

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".

Name	Form type	Status	Managed	Customized	Customizable
Form	Main	On	Yes	Yes	Yes
Information	Card	On	Yes	No	No
Information	Quick View	On	Yes	No	No
Information	Main	On	Yes	No	No

Form settings

Security roles for Form form

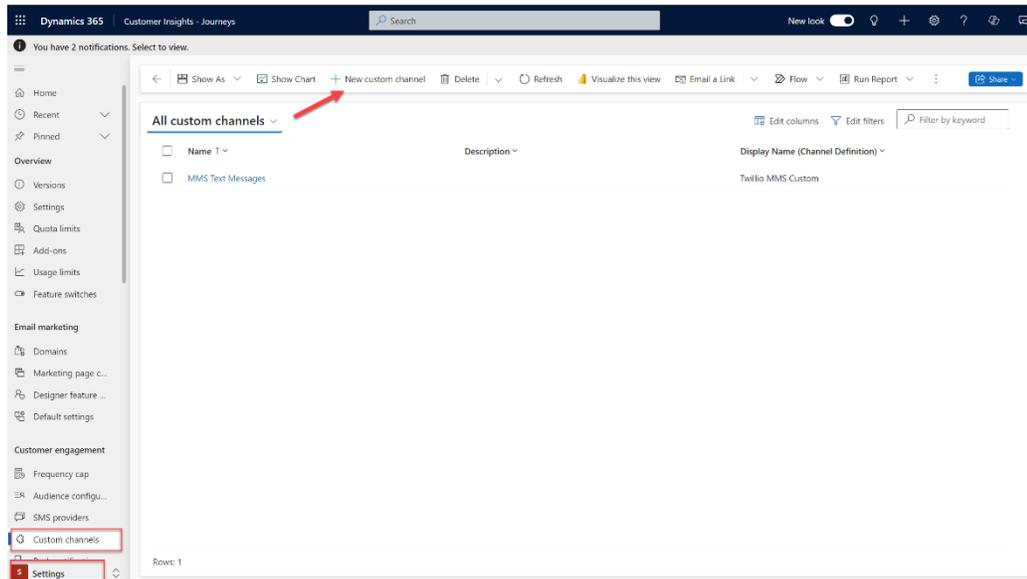
You can assign security roles to a form to accommodate how different people in your organization need to interact with the same data in different ways. Applying security roles to forms ensures users get access to only the forms they need. [Learn more](#)

Everyone

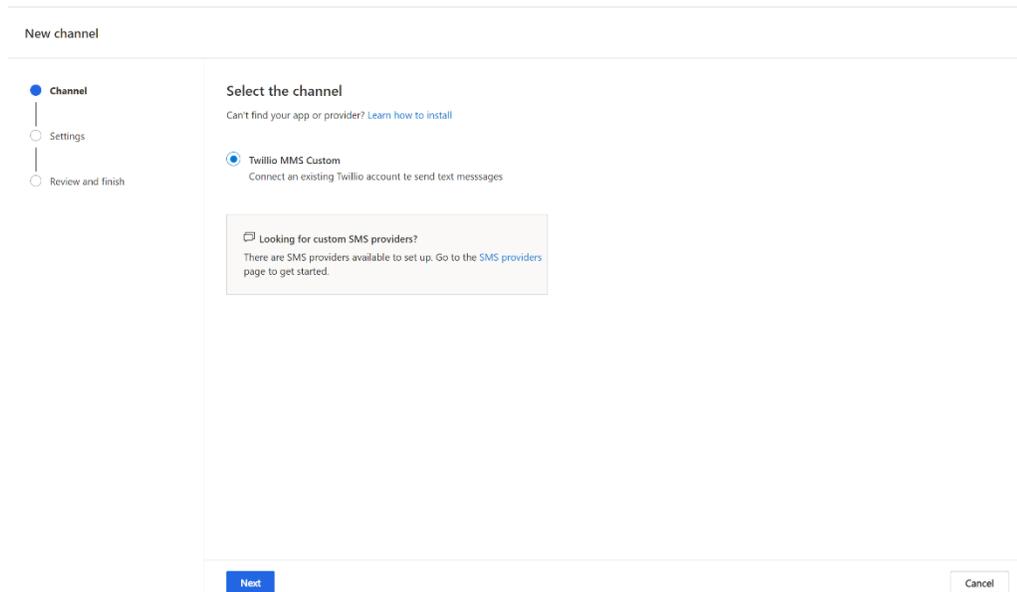
Specific security roles

7. 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.

- Go to 'Customer Insights – Journeys' application. Choose **Settings** area, select **Custom Channel** item. Click to **New custom channel** to add new one.



- Select 'Twilio MMS Custom' and click next



- Set up channel

New channel

- Channel
- Settings**
- Review and finish

Set up channel

Enter the details required to connect your channel to Dynamics 365 Customer Insights - Journeys. [Learn more](#)

Name*

Description

Sender*
 → Twilio phone number that will send MMS

Name*

Owner*

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

You have 2 notifications. Select to view.

Home
Recent
Pinned
Channels
Emails
Push notifications
Text messages
Forms
More channels

All other messages
+ New message

Name	Status	Name (Channel Instance ID)	Created on
New Message	Ready to send	MMS Text Messages	10/2/2024 3:27 PM

Select a channel

Select a channel to create a message for. [Learn more](#)

Channel

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

← Edit Save Check content Test send Refresh Check Access Assign Run Report Share

New Message - Unsaved

Custom channel message

CustomChannelMessageForm

General

Name	New MMS	Channel Instance ID	MMS Text Messages
Text Message	Send mms from dynamics	Media Url	https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9GcRNxizZmeL...
Compliance	default	Purpose	Transactional
Status	Active	Status	Ready to send
Topic	---		

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

Add an action

Messages

- Email
- Text message
- Push notification
- Other channel** (highlighted with red arrow)

AI powered actions

- A/B test
- Channel optimization

Conditions

- Wait time
- Wait for trigger
- Series
- Attribute branch
- Audience split (preview)

Activities

- Phone call
- Task

Connectors

- Activate a custom trigger

