1440 Mobile: User Guide for Android Devices and SMS Messaging.

Summary:

The 1440 Mobile App is a great messaging tool for Salesforce designed for end users to engage in conversations with customers across various channels on mobile devices.

To utilize SMS functionality within the 1440 Mobile App, ensure your Salesforce Org has Messaging channels and Omni Routing enabled. Refer to Salesforce documentation for guidance on configuring these channels in your Org. (Links will be provided in this guide).

Additionally, you'll need a Salesforce User account with a Messaging User license within the configured Salesforce Organization to log in to the app and manage conversations.

Please contact support@1440.io with any questions or concerns.

Table of Contents

Prerequisites for Using SMS with 1440 Mobile:

1.) A Salesforce SMS Messaging Channel:

SMS must be configured as a Messaging Channel in Salesforce setup. Follow these links for information on setup.

Prepare: Prepare your Salesforce Org.

Set Up SMS: Set Up SMS Channels In Service Cloud

2.) Omni-Channel Enabled:

Omni-Channel must be enabled in the connected Salesforce Org. Follow the Salesforce documentation provided to confirm all necessary setup steps have been completed.

Enable Omni-Channel for Salesforce: Omni-Channel Overview

3.) Agent Routing Configured:

Omni Routing must be configured for the users who wish to accept work and reply to customers on the 1440 Mobile app.

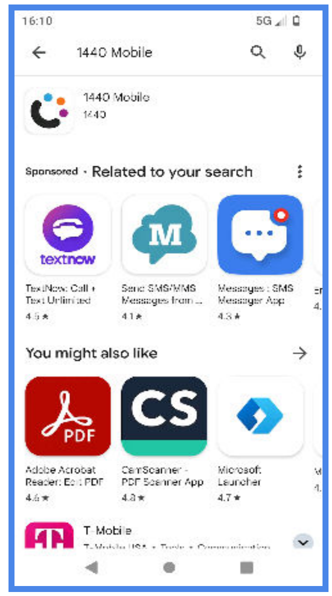
Omni-Channel Routing: Omni-Channel Routing

Install and Log in to 1440 Mobile

Step 1: Install the 1440 App from the Google Play Store

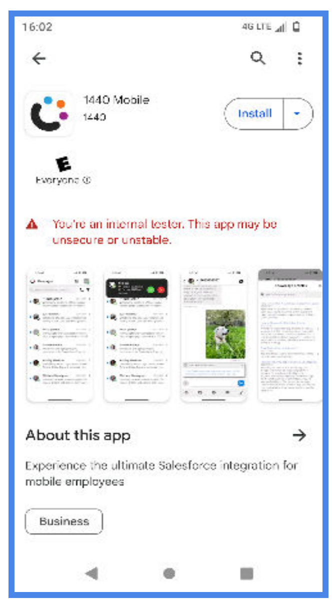
App Store Search

a. Search for “1440 Mobile” in the Google Play Store and Click the Icon that appears in the image.



App Download Page

b. Select “Install” for 1440 Mobile



Step 2: Login to Salesforce through the 1440 App

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Locate the App.

a. Search for 1440 on your device and find the application with the icon in this image.

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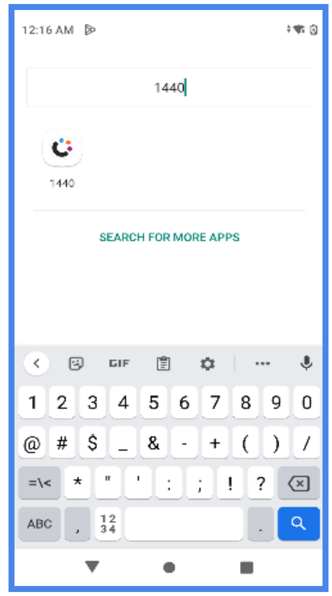

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Login Screen

b. Use the green “Login with Salesforce” button to log in.

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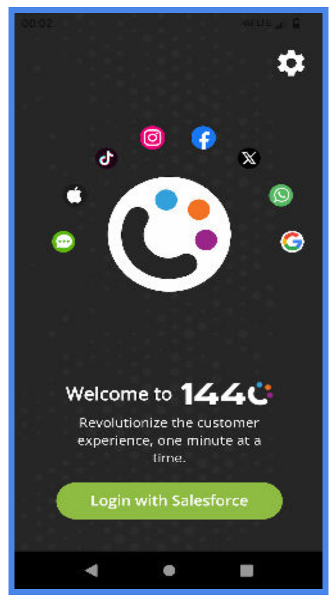

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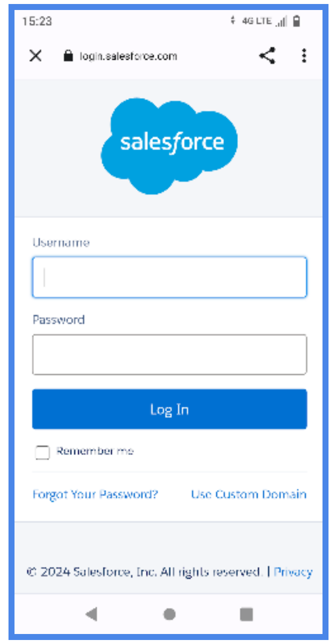
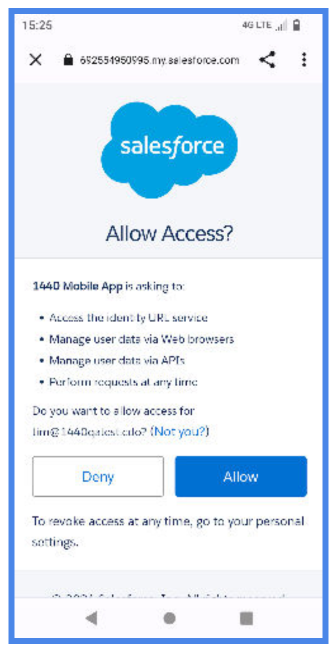
Salesforce Login

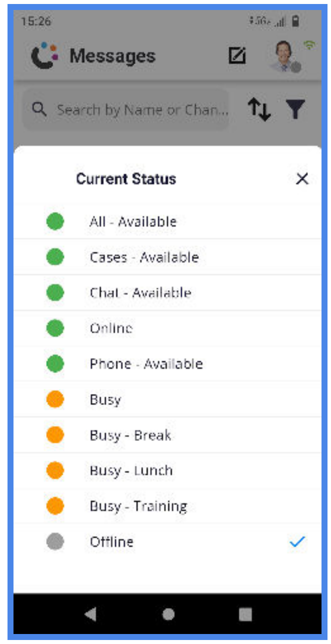
c. Users will be prompted to log in with their credentials for the connected Salesforce Org.



