

User Manual

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Introduction

TextSMS4Dynamics is a solution that integrates popular messaging services like SMS with Microsoft Dynamics 365 CRM platform.

It acts as a connector linking message communication with Dynamics 365, empowering individuals to employ messaging functions seamlessly within the Dynamics 365 environment.

Key features include:

- Enables sending and receiving messages directly from Microsoft Dynamics 365 CRM.
- Provides prompt notifications and updates from Message Account on CRM, keeping users informed.
- Utilize automation features to set up triggered messages associated with specific events, such as sending automated responses in reaction to CRM actions. Customize the message templates according to your requirements.
- Supports the sharing of images along with text to enrich the conversational experience with clients within the CRM environment.
- Store and access conversation history records on daily basis in Microsoft Dynamics 365 CRM.

Ultimately, TextSMS4Dynamics offers Dynamics users an enhanced communication and engagement tool to leverage the power of Text messages for personalized messaging and gaining a competitive edge in attracting attention relative to alternative communication channels within their CRM workflows.

Salient Features:

- i. Integrate messaging service within Microsoft Dynamics 365 CRM to send automated messages based on CRM actions.
- ii. Leverage TextSMS4Dynamics for customer engagement, such as sending notifications, updates, or send marketing, sales or promotional messages from Microsoft Dynamics 365 CRM.
- iii. Create any OOB or custom entity for conversations.
- iv. Integration of CRM data, granting users access to customer information and context-enriched conversations.
- v. Access messaging interface from the CRM records to have a seamless and integrated approach to customer communication, which can lead to improved customer service and relationship management.

Available for: Microsoft Dynamics 365 CRM and Dataverse.

Deployment: Online.

Security Roles

The first step is to assign security roles to users.

TextSMS4Dynamics has the following security roles:

The user with **TextSMS4Dynamics Administrator** security role is in charge of setting up of the solution. They can setup the Twilio Account and integrate it with Dynamics 365 CRM, Create Configurations, Record Types, Customize Templates, etc.

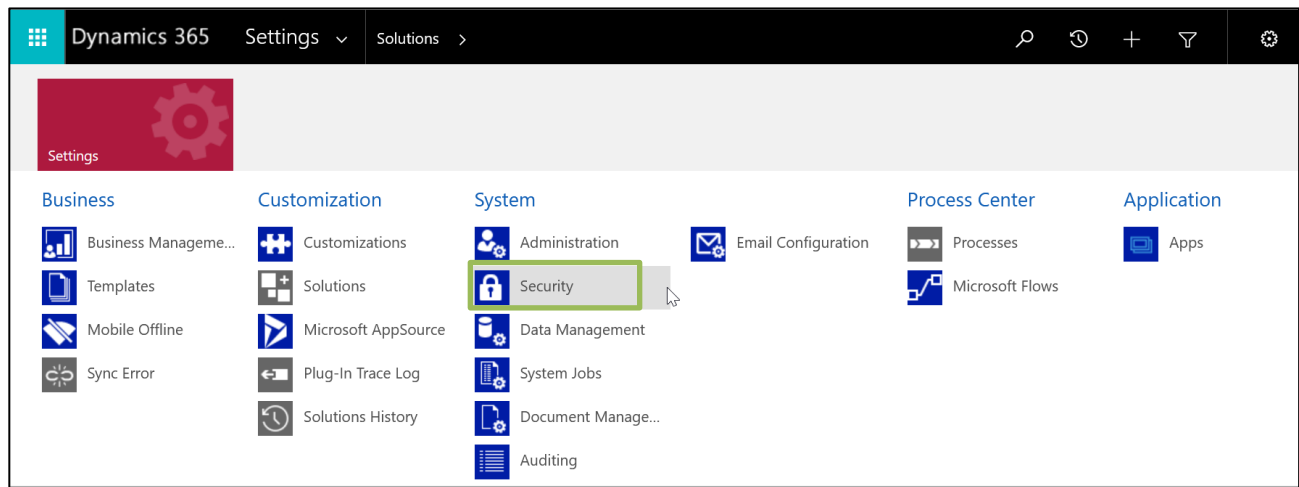
The user with **TextSMS4Dynamics User** security role can only message with the customer and convert them into lead, opportunity, etc.

