## Dynamica MMS for Customer Insights and Journeys – User Guide

## Solution Requirements

This solution is an extension of Dynamics 365 Customer Insights – Journeys that allow send MMS via Twilio integration.

- 1. Dynamics 365 Customer Insights Journeys
- 2. Twilio account

## Solution Configuration

- 1. Assign security role 'Dynamica MMS for Marketing Security Role' to your user
- 2. Open Application 'Dynamica MMS for Customer Insights Journeys'
- 3. Select Dynamica Settings table
- 4. Create Settings 'TwilioAccountSid': Name "TwilioAccountSid"; Encrypt "Yes"; Value your Twilio Account SID
- 5. Create Settings '**TwilioAuthToken**': Name "TwilioAuthToken"; Encrypt "Yes"; Value your Twilio Auth Token
- 6. Go to make.powerapps.com, find table "**Custom channel message**", select forms. Remove all security roles for form "**Information**". Enable security "**Everyone**" for form "**Form**".

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|  | Information                              | ÷      | Card                          | On                         | Yes            | No                | No                               |          |
|  | Information                              | ÷      | Quick View                    | On                         | Yes            | No                | No                               |          |
| 0  | Information                              | ÷      | Main                          | On                         | Yes            | No                | No                               |          |
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| Form         Security roles         You can assign security roles to a form to accommodate how different people in your organization need to interact<br>with the same data in different ways. Applying security roles to forms ensures users get access to only the forms they<br>need, earn more         Yes           Inform         Form order         No           Inform         Form access checker         Specific security roles         No | Nume    | Form settings       | Secur ty roles for Form form   | ×   | Customizable $\checkmark$ |
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| Inform: Fallback forms  Everyone  No  | Informa | Form order          | need, earn more  | ĺ   | No                        |
| Inform Form access checker Specific security roles No   | Informa | Fallback forms      | Everyone   | - 1 | No                        |
|   | Informa | Form access checker | ○ Specific security roles  | - 1 | No                        |
|   |         |                     |  | - 1 |                           |

 Add security role 'Dynamica MMS for Marketing Security Role' for user '# D365 Marketing'. If you can't add directly security role for this user add security via team. This user is used by Microsoft to send MMS activities. 8. Go to 'Customer Insights – Journeys' application. Choose Settings area, select Custom Channel item. Click to New custom channel to add new one.

| III Dynan            | nics 365           | Customer Insights - Journeys | P Search                                    |                       | New look 💽 💡                            | କ ୧ 🐵 +             |
|----------------------|--------------------|------------------------------|---|-----------------------|---|---------------------|
| You have             | e 2 notification   | ns. Select to view.          |   |                       |   |                     |
| —<br>⋒ Home          |                    | ← 💾 Show As 🗠 😭 Show Charl   | + New custom channel 📋 Delete 🛛 🗸 🕐 Refresh | 👍 Visualize this view | 토핑 Email a Link 🛛 🗸 🔊 Flow 🗸 🗐 Run Repo | rt \vee 🗄 😥 Share - |
| ⓒ Recent<br>於 Pinned | ×                  | All custom channels ~        |   |                       | 😨 Edit columns 🛛 🍸 Edit filters         | P Filter by keyword |
| Overview             |                    | Name 1 ~                     | Description ~                               |                       | Display Name (Channel Definition) ~     |                     |
| O Versions           |                    | MMS Text Messages            |   |                       | Twillio MMS Custom                      |                     |
| Settings             |                    |                              |   |                       |   |                     |
| 鸟 Quota lin          | nits               |                              |   |                       |   |                     |
| 🛱 Add-ons            |                    |                              |   |                       |   |                     |
| 🗠 Usage lin          | nits               |                              |   |                       |   |                     |
| Feature s            | witches            |                              |   |                       |   |                     |
| Email marketi        | ing                |                              |   |                       |   |                     |
| Ĉ₿ Domains           |                    |                              |   |                       |   |                     |
| 🖻 Marketing          | ig page c          |                              |   |                       |   |                     |
| ₿ Designer           | feature            |                              |   |                       |   |                     |
| Default se           | ettings            |                              |   |                       |   |                     |
| Customer eng         | gagement           |                              |   |                       |   |                     |
| Frequenc             | гу сар             |                              |   |                       |   |                     |
| ER Audience          | e configu          |                              |   |                       |   |                     |
| G SMS prov           | viders<br>channels |                              |   |                       |   |                     |
| S Settings           | 0                  | Rows: 1                      |   |                       |   |                     |

## 9. Select 'Twilio MMS Custom' and click next

| New channel                           |   |        |
|---------------------------------------|---|--------|
| Channel     Channel     Settings      | Select the channel Can't find your app or provider? Learn how to install  |        |
| <ul> <li>Review and finish</li> </ul> | Connect an existing Twillio account te send text messsages  |        |
|                                       | C Looking for custom SMS providers?<br>There are SMS providers available to set up. Go to the SMS providers<br>page to get started. |        |
|                                       |   |        |
|                                       |   |        |
|                                       |   |        |
|                                       |   |        |
|                                       |   |        |
|                                       | Next  | Cancel |
| t up channel                          |   |        |

| New channel       |   |  |
|-------------------|---|--|
| Channel           | Set up channel<br>Enter the details required to connect your channel to Dynamics 365 Customer Insights - Journeys. Learn more |  |
| Settings          |   |  |
|                   | Name*   |  |
| Review and finish | MMS Text Messages   |  |
|                   | Description   |  |
|                   | Enter a description   |  |
|                   | <i>d</i> i  |  |
|                   | Sender*   |  |
|                   | 858585 Twilio phone number that will send MMS   |  |
|                   | Name*   |  |
|                   | MMS Text Messages   |  |
|                   | Owner+  |  |
|                   | Q   |  |
|                   |   |  |
|                   |   |  |
|                   |   |  |
|                   |   |  |
|                   |   |  |
|                   |   |  |
|                   | Back Next Cancel  |  |