Salesforce Permissions

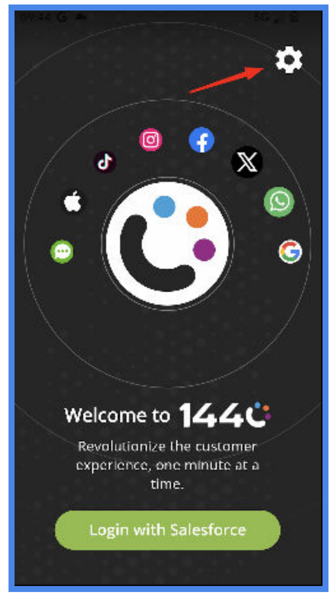
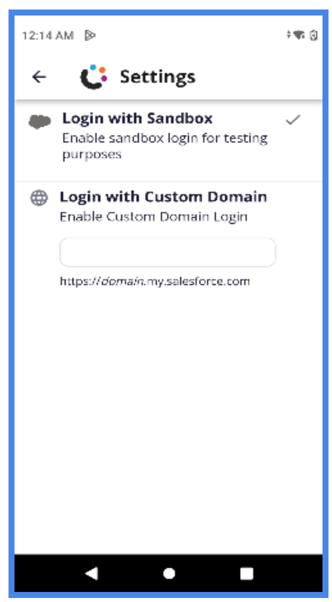
d. Click “Allow” to allow access to 1440 Mobile.



1440 Home e. Users will now be redirected into the 1440 Mobile App. If it is the first time logging in to 1440 mobile users will be prompted to allow notifications first. **NOTE:** For first time login See Step 3	

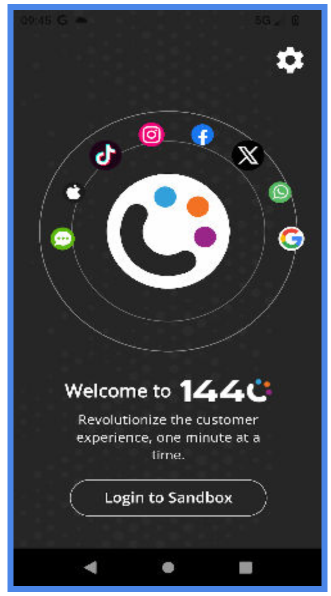
Login Screen Settings

Sandbox Login

Login Settings a. To log in to a Sandbox on the Mobile App. Select the settings gear icon on the home login page.	
Login with Sandbox Toggle b. From the settings, select "Login with Sandbox". A check mark will appear to the right showing you that the option has been selected.	

Sandbox Login

c. Returning to the Login screen will now show a Sandbox only option.



Login with a Custom Domain

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Custom Domain Login

d. To use this option select “Login with Custom Domain” in the settings.

You will need to fill out the text box with your domain. The address below will automatically format itself as you make changes.

This option will also appear checked when in use.

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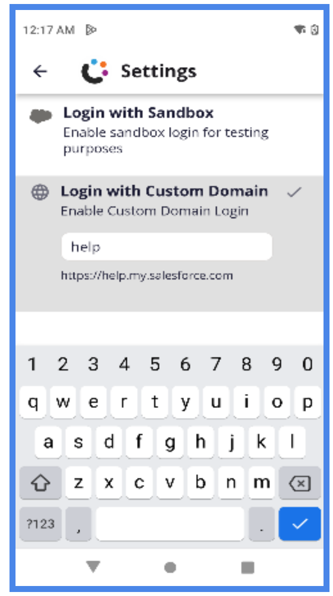

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Custom Domain Login

e. Returning to the Login screen will now show the provided custom domain below the login button.

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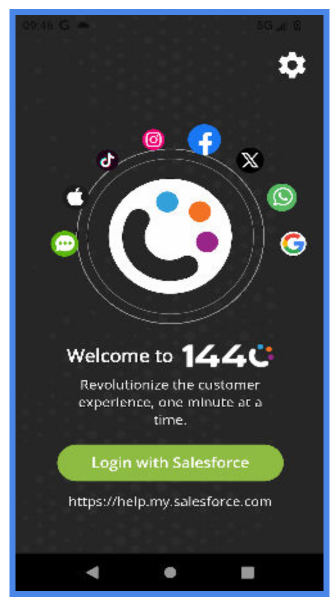

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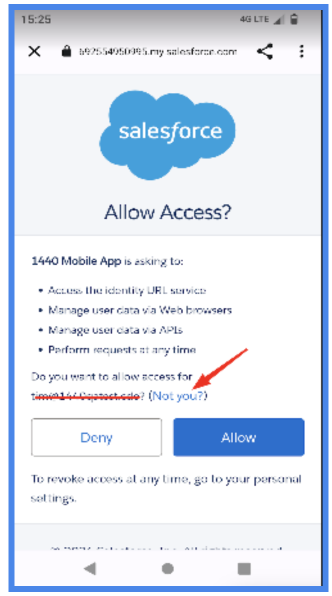
Change User

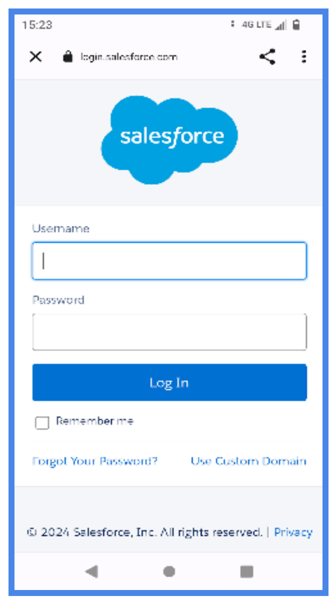
Login with a Different User on the Same Device

a. Users may need to switch users on the same device. When logging in, access the Salesforce prompt and select “Not You”.

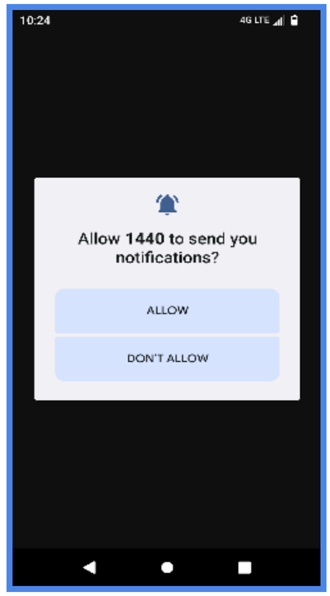


Blank Login Screen

b. Users will now be able to access a new login page for Salesforce.