Note:

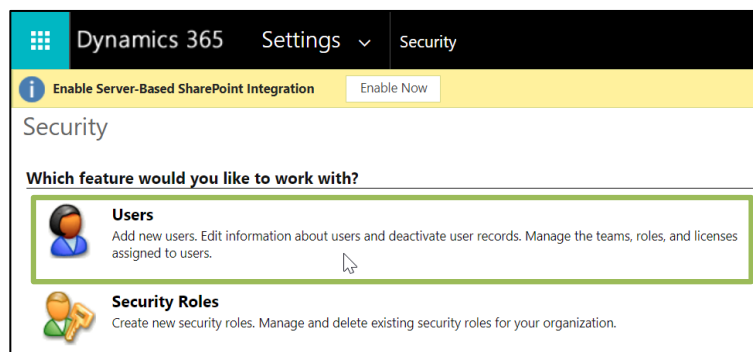
- It is necessary to assign any one of the above security roles to use TextSMS4Dynamics solution.
- System Administrator has all the rights that TextSMS4Dynamics administrator has.

Here are the steps to assign security roles to CRM users.

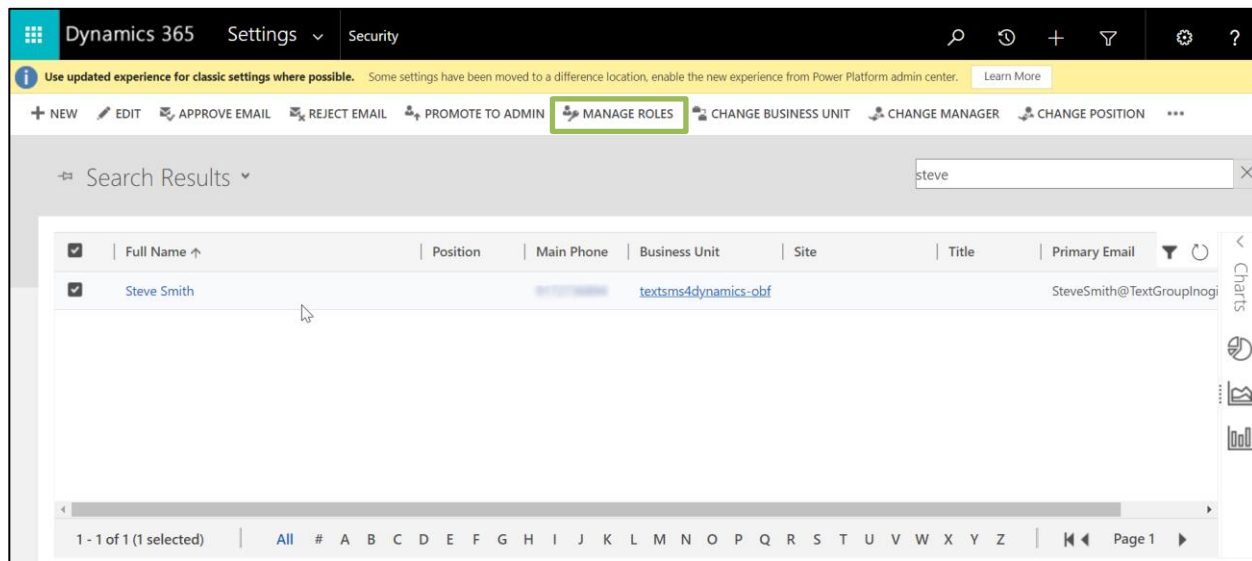
- Go to Advanced **Settings --> Settings --> Security**.



- Select **Users**.



- Select user --> Click on **Manage Roles**



- Click on any one of the TextSMS4Dynamics security roles --> Click **OK**.

Set Up Team

The next step is to set up the TextSMS4Dynamics team and add the users in order to access TextSMS4Dynamics.

After you install the solution and activate the license, teams will be generated under 'TextSMS4Dynamics Team' according to the selected channel licenses, gets created in CRM. You can add all the users to the Team, whom you would like to give access to TextSMS4Dynamics.

Note: As of now TextSMS4Dynamics only supports SMS messaging channel.

Your license determines how many members you can have in your Team. For instance, if your license is for up to 5 users, you can only add 5 members to your Team.

