



SMS/Text Message Solution

User Guide

How to send bulk SMS messages

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Introduction

xRM Consultancy has partnered with North52 to bring you the ability to easily send bulk SMS messages. This functionality is available to you at no additional cost.

North52's product Formula Manager is a must-have solution for any Microsoft Dynamics CRM system – it allows you to extend the capabilities of Microsoft Dynamics CRM very quickly without the need for expensive developer resources.

This guide provides step-by-step instructions on how to set everything up.

Pre-requisites

This guide assumes your System Administrator has installed and configured the xRM Consultancy SMS Solution and given the appropriate security roles to users. If you encounter any errors trying to perform the actions outlined in this guide please consult your System Administrator.

Please see the xRM Consultancy SMS Installation and User Guide for further information – <http://www.xrmconsultancy.com/sms-text-messaging-for-crm/>

North52 Formula Manager

North52's Formula Manager Solution needs to be installed and can be downloaded from www.north52.com. There is no cost for the Standard Edition which is sufficient to set up and send bulk SMS messages.

Sending bulk SMS messages

xRM Consultancy's SMS solution for Microsoft Dynamics CRM 2011 does not have the ability to automatically send bulk SMS messages, however with a little help from North52's Formula Manager and Scheduler functionality it can be easily achieved. Using the method outlined below bulk SMS messages can even be personalized.

The building blocks to send a bulk SMS message are:

1. Workflow set up on the Contact entity to create and send a SMS message – this allows you to add dynamic 'slugs' in the workflow to personalize your messages.
2. Marketing List - list of Contacts you want to send the message to.
3. North52's workflow schedule functionality to execute the workflow for each contact in the marketing list.

1. Set up workflow

Create a new workflow on the Contact entity to send the SMS message.

Go to **Settings > Processes > New**

Set the *Process name* to **Send Bulk SMS**, choose **Contact** as the *Entity* and **Workflow** as the *Type*:

Create Process

Create a new process definition or a process based on an existing template. There are two categories of processes you can create, dialogs and workflows.

Process name: * Send Bulk SMS

Entity: * Contact Category: * Workflow

Type:

New blank process

New process from an existing template (select from list):

Set the *Scope* to **Organization** (if you want other users to be able run the workflow), the *Available to Run* as '**As an on-demand process**' and uncheck any *Start When* conditions.

Add a *Conditional* step to check the record has a mobile number (there is no point in trying to send a message if there is no number!):

Check Contact has a mobile number

If Contact:Mobile Phone does not contain data, then:

No Mobile so Cancel workflow

Stop workflow with status of: Canceled

Add step to *Create* a new SMS record:

Set the Properties of the SMS record. This is where you can personalize the message. For this create SMS step you need to include the Mobile number and Message as a minimum, however it is beneficial to set the From, To and Regarding fields too so that the SMS message is recorded in the Contact's history:

Add step to Send the SMS message - change the record status to 'Sent':

Activate the workflow, the final process should look like this:

Tip - if you are going to be sending many different bulk SMS messages save a pre-configured workflow as a template to save time when setting up new messages.

Tip - if you would like to track your messages against a Campaign set the Regarding of the SMS message to the relevant Campaign or Campaign activity

2. Create Marketing list

Create a marketing list (static or dynamic) for the contacts you which to send the message to.

Most users are familiar with creating a marketing list for a group of contacts so we will not detail the process here. If you are not familiar with Marketing Lists please refer to the help files or online resources. An example for dynamic marketing lists:

<http://www.democrmonline.com/links/MarketingLists/>

Note that it is not essential that you set up a marketing list to send the bulk SMS messages, however, it is probably the most convenient way to manage your target contacts. Alternatively, it is possible set up an advanced find query directly in the workflow schedule (next step) to find your target contacts.

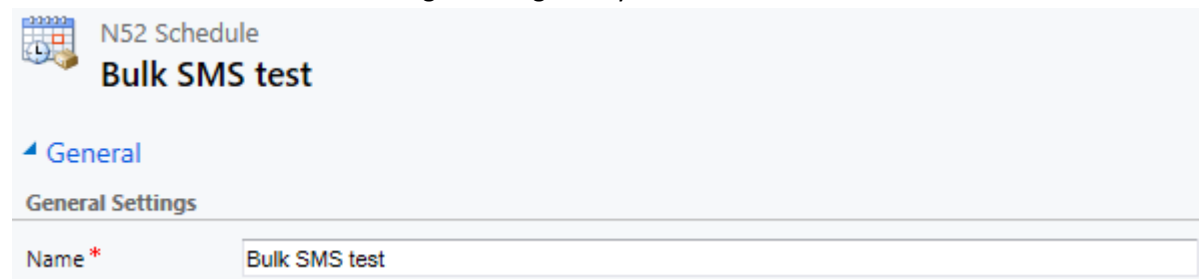
Tip – create a Do not allow Bulk SMS field on the contact entity and position in the Contact Methods tab so that you can manage your contact’s SMS marketing preferences. When specifying your list be sure to filter out any contacts with ‘Do not allow Bulk SMS’ set to ‘Don’t Allow’. See section *Set up ‘Do Not Bulk SMS’ Contact Method on the contact form* on page 9 of this guide.

3. Set up the workflow schedule

Once the Formula Manager Solution has been installed:

Go to **Settings > North52 > N52 Schedule > New**

Name the Schedule with something meaningful to you



The screenshot shows a CRM interface for creating a new workflow schedule. At the top, there is a calendar icon and the text 'N52 Schedule' and 'Bulk SMS test'. Below this, there is a section titled 'General' with a sub-section 'General Settings'. A text input field labeled 'Name *' contains the text 'Bulk SMS test'.

