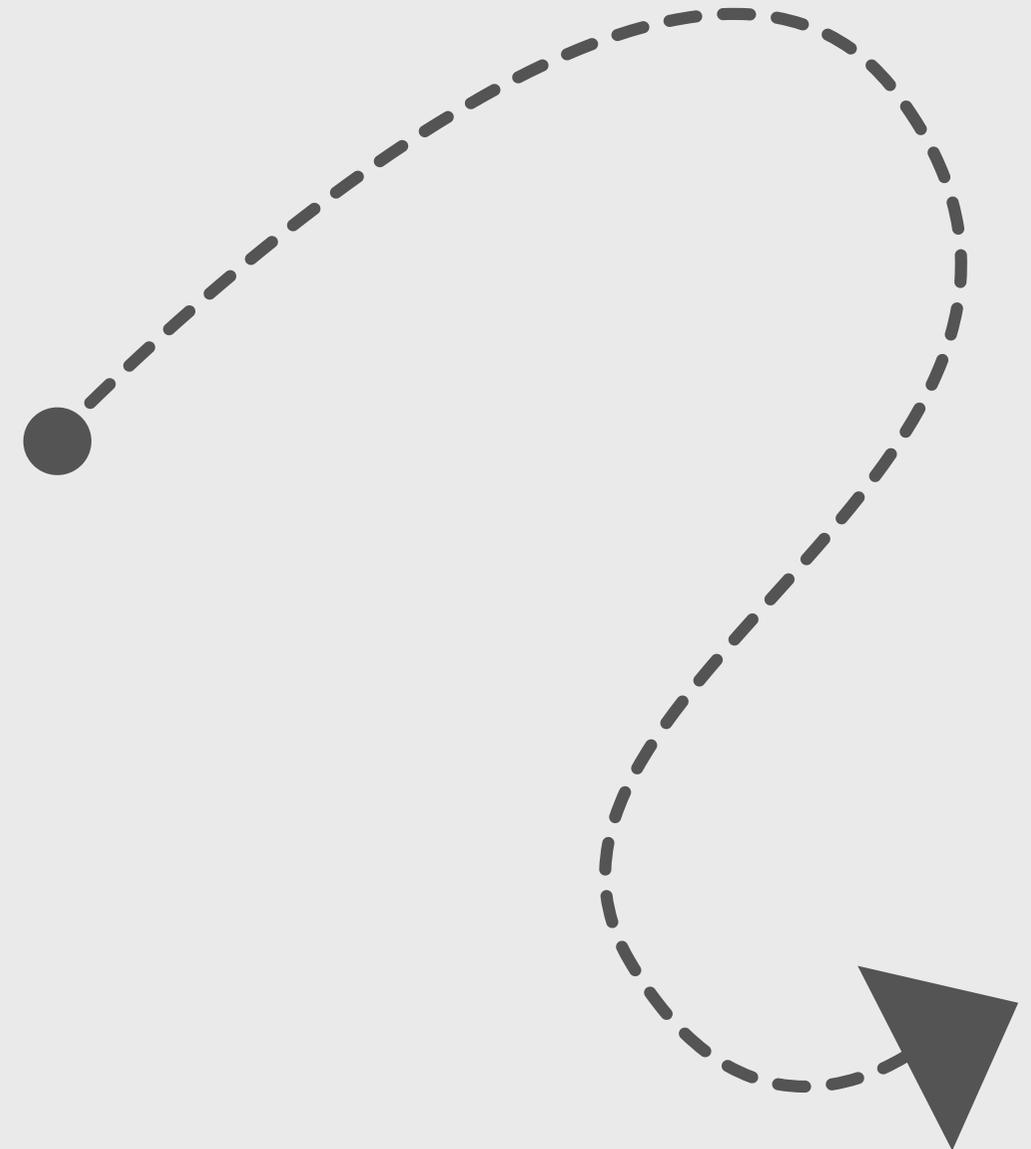


STEP-BY-STEP POST-INSTALLATION GUIDE

For Message Blink on Salesforce



Available on
AppExchange

STEP 1: OPEN THE APP

Click on the App Launcher (9 dots) on the top-left corner

The screenshot displays the Salesforce Setup interface. At the top left, the App Launcher icon (a 3x3 grid of dots) is circled in blue. A blue arrow points from this icon to the text instruction above. Below the icon, the App Launcher dropdown menu is open, showing a search bar with 'message Blink' entered. Under the 'Apps' section, 'Message Blink' is listed with a blue icon. Under the 'Items' section, 'Message Blink Social Settings' is highlighted with a blue border. A blue arrow points from this item to the text instruction below. The background shows the 'Setup' navigation bar with 'Home' and 'Object Manager' tabs, and a 'Create' button. The main content area is partially visible, showing a 'Most Recently Used' section.