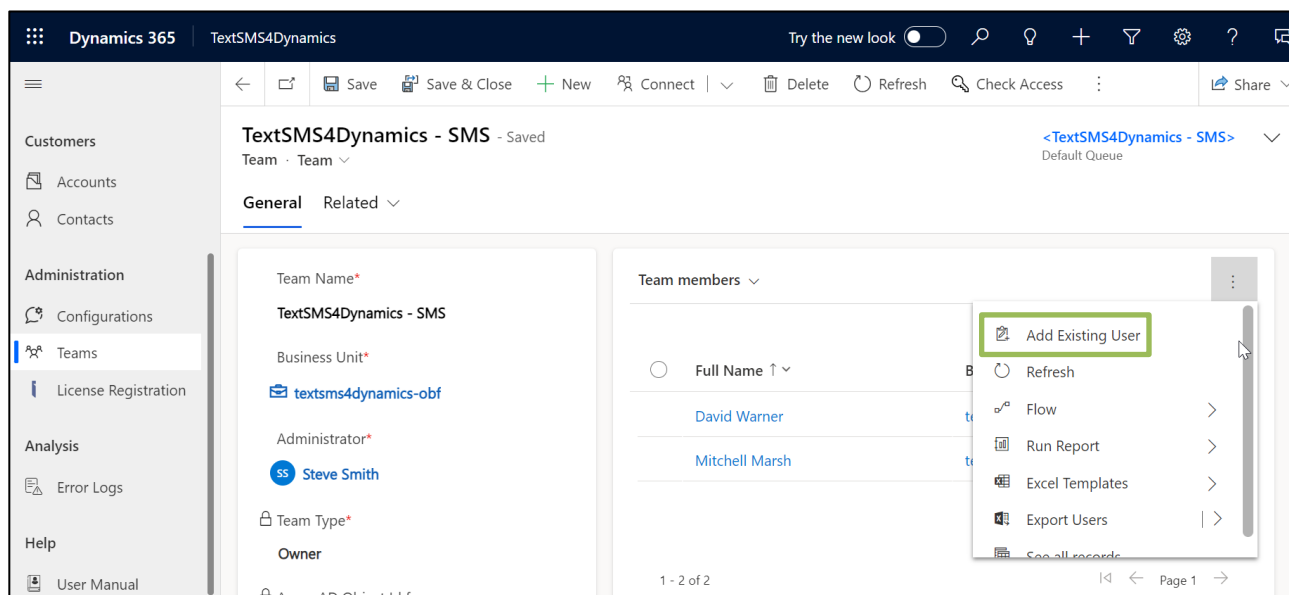
To add team members, follow the steps given below:

- Navigate to **TextSMS4Dynamics App --> Administration --> Teams**.

The screenshot displays the Dynamics 365 interface for the TextSMS4Dynamics app. The left-hand navigation pane shows the 'Administration' section with 'Teams' highlighted. The main content area displays the 'TextSMS4Dynamics Team*' with a table listing team details. The table has columns for Team Name, Business Unit, Channel, and Created On. A single team entry is visible: 'TextSMS4Dynamics - SMS' with Business Unit 'textsms4dynamics-obf', Channel '1', and Created On '1/2/2024 10:53 AM'. The 'Teams' option in the navigation pane and the team name in the table are highlighted with green boxes.

Team Name	Business Unit	Channel	Created On
TextSMS4Dynamics - SMS	textsms4dynamics-obf	1	1/2/2024 10:53 AM

- Select the team '**TextSMS4Dynamics - SMS**' --> **Add team members** --> Click on '**Save**'.



Configuration Privileges

In order to create configurations within TextSMS4Dynamics, Microsoft Dynamics 365 CRM users need to have the following privileges:

- **Attribute map -read, write, delete**
- **Customization -read, write, delete**
- **Entity - read, write, delete**
- **Field - create, read, write, delete**
- **Relationship - create, read, write, delete**

Security Role: TextSMS4Dynamics Administrator Working on solution: Default Solution

