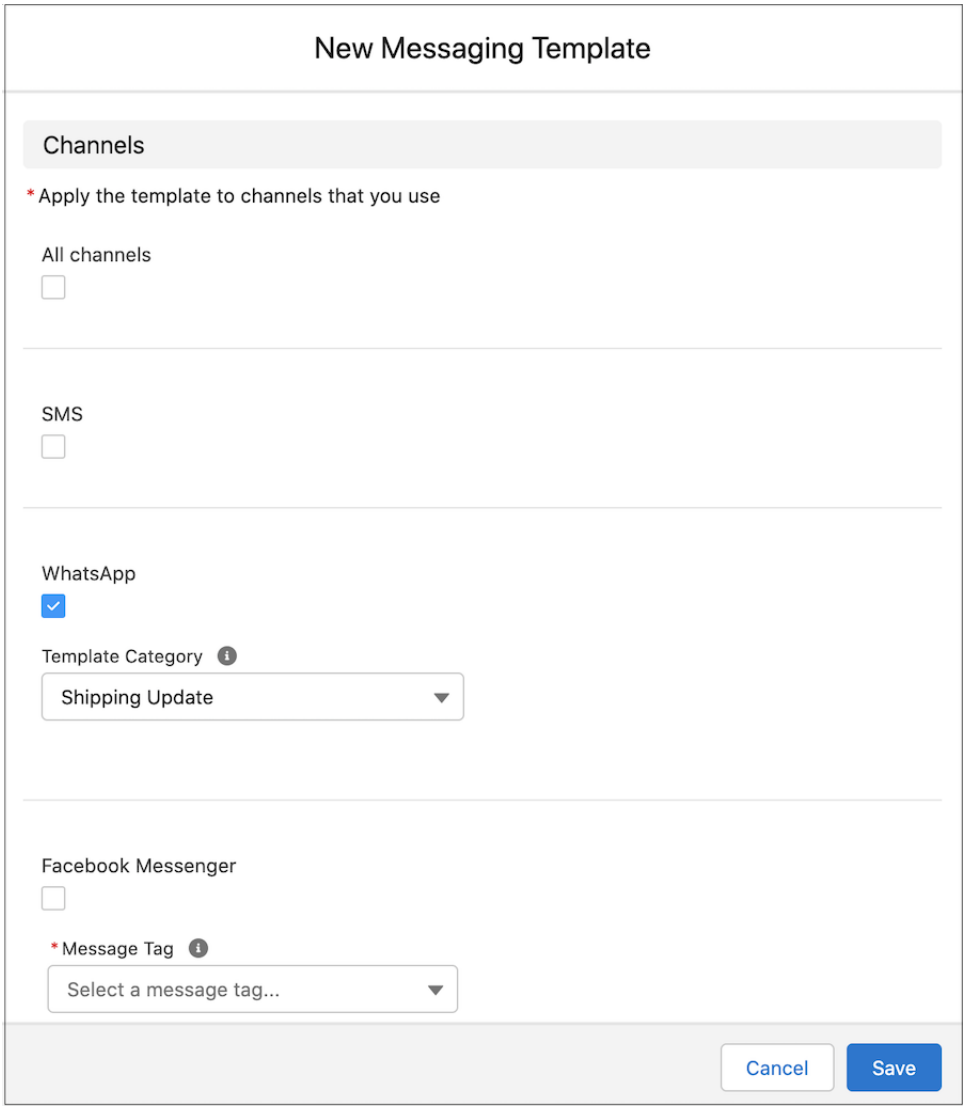
   Use merge fields to insert variables into the message, such as the customer's name or case status.



Note:

- You can access fields from these objects: `Account`, `Asset`, `Case`, `Contact`, `Lead`, `Location`, `Opportunity`, `Organization`, `Service Contract`, `User`, and any custom object with `Allow Activities` enabled. When Field Service is enabled, you can also access fields from these objects: `Assigned Resource`, `Maintenance Plan`, `Return Order`, `Service Appointment`, `Work Order`. When Work.com is installed with Broadcast permissions, the `Employee` object is available.
- `Messaging End User` fields can't be inserted as merge fields.

5. Select the channels where this template will be available: All channels, SMS, WhatsApp, or Facebook Messenger.



6. Optionally, set the message intent.
7. Click **Save**.

After you create a messaging template, create a flow that manages the sending of the message.

Create Flows to Send Automatic Message Notifications

Use Flow Builder to create flows that automatically send messages to customers over SMS, WhatsApp, or Facebook Messenger when certain conditions are met. In your flow, select a messaging template and channel.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

1. From Setup, in the Quick Find box, enter *Flows*, then select Flows.
2. Click **Next Flow**.
3. Select the flow type, and click **Next**.
   The Flow Builder canvas opens.
4. Add an action to the canvas.
   The New Action window opens.
5. Enter *Message Notification* in the search, and then select **Message Notification**.
6. Fill out the fields for the Message Notification core action.

You can use values from earlier in a flow to set inputs for the message notification. If the message notification fields don't contain valid inputs, the flow fails.

Field	Description
`Messaging Channel Unique Name`	The developer name associated with the messaging channel.
`Messaging Template Unique Name`	The developer name associated with the messaging template.
`Context Record ID`	A record that can provide context for merge fields. For the message to send successfully, all merge fields must be filled.
`ConversationBroadcast Record ID`	Optional. ID of the conversation broadcast record that links all messages within a broadcast.
`Recipient Phone Number`	Optional. The destination phone number that the message is sent to. Use if `Recipient Record ID` lists an object other than MessagingEndUser, or if `Recipient Record ID` isn't completed.
`Recipient Record ID`	Optional. ID of a MessagingEndUser or a record with a phone number, such as a contact record.
`Triggered Outbound Type`	Optional. The type of message. Enter either *Standard* or *Broadcast*.

Note: Though both are optional, use either `Recipient Phone Number` or `Recipient Record ID` to ensure the Message Notification action works.

SEE ALSO:

Build a Flow

Create Processes to Send Automatic Message Notifications

Use Process Builder to define processes that automatically send messages to customers over SMS, WhatsApp, or Facebook Messenger when certain conditions are met. Here's an example of a process that sends a messaging notification when the case status is changed to Closed.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To create, edit, or view processes:

- Manage Flow

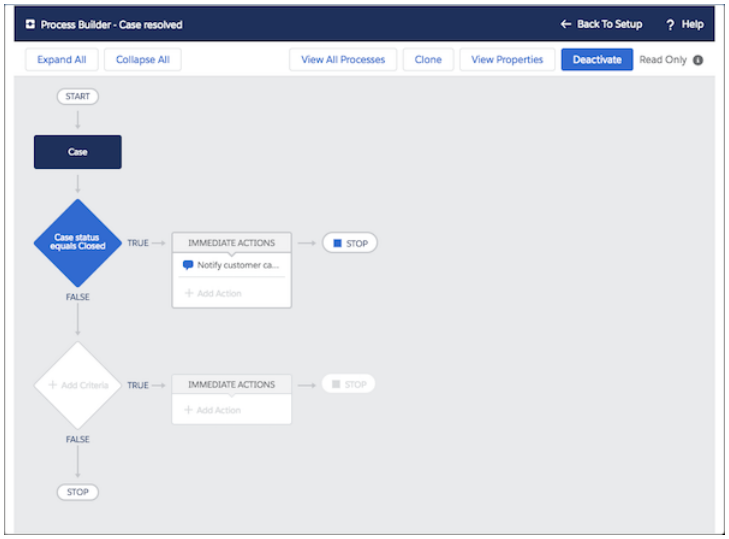
  AND View All Data

Note: While both processes and flows can be used to send automatic message notifications, we recommend using flows, which support more complex use cases.

1. From Setup, enter `Process Builder` in the Quick Find box, and select **Process Builder**.
2. Click **New**.
3. In the **Process Name** field, enter a name for this process.
4. In the **API Name** field, enter an API name for this process.
5. Select the event that triggers the process from **The process starts when** menu.
   For example, select *Status is changed to Closed*.
6. To specify an object that triggers the process, click **+ Add Object**.
   For example, select *Case*.
7. To specify the conditions that trigger the process, click **+ Add Criteria**.
8. In Immediate Actions, click **+ Add Action** and:
   a. In the Action Type menu, select *Messaging Notifications*.
   b. In the Action Name field, enter a name for this action.
   c. In the Messaging Template field, select a messaging template.
   d. In the Channel field, select a channel.
9. In the Send To field, select **Phone** or **Messaging User**.
10. If you selected **Phone**, in the Record ID field, select **Contact ID**.
11. In the Recipient Phone Number menu, select a phone field. Or in the Messaging User Record ID field, select a field.
12. Click **Save**.
13. To enable the process, click **Activate**.
    A confirmation window opens.

14. In the confirmation window, click **Confirm**.

When the conditions are met, the process runs and sends the message.



Note: To send message notifications from a custom object, add a lookup to Messaging User on that custom object. In some channels, customers must initiate messaging to create a Messaging User record.

SEE ALSO:

Process Builder

Create a Process

Troubleshoot Errors for Automatic Message Notifications

Flows or processes can send automatic message notifications to customers over SMS, WhatsApp, or Facebook Messenger channels when a predefined condition is met. This feature is also known as triggered outbound messaging.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	✓	×	×

If something goes wrong and a message can't be sent, review the Messaging Templates error log to find out what happened. The error detail page provides more information to help you troubleshoot and resolve the error.

1. From Setup in Lightning Experience, enter `Messaging` in the Quick Find box, and select **Messaging Templates Error Log**.