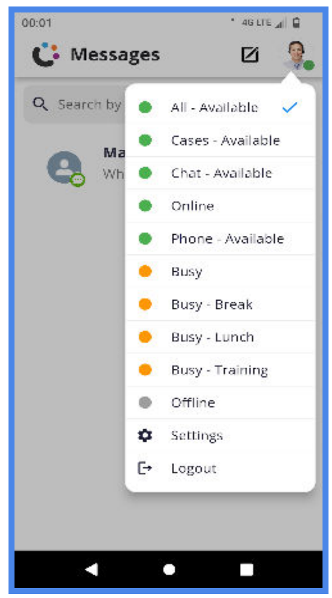
Step 3: Set Notification Permissions

Allow Notifications a. After logging in for the first time users will be prompted to allow 1440 to send notifications. Click "Allow" to enable notifications.	

Using the 1440 Mobile App

IMPORTANT: Omni-Channel is **Required** for all 1440 Mobile Users. See Prerequisites and Setup Documentation Links Above: [Prerequisites]

Omni-Channel: Set or Update Current Status

<table>
<tr>
<td>a. Each time users login to the app, they will be prompted to set a “Current Status” representing their current Omni-Channel availability.</td>
<td>
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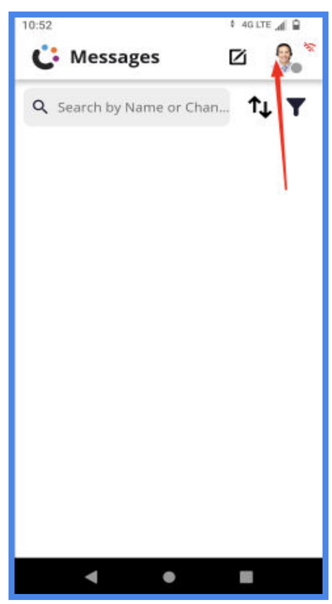
<td>b. Users can update their current status at any time by clicking the “User Avatar” located in the upper right corner of the app.</td>
<td>
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c. Select a status from the drop down menu. The blue “check” will indicate the selection.

Status will also be reflected in the status color icon, next to the user avatar.

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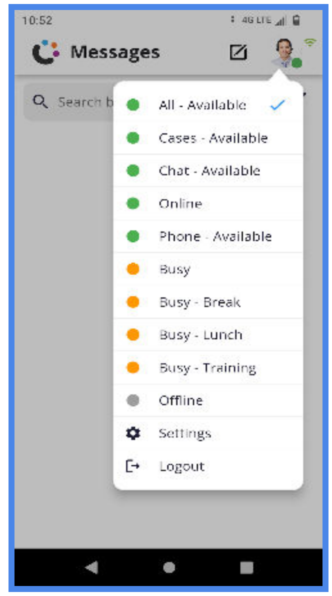

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Status Breakdown

NOTE: Each status type may include different selections depending on the options available in your org.

The behavior by status type will be uniform when using the 1440 Mobile app.

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Status Types

a. **Online:** Represented by a green status icon. This status enables routing to the user. Users will receive all New and Active work notifications.

NOTE: Online status is required to send outbound messages.

b. **Busy:** Represented by an orange status icon. Users will not receive notifications for new work. Users will receive notifications for current active conversations.

c. **Offline:** Represented by a gray status icon. Users will not receive any notifications.

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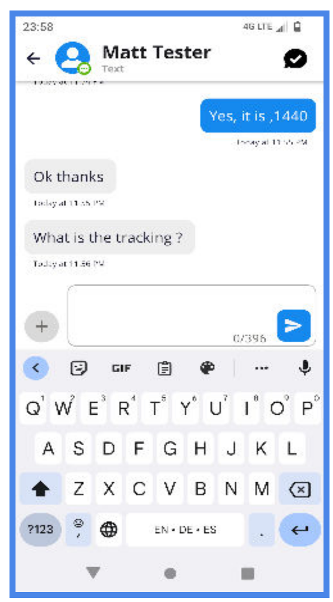
</table>

Accepting New Work

When conversations are routed, active 1440 Mobile agents will be prompted to decline or accept messages via a notifications banner.

NOTE: Omni-Channel Status availability will determine the ability to accept new work.

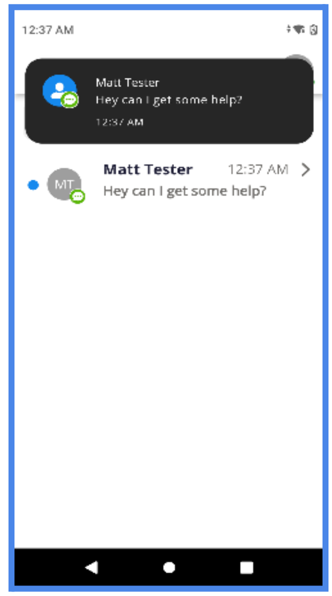
Accept or Decline a. Use the green “Check” button to accept ownership of a conversation Decline work by tapping the red “X”.	
Conversation Window b. After accepting a conversation, users will be redirected into a conversation window to begin interacting with customers.	

Managing Notifications

In-App Notifications:

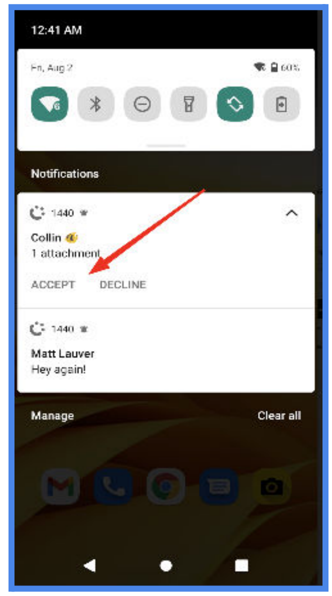
Notification banners will show in the app for new messages.

Conversations containing new messages will be designated by a blue activity dot to the left of the contact icon.



Off App Notifications:

a. When working outside of the 1440 Mobile App., new message notifications will be pushed to users by showing both a notification icon and a notification badge on the App.