Table	Create	Read	Write	Delete	Append	Append To	Assign	Share
App Config Master	○	○	○	○	○	○		
Attribute Map	○	●	●	○	○	○		
Callback Registration	○	○	○	○	○	○	○	○
Canvas App	○	○	○	○	○	○	○	○
Custom Control	○	○	○	○	○	○		
Custom Control Default Config	○	○	○	○	○	○		
Custom Control Resource	○	○	○	○	○	○		
Customizations	○	●	●	●	○	○		
Entity	○	○	○	○	○	○		
Entity Key	○	○	○	○	○	○		
Entity Map	○	○	○	○	○	○		
Expander Event	○	○	○	○	○	○		
Field	●	●	●	●				
Hierarchy Rule	○	○	○	○				
Import Job	○	○	○	○	○	○		
Model-driven App	○	●	●	○	○	○		
Option Set	○	○	○	○				
Plug-in Assembly	○	○	○	○				
Plug-in Trace Log	○	○	○	○	○	○		
Plug-in Type	○	○	○	○	○	○		
Process	○	○	○	○	○	○	○	○
Process Configuration	○	○	○	○	○	○		
Process Session	○	○	○	○	○	○	○	○
Publisher	○	○	○	○	○	○		
Relationship	○	○	○	○	○	○		
Sdk Message	○	○	○	○	○	○		

Key
 ○ None Selected
 ● User
 ● Business Unit
 ● Parent Child Business Units
 ● Organization

Configuration

Configuring TextSMS4Dynamics

Configuring TextSMS4Dynamics is a straightforward process that involves setting up the integration of Messaging Service and Microsoft Dynamics 365.

Below is a step-by-step guide to help you with the configuration:



- Click **+New** to add a New Configuration.
- In General Tab, add the details such as Mobile Number, Description, etc.
- This section requires you to add Twilio Account SID, Auth Token and Callback URL which will allow the CRM to communicate with the Twilio platform. You can obtain them by creating a Twilio account.

TextSMS4Dynamics – User Manual

The screenshot displays the Dynamics 365 TextSMS4Dynamics interface. The top navigation bar includes 'Dynamics 365' and 'TextSMS4Dynamics'. A yellow warning banner at the top states: 'Please copy the URL from the Power Automate Flow - 'Real-time Chat Logging' and paste it into Phone Numbers → Manage → Active numbers → Select Mobile Number → Configure Tab → Messaging Configuration Section → Default Messaging Service for Conversations → 'Request URL' and 'Callback URL' in Twilio before proceeding with the configuration.' The main form is titled 'New Configuration - Unsaved' and is owned by 'Steve Smith'. It features three tabs: 'Details', 'Record Type', and 'Message Template'. The 'Details' tab is active, showing 'Communication Medium Information' with fields for 'Medium' (SMS), 'Mobile Number', and 'Description'. To the right, the 'Twilio Details' section is highlighted with a green border, containing fields for 'Twilio Account SID', 'Twilio Auth Token', and 'Callback Url'. Below this, the 'Settings' section includes 'Allow Create To' (a dropdown menu), 'Session Timeout' (1 day), and 'Idle Timeout' (5 minutes).

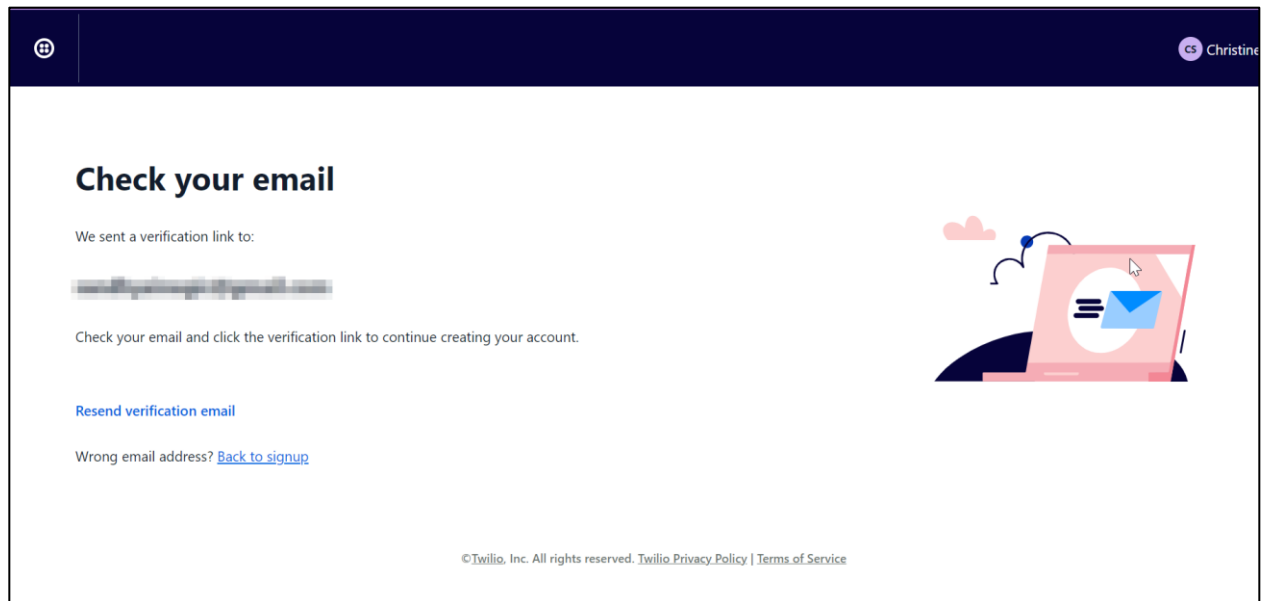
Create A Twilio Account (Sandbox)