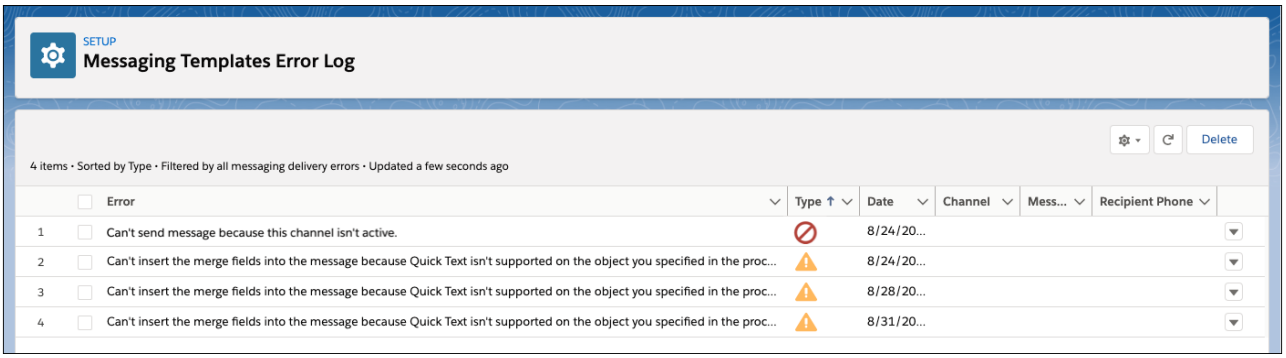
EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To create messaging templates and view errors:
- Configure Messaging

To view channels:
- View Setup and Configuration



2. To view an error's details, click the down arrow in the error's action menu and select **View**.

When you're troubleshooting errors, keep this information in mind.

Messaging sends messages only to recipients who meet certain criteria.
Recipients are excluded when they don't meet all the criteria:

- The recipient must have a corresponding Messaging User record.
- The Mobile Number field on the Messaging User record must be populated.
- The recipient must be opted in to receiving messages from you.
- The sender numbers you select must be associated with a messaging queue.

Messaging templates can't be deleted after use.
You can't delete a messaging template after it's used in a broadcast message. You can see if a template has been used before in the Conversation Broadcasts tab.

Recipients might receive multiple messages.
If they're opted into multiple sender numbers, recipients can receive multiple messages. We recommend regularly reviewing your Messaging User records to remove duplicates and check your recipients' opt-in statuses.

Messaging templates aren't supported in some Messaging channels.
Messaging templates are available in SMS channels, standard WhatsApp channels, and standard and enhanced Facebook Messenger channels. They aren't available in enhanced WhatsApp channels.

Note: Messaging errors are automatically deleted after 30 days. Deleted errors no longer appear in the error log. You can also delete an error from the list view or error detail page.

SEE ALSO:

Messaging Error Codes in Service Cloud

Create Notification Templates for WhatsApp in Service Cloud

Report on Messaging Activity in Service Cloud

Customize Auto-Responses in Service Cloud Messaging Channels

Customize auto-responses for common scenarios in messaging sessions, and set keywords that customers can use to perform actions like opting out of receiving messages. Some auto-response options are available only in enhanced Messaging channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up and edit Messaging channels:
- Configure Messaging

To view channels:
- View Setup and Configuration

1. From Setup in Lightning Experience, enter `Messaging` in the Quick Find box, and then select **Messaging Settings**.
2. Find your channel in the list. Click the down arrow on the right-hand side and select **Edit**.

   Important: In enhanced Messaging channels, clicking **Edit** shows only some of the channel settings. To edit additional auto-response settings, such as the required level of consent and language-specific keywords, click the channel name in the list of channels.
3. In the Automated Responses section, enter the messages that you want to send to customers.
4. Save your changes.

Field	Description	Example	Required?
Conversation Acknowledgment	The reply sent to a customer's initial message. It assures the customer that you received their message. In channels that require customers to opt in to receiving messages, the conversation acknowledgment is sent after the opt-in confirmation. If a bot is in use, the Conversation Acknowledgment field is disabled because the bot responds to the customer's initial message. In Messaging for In-App and Web channels, create an auto-response messaging component to use as your Conversation Acknowledgment message.	Thanks for your message. An agent will be with you shortly. Just so you know, we record and track conversations to help improve your experience.	No
Start Conversation	The message sent to a customer when an agent joins the conversation. In Messaging for In-App and Web channels, create an auto-response messaging component to use as your Start Conversation message.	Hello, how can I help you today?	No
End Conversation	The message sent to a customer when the agent or customer ends the conversation. In Messaging for In-App and Web channels, create an auto-response messaging component to use as your End Conversation message.	Thanks again for contacting us. We appreciate your business.	No

Field	Description	Example	Required?
Opt-In Prompt	Asks customers to opt in to receive messages on this channel. To opt in, customers can reply with an opt-in keyword. You can't customize the prompt for other languages. To customize the opt-in prompt for enhanced Messaging channels, set the channel's Consent Type to Explicit Opt-In.	To subscribe to [Campaign Name] [Description] Alerts, reply START. Reply HELP for help. Reply STOP to cancel at any time. Msg&data rates may apply.	Short codes only
Opt-In Keywords	Keywords your customers can send to agree to receive messages on this channel. You can add opt-in keywords for every language you support.	START, OPT IN	Short codes only
Opt-In Confirmation	The message sent after a customer sends an opt-in keyword. The confirmation acknowledges that the customer consents to receiving messages from your company on this channel. In enhanced Messaging channels, customers don't receive an opt-in confirmation when they're implicitly opted in to receive messages.	By default, the opt-in message is "Thanks for opting in and allowing us to send you messages."	SMS and short codes only
Opt-Out Keywords	Keywords your customers can send to opt out of receiving messages on this channel. When a customer sends an opt-out keyword, they receive an opt-out confirmation, and then stop receiving messages. You can add opt-out keywords for every language you support. The default keywords are: • Stop • Stopall • Unsubscribe • Cancel • End • Quit	STOP	Yes
Opt-Out Confirmation	The message sent after a customer sends an opt-out keyword. You can customize this for every language you support. American and European privacy regulations require opt-out confirmation.	By default, the opt-out message is "You've opted out of receiving messages from us, so we won't contact you again."	Yes
Double Opt-In Prompt	(Not available in enhanced Messaging channels) Asks customers to confirm that they agree to receive messages on this channel. This message is sent in channels that require double consent. To opt in, customers can reply with a double opt-in keyword. You can't customize the prompt for other languages.	To confirm your subscription to [Campaign Name] [Description] Alerts, reply YES. Reply HELP for help. Reply STOP to cancel at	Short codes only

Field	Description	Example	Required?
		any time. Msg&data rates may apply.	
Double Opt-In Keywords	(Not available in enhanced Messaging channels) Keywords your customers can send to doubly agree to receive messages on this channel. You can add double opt-in keywords for every language you support. Your opt-in keywords and double opt-in keywords should be different.	CONFIRM, YES, Y	
Help Keywords	Keywords your customers can send to request help during a conversation. You can add help keywords for every language you support.	HELP, AIDE	Short codes only
Help Response	The response sent to customers when they send a help keyword. You can customize this for every language you support.	[Campaign Name] [Description] Alerts: Help at [source of help] or [toll free number]. Msg&data rates may apply. [Message frequency]. Text STOP to cancel.	Short codes only
Custom Keywords	Keywords your customers can send to receive a custom response. For example, use custom keywords to automate the sharing of company-specific information, or to comply with country-specific regulations. You can add custom keywords for every language you support.	INFO	Short codes only
Custom Response	The response sent to customers when they send a custom keyword. You can customize this for every language you support.	[Campaign Name] [Description] Alerts: Contact us at [web URL] or [email address]. Msg&data rates may apply. [Message frequency]. Text STOP to cancel.	Short codes only
Consent Type	(Available only in enhanced Messaging channels) The level of consent required from customers for your company to send them messages on this channel. • Implicit Opt-In—(Default) By sending your company a message, the customer consents to receive messages. • Explicit Opt-In—The customer must send an opt-in keyword to receive messages.	Not applicable.	Not applicable.

Tip: In addition to customizing auto-responses, you can save agents time during messaging sessions by giving them predefined "quick text" messages, like greetings, answers to common questions, and descriptions of company policies. Quick text can include merge fields, line breaks, and special characters, and is a great way to standardize your company messaging. In enhanced Messaging channels, quick text folders aren't available, but agents can still search your quick text library.

SEE ALSO:

- Track Customer Consent in Messaging Channels
- Create a Messaging Component: Auto-Response
- Set Up and Use Quick Text
- Messaging for Web Developer Guide
- Messaging for In-App Developer Guide

Update Service Cloud Messaging Channel Settings

Configure your settings for WhatsApp, Facebook Messenger, or SMS Messaging channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	✓	✓	✓

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up and edit Messaging channels:
- Configure Messaging

To view channels:
- View Setup and Configuration

1. From Setup, enter `Messaging` in the Quick Find box and select **Messaging Settings**.
2. Find your channel in the list, and click **Edit** in its action menu.

   Important: In enhanced Messaging channels, clicking **Edit** shows only some of the channel settings. To edit additional auto-response settings, such as the required level of consent and language-specific keywords, click the channel name in the list of channels.
3. Update your settings and save your changes.

Field	Description
Channel Name	Name of this channel. If you update the name of your Facebook page in Facebook, the old name still appears in the Messaging channels list view. To show the new name, delete the channel for that page and then add it again.
API Name	API name of this channel.
Business Hours	(Available only if Einstein Bots are in use) The operating hours for your business, when agents are available.
Messaging Platform Key	(Not editable) • SMS: Phone number associated with this channel. • WhatsApp: Phone number associated with this channel.

Field	Description
	• Facebook Messenger: Facebook page ID associated with this channel. To encrypt this field, use deterministic encryption. If you use probabilistic encryption, Messaging doesn't work as expected.
Active	(Not editable) Indicates whether the channel is available for customers to send messages to.
Routing	
Enable Advanced Routing	Select this option to route this channel's messaging sessions based on the logic in the specified Omni-Channel flow. If it's not selected, sessions are routed to a specific queue.
Flow Definition	(Visible only if Enable Advanced Routing is selected) The Omni-Channel flow used to route messages in this channel.
Fallback Queue	(Visible only if Enable Advanced Routing is selected) The queue that receives messaging sessions that the Omni-Channel flow is unable to route.
Routing Type	The type of routing for this channel: Omni-Channel or Channel Skills. If you're not routing messages with an Omni-Channel flow, select **Omni-Channel** to use a queue-based or skills-based routing configuration.
Queue	The queue that messages sent to this channel are routed to. You can't delete queues.
Routing Configuration	(Visible only if Routing Type is set to Channel Skills) The routing configuration used to route messages in this channel. A routing configuration defines the relative priority and relative size of work items, and specifies how work items are routed to agents.
Skill	(Visible only if Routing Type is set to Channel Skills) The skill or skills associated with this channel.