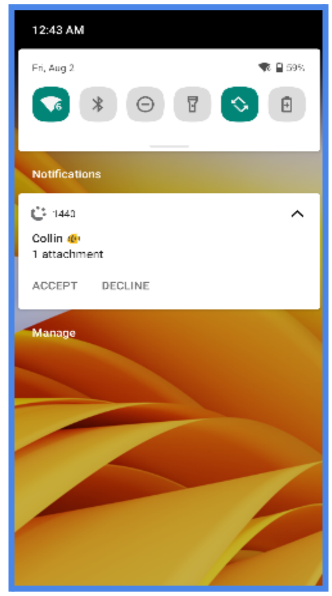
b. When off the application, dragging down the 1440 icon from the top of the screen will allow users to accept or decline new work. Existing work will not show these options. Click into the notifications banners to access existing conversations. Both options will redirect users to the conversation screen within the app.	

Lock Screen Notifications

For New Conversations (Accept Work):

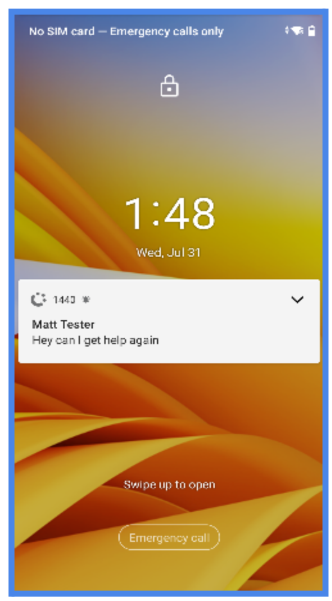
When active, users will be prompted to accept new conversations from the lock screen.

On a locked screen, a banner will show a preview of the message. The buttons to accept or decline work are also available in this view.



For Active Conversation:

Notifications for ongoing conversations will also show in a banner with preview. Click the banner to be redirected into the app.



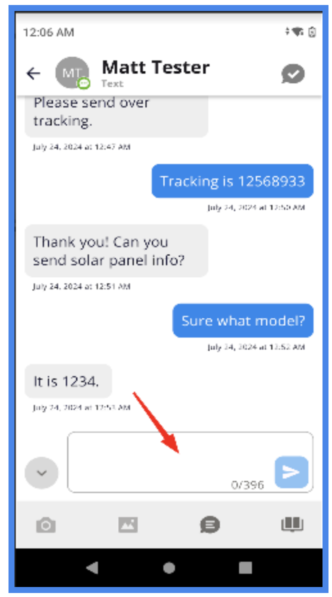
Managing Conversations

Responding to a Message

Open the Keyboard

a. If the keyboard is not showing, click into the Response Text Box Area (located to the right of the plus button).

This will open a keyboard below the response box.



Type a Response

b. Use the keyboard located below the text box to type responses.

Send a Reply

c. Use the “Send”, (blue arrow)button to the right of the text box, to send a reply.

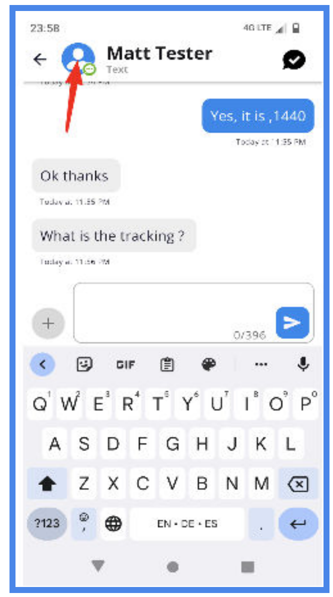
NOTE: A character count and limit is displayed in the bottom right corner of the text box.

Related Contact Information

Access Contact Information

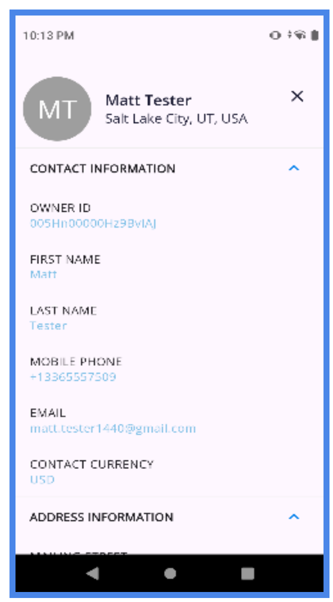
a. If a related contact exists for the customer on a message, a contact avatar and the contact name will be displayed at the top of the conversation thread.

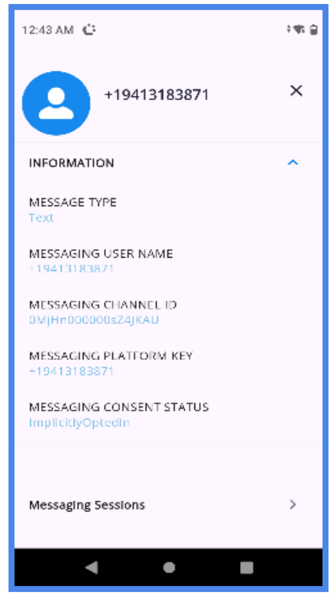
Clicking into the contact avatar will open a page that displays related Salesforce Contact information.



Contact Details

b. Information stored on the contact record in Salesforce will be displayed on the detail page.

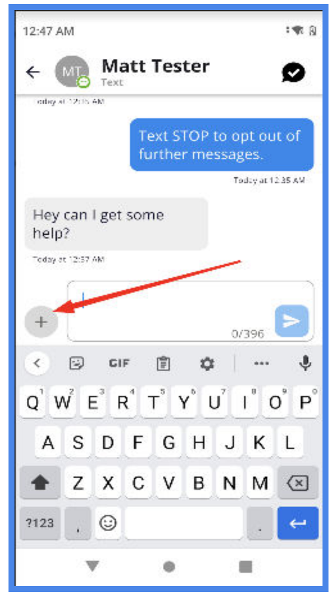


Messaging End User c. If a related contact does not exist for the customer on a message, their SMS number will be displayed in place of a contact name. Clicking into the avatar for these types of customers will take users to a messaging end user detail page.	

Accessing the Toolbar

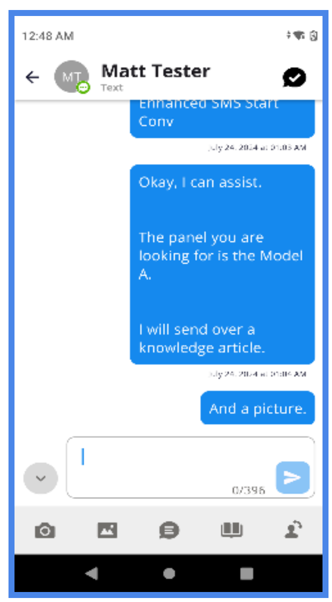
Toolbar Access

a. Use the “plus” button, located to the left of the text response box to access the toolbar.