TextSMS4Dynamics leverages Twilio's SMS API to enable seamless communication within the Microsoft Dynamics 365 environment. By integrating Twilio's API, TextSMS4Dynamics allows users to send and receive messages directly from their Dynamics 365 interface.

Let's take a look at how to get started with Twilio:

The screenshot shows the Twilio sign-up page. On the left, the 'Sign up' form includes fields for 'First name', 'Last name', 'Email address', and 'Password'. Below these fields is a checkbox for accepting the 'Twilio Terms of Service' and links to the 'Privacy Policy' and 'European Electronic Communications Codes Rights Waiver'. A blue 'Continue' button is at the bottom of the form. On the right, there is an illustration of a person with arms raised, surrounded by icons for communication. Text on the right states: 'By signing up today, you will get access to all Twilio products. No credit card is required!'. Below this, three Twilio products are listed: 'twilio comms' (Streamline your communication capabilities with Twilio's advanced suite of APIs), 'twilio segment' (Collect, unify, and enrich customer data across any app or device, all in one safe place), and 'twilio sendgrid' (Integrate in minutes with our email API and trust your).

- Sign up on <https://www.twilio.com/try-twilio>
- Add your **First Name, Second Name, Email Address and Password**.
- You will then be sent a verification email.



Check your email

We sent a verification link to:

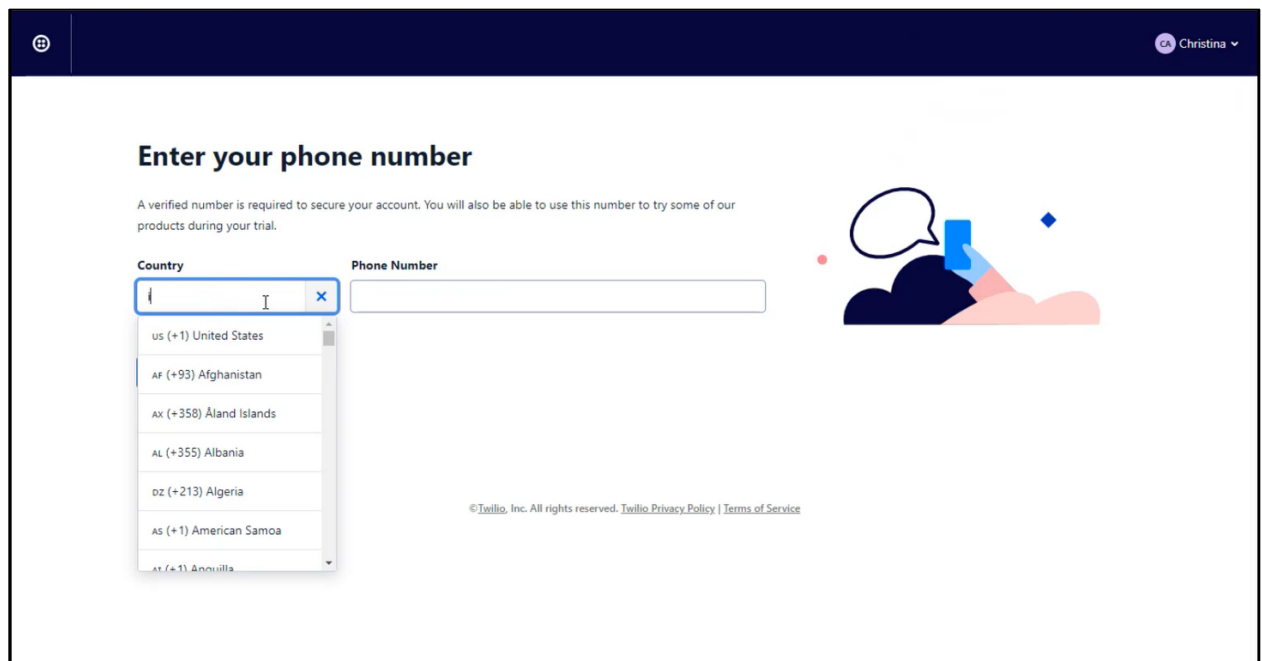
Check your email and click the verification link to continue creating your account.