SEE ALSO:

Customize Auto-Responses in Service Cloud Messaging Channels

Persist Secure Messaging History Across Multiple Devices with User Verification

Securely connect your customers to their messaging history and persist conversations across devices with user verification.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:
- Customize Application

Add user verification to:

- Maximize data privacy with secure tokens that verify your customer's identity.
- Allow conversations to persist across multiple devices. For example, if a user signs in to your mobile app and starts a messaging session, and then later logs in to your website and continues the messaging conversation there, they see the same conversation history in both places.
- Enable asynchronous conversations. For example, your customer can start a conversation, walk away from their device for hours, and return to the same conversation at any time.
- Extend your customer's access to their Messaging for Web conversation history. Without User Verification, Messaging for Web customers can view their conversation history in the messaging window for six hours. With User Verification, your customer can always see their conversation history after logging in. Messaging for In-App continues to show messaging history for an unlimited time frame.

Important: User verification is available for a mobile app or an external website. User verification doesn't work with Experience Builder or Commerce Cloud sites. When you're using the Messaging for In-App SDK for mobile apps, we don't support verified users alongside unverified users. Your mobile app implementation must be designed for either verified users or unverified users.

IN THIS SECTION:

Understanding User Verification

When setting up your Messaging implementation, it's often valuable for your agents to know that they're speaking to a customer, or prospective customer, who has been verified by your authentication system. You can continue a conversation with a verified user, even when they're on a different device, or when they reach out at a later time. The User Verification feature for Messaging for In-App and Web uses a token system to ensure that the agent is speaking to someone who has been verified.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

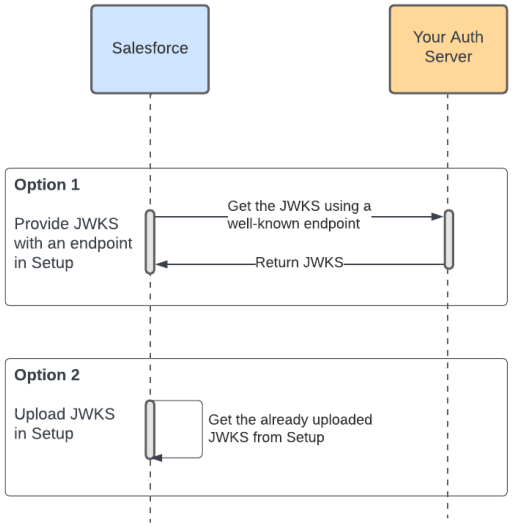
In this article, we show how you can use a JSON Web Key Set (JWKS) and a JSON Web Token (JWT) to verify your users. If you don't have an authentication system already in place, we show how you can test User Verification to see if it's right for you.

For this feature, a JWT is used as an access token for a user. A JWKS is used to verify the validity of that token. To learn more about JSON, JWT, and JWKS, see User Verification Terms.

Note: This documentation assumes that you already set up Messaging for In-App or Messaging for Web. To learn more, see Add Flexibility and Power with Messaging for In-App and Web.

Set Up Keys in Salesforce

When setting up User Verification in Salesforce Setup on page 171, you can upload JSON Web Keys (JWK), or you can provide an endpoint that delivers this same information to Salesforce. This decision determines how Salesforce attempts to access your keyset when verifying your token. The user experience is the same for either flow.



Other details about the key: We require a 2048-bit minimum RSA key length. Also, the `n` (modulus) and `e` (exponent) properties of the JWK should be Base64 URL encoded.

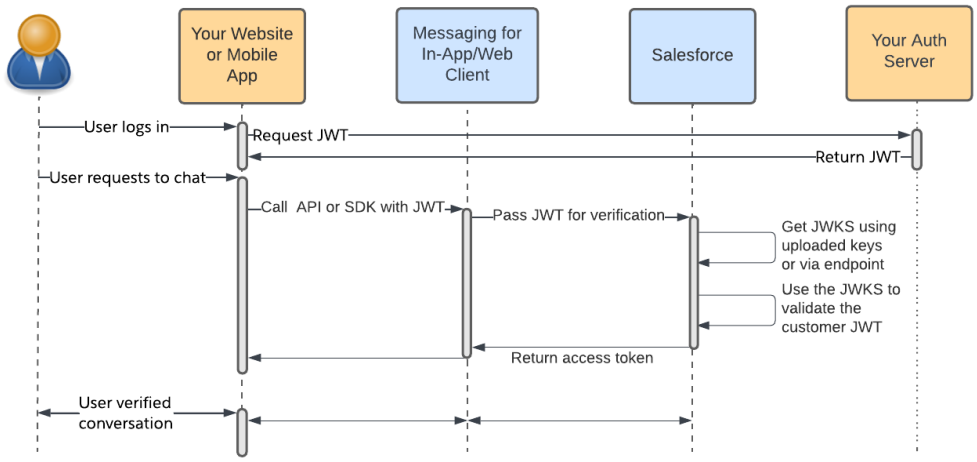
How Do I Do This?

If you already have an endpoint or a keyset using your existing certificate, follow the instructions in Set Up User Verification on page 171.

If you want to test this feature by creating a certificate, a key, and a token, see our GitHub repository. This repo walks you through creating a test certificate, creating a JWK, and creating a JWT. After you have a JWK and JWT, follow the instructions in Set Up User Verification on page 171.

Pass Token Information When the Customer Logs In

In addition to providing the key set in Setup, you must pass user verification token information to Salesforce during the login process. When you pass the token to Salesforce, your Salesforce org verifies this information with the keys that you provided earlier.



After Salesforce verifies the token with the keyset, the verified user can have a conversation with an agent and all message history is associated with that user.

Other details about the token: The "sub" value in the JWT is stored as part of the Messaging Platform Key field of the Messaging End User record. For instance, if the "sub" value is `user-123`, the Messaging Platform Key might be `v2/iamessage/AUTH/{auth_id_info}/uid:user-123`.

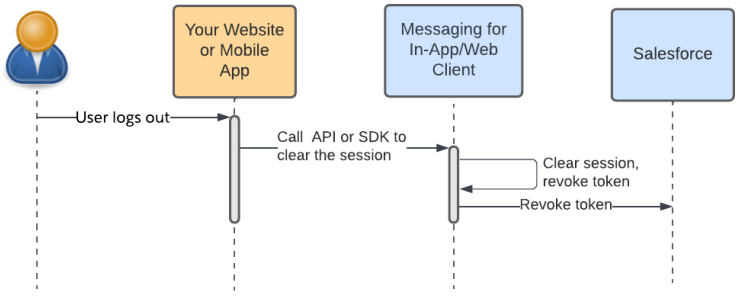
How Do I Do This?

To learn how to use our API to pass a token, refer to our developer documentation for User Verification (Web, iOS, Android).

If you need help creating a token, use the command-line tool in our GitHub repository.

Handle Cleanup After Logout

When the user logs out of your system, call the API to clear the session. This call clears any session data and revokes the token.



How Do I Do This?

To learn how to use our API to clear the session, refer to our developer documentation for User Verification (Web, iOS, Android).

Final Thoughts

Handling authorization and verification takes some time to set up. But when you have the mechanism in place, you ensure that your customers can have a secure, verified conversation with one of your skilled agents.

SEE ALSO:

- Add Flexibility and Power with Messaging for In-App and Web
- Set Up User Verification
- User Verification Terms
- Troubleshooting User Verification
- GitHub: Key and Token Command-Line Utility
- Messaging for Web Developer Guide
- Messaging for In-App Developer Guide

Set Up User Verification

Let customers have secure conversations with User Verification. Add keys, create a keyset, and turn on User Verification in Setup.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

Important: User verification is available for a mobile app or an external website. User verification doesn't work with Experience Builder or Commerce Cloud sites. When you're using the Messaging for In-App SDK for mobile apps, we don't support verified users alongside unverified users. Your mobile app implementation must be designed for either verified users or unverified users.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:

- Customize Application

IN THIS SECTION:

- Add Your Keys and Create a Keyset
- Turn On User Verification
- Use the API to Send the Token to Salesforce

Add Your Keys and Create a Keyset

Upload at least one key and then create at least one keyset containing one or more keys.

1. From Setup, in the Quick Find box, enter `User Verification`, and then select **Messaging for In-App and Web User Verification**.
2. Click **New Key**.
3. Name your key and activate it.

4. Upload your key file.
5. Save your changes.
6. Repeat steps 2 through 5 until all keys are uploaded.
7. Click **New Keyset**.
8. Name your keyset and indicate the JSON web key issuer. Enter an issuer that matches the `iss` parameter value in the JWT payload.
9. Select **Keys** as the type.
10. Search for and select each key to add to your keyset.
11. Save your changes.

Turn On User Verification

1. From Setup, in the Quick Find box, enter *Messaging*, and then select **Messaging Settings**.
2. In the dropdown for your messaging channel, select **Edit**.
3. Select the **Add User Verification** checkbox.
4. Search for and select your Keyset.
5. Save your changes.

Use the API to Send the Token to Salesforce

From your website or mobile app, use the APIs we provide to send the customer token to Salesforce (Web, iOS, Android).

SEE ALSO:

- Understanding User Verification
- Troubleshooting User Verification
- Messaging for Web Developer Guide
- Messaging for In-App Developer Guide

Troubleshooting User Verification

Use these troubleshooting tips to diagnose issues with User Verification.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

Problem: Keys Fail to Upload to Salesforce

If your keys fail to upload in Salesforce Setup, answer these questions.

- Does your key include these required properties: `kty`, `kid`, `alg`, `x5c`?
- Did you upload each key individually? You can't upload the keys in one single JSON array.
- Does your key follow the JWK structure outlined below? Your key must follow this structure.