Toolbar Icons

b. Clicking this button will open a toolbar containing 5 icons that will open different options when clicked.

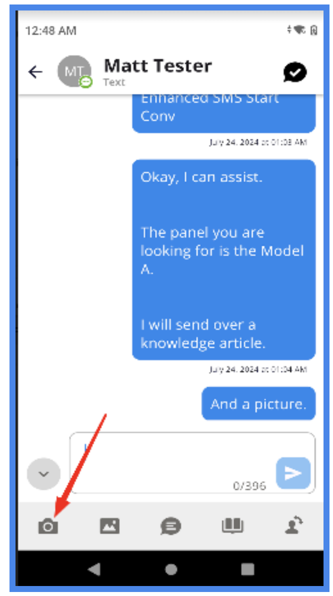


Toolbar Options (5)

1. Take and Send a New Image

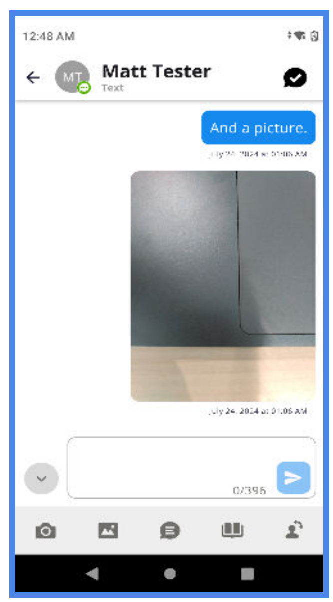
Camera Icon

a. Take a new image to add to the chat by clicking the “Camera” icon. This button will open the camera on your Android Device.



New Image

b. Once an image is captured, it will automatically be inserted into the conversation.



2. Attach an Image File

Photo Icon

a. Clicking the “Photos” icon will open up a page of image tiles available for selection.

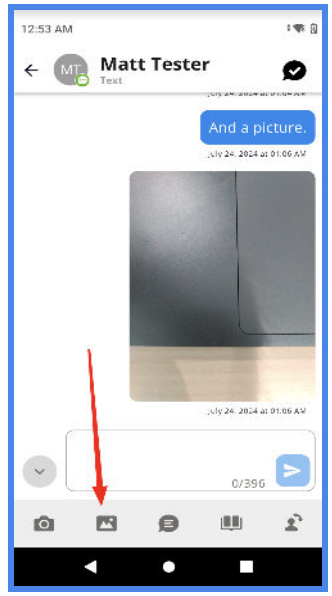
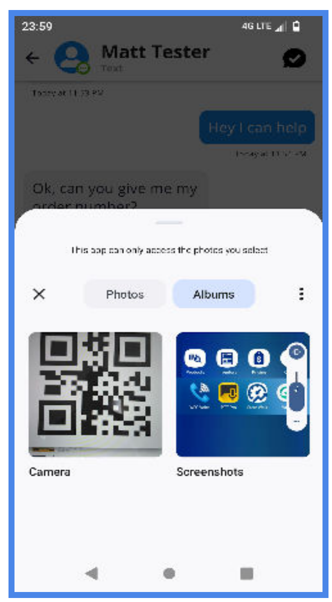


Photo Selector

b. To make images available,select images from your device.

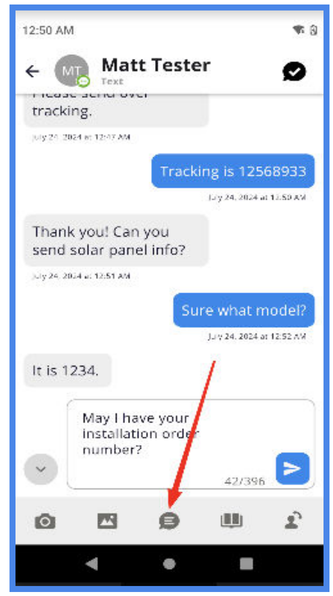
NOTE: All Photos or Specific Albums can be accessed.



3. Attach and Send Quick Text

Quick Text Selector

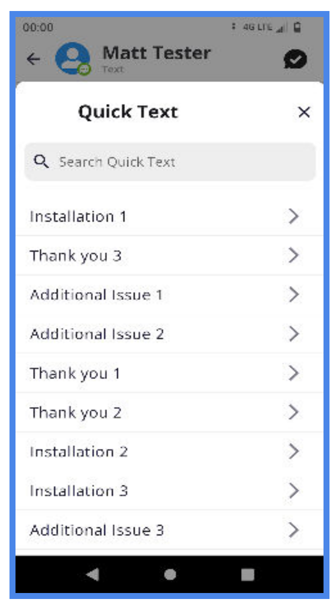
a. Use the “Quick Text” icon to open the Salesforce Quick Text selector.



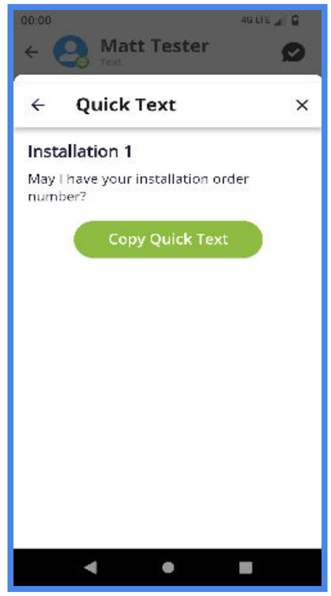
Quick Text Search and Select

b. Pre-crafted responses, stored in Salesforce as “Quick Text” records, can be searched by title and selected from a list.

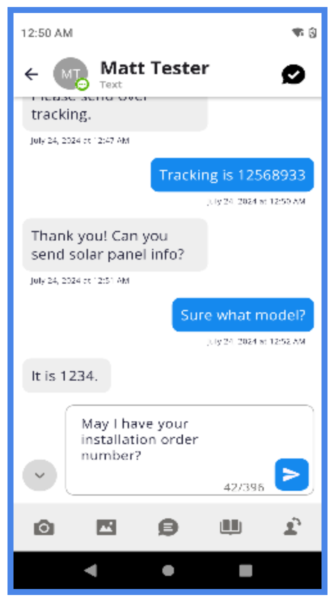
Use the gray arrow to click and view the templated response.



c. Use the green “Copy Quick Text” button to insert the template into the response window.