Click on it to open the **Message Blink** Social Settings page

STEP 2: START YOUR 30-DAY FREE TRIAL

The screenshot displays the Message Blink dashboard interface. At the top, there is a navigation bar with the Message Blink logo on the left, a search bar in the center, and various utility icons on the right, including a star, a plus sign, a shield, a question mark, a gear, a notification bell with a red '2', and a user profile icon. Below the navigation bar, the main menu includes 'Message Blink', 'Message Blink Social Settings' (which is highlighted), 'Message Templates', 'Messages', 'SMS/WhatsApp Settings', 'Create Template', 'Contacts', and 'More'. The main content area is titled 'Message Blink Social Settings' and features a large, centered promotional card. The card has a colorful confetti icon on the left and contains the following text: 'You're eligible for a 30-day free trial!', 'Includes 100 Sms Credits', and a prominent dark blue button with the text 'Start My 30-Day Free Trail Now'. At the bottom left of the dashboard, there is a 'My Inbox' link.

Message Blink

Message Blink Social Settings

Message Templates

Messages

SMS/WhatsApp Settings

Create Template

Contacts

More

Message Blink Social Settings

You're eligible for a 30-day free trial!

Includes 100 Sms Credits

Start My 30-Day Free Trail Now

My Inbox

STEP 3: CHOOSE YOUR COUNTRY

Message Blink

Message Blink Social Settings

Message Templates

Messages

SMS/WhatsApp Settings

Create Template

Contacts

More

Search...

Choose Your Country

United States

United Kingdom

Canada

Confirm

then click 'Confirm'.

My Inbox

STEP 4: A TEST NUMBER WILL BE ASSIGNED.

The screenshot displays the Message Blink dashboard. At the top, there is a navigation bar with the Message Blink logo, a search bar, and various menu items including 'Message Blink Social Settings', 'Message Templates', 'Messages', 'SMS/WhatsApp Settings', 'Create Template', 'Contacts', and 'More'. A 'Confirm' button is visible in the background. The main content area features a white modal box with a green checkmark icon and the text: 'Your test number has been assigned successfully!'. Below this text is a dark blue 'Save' button. A blue arrow points from the 'Save' button to a callout box on the right. The callout box contains the text: 'Your test number has been assigned successfully' and 'Click Save'. At the bottom left of the dashboard, there is a 'My Inbox' link.

Message Blink

Message Blink Social Settings

Message Templates

Messages

SMS/WhatsApp Settings

Create Template

Contacts

More

Search...

Confirm

✓ Your test number has been assigned successfully!

Save

“Your test number has been assigned successfully”

Click Save

My Inbox

STEP 5: CHOOSE AN OBJECT & RECORD

Select any object (Lead, Contact, Account)

The screenshot shows a CRM interface with a top navigation bar containing various menu items. The 'Leads' menu item is highlighted with a blue box and a blue arrow pointing to it from the text above. Below the navigation bar, the 'Leads' section is displayed, showing a 'Recently Viewed' list. The list contains two items: 'Bertha Boxer' and 'Gokul'. A blue arrow points from the text below to the first record, 'Bertha Boxer'.

Message Blink Message Blink Social Settings Message Templates Messages SMS/WhatsApp Settings Create Template Leads More

Leads Recently Viewed

2 items • Updated a few seconds ago

	Name	Title	Company	Ph...	Mobile	Email	Lead Status	O...
1	Bertha Boxer	Director of Vendor Relations	Farmers Coop. of Florida		18777804236	bertha@fcof.net	Working - Contacted	GS
2	Gokul		Sastorm		918825512013		Open - Not Contacted	GS

My Inbox

Select any Record from the object

STEP 6: EDIT THE PAGE LAYOUT

Click on the gear icon (⚙️) at the top-right

The screenshot shows a Salesforce interface. At the top right, a gear icon (⚙️) is circled in blue. A blue arrow points from the text 'Click on the gear icon (⚙️) at the top-right' to this icon. Below the gear icon, a dropdown menu is open, listing several options: 'Setup Menu', 'Setup', 'Service Setup', 'Salesforce Go', 'Developer Console', 'Edit Page', and 'Edit Object'. The 'Edit Page' option is highlighted with a blue box, and a blue arrow points from the text 'Select "Edit Page"' to this option. The background of the screenshot shows a search bar, navigation tabs like 'Social Settings', 'Message Templates', and 'Messages', a '+ Follow' button, contact information for 'Company' and 'Email', and a 'Related' section with a table of channel counts.

