SMS/Text Message Solution
User Guide

How to send bulk SMS messages
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contents</td>
<td>2</td>
</tr>
<tr>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>Pre-requisites</td>
<td>3</td>
</tr>
<tr>
<td>North52 Formula Manager</td>
<td>3</td>
</tr>
<tr>
<td>Sending bulk SMS messages</td>
<td>4</td>
</tr>
<tr>
<td>1. Set up workflow</td>
<td>4</td>
</tr>
<tr>
<td>2. Create Marketing list</td>
<td>6</td>
</tr>
<tr>
<td>3. Set up the workflow schedule</td>
<td>6</td>
</tr>
<tr>
<td>4. Set up ‘Do Not Bulk SMS’ Contact Method on the contact form</td>
<td>9</td>
</tr>
<tr>
<td>Support</td>
<td>10</td>
</tr>
</tbody>
</table>
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.

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 ContactMobile 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:

- Create SMS message

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:

![Process: Send Bulk SMS]

Create SMS

- **General**
  - From: (Owner(Contact))
  - Mobile Number: (Mobile Phone(Contact))
  - To: (Contact(Contact))
  - Message: *(First Name(Contact))
  Regards, (Full Name(Owning User(User)))
  - Message Length: Short (160 characters)
  - Send At: 
  - Regarding: (Contact(Contact))
  - Owner: 

Add step to *Send* the SMS message - change the record status to ‘Sent’:

- Send SMS message
  - Change record status to: Create SMS message (SMS) Sent

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

- **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
  - **Create SMS message**
    - Create: SMS View properties
  - **Send SMS message**
    - Change record status to: Create SMS message (SMS) Sent
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

![N52 Schedule]

Bulk SMS test

General

General Settings

Name * 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:

<table>
<thead>
<tr>
<th>Frequency *</th>
<th>Once</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule Type *</td>
<td>Workflow</td>
</tr>
</tbody>
</table>

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:

![Query](image)

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

![Query](image)

If you are happy with the results click on the Save button in the main NS2 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:

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.

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:

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