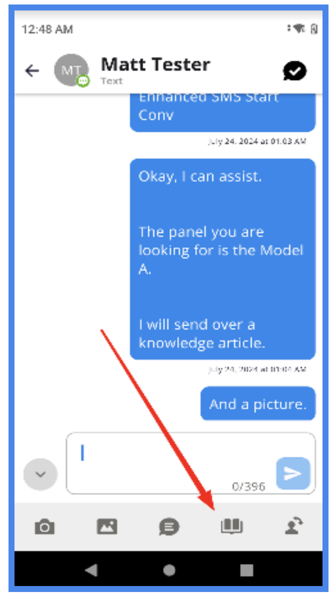
d. **NOTE**: Quick Text can be modified before sending. Use the blue send arrow to reply once the response is complete.



4. Attach and Send a Knowledge Article

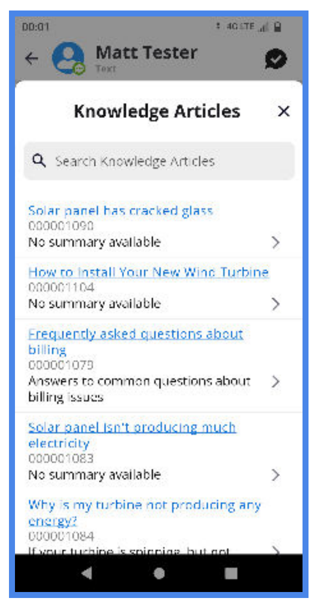
Knowledge Icon

a. Use the “Knowledge” icon to open up a page where users can search for and select Salesforce Knowledge Articles.



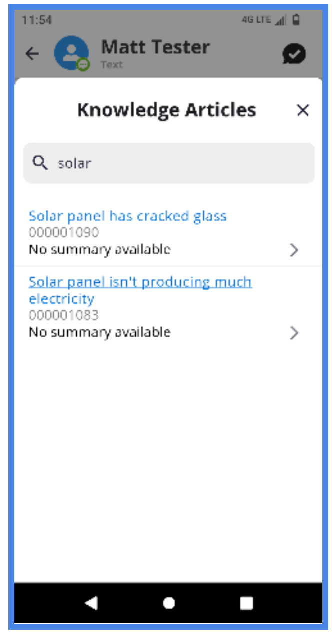
Knowledge Articles

b. A searchable list of Knowledge Articles will be displayed with a title, an ID and a portion of the stored text.



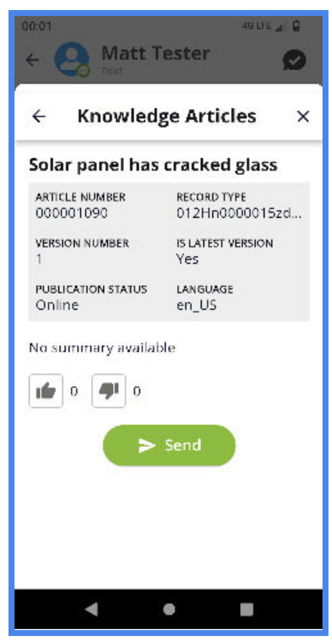
Knowledge Search

c. Search Knowledge articles by Title. Use the gray arrow to click into and view an article.



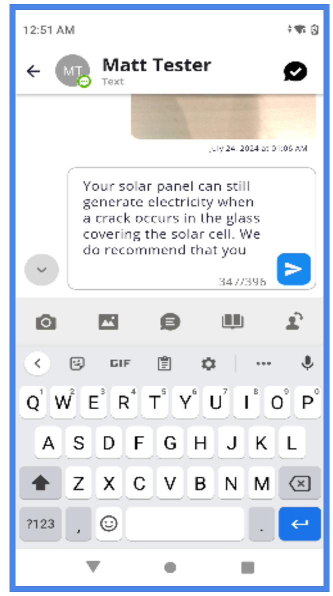
Knowledge Detail View

d. Click into an article to access an article detail view. Click the green "Send" button to copy the article into the text response box. The article preview text and included URL can be viewed once copied.



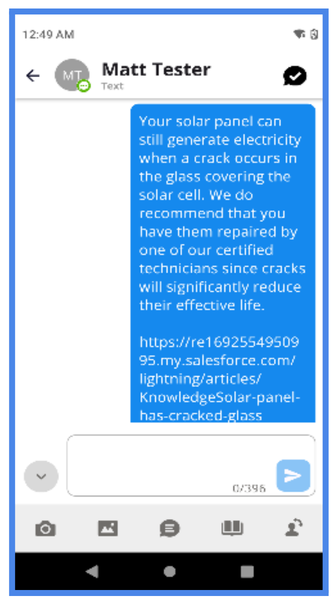
Response Window

e. Articles will be displayed in the response window, prior to sending, for review.



Sent Article

f. An article preview and a URL will be inserted in the thread, including a link to the full article on the Salesforce Experience Site (if enabled).



5. Transfer a Conversation

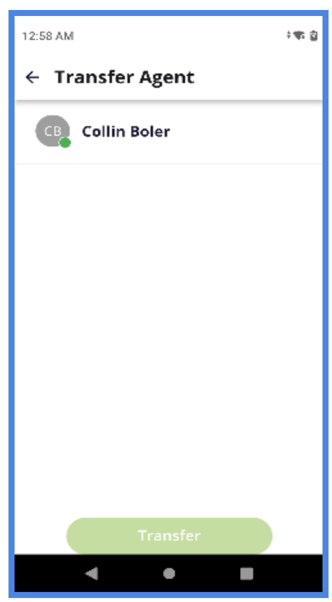
Transfer

a. Use the “Transfer” Icon (with arrows) to begin transferring a conversation.

Active Agents

b. Clicking the icon will display a list of all active users (including status icon).

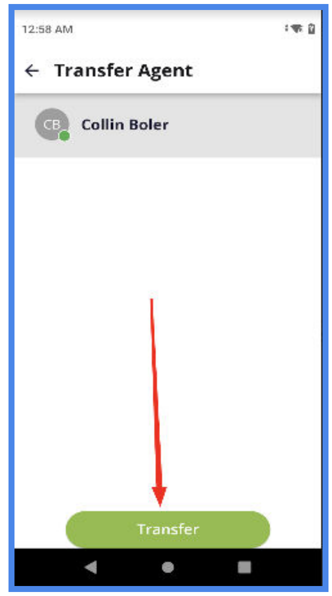
The “Transfer” button will not become clickable until an available agent has been selected.



Agent Transfer

c. Once an active user has been selected, the green "Transfer" button at the bottom of the screen will become available.