[Resend verification email](#)

Wrong email address? [Back to signup](#)

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- Once verified, you need to add your phone number to setup your Twilio account and validate the same.



Enter your phone number

A verified number is required to secure your account. You will also be able to use this number to try some of our products during your trial.

Country

Phone Number

us (+1) United States

AF (+93) Afghanistan

AX (+358) Åland Islands

AL (+355) Albania

DZ (+213) Algeria

AS (+1) American Samoa

AI (+1) Anguilla

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Please Note: During signup, the phone number provided is only for setup and verification. This number need not be similar to your **SMS Account number / Sender Number** that you will use to communicate with your clients, and is only for setup.

twilio

CONSOLE DOCS Christina An...

Ahoy Christina Anderson, welcome to Twilio!

Tell us a bit about yourself so we can personalize your experience. You will have access to all Twilio products.

• Which Twilio product are you here to use?

• What do you plan to build with Twilio?

• How do you want to build with Twilio?

- ☐ With code
Customize exactly what you want
- ☐ With minimal code
Build on top of our code samples
- ☐ With no code at all
Launch a starter app with no code

After the Twilio Verification Process is completed, then you need to mention which product you would like to access with the help of Twilio.

- Add **"SMS"**, when asked which Twilio product are you here to use.
- We have added **"Lead Conversion"**, when asked what do you plan to build with Twilio. You may choose any other segment as your business preference.

twilio

CONSOLE DOCS Christina An...

all Twilio products.

• Which Twilio product are you here to use?

• What do you plan to build with Twilio?

Lead Conversion

• How do you want to build with Twilio?

- ☐ With code
Customize exactly what you want
- ☐ With minimal code
Build on top of our code samples
- ☒ With no code at all
Launch a starter app with no code

• What is your goal today?