Channel	Remaining Count
SMS	100
WhatsApp	

Bertha Boxer

Select "Edit Page"

STEP 7: ADD THE MESSAGE BLINK COMPONENT

In the Lightning App Builder:



Scroll the left-side panel to “Custom – Managed”



Drag and drop the “**Connect the Social Chat Component**” onto your desired section on the record page



STEP 8: SELECT PHONE FIELD

The screenshot shows the Salesforce Lightning App Builder interface. At the top, the breadcrumb navigation includes 'Lightning App Builder', 'Pages', and 'Lead Record Page'. The main workspace is dimmed, showing a 'Connect Social Chat Component' in an undefined state. A 'Select Phone Field' dialog box is open, featuring a dropdown menu labeled 'Phone Field' with the current selection 'Select Phone Field'. Below the dropdown, two options are visible: 'Mobile Phone' and 'Phone'. A blue arrow points from the dropdown menu to a text box on the right side of the screen. The text box contains the instruction: 'Select phone field in which you are storing the phone number'. The left sidebar shows a 'Components' panel with various integrations like Salesforce Anywhere Messages, Slack, and Tableau Pulse. The right sidebar shows configuration options for the 'Connect Social Chat Component', including a 'Set Component Visibility' section with a 'Filters' area containing an 'Add Filter' button.

STEP 9: ACTIVATE THIS PAGE

The screenshot shows the Salesforce Lightning App Builder interface. At the top, the breadcrumb navigation reads "Lightning App Builder > Pages > Lead Record Page". The top toolbar includes buttons for "Analyze", "Activation...", and "Save". The main workspace displays a lead record for "Sastorm Software" with a "New" status and a "Mark Status as Complete" button. A "Page Saved" dialog box is centered on the screen, containing the following text:

Page Saved

Activate this page to make it visible to your users.

Activate the page now, or do it later using the Activation button in the App Builder toolbar.

Don't show this message again

Buttons: **Not Yet** | **Activate**

An arrow points from the "Activate" button to the text "Click 'Activate'" on the right side of the image.

On the left sidebar, under "Components", there is a search bar and a list of components including "Salesforce Anywhere Messages", "Slack", "Tableau Pulse", "Tableau View", "Tabs", "Topics", "Trending Topics", "Twitter", and "Visualforce". Below this, there are sections for "Custom (0)" and "Custom - Managed (2)", with the latter containing "campaignBulkSms" and "Connect Social Chat Component".

At the bottom left, there is a link: "Get more on the AppExchange".

STEP 11: CLICK THE **ACTIVATION BUTTON** AT THE TOP RIGHT OF THE PAGE BUILDER.



Pages ▾ Lead Record Page ? Help

Desktop ▾ Shrink To View ▾ ↻

Analyze Activation... Save

Lead **Ms. Bertha Boxer** + Follow Convert Edit New Case ▾

Title: Director of Vendor Relations Company: Farmers Coop. of Florida Phone (2): Email: bertha@fcof.net

Working - Contacted Closed - Not Converted Converted ✓ Mark Status as Complete

Activity Details Chatter

Log a Call ▾ New Task ▾ New Event ▾ Email ▾

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Related

Channel	Remaining Count
SMS	100
WhatsApp	

Bertha Boxer

why 18:06

This is the Test Message From Sastorm Software 22:06 ✓

Thank you recieved 22:06

This is the Test Message From Sastorm Software LLC 22:09 ✓

Today

Hello

Page

* Label: Lead Record Page

* API Name: Lead_Record_Page

* Page Type: Record Page

Object: Lead

Template: Header, Subheader, Right ... Change

STEP 10: CHOOSE “SET AS ORG DEFAULT” FOR BOTH DESKTOP AND PHONE TO MAKE IT AVAILABLE FOR ALL USERS.

Lightning App Builder Pages Lead Record Page Help

Activation: Lead Record Page

Custom record pages can be assigned at different levels:

- The org default** record page displays for an object unless more specific assignments are made.
- App default** page assignment, if specified, overrides the org default.
- App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

ORG DEFAULT APP DEFAULT APP, RECORD TYPE, AND PROFILE

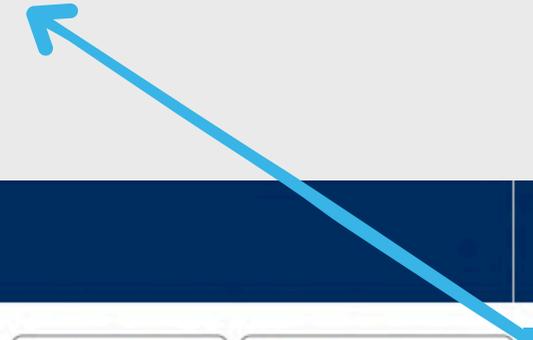
This page is set as org default for **desktop and phone** form factors.

