



SMS/Text Message Solution

User Guide

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Pre-requisites

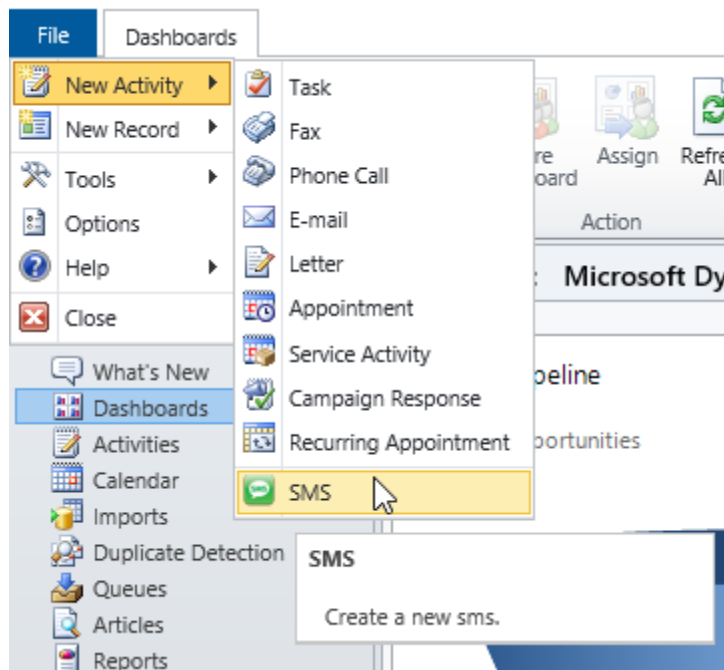
This guide assumes your System Administrator has installed and configured the SMS Solution and given the appropriate security roles to users. If you encounter any errors trying to perform the actions outlined in this guide please consult your System Administrator.

Sending SMS Messages

SMS messages are created as CRM Activities and behave in a similar way to creating Phone Calls, Tasks etc. It is possible to send SMS Messages from a variety of places within CRM:

- Main Ribbon > File menu >
- From any Activity grid menu
- From an Account grid (highlight the Account record first) or Account Form
- From a Contact grid (highlight the Contact record first) or Contact Form
- From a Lead grid (highlight the Lead record first) or Lead Form
- From a Process, either a Workflow or Dialog

Main Ribbon



Sending a message directly from the Main Ribbon (File > New Activity > SMS) opens up a blank SMS message where you will need to complete at a minimum the Message and Mobile Number fields. If you wish for the SMS to show in a record's Closed Activities grid you will need to add an Account/Contact/Lead in the To field or set the Regarding field.



Click **Save/Save and Close** to save the SMS Message which can be edited and sent at a later date.



Click **Send SMS** to "Complete" the SMS activity record and send the SMS message.

A message's Status Reason will be changed to **Sent** once a message has been successfully sent and the SMS record becomes read-only. If there is an error trying to send the message the Status Reason is changed to **Error** and the SMS record is still editable and you can attempt to send it again (Please review any messages in the Administration section of the SMS form (and if necessary get in touch with your System Administrator) before attempting to send the message again.

SMS message from an Account

When sending a message from an Account, the solution tries to locate the Mobile number of the primary contact. If it cannot locate a valid number a message will be displayed asking you to either enter a mobile number manually or update the primary contact record's mobile number.

The 'Regarding' field is automatically set to the Account but can be changed to any other entity that supports Activity associations.

Note: even though it is possible to add more than one Account or other party in the 'To' field of the SMS, only the first party is evaluated and only one message will be sent.

SMS message from a Contact

When sending a message from a Contact, the solution tries to locate the Mobile number of the primary contact

The 'Regarding' field is automatically set to the Contact but can be changed to any other entity that supports Activity associations.

Note: even though it is possible to add more than one Contact or other party in the To field of the SMS, only the first party is evaluated and only one message will be sent.

SMS Message from a Lead

The 'Regarding' field is automatically set to the Lead but can be changed to any other entity that supports Activity associations.

Note: even though it is possible to add more than one Lead or other party in the To field of the SMS, only the first party is evaluated and only one message will be sent.

Help on the SMS activity form

There is help for users on the SMS activity form. Click on the Help 'tab' to expand review the content. The content is also provided below:

Mobile Number - enter a mobile number without spaces and less than 15 digits. If the To is set to a Contact, Lead, Account or User record the system will attempt to retrieve the mobile number from the corresponding record (in the case of an Account the primary contact is used), if the number is blank or contains non numeric characters the corresponding record will need to be updated or a number entered on the form manually. Mobile numbers retrieved automatically from the To record will be automatically formatted if they contain characters like + or () e.g. +44 (0) 777 1234 1234 will be automatically formatted to 4477712341234.

Message Length - Short (default) allows you to send messages of up to 160 characters using 'normal' characters. If your message contains more complex characters (e.g. €, Chinese or Arabic symbols) each character will use up more than a 1 character allocation. Long allows up to 612 characters. Note that longer messages use up more SMS gateway credits (up to 4) than a short message (uses 1 credit). The Current Message Length field will accurately display the characters count taking in account any complex characters.