Sample JWK Structure

```
{
    "kid":"123456",
    "alg":"RS256",
    "use":"sig",
    "kty":"RSA",
    "x5c":["<Your public certificate>"],
    "y":"y",
    "n":"<Base64-encoded modulus>",
    "e":"<Base64-encoded public exponent>",
    "crv":"crv",
    "d":"d",
    "k":"k"
}
```

In some cases, the key fails to upload because of issues related to the certificate. Answer these certificate-related questions.

- Has the certificate expired? The certificate must be valid for at least 10 days.
- Are you generating the keys using the public certificate? Don't use the private certificate.
- Is your certificate valid? To test your certificate, refer to the certificate guidelines below.

Certificate Test Guidelines

1. Create an empty text file, and give it the `.pem` extension.
2. Add `-----BEGIN CERTIFICATE-----` to the beginning of the file.
3. Copy the certificate from the JWK into a file.
4. Add `-----END CERTIFICATE-----` to the end of the file.
5. Run this keytool command.

```
keytool -printcert -file <PublicCertFilename.pem>
```

This command prints the certificate if it's a proper public certificate.

Problem: User Verification Fails with the Provided Token

If user verification fails because of an issue with your token, answer these questions.

- Does your token header include these properties? `alg`, `typ`, `kid`
- Does your token body include these properties? `sub`, `iss`, `exp`
- Is the JWK uploaded in Salesforce Setup? See Set Up User Verification.
- Does the uploaded JWK have the same `kid` value as the `kid` value in the JWT? You can inspect an encoded token at JWT.io.

  Warning: Don't share production JWTs with other organizations and don't paste production JWTs into sites or tools.

- Does your JWT use the same issuer as the issuer that you specified in Salesforce Setup?
- Was the JWT created using the same JWKS uploaded and configured with the Messaging Channel?
- Is the JWKS for the private key used to sign the JWT? If the uploaded JWKS isn't for the private key used to sign the JWT, validation fails.
- Are the `n` (modulus) and `e` (exponent) properties of the key Base64 URL encoded? You must Base64-encode these values.
- Is the key identifier the same for the public/private certificate pair?

- Is the expiry date valid for the certificate uploaded in Salesforce Setup? Confirm that it was.

SEE ALSO:

Understanding User Verification

Set Up User Verification

User Verification Terms

To set up User Verification, you must be familiar with tokens, keys, and keysets. These terms describe the fundamental concepts associated with this feature. If you want more context, this article breaks down the terms to understand.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

JSON (JavaScript Object Notation)

What is it?

JSON is an open standard data format that uses a simple, human-readable syntax to store and transfer data. Even though it has "JavaScript" in the name, the format is language independent. The basic concept is an element that consists of a key, followed by a colon (:), followed by a value. You can create elements for strings, numbers, and boolean values. You can also create a comma-separated list of elements, or you can nest elements within elements by creating objects.

To learn more, see RFC 8259.

How do we use it for Messaging for In-App and Web?

Our tokens and keys are stored using JSON.

Show me an example!

Here's an example of some JSON.

```
{
  "name": "Carrie",
  "age": 135,
  "isHappy": true,
  "favorite_colors": ["blue", "green", "yellow"],
  "catch_phrase": "I can't believe I'm 135 years old!"
}
```

JSON Web Token (JWT, pronounced "jot")

What is it?

A JWT is a compact, self-contained way to pass information between two parties. The data in a JWT is stored as a JSON object. It's often digitally signed so that the recipient can verify the integrity of the data. A JWT is also typically encoded to ensure that it's URL-safe when being passed.

A JWT consists of three parts: a header, a payload, and a signature. The header contains information about how the token is signed. The payload contains information about the user and other data. The signature contains the signed result of the header, the payload, and the secret. The signature doesn't encrypt the data, the signature ensures that the data hasn't been tampered with.

To learn more, see RFC 7519.

How do we use it for Messaging for In-App and Web?

A JWT ensures that we display the right conversation history for the right user. After verifying that the token is valid, we use the subject of the token, the "sub" property, to identify the user and display their conversation history. The "sub" value in the JWT is stored as part of the Messaging Platform Key field of the Messaging End User record. For instance, if the "sub" value is `user-123`, the Messaging Platform Key might be `v2/iamessage/AUTH/{auth_id_info}/uid:user-123`.

Show me an example!

This JSON is a sample header.

```
{
  "kid": "123456",
  "typ": "JWT",
  "alg": "RS256"
}
```

This JSON is a sample payload.

```
{
  "sub": "user-123",
  "iss": "example.com",
  "exp": 1674164345,
  "iat": 1674158345
}
```

When a JWT is signed and encoded, it has this format.

```
hhhhhhh.ppppppp.sssssss
```

Where `hhhhhhh` represents the header, `ppppppp` represents the payload, and `sssssss` represents the signature.

This data is a sample encoded JWT.

```
eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.
eyJzdWIiOiIxMjM0NTY3ODkwIiwibmFtZSI6IkpvaG4gRG9lIiwiaWF0IjoxNTE2MjM5MDIyfQ.
SflKxwRJSMeKKF2QT4fwpMeJf36POk6yJV_adQssw5c
```

You can use a site like JWT.io to decode an encoded JWT.

Warning: Don't share production JWTs with other organizations and don't paste production JWTs into sites or tools.

JSON Web Key (JWK) and JSON Web Key Set (JWKS)

What is it?

A JWK represents a public cryptographic key that can be used to verify the validity of a token (for user verification, this token is a JSON Web Token). A set of JWK keys is known as a JSON Web Key Set (JWKS).

To learn more, see RFC 7517.

How do we use it for Messaging for In-App and Web?

We use a set of JSON Web Keys to verify the validity of the JSON Web Token (JWT). That way, we can ensure that an untampered token came from the correct source. We require a 2048-bit minimum RSA key length.

Show me an example!

```
{
  "kid":"123456",
  "alg":"RS256",
  "use":"sig",
  "kty":"RSA",
  "x5c":["<Your public certificate>"],
  "y":"y",
  "n":"<Base64-encoded modulus>",
  "e":"<Base64-encoded public exponent>",
  "crv":"crv",
  "d":"d",
  "k":"k"
}
```

SEE ALSO:

- Understanding User Verification
- Set Up User Verification

Considerations for Using Enhanced Bots in Messaging Channels

To take your use of AI to the next level, add an enhanced bot to your Messaging for In-App and Web channels or enhanced Messaging channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	✅	✅

EDITIONS

Einstein Bots is available in Salesforce Classic and Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

With enhanced bots, you can apply the flexibility of Omni-Channel Flow and powerful business rules to route conversations to and from a bot. Plus, add rich content such as files and hyperlinks to your bot conversations—no workarounds required.

Keep these considerations in mind when working with enhanced bots.

- You can use enhanced bots only in enhanced Facebook Messenger, enhanced WhatsApp, and Messaging for In-App and Web channels.
- You must use Omni-Channel Flows to route messaging sessions to bots.
- Bots can send files, but the same file sharing limits apply for both bots and agents.
- In enhanced Facebook Messenger channels and Messaging for In-App and Web channels, enhanced bots can send only enhanced link messaging components. Other types of messaging components aren't supported. In enhanced WhatsApp channels, enhanced bots can't send messaging components of any type.

- We recommend configuring your bot's welcome dialog to let customers know that they're messaging with a bot and that conversation transcripts, even in conversations that include only a customer and a bot, are saved in Salesforce. To make sure that you address any compliance considerations, check with your legal counsel.

SEE ALSO:

Set Up Enhanced Bots

Considerations for Enhanced Bots

Track Messaging Users in Salesforce

What a customer messages your company, Salesforce creates a messaging user record for them. The messaging user record can include the customer's name, phone number or Facebook name, and consent status. Messaging user records are required for your recipients, even if you're sending messages to contacts, employees, or person accounts.

EDITIONS

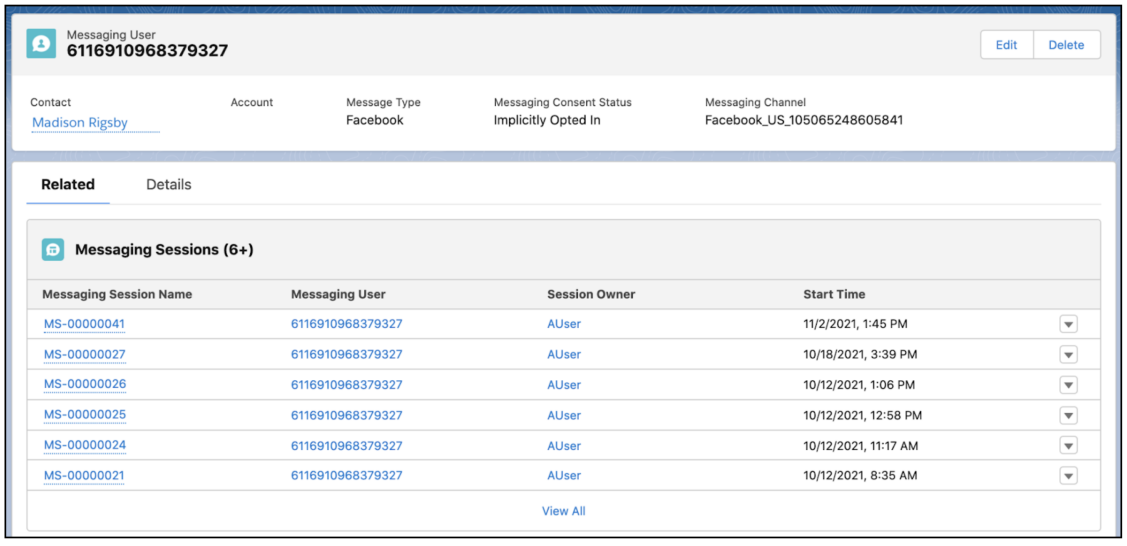
Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	✓	✓	✓	✓	✓

A messaging user record is created for each channel the customer uses. For example, a single contact may be represented by two messaging user records: one for their Facebook Messenger interactions with your company, and one for their SMS interactions. By linking messaging user records to contacts or other Salesforce records, you can get a full picture of the customer's interactions with your service team.

View the history of a messaging user's exchanges with your company in the Messaging Sessions related list.