In standard Salesforce apps, some objects have a system app default record page. For those objects, if you assign a custom org default page,

Close

Get more on the AppExchange

STEP 12: CLICK SAVE.



Pages ▾ Lead Record Page ? Help

Desktop ▾ Shrink To View ▾ ↻

Analyze Activation... **Save**

Lead **Ms. Bertha Boxer** + Follow Convert Edit New Case ▾

Title: Director of Vendor Relations Company: Farmers Coop. of Florida Phone (2): Email: bertha@fcof.net

Working - Contacted Closed - Not Converted Converted ✓ Mark Status as Complete

Activity Details Chatter

Log a Call ▾ New Task ▾ New Event ▾ Email ▾

Filters: All time • All activities • All types Refresh • Expand All • View All

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Related

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WhatsApp	

Bertha Boxer

why

18:06

This is the Test Message From Sastorm Software

22:06

Thank you recieved

22:06

This is the Test Message From Sastorm Software LLC

22:09

Today

Hello

Page

* Label
Lead Record Page

* API Name
Lead_Record_Page

* Page Type
Record Page

Object
Lead

Template
Header, Subheader, Right ... **Change**

STEP 13 : CLICK THE **BACK ARROW** ON THE TOP-LEFT CORNER TO **RETURN TO THE RECORD VIEW.**

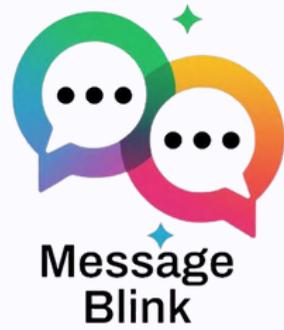
Click the back arrow on the left.

The screenshot displays the Lightning App Builder interface. At the top, there is a dark blue navigation bar with the following elements from left to right: a white back arrow icon inside a white circle, the text "Lightning App Builder", a "Pages" dropdown menu, and the text "Lead Record Page". Below the navigation bar is a toolbar with icons for undo, redo, cut, copy, and paste. To the right of the toolbar are three buttons: "Desktop" with a dropdown arrow, "Shrink To View" with a dropdown arrow, and a refresh icon. The main content area is split into two panes. The left pane is titled "Components" and "Fields" and contains a search bar, a "Custom (0)" section with "No components available.", and a "Custom - Managed (6)" section with items like "campaignBulkSms", "Connect Social Chat Component", "tt_confirm_cmp", and "tt install package cmp". The right pane shows a lead record for "Ms. Bertha Boxer" with fields for Title, Company, Phone, and Email. Below the lead information is a progress bar with "Working - Contacted" and "Closed - Not Converted" stages. At the bottom, there is an "Activity" section with tabs for "Activity", "Details", and "Chatter", and a list of activity actions like "Log a Call", "New Task", "New Event", and "Email".

STEP 14: REDIRECT TO THE **RECORD PAGE** AND **REFRESH IT ONCE.**

The screenshot displays a CRM interface for a lead named Ms. Bertha Boxer. The top navigation bar includes a search field and various menu items like 'Message Blink', 'Messages', 'Leads', and 'Accounts'. The 'Leads' menu is currently selected. Below the navigation, the lead's name 'Ms. Bertha Boxer' is shown with a star icon and a 'Lead' label. Action buttons for '+ Follow', 'Convert', 'Edit', and 'New Case' are visible. The main content area is split into two panels. The left panel, titled 'Upcoming & Overdue', shows 'No activities to show' and 'No past activity'. The right panel, titled 'Bertha Boxer', displays a message chat history with messages such as 'Thank you recieved' and 'This is the Test Message From Sastorm Software LLC'. A blue callout box with white text is overlaid on the bottom left, pointing to the chat component in the right panel.

Now You'll now see the Message Blink Chat Component on the record page.



Email Address

hello@messageblink.com

Website

www.messageblink.com

Youtube

[@MessageBlink](https://www.youtube.com/@MessageBlink)

Linkedin

[@MessageBlink](https://www.linkedin.com/company/messageblink)

Get in touch.