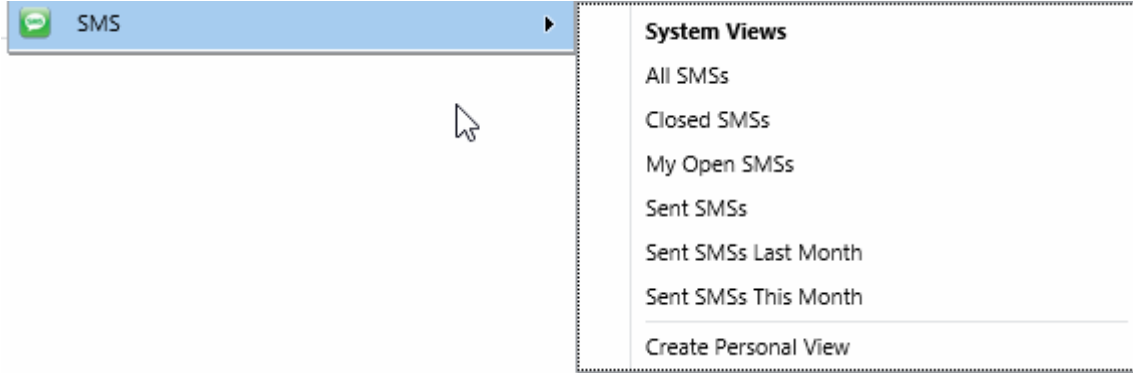
Send At - if you would like the SMS message to be sent at a specified time in the future please enter the date and time in the Send At field. Note that this instructs the SMS message server to send the message and cannot be retracted once the message has been sent from CRM.

Send SMS - a message will only attempt to be sent if the Send SMS button is clicked or the Status Reason is set to Send from within a workflow. This means you are able to save a message as a draft and come back to it later.

Errors - if a message cannot be sent due to licensing restrictions a message will be displayed with a relevant error message and instructions on how to correct it. If there is a problem sending the message via the SMS gateway the Status of the message record will remain Open, the Status Reason set to Error and a message will be displayed in the Administration section of the form.

Activity Grid

SMS messages are displayed in the Activity grids in any entity that supports Activities. You can filter the grid to just show SMS messages – the default system views are shown below:



Dashboard

The SMS solution provides a sample dashboard to monitor your SMS messages. You can build your own using this as a baseline.

Dashboard: SMS Messaging Dashboard ▾

Sent SMSs This Month ▾

SMSs by Status Reason

Status Reason	Count
Sent	2

SMSs by Status Reason

Sent SMSs Last Month

Status Reason	Count
Sent	1

Activities Sent SMSs This Month ▾

Actual End	Status Reason	To	Mobile Number	Subject
14/02/2013 21:10	Sent	Bruce Buxton	7733262333	Hi Bruce, This is
14/02/2013 21:06	Sent	Bruce Buxton	7733262333	Hi Bruce, This is

1 - 2 of 2 (0 selected) Page 1

Activities Sent SMSs Last Month ▾

Actual End	Status Reason	To	Mobile Number	Subject
23/01/2013 16:15	Sent		7733262333	test

1 - 1 of 1 (0 selected) Page 1

Sending SMS from a Process – Workflow or Dialog

Sending a SMS from a Workflow or Dialog is very easy. Usually you would create the process of the Lead of Contact entity as you have direct access to the Mobile Phone field, for example:

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: *

Entity: * Category: *

Type:

New blank process

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

Template Name	Primary Entity	Owner

When setting up the SMS message to be sent via a process you need the following steps as a minimum:

▼ **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

For the 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. See below:

General

From: {Owner(Contact)} Mobile Number: {Mobile Phone(Contact)}

To: {Contact(Contact)} Message Length*: Short (160 characters)

Message*: Hi {First Name(Contact)},
This is a SMS message.
Regards,
{Full Name(Owning User (User))}

Current Message Length: Send At: [Calendar icon]

Regarding+: {Contact(Contact)}

Owner: [Search icon]

The Message Length field is not important to set in the workflow – it only has an effect in the SMS message form. However, it is best to keep your message length as short as possible as that affects how many SMS credits you use (1 credit per 160 characters).

Sample Process included in Solution

An example process is included with the SMS Solution - **Send SMS Dialog Sample**

This dialog shows you how to create a number of pre-determined messages a user can choose from or specify their own message as part of a Dialog.

The outline of the process is shown below

The screenshot displays a configuration window for a dialog process. The left sidebar shows a tree view with 'Input Arguments', 'Variables', and 'Steps' expanded. The main area shows the configuration for 'Step: Select Type of SMS'. It includes several steps and conditional logic:

- Choose Message Temple**: Prompt and Response: [View properties](#); Prompt: Select the SMS message template; Response: Happy Birthday, Thank you for your custom, Custom.
- Mobile Phone**: Prompt and Response: [View properties](#); Prompt: Enter number.
- If custom message**: If Choose Message Temple-Response Label equals [Custom], then:
 - Page: Write SMS message**
 - SMS Message**: Prompt and Response: [View properties](#); Prompt: Write Message.
 - Create Custom SMS**: Create: SMS [View properties](#).
 - Send SMS**: Change record status to: Create Custom SMS (SMS) Sent.
 - Message Sent**: Stop dialog.
- Happy Birthday**: If Choose Message Temple-Response Label equals [Happy Birthday], then:
 - Create Happy Birthday SMS**: Create: SMS [View properties](#).
 - Send SMS**: Change record status to: Create Happy Birthday SMS (SMS) Sent.
 - Message Sent**: Stop dialog.
- Thank you for your custom**: If Choose Message Temple-Response Label equals [Thank you for your custom], then:
 - Create Thank you for your custom SMS**: Create: SMS [View properties](#).
 - Send SMS**: Change record status to: Create Thank you for your custom SMS (SMS) Sent.
 - Message Sent**: Stop dialog.

Bulk SMS

Sending bulk SMS is possible by creating a workflow, then highlighting you Contact or Lead list and clicking on the Run Workflow button. A workflow will be run for each highlighted record and will send the SMS. Note this has a limitation of sending up to 250 messages at a time.

For a more scalable and controllable way of sending Bulk SMS messages you can use North52's (www.north52.com) free Formula Manager solution – please contact us (support@xrmconsultancy.com) for further information on how to configure this.

Support

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