IN THIS SECTION:

Create Messaging Users

Salesforce automatically creates messaging user records for customers when they message your company. However, depending on your business needs, you may want to use additional methods to mass-create or automate the creation of messaging user records for WhatsApp, Facebook Messenger, or SMS channels.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	✓	✓	✓

Create Messaging Users with Imported Data

Method	Benefits	Best for you if...
Import a CSV file of user data into Salesforce using Data Loader.	Lets you add new messaging user records to your org without them messaging you first.	You plan to use agent-initiated outbound messaging, and you have a set of historical customer data that includes information like phone numbers and opt-in status.

1. Find the Messaging Channel ID.
   a. From Setup in Lightning Experience, use the search to go to the **Messaging Settings** page.
   b. Click **Edit** next to the messaging channel you want to view.
   c. Copy and save the Messaging Channel ID value.
2. Populate the following data into a CSV file.
   - Customer first name and last name
   - Messaging platform key: SMS phone number
     - No hyphens, parentheses, or spaces

  - Use a `+1` in front of the number
- Messaging channel: `Text`, `Facebook`, or `WhatsApp`
- The Messaging Channel ID you copied in Step 1
- Messaging Consent Status: `DoublyOptedIn`, `ExplicitlyOptedIn`, `ImplicitlyOptedIn`, or `OptedOut`

Note: To add a user to multiple channels, create separate entries in the CSV file per channel, per user. For example, create two entries for a user who communicates with your company using both SMS and Facebook Messenger.

3. Open Data Loader on your computer. If you're new to Data Loader, see Data Loader.
4. In Data Loader, select **Insert**.
5. Select **Password Authentication**, then log in with your org credentials.
6. Select **Show All Salesforce Objects** and select the Messaging User object.
7. Import the CSV file you created in Step 2.
8. Automap the fields and run reports.

Create Messaging Users with Process Builder

Method	Benefits	Best for you if...
Use Process Builder to automate the creation of messaging user records.	Ensures that messaging user records are created automatically based on data in other Salesforce records.	You plan to use triggered outbound messaging.

Create a process that creates messaging users from the contacts, employees, and person accounts that you'd like to send messages to. In your process:

- Include a command to create a messaging user record using field values on your contact, employee, or person account records.
- Ensure that the process completes at least the minimum fields required to create a messaging user record: `MessageType`, `MessagingChannel`, `MessagingConsentStatus`, `MessagingPlatformKey`, and `IsoCountryCode`.

SEE ALSO:

Start a Messaging Session with a Customer

Link Messaging Users to Other Salesforce Records (Beta)

To gain insight into your customers' interactions with your company, create linking rules using channel-object linking. Linking rules help your service team associate messaging user records with related records such as contacts, leads, and person accounts.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	✅	✅

When a customer sends your company a message over a channel that uses channel-object linking, Messaging automatically searches for matching records. Depending on your preference, Messaging can automatically link the messaging user record to a matching record, or prompt the agent to review and link the records. Linking can take place during or after a messaging session.

1. From Setup in Lightning Experience, enter Channel-Object Linking in the Quick Find box, then select **Channel-Object Linking**.
2. Turn on Channel-Object Linking.
3. Click **New Linking Rule**.
4. Choose a channel for the new linking rule, such as an existing Facebook channel. Channel-object linking isn't available for Messaging for In-App and Web channels.
5. Choose an object, such as **Contact**.
6. Set the linking logic.

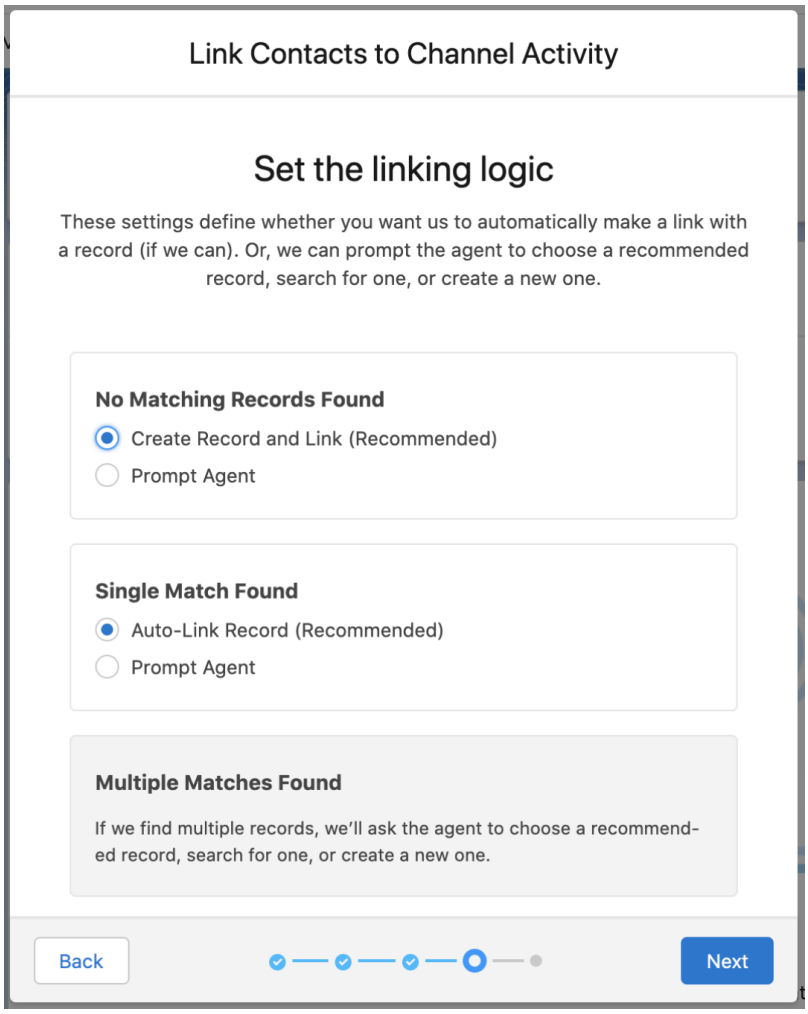
EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up and edit Messaging channels:
- Configure Messaging

To view channels:
- View Setup and Configuration



7. Enter a name and description for your rule.
8. Turn on **Activate on Save** if you want the rule to work right away.
9. Save your rule.

Important: To link records, agents need view access to records owned by other users. For example, if you allow agents to link messaging user records to contacts, agents must be able to see contact records that other users created.

Agents who see a prompt about a possible matching record can click **Review and Link** to proceed. If the record that Salesforce suggests doesn't match, the agent can search for other records or create and link a new one.

Messaging User Fields

Messaging user records represent a link between a messaging channel and a user. The messaging user record includes the customer's name, phone number or Facebook name, and consent status, and allows you to quickly review all messaging sessions that took place with the customer in the associated channel.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to						
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

Table 2: Messaging User Fields

Field	Description
Contact	Contact record that's linked to the messaging user record.
Account	Account record that's linked to the messaging user record.
External ID	The messaging user's contact information: • (SMS channels) The messaging user's phone number • (Facebook Messenger channels) The messaging user's Facebook name • (WhatsApp channels) The phone number associated with the messaging user's WhatsApp account
Locale	The locale of the messaging user.
Messaging Channel	The channel that the messaging user sent the message to.
Messaging Platform Key	The phone number, Facebook page ID, or web or mobile app identifier associated with the messaging user.
Message Type	Indicates the types of messages sent: • `Text` • `WhatsApp` • `Facebook` • `Embedded Messaging` (shown for Messaging for In-App and Web channels)
Messaging User Name	The name of the messaging user. Because this field is editable, we don't recommend referencing it in automation. Instead, use the Messaging Platform Key.
Messaging Consent Status	Indicates whether the messaging user gave implicit, explicit, or double consent. If the messaging user revokes their consent, the status is set to **Opt-Out**. A messaging user engages over a channel and gives implicit consent. The messaging user must take an extra step to give explicit or double consent over a channel. In short code or enhanced Facebook Messenger channels, messaging users can use a keyword to give consent. Usually, messaging users give consent outside of Messaging.
Profile Picture URL	The URL of the messaging user's profile picture.

Field	Description
	You can see profile pictures only for messaging users that use HTTPS URLs. Chrome and Firefox no longer support mixed content downloads.

SEE ALSO:

Object Reference: MessagingEndUser

What's Service Cloud Messaging?

Report on Messaging Activity in Service Cloud

To track your service team's messaging activity in WhatsApp, Facebook Messenger, or SMS channels, create custom report types on Messaging objects.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

Consider creating reports based on the following objects.

- MessagingChannel: Represents a communication channel that an end user can use to send a message to an agent. A communication channel can be an SMS number, a Facebook page, or a WhatsApp channel.
- MessagingChannelSkill: Junction object that represents an association between MessagingChannel and Skill.
- ConversationEntry: Represents a message or an event in the chat history between an agent and a messaging user.
- MessagingSession: Represents a session with a messaging user on a Messaging channel.
- MessagingEndUser: Represents a single address—such as a phone number or Facebook page—communicating with a single Messaging channel.
- MessagingTemplate: Represents a Messaging template used to send pre-formatted messages.
- MessagingDeliveryError: Represents a log of triggered outbound failures to verify when a triggered outbound has failed.

Review these sample report configurations for ideas.

Reporting Goal	Configuration
Track the average length of closed sessions by channel type and assigned agent.	Create a custom report type with MessagingSession as the primary object. Filter or sort the report based on these fields: • `AcceptTime` • `AgentMessageCount` • `AgentType` • `ChannelType` • `EndTime` • `EndUserMessageCount`

Reporting Goal	Configuration
	• `OwnerId` • `Status` Note: `AgentMessageCount` and `EndUserMessageCount` aren't calculated in enhanced Messaging channels. If you're trying to assess agent performance, calculate the messaging session length (`EndTime – AcceptTime`) instead.
Track your accounts with the most active messaging users.	Create a custom report type with MessagingEndUser as the primary object. Filter or sort the report based on these fields: • `AccountId` • `MessageType` • `MessagingChannelId`
Track inbound and outbound messages that weren't delivered.	Create a custom report type with ConversationEntry as the primary object. Filter or sort the report based on the `ActorType` and `MessageStatusCode` fields.
Track conversations by channel.	Create a custom report type with MessagingSession as the primary object. Filter or sort the report based on the `ChannelName` field.
Track conversations by channel type.	Create a custom report type with MessagingSession as the primary object. Filter or sort the report based on the `ChannelType` field.
Track conversations by day or conversations by day and by channel.	Create a custom report type with MessagingSession as the primary object. Filter or sort the report based on the `StartTime` and `ChannelName` fields.