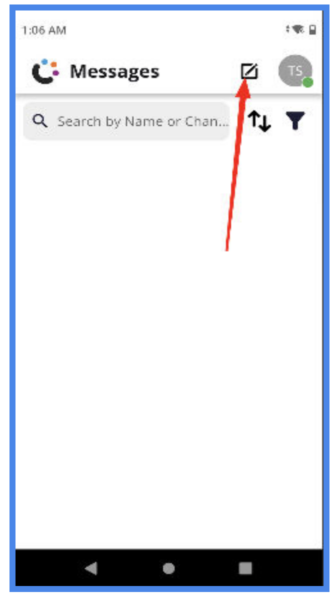
   Click the button to transfer a conversation to the agent selected.



Initiate Outbound Conversations

New Outbound Conversation

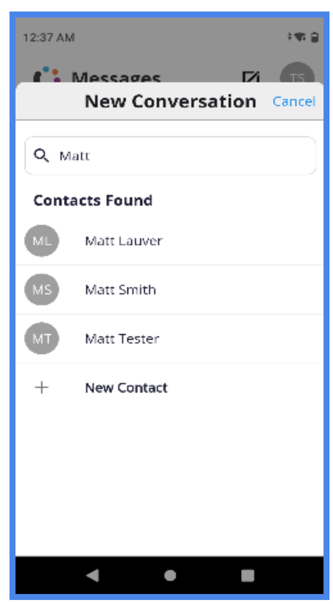
a. Use the “New Conversation” icon to start the process for initiating a new outbound conversation.



Search or Create Contact

b. Users will be prompted to search for or create a new contact.

Use the search bar or the recent contacts list to find existing contacts.

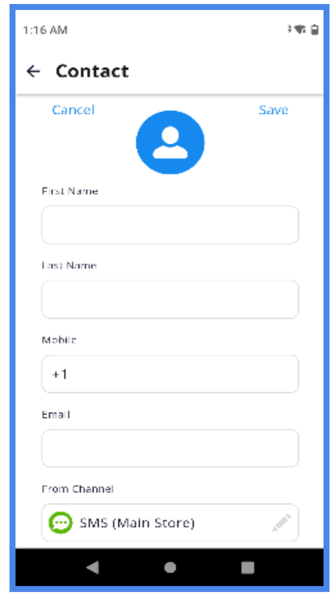


New Contact Form

c. Use the “+ New Contact'' option to create a new contact. If selected, users will be presented with a page to fill out.

Click “Save” in the upper right corner once the required information is complete.

This will present users with a green “Message” button to now start a conversation.



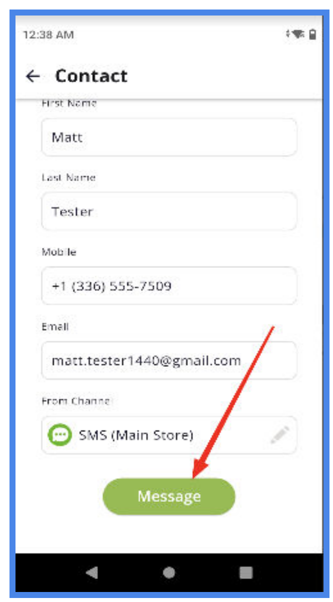
New Conversation

d. After accessing an existing contact or saving a new contact users will be able to use the “Message” button.

Clicking the green “Message” button will redirect users to a conversation window to begin typing.

NOTE: Once an initial message has been sent users will not be able to send additional messages until the customer responds.

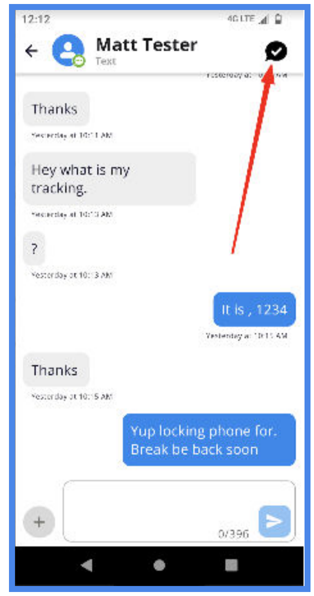
NOTE: Images can not be sent on the initial outbound message.



End Conversations

End Button

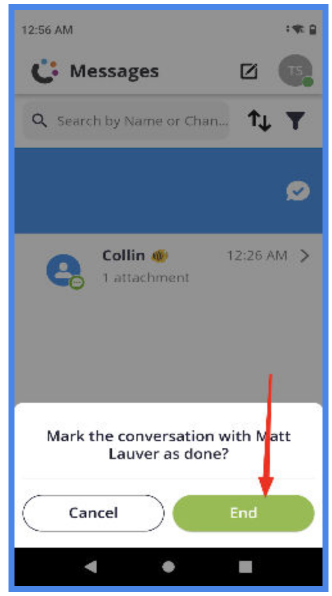
a. To initiate ending a conversation click the “check mark” button.



End a Conversation

b. Users will be prompted to mark the conversation as done.

Click the green “End” button to end a conversation. Ending a conversation will redirect users back to the list of “Active” conversations.

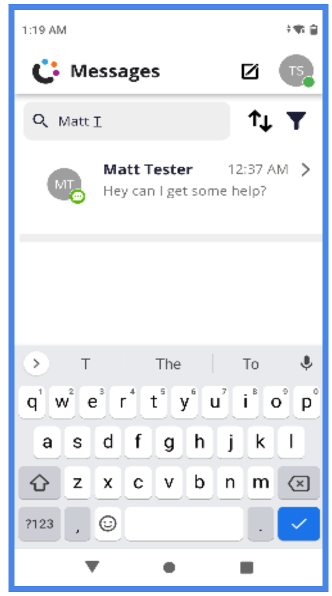
End by Swiping	
c. Users are also able to quickly end conversations by swiping on the list view. A blue banner over the message and a prompt should appear. Click the green “End” button to mark the conversation with the customer as done.	

Search for Conversations

Searching for Conversations by Name

a. You can search for conversations with the search bar on the home screen.

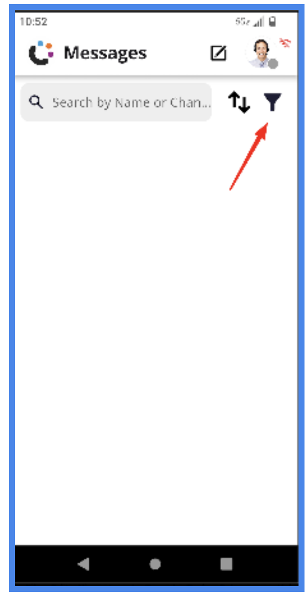
You can search by the name of the customer in a conversation or by the channel name.