- 11. Review and finish custom channel configuration
- 12. Create MMS template. Go to **Real-Time journeys** area, select **More channels** Item, Click **+ New Message.**

| <ul> <li>All other messages ~</li> </ul> | ×   | 표당 Edit columns              | √ Edit filters   √ Filter by keywor |
|--|---|------------------------------|-------------------------------------|
| ✓ Name ↑ ✓                               | Status ~                                  | Name (Channel Instance ID) ~ | Created on ~                        |
| New Message                              | Ready to send                             | MMS Text Messages            | 10/2/2024 3:27 P                    |
| fications                                |   |                              |                                     |
| ages                                     | Select a channel                          | ×                            |                                     |
|  | Select a channel to create a message for. | Learn more                   |                                     |
| nnels                                    | Channel                                   |                              |                                     |
|  | MMS Text Messages                         | ~ _                          |                                     |
| d  |   |                              |                                     |
|  | Select                                    | Cancel                       |                                     |
|  |   |                              |                                     |
|  |   |                              |                                     |
|  |   |                              |                                     |
|  |   |                              |                                     |
|  |   |                              |                                     |
| enter                                    |   |                              |                                     |

13. Select newly created channel, and fill main attributes for new MMS template.

| ← 🗗 🖉 Edit  | Save 🗸 🖾 Chee      | ck content ▷ Test send 心 Refre | esh 🔍 Check Access | 옥, Assign 🗐 Rur | n Report 🗸  | Share ~ |
|---|--------------------|--------------------------------|--------------------|-----------------|---|---------|
| New Message -<br>Custom channel mess<br>CustomChannelMe | ved<br>eForm       |                                |                    |                 |   |         |
| General   |                    |                                |                    |                 |   |         |
| Name  | New MMS            |                                | Char               | nel Instance ID | <u>MMS Text Messages</u> ×                                      | Q       |
| Text Message  | Send mms from dyna | amics                          | Med                | a Url           | https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9GcRNxiiZmeL | •       |
| Compliance  | default ×          |                                | ب<br>Purp          | ose             | R Transactional ×   | Q       |
| Status  | Active             |                                | Statu              | s               | Ready to send   |         |
| Торіс   |                    |                                | Q                  |                 |   |         |
|   |                    |                                |                    |                 |   |         |

- 14. To finish setup MMS template click Check Content, and Test Send to validate template.
- 15. Create Journey and send MMS from custom channel

| Upnamics 365 Customer Insi             | Add an action   | a                                    |
|--|---|--------------------------------------|
| You have 2 notifications. Select to vi | All Messages Al powered actions Conditions Activities Connectors  | ₽ Search                             |
| = ← Jo                                 | -   | Redo 🖬 Save Publish                  |
| ŵ Home                                 | Messages  |                                      |
| 🕒 Recent 🗸                             | Email Text message O Push notifical   | tion 🔹 🕘                             |
| 🖈 Pinned 🗸 🗸                           | Send a text message (SMS)   | Stication                            |
| Channels                               |   | C                                    |
| 🖾 Emails                               | Other channel     Send other types of messages  |                                      |
| Push notifications                     |   |                                      |
| CP Text messages                       | Al powered actions  | Audience: Contact                    |
| P Forms                                | A/B test Channel optimization   |                                      |
| G More channels                        | Test messages or channels against each other  | h a static audience                  |
| Engagement                             | Conditions  | start any time                       |
| Get started                            |   | ere all audience<br>imey every:      |
| 9월 Journeys                            | Wait time         Wait for frigger         Schedule an action for a specific time         Wait to ringger         Series         Series | If messages until conditions are met |
| ⇒ Triggers                             |   |                                      |
| # Analytics                            | Attribute branch  | It can't participate in              |
| Audience                               | energia manage and a sharene anna   | nultiple segments.                   |
| Segments                               | Activities  |                                      |
| A Contacts                             | Phone call  |                                      |
| @ Leads                                | Create and assign a phone call activity to sales  |                                      |
| E Consent center                       | Connectors  | amey. Reset                          |
| Arrate                                 |   | sal Time 🗸                           |
| RJ Real-time journeys 🗘                | Activate a custom trigger     Nigger journeys and Power Automate flows  |                                      |

| a) Journey start       |                       | Other channel                              | ■ →<br>⊖ |
|------------------------|-----------------------|--|----------|
| Newsletter Subscribers | use created channel 🗪 | Channel *<br>252525 (MMS Text Messages)    | ~        |
| Other channel          | use created template  | Choose a message *<br>Happy Birthday MMS × | ۵<br>۵   |
| Happy Birthoay MMS     |                       | Send to *<br>Mobile Phone                  | 7        |
| e                      |                       |  |          |
| Exit                   |                       |  |          |
|                        |                       |  |          |
|                        |                       |  |          |
|                        |                       |  |          |
|                        |                       |  |          |
|                        | — + 100% Reset        |  |          |