SEE ALSO:

Create a Custom Report Type

What's Service Cloud Messaging?

Set the Enter or Return Key to Insert a New Line of Text Instead of Send a Message in Messaging for Web

By default, Messaging for Web is configured so that the Enter or Return key sends a message. To make it start a new line of text instead, change the deployment settings.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	×	×	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:
- Customize Application

  AND Modify Metadata Through Metadata API Functions

1. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and then select **Embedded Service Deployments**.
2. Select **View** from the dropdown menu for your deployment.
3. Click **Edit Settings**.
4. Select **Press Enter or Return to start a new line of text**. To use the Enter or Return key to send a message, deselect the checkbox.
5. Save your changes.

Note: When the Enter or Return button is set to send a message, start a new line of text by pressing Option + (Enter or Return) (Mac) or pressing Alt + (Enter or Return) (Windows). When the Enter or Return button is set to start a new line of text, send a message by pressing Option + (Enter or Return) (Mac) or by pressing Alt + (Enter or Return) (Windows).

Show the Emoji Keyboard in Messaging for Web

Choose to allow messaging for web customers to send emojis to agents in messaging conversations. On the Embedded Service Deployment Settings page, turn on the keyboard.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	×	×	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:
- Customize Application

  AND Modify Metadata Through Metadata API Functions

To modify permission sets and profiles:
- Manage Profiles and Permission Sets

1. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and then select **Embedded Service Deployments**.
2. Click the edit button to the right of your deployment, and select **View**.
3. Click **Edit Settings**.
4. Select **Show Emoji Keyboard**, and save your changes.
5. Publish your deployment.

Show Customers an Estimated Wait Time in the Messaging Conversation Window

Automatically tell customers how many minutes they'll wait before being connected to an agent. Build customer trust by setting expectations.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	×	×	×	×	×

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To set up this feature:
- Customize Application

  AND Modify Metadata Through Metadata API Functions

To modify permission sets and profiles:
- Manage Profiles and Permission Sets

Estimated wait time can appear in several scenarios as long as certain conditions are met.

Possible scenarios that trigger Estimated Wait Time include:

- A customer initiates a messaging session, and they're routed directly to a queue or to a flow that routes to a queue.
- An agent transfers to a flow that routes to a queue.
- A bot transfers to a flow that routes to a queue.

Conditions that must be met to show Estimated wait time include:

- You activated Estimated Wait Time.
- Agents accepted at least 10 messaging requests in the last 10 minutes in the corresponding queue.
- To trigger estimated wait time when a customer creates a new messaging session, the Routing Type field for your deployment in Messaging Settings must be set to Omni-Queue or Omni-Flow with a selected flow that routes to a queue. This condition isn't required to trigger estimated wait time when an agent transfers to a flow that routes to a queue or when a bot transfers to a flow that routes to a queue.

Note: If the estimated wait time is less than 1 minute, we round it up to 1 minute.

1. From Setup, in the Quick Find box, enter `Messaging Settings`, and then select **Messaging Settings**.
2. Click the edit button to the right of your deployment, and then select **Edit**.
3. Click **Show estimated wait time**.
4. Save your changes.

Move Your Messaging Channels from Salesforce Classic to Lightning Experience

Messaging in Salesforce Classic depends on the LiveMessage managed package, while Messaging in Lightning Experience uses standard Salesforce objects and features. Learn how to move your SMS or Facebook Messenger channels to Lightning Experience.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

Messaging channels that this article applies to						
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	×	×	×

Important: LiveMessage in Salesforce Classic and Digital Engagement in Lightning Experience can't run concurrently in the same production org. We recommended testing a complete sandbox implementation of Messaging in Lightning Experience before you complete the transition.

1. Get Digital Engagement.
   a. To access Messaging in Lightning Experience, purchase the Digital Engagement SKU. Contact your Salesforce account executive to learn more.
   b. Log into your production org to verify that Digital Engagement has been added. From Setup, enter `Company Information` in the Quick Find box, and select **Company Information**. Verify that the Messaging and Service Cloud User licenses are listed and reflect the total number of licenses that you purchased.
2. (Optional) Set up Messaging in a sandbox org. For help, see Test Your SMS Channel in Service Cloud and Test Your Facebook Messenger Channel in Service Cloud.
3. Set up messaging permissions and turn on Messaging. For help, see Prepare for Messaging for WhatsApp, Facebook Messenger, and SMS.
4. File a case in Salesforce Help to migrate your messaging channels from Salesforce Classic to Lightning Experience.

   Note: Filing a case simply lays the groundwork for the migration; it doesn't automatically switch your implementation to Lightning.

   Include this information in your case:

   - Topic: `Service Cloud`
   - Category: `Messaging`
   - Subject: `Lightning Migration for <Organization Name>`
   - Org ID of the org that you want to migrate to Lightning Experience
   - (For SMS channels) Every phone number (long code and short code) that you want to migrate. Indicate whether you want to seek exceptions or enable more numbers.

   Salesforce sets up your phone numbers in Lightning Experience within 72 business hours. We'll give you information about the next steps.

   After you file your case, continue preparing your Messaging configuration in Lightning Experience (steps 5 and 6) while you wait for your channels to be migrated. When your case is closed, your phone numbers appear on the Messaging Settings page in Lightning Experience, but messages continue to be routed through Salesforce Classic. When you're ready to switch to Lightning Experience routing, move on to step 7.
5. Complete the remaining steps in Messaging for WhatsApp, Facebook Messenger, and SMS, including creating your channels.
6. Configure routing in Omni-Channel. Skip this step if you currently use Omni-Channel for LiveMessage. But if you use the LiveMessage widget to monitor your queues, you must set up Omni-Channel.
   a. Follow the instructions in Omni-Channel for Administrators. Assign the Messaging Session object to your queue.

Note: The LiveMessage session (Installed Package: LiveMessage for Salesforce) object is a remnant of Classic LiveMessage. You can ignore it.

7. Convert your automated triggered messages to messaging notifications. For instructions, see Set Up Automatic Message Notifications.
8. Copy or document any processes and data that reference classic LiveMessage's custom objects. While this step isn't required, the information can be useful. After messaging traffic is cut over and your classic LiveMessage licenses expire, access to its custom objects, data, and associated processes is blocked.
9. Important: Everything beyond this point can affect your service. Proceed only when you're ready to fully migrate to Messaging in Lightning Experience.

   File a new case in Salesforce Help to switch SMS traffic from classic LiveMessage to Messaging in Lightning Experience.

   Include this information in your case:

   - Topic: `Service Cloud`
   - Category: `Messaging`
   - Subject: `Lightning Migration for <Organization Name>`
   - Org ID of the org that you want to migrate. Specify that you must schedule the cutover of your numbers from classic LiveMessage to Lightning Experience.
   - Every phone number that you want to migrate, including long code and short code numbers. Indicate whether you plan to seek exceptions or want to enable more numbers.

   When your case is accepted, a support agent offers you a few time slot options for the conversion. When the conversion occurs during your scheduled time slot, messaging traffic moves to your new Lightning Omni-Channel queue. It can take up to 4 hours for carriers to accept the traffic routing updates. In the meantime, check both consoles for message delivery.
10. Migrate your Facebook channels.
    a. If your Facebook channel is live in Salesforce Classic, remove the association between your Facebook page and the LiveMessage app.
       a. Log in to Facebook.
       b. Select the Facebook page that you want to migrate.
       c. Navigate to the page setup screen and remove the Facebook page from the LiveMessage app.
    b. Associate your Facebook page with your Lightning org. For help, see Create a Facebook Messenger Channel in Service Cloud.
11. Change your Omni-Channel configuration. If you already use Omni-Channel in Salesforce Classic, update your queue configurations and swap out LiveMessage Session (Installed Package: LiveMessage for Salesforce) for Messaging Session. Omni-Channel doesn't work properly if you have both Salesforce Classic and Lightning Experience configured to use it.

SEE ALSO:

Compare Messaging Channel Capabilities in Service Cloud

What's Service Cloud Messaging?

Message with Customers in the Service Console

Interact with customers over WhatsApp, Facebook Messenger, SMS, and Messaging for In-App and Web channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

IN THIS SECTION:

Open Messaging

Access Messaging through the Service Console app that your admin set up. Log into Omni-Channel to start chatting with customers.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

1. Open the app that contains Messaging.
   a. To open the App Launcher, on the left side of the navigation bar, click .
   b. Click the app that contains Messaging. Usually, this is your Service Console app.
      The name of the app might vary depending on how your admin set up Salesforce. When in doubt, your admin can tell you which app to use.
2. Log into Omni-Channel. Messages are routed only to agents who are logged in to the Omni-Channel utility.
   a. To open the Omni-Channel utility, click **Omni-Channel** in the footer of your screen.
   b. Click the dropdown menu and select your status. If you're online, a green dot is shown next to the status. Now you're ready to chat with customers.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To send and receive messages and end messaging sessions in Messaging for In-App and Web:

- Service Cloud User

To send and receive messages in Messaging for WhatsApp, Facebook Messenger, and SMS:

- Messaging Agent

To end messaging sessions in Messaging for WhatsApp, Facebook Messenger, and SMS:

- End Messaging Session

Accept a Message and Chat with a Customer

When a new message arrives in Messaging, it appears in the Omni-Channel utility.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	✓	✓	✓	✓	✓

You can enter up to 840 characters in a single message. Messages over 840 characters aren't sent.

1. To accept a message and open the messaging session window, click the check mark icon.

   To see the first message that a customer sent, hover your mouse over the check mark icon. The first message can give you context about why the customer is contacting your company.