Show Ended Conversations

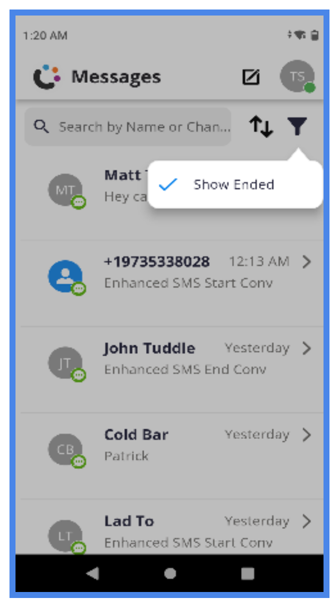
Show Ended Button

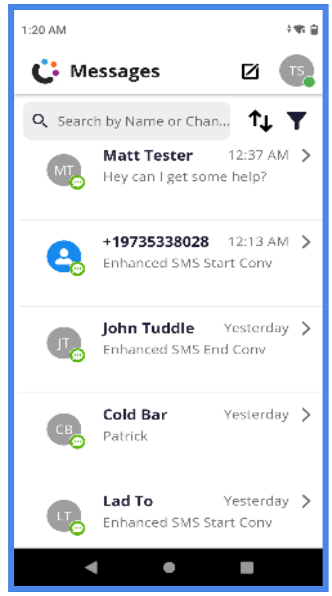
a. Use the show ended button, “funnel icon”, in order to display conversations in an ended status.



Show Ended Toggle

a. Click “Show Ended”. A check mark will appear next to the selection to show that the filter is active.

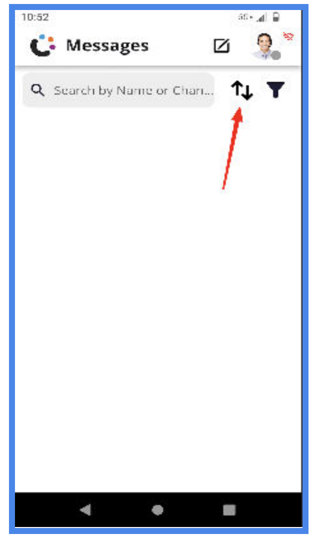


Ended and Active Conversations b. Conversations that have ended will now be displayed along with active conversations.	

Filter and Sort Conversations

Sort Button

a. Sorting options for conversations can be found by clicking the button with "two arrows", one facing up and one facing down.



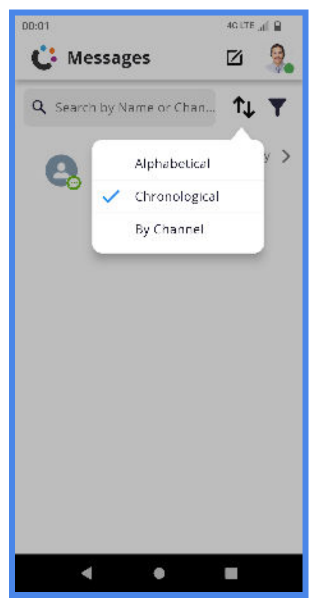
Sort Options

The list can be sorted by three options by default, the Conversations are sorted Chronologically.

Chronologically: Sorts the conversations by the time of their last message.

Alphabetically: Sorts the conversations by name, which is the name or phone number of the Customer they are talking to.

By Channel: Sorts the conversations by their Channel and groups them together in an accordion with a header indicating the Channel they are part of.



AI Recommendations (BETA)

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Access Settings

a. Click the User Avatar Icon to find the settings menu. This option is located under the selection of available Omni-Channel statuses.

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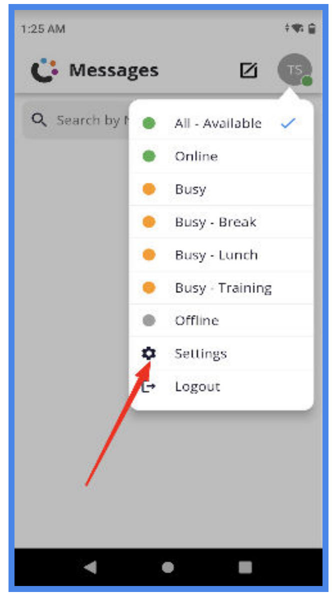

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AI Suggestions

b. Use the slider button to turn on AI Suggestions.

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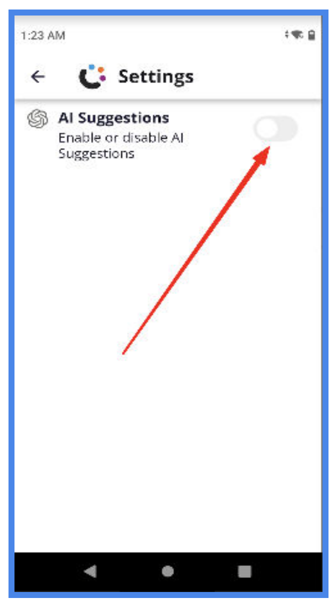

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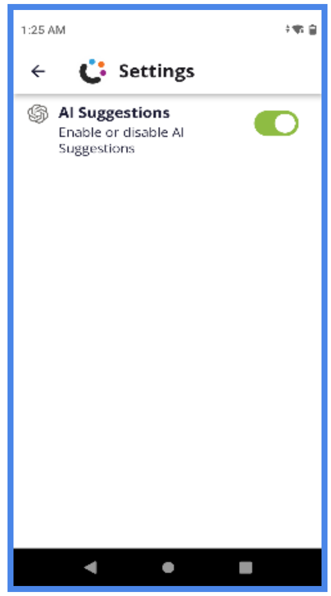
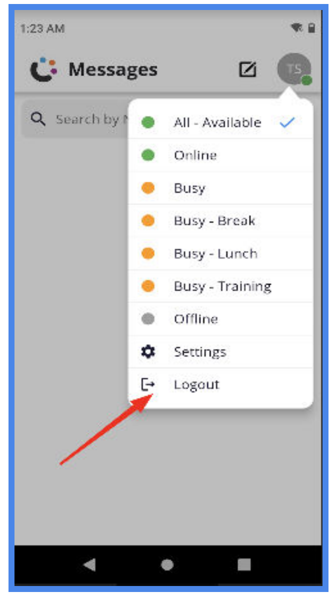
AI Suggestions ON c. When turned on the slider button will display as green.	

Logging Out of 1440 Mobile

Logout

A logout option will be available when clicking into the User Avatar. This is the same menu that is used to adjust status and to access the settings menu.

The logout option will be at the bottom of the list. Click this button to log out.



Contact Us

If you have questions please contact support@1440.io!