Keep the *Frequency* to **Once** (although you could use a recurring schedule if you want to send out the same message multiple times - this could be useful where you run the schedule daily to send a message to contacts who match your query or marketing list). Set the *Schedule Type* to **Workflow** and select the

Workflow that you set up in Step 1:

Frequency*
 Schedule Type* Workflow*

Leave the Date Settings and other fields to their defaults.

In the *Query* tab set your Advanced Find query. In this case we are querying all contacts who are on the marketing list 'SMS Test'. From the *Select* dropdown scroll down to the Related entities section and select **Marketing Lists**. From the next *Select* dropdown select **Marketing List** and **Equals** and then lookup the Marketing List you want to use, in our case **SMS Test**. Your query should like the one below:

Microsoft Dynamics CRM

File | Advanced Find

Query | Saved Views | Results | New | Save | Save As | Edit Columns | Edit Properties | Clear | Group AND | Group OR | Details | Download Fetch XML | Debug

Look for: Use Saved View:

Select

Marketing Lists

Marketing List Equals SMS Test

Select

Click to select a value for Marketing List.

Click on the **Results** button in the Advanced Find ribbon to make sure you have returned some contacts:

Microsoft Dynamics CRM

File | Advanced Find | List Tools | Contacts

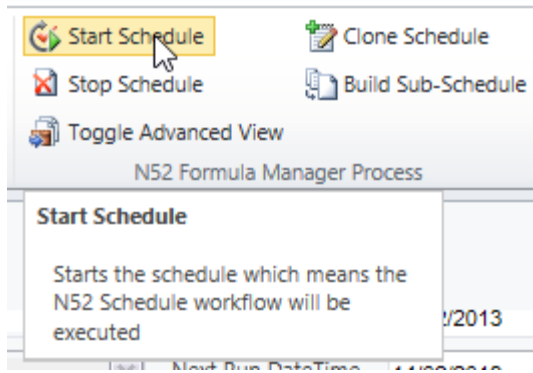
New Contact | Edit | Activate | Deactivate | Delete Contact | Merge | Send Direct E-mail | Add to Marketing List | Quick Campaign | Mail Merge | Connect | Follow

Records

<input type="checkbox"/>	Full Name ▲	Business Phone
<input type="checkbox"/>	Bruce Buxton	

If you are happy with the results click on the **Save** button in the main N52 Schedule entity record.

Finally, click on the Start Schedule button to send your SMS messages!



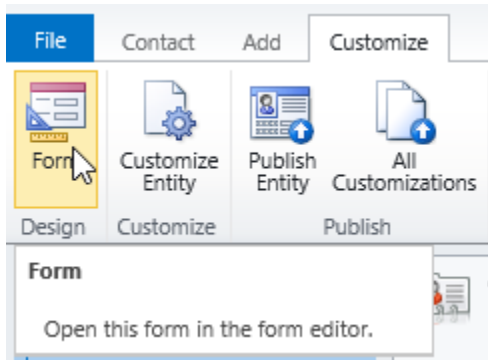
Tip - You can use this schedule multiple times to send messages on an ad hoc basis, either by changing the workflow (or message within the workflow) and/or query (e.g. change Marketing List) or by using the same parameters again – just click the Start Schedule button when you are ready.

Tip - you can use the **Clone Schedule** functionality to easily duplicate and change settings for a different schedule.

4. Set up 'Do Not Bulk SMS' Contact Method on the contact form

This is not mandatory but it is best practice to be able let your SMS recipients opt out from receiving future messages.

Create a new field on the Contact entity to match the existing Contact Method options. Easiest way to do this is to navigate to a Contact > Open the form > Customize tab > Form



Create a new 'Two Options' field by clicking the **New Field** button at the bottom right of the form page.

Display Name: Do not allow Bulk SMS

Name: new_donotbulksms

Type: Two Options

Edit the allowable values to be consistent with that other Contact Method options:

Edit the **No** option to be 'Allow'

Edit the **Yes** option to be 'Do Not Allow'

Your Field should look like this:

The screenshot shows the 'Do not allow Bulk SMS of Contact' field configuration form. The 'Schema' section includes the following fields:

- Display Name ***: Do not allow Bulk SMS
- Name ***: new_donotbulksms
- Requirement Level ***: No Constraint
- Searchable**: Yes
- Field Security**: Enable Disable
- Auditing ***: Enable Disable
- Description**: (Empty text area)
- Type**: Two Options
- Allow**: (List box containing 'Do Not Allow')
- Default Value**: Allow

Buttons for 'Move Up', 'Move Down', and 'Edit' are visible on the right side of the form.

Click Save and Close.

Drag the field from the Field Explorer and position it under the Do not allow Faxes field in the Contact Methods section

The screenshot shows the 'Contact Methods' section of the CRM form. It contains a grid of fields with labels and input boxes:

Preferred Method of Contact	Preferred Method of Contact	Do not allow Bulk E-mails	Do not allow Bulk E-mails
Do not allow E-mails	Do not allow E-mails	Do not allow Faxes	Do not allow Faxes
Do not allow Phone Calls	Do not allow Phone Calls	Do not allow Bulk SMS	Do not allow Bulk SMS
Do not allow Mails	Do not allow Mails		

Click Save and then Publish. Close the form window and go back to your Contact form window that was previously open.

Scroll down to the Contact Methods section and you should see your new field:

The screenshot shows the 'Contact Methods' section with radio button options for each field:

Preferred Method of Contact	Any	Do not allow Bulk E-mails	<input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow
Do not allow E-mails	<input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow	Do not allow Faxes	<input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow
Do not allow Phone Calls	<input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow	Do not allow Bulk SMS	<input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow
Do not allow Mails	<input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow		

Support

Please contact support@xrmconsultancy.com if you have any questions.