2. To send a message to the customer, enter your message and press **Enter** on your keyboard.

   Tip: To add more context to the messaging session, use the lookup fields on the Details tab to associate the session with a case, lead, or opportunity.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To send and receive messages and end messaging sessions in Messaging for In-App and Web:
- Service Cloud User

To send and receive messages in Messaging for WhatsApp, Facebook Messenger, and SMS:
- Messaging Agent

To end messaging sessions in Messaging for WhatsApp, Facebook Messenger, and SMS:
- End Messaging Session

Start a Messaging Session with a Customer

Agents can proactively update customers on the status of their case by sending outbound messages. Agent-initiated outbound messaging is available only in standard SMS channels in Service Cloud. It's in beta for standard Facebook Messenger and standard WhatsApp channels and not available in enhanced Messaging channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✓	✓	✓	×	×

Whenever a user exchanges a message with your company, a *messaging user* record is created to represent the customer in Salesforce. After an agent associates a customer's messaging user record with a contact or other type of record, all future messages from that number are automatically associated with that contact. This way, the contact record shows the complete history of the customer's exchanges with your company.

Agents can send outbound messages from the following record detail pages:

- Messaging User

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To send agent-initiated outbound messages:
- Agent Initiated Outbound Messaging

  AND Messaging Agent

To end Messaging sessions:
- End Messaging Session

To view the Start Conversation button on Person Account records:
- B2C

- Contact
- Account (person accounts only)
- Case
- Lead
- Opportunity

Before starting, log in to Omni-Channel.

From a Messaging User record:

1. From the App Launcher, click **Messaging Users** to open the Messaging Users tab.
2. Click the messaging user record in question.
3. Click **Start Conversation**.

   Note: Here are some reasons that the Start Conversation button may not be visible:

   - The user has opted out of messages.
   - The agent isn't assigned to the queue associated with the channel.
   - The channel is a WhatsApp or Facebook Messenger channel, and your Salesforce org doesn't have agent-initiated outbound messaging (in beta for WhatsApp and Facebook Messenger). Contact your account executive to learn more.

4. A new messaging session starts. Send one or more messages, then wait for the customer to respond.

From a Contact, Person Account, Case, Lead, or Opportunity Record:

Important: To view the Start Conversation button on a lead, case, or opportunity record, these requirements must be met:

- An inbound messaging session for the messaging user must exist in the channel, and the messaging session must be associated with the record where you want to start the conversation.
- The Start Conversation button must be added to the record page layout in question: lead, case, or opportunity.

To view the Start Conversation button on person account or contact records, the person account or contact must be associated with the messaging user record.

1. On the Messaging User record detail page, edit the appropriate lookup field—Case, Lead, Account, Contact, or Opportunity. Select the record you want to link to, such as a specific case. Click **Save**.
2. Navigate to the record you linked to the Messaging User.
3. From the actions menu, select **Start Conversation**.
4. Select the Messaging User record that you want to have a conversation with.

   Note: A contact can be associated with more than one Messaging User, so there may be several to choose from.

5. Click **Start Conversation**.
6. A new messaging session starts. Send one or more messages, then wait for the customer to respond.

You can send multiple messages to a customer before they respond. When you finish sending messages, you can close the tab while you wait for a response. In enhanced messaging sessions, the messaging session tab turns orange to notify you of a new message. If the customer responds within 24 hours and you're online, their message is routed directly to you. If you aren't online or more than 24 hours have passed, the session ends and their message are routed to a qualified, available agent. Outbound messages don't use agent capacity until the customer responds.

For agent-initiated messages, we use the most current customer opt-out information when the message is sent. If a customer changes their opt-out status after an agent sends an outbound message, the agent can continue sending messages until the official opt-out status is updated.

Send Images and Files in Messaging Sessions

Sometimes, only a picture will do. Resolve customer inquiries faster by sending images and files during Service Cloud messaging sessions.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

Supported file types and maximum attachment size vary depending on the channel type.

Channel Type	Maximum File Size	Supported File Types
Messaging for Web	5 MB	.pdf, .png, .jpeg, .jpg, .bmp, .tiff, .gif
Messaging for In-App	5 MB	.pdf, .png, .jpeg, .jpg, .bmp, .tiff
WhatsApp (Standard)	5 MB	.jpg, .jpeg, .png, .pdf
WhatsApp (Enhanced)	Varies by file type. For details, see Considerations for Using WhatsApp in Service Cloud.	.jpeg, .png, .pdf, .txt, .ppt, .pptx, .pps, .ppsx, .doc, .docx, .xls, .xlsx, .csv, .aac, .amr, .mp4, .3gp
Facebook Messenger (Standard)	25 MB	.jpg, .jpeg, .png, .gif
Facebook Messenger (Enhanced)	25 MB inbound 10 MB outbound	.pdf, .png, .bmp, .tiff, .gif, .jpeg, .jpg, .xbm, .xpm, .mp3, .mp4
SMS long codes	• AT&T: 1 MB • T-Mobile: 1 MB • Verizon: 1.2 MB • Sprint: 2 MB • US cellular: 500 KB	.jpg, .jpeg, .png, .gif
SMS toll-free long codes	525 KB	.jpg, .jpeg, .png, .gif

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To send and receive messages and end messaging sessions in Messaging for In-App and Web:
- Service Cloud User

To send and receive messages in Messaging for WhatsApp, Facebook Messenger, and SMS:
- Messaging Agent

To end messaging sessions in Messaging for WhatsApp, Facebook Messenger, and SMS:
- End Messaging Session

Note: Images and file attachments sent over SMS channels are supported only for US and Canadian numbers associated with Salesforce North American instances. To see what instance you're on, go to the Company Information page in Setup and check the Instance field.

1. Press the paperclip or plus icon in the messaging window.
2. Select the image or file that you want to send. You can send only one file at a time.

   Note:

   - In standard Messaging channels, you can't send text and a file in the same message.
   - In enhanced Messaging channels and Messaging for In-App and Web, only files with public links appear in the file browser. These include files that you sent in a messaging session in the last 30 days, and files shared with you that have a non-expiring public link. If you don't see the file you want to send, open the file elsewhere (such as on the Files tab) and select the option to create a public link. After the link is created, you'll be able to see the file in the file browser during messaging sessions.

3. Press the send icon.

SEE ALSO:

Share Knowledge Article URLs in Channels

Share Knowledge Articles in Channels in Lightning Knowledge

Send Messaging Components in Enhanced Messaging Sessions

Messaging components let you send structured content, such as a question with options, to customers in enhanced Facebook Messenger or Messaging for In-App and Web channels.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✓	✓	×	×	×	✓	×

Send an enhanced link, a question with options, or a time selector to a customer in an enhanced Facebook Messenger channel or Messaging for In-App and Web channel. Your admin creates these components ahead of time.

If a component includes customer-specific choices—for example, a list of available appointment times or a list of cases—you can send it to a customer during a messaging session by running a flow. You can find each flow in a Flow component in the Service Console. Your admin may group the messaging component flows into one section to make them easier to find.

Note: Auto-response messaging components, which are available only for Messaging for In-App and Web, aren't sent from the Service Console. Instead, they're selected in the channel's settings. The components are sent to the customer automatically when a messaging session starts or ends, or when an agent joins.

SEE ALSO:

Interactive Messaging Components

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To send and receive messages in Messaging for In-App and Web:

- Service Cloud User

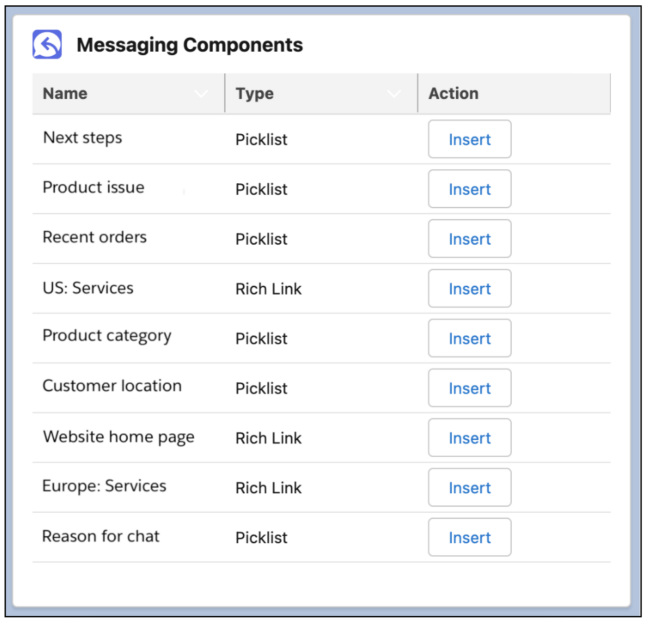
To send and receive messages in Messaging for WhatsApp, Facebook Messenger, and SMS:

- Messaging Agent

Send Static Messaging Components

To send an enhanced link or a question with static options, find it in the Messaging Components console component.

1. On the messaging session page, find the component you want in the Messaging Components section. If you don't see this section, ask your admin to add it to the Service Console.

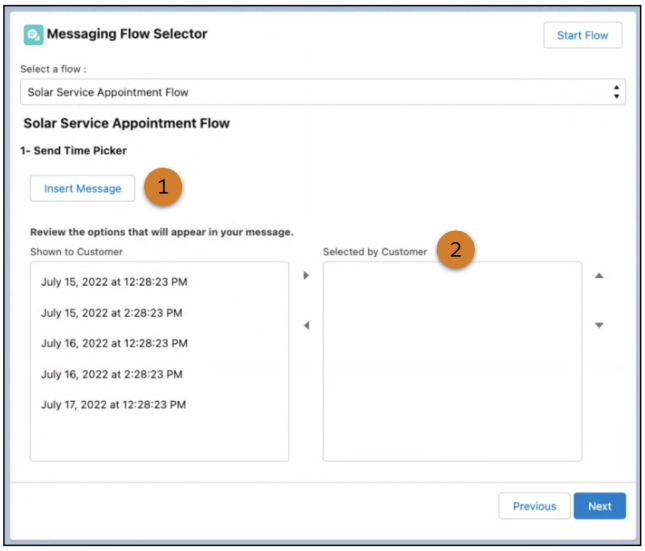


2. Click **Insert** next to the component to insert it into the message field.
   A placeholder appears below the message field; no preview of the component is available.
3. Click **Send** in the message field.
   The component is sent to the customer and appears in the conversation transcript. The component's appearance varies depending on the channel type and how the component was configured.

Send Dynamic Messaging Components

To send a time selector component or a question component with dynamic options, run a flow in the Service Console.

1. On the messaging session page, find and start the flow to send the component. Your admin configures the flow's location and start button label.
2. Click **Insert Message** (1).



A placeholder appears below the message field. No preview of the component is available.

3. Click **Send** in the message field.
   The component is sent to the customer and appears in the conversation transcript.
4. When the customer selects an option, find the same option in the Flow component and move it to the Selected by Customer column (2). Then, complete the flow.

End or Transfer a Messaging Session

Wrap up after helping a customer in a messaging session in Service Cloud. Transfer them to another agent, flow, or bot for further help, end the session, or mark it inactive.

Messaging channels that this article applies to						
Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
✅	✅	✅	✅	✅	✅	✅

Transfer a Messaging Session

If you're unable to help a customer, transfer their messaging session to another qualified agent, flow, or enhanced bot.

The transfer option is available only in enhanced Facebook Messenger channels, enhanced WhatsApp channels, and Messaging for In-App and Web. On the Omni-Channel Settings page in Setup, **Enable Skills-Based and Direct-to-Agent Routing** must also be selected.

1. In an active messaging session, click the transfer icon in the lower-left corner of the Conversation component.
2. Search for and select an agent, flow, or enhanced bot. The transfer window shows up to five transfer recipients in alphabetical order. Agent status isn't shown.

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

USER PERMISSIONS

To send and receive messages and end messaging sessions in Messaging for In-App and Web:

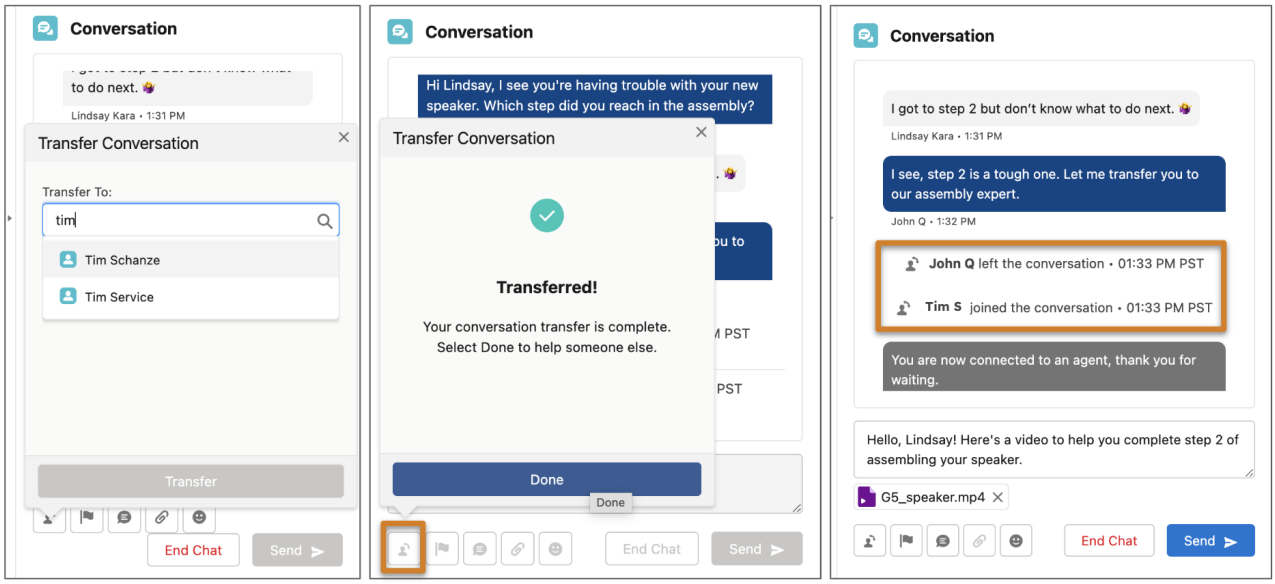
- Service Cloud User

To send and receive messages in Messaging for WhatsApp, Facebook Messenger, and SMS:

- Messaging Agent

To end messaging sessions in Messaging for WhatsApp, Facebook Messenger, and SMS:

- End Messaging Session



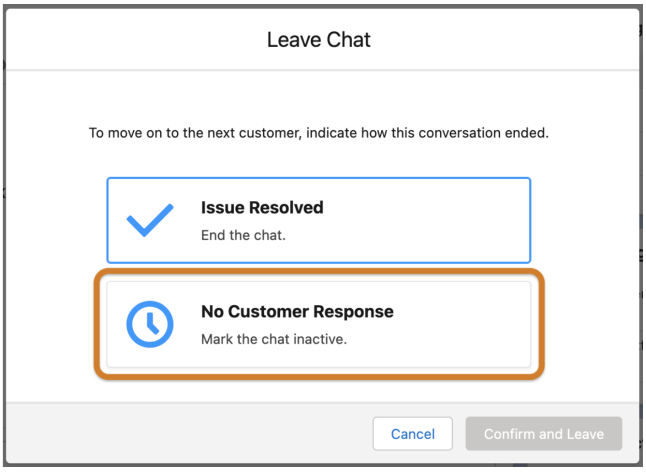
3. When the selected agent accepts the transfer, the original agent is removed from the conversation. After an agent clicks Transfer, the transfer can't be canceled.

Mark a Messaging Session Inactive

If the customer stops responding to you before you resolve their issue, mark the session inactive.

The option to mark a session inactive is available only in enhanced Facebook Messenger channels, enhanced WhatsApp channels, and Messaging for In-App and Web.

1. Close the messaging session tab. A confirmation window appears.
2. In the confirmation window, select **No Customer Response**, then **Confirm and Leave**. The session's status changes to Inactive.

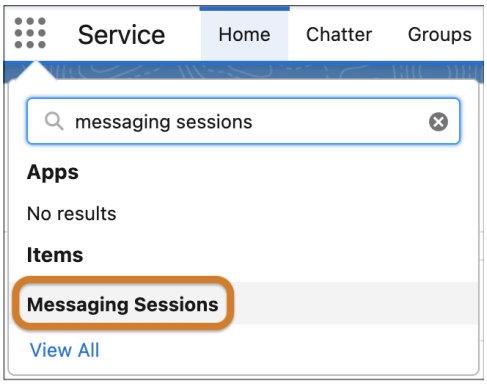


Marking a session inactive frees up your capacity so you can help the next customer. If they send a response after the session has been marked inactive, the session is routed to an available agent. Inactive sessions switch to the Ended status after approximately 30 hours.

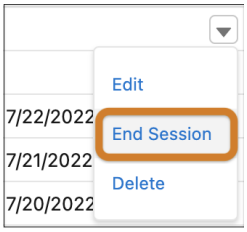
End a Messaging Session

When you're done helping a customer, end the messaging session from the session record or the Messaging Sessions list view.

1. Close the session from the Messaging Session record.
   a. In the Conversation component of an active messaging session, click **End Chat**.
   b. In the confirmation window that appears, click **End Chat**.
   c. To restore your capacity and accept new messaging sessions, close the messaging session tab.
2. Close the session from the Messaging Sessions list view.
   a. To find the Messaging Sessions list, select **Messaging Sessions** from the Item Picker or open a messaging user record.



   b. In the list of sessions, find the messaging session you want to end.
   c. Click the menu next to the session and select **End Session**.



If you go offline for any reason during an active messaging session, the session is rerouted.

Messaging Error Codes in Service Cloud

Identify errors encountered during WhatsApp, Facebook Messenger, and SMS Messaging sessions.

Messaging channels that this article applies to

Web	In-App	SMS (Standard)	Facebook (Standard)	WhatsApp (Standard)	Facebook (Enhanced)	WhatsApp (Enhanced)
×	×	✅	✅	✅	✅	✅

EDITIONS

Available in: Lightning Experience. View required editions. on page 5

When something goes wrong in the middle of a conversation with a customer, you receive a message that identifies the errors with codes. Verify the meaning of messaging error codes you receive. There are 4 categories of errors and they are differentiated by their starting number.

0xxx Errors

Error codes starting with zero (0xxx) indicate that a problem occurred when communicating with the OTT/MSC.

Error	Message
0001	Can't contact the messaging service right now. Try again later.
0002	Can't contact the messaging service right now. Try again later.
0003	Can't contact the messaging service right now. Ask your admin to check the channel settings.
0004	This message timed out. You can't contact this user until they contact you again.
0005	Can't send messages on this channel right now. Try again later.
0006	We couldn't send this message because another app is controlling the Messaging session.

1xxx Errors

Error codes starting with one (1xxx) indicate a problem with the source address.

Error	Message
1001	Can't send messages from this channel. Ask your admin to check the channel settings and contact Salesforce Customer Support.
1002	Can't send messages from this channel. Ask your admin to check the channel settings and contact Salesforce Customer Support.
1003	Can't send messages from this channel because the channel's phone number isn't verified. Ask your Salesforce admin to verify the number. Learn More
1004	Can't send messages from this channel because the channel's phone number is blocked. Ask your Salesforce admin to contact Salesforce Customer Support.

2xxx Errors

Error codes starting with two (2xxx) indicate a problem with the destination address.

Error	Message
2001	Can't send messages to this number. Make sure that the contact information is correct and try again.
2002	Can't send messages to this recipient because they blocked you.
2004	Messages to this recipient are getting blocked by their carrier. Try contacting them another way.

3xxx Errors

Error codes starting with three (3xxx) indicate a problem with the message being sent.

Error	Message
3001	Can't send this message. Try rewriting the message.
3002	Can't send attached files because the file types aren't supported.
3003	Can't send this message because the message body is flagged as spam.
3004	Can't send this message because the message body is too large.
3005	Can't send this message because the attachment is too large.
3006	The message has exceeded the number of attachment'(s) limit.
3007	The message's intent is invalid.