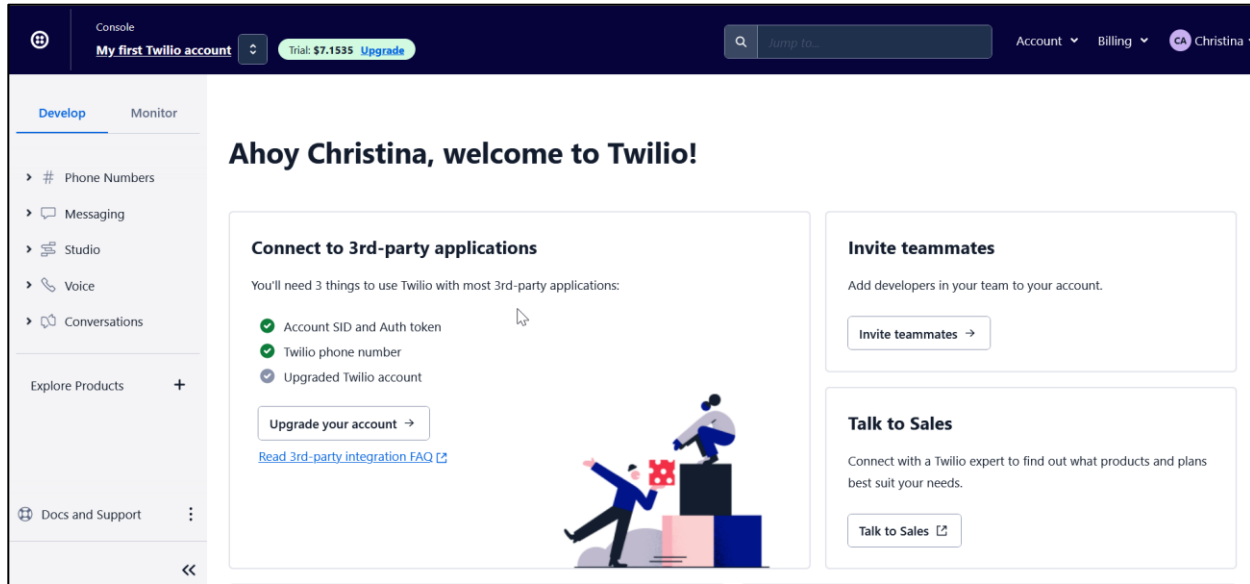
Build something myself

Your billing country is India. [Change](#)

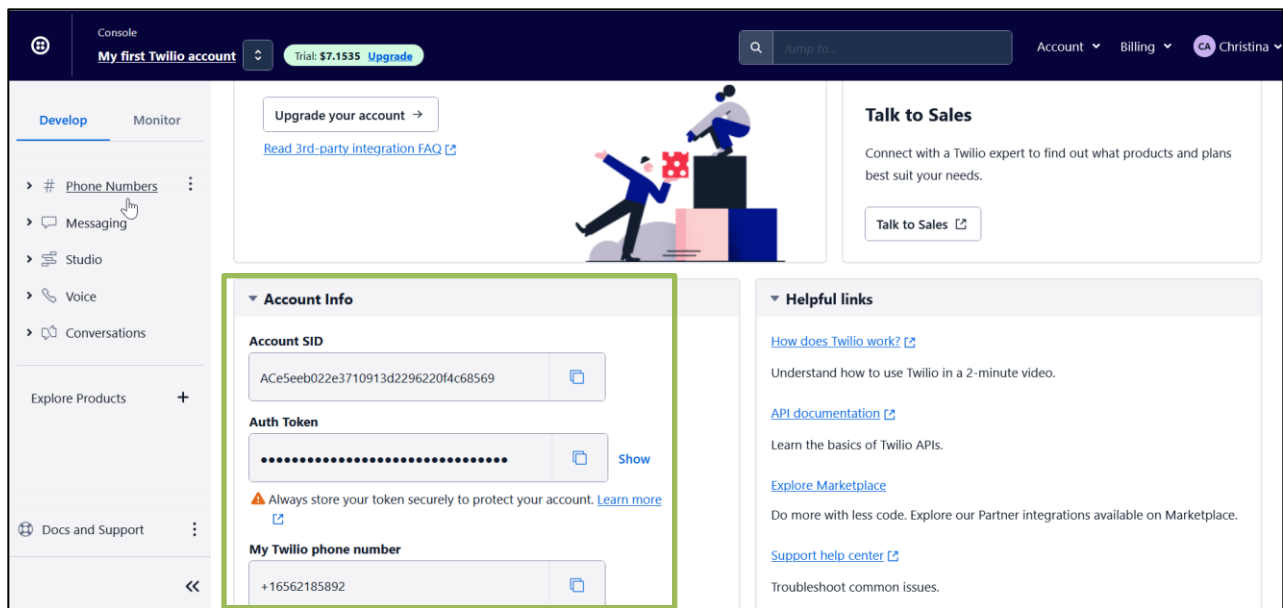
Get started with Twilio

- Select, **"With no code at all"**
- And in the last section, select **"Build something myself"**
- And click **"Get started with Twilio"**

Once registered, you'll have access to your Twilio dashboard.



Get your "Twilio Account SID" and "Auth Token": In the Twilio dashboard, go to "Account Info" and take note of the "Account SID" and "Auth Token."



- **Install and configure the integration:** Follow the instructions provided by the integration solution to set up the connection with Twilio's API. This typically involves entering your Twilio Account SID and Auth Token, which will allow the CRM to communicate with the Twilio platform.

TextSMS4Dynamics – User Manual

Dynamics 365 TextSMS4Dynamics

Try the new look

Please copy the URL from the Power Automate Flow - 'Real-time Chat Logging' and paste it into Phone Numbers → Manage → Active numbers → Select Mobile Number → Configure Tab → Messaging Configuration Section → Default Messaging Service for Conversations → 'Request URL' and 'Callback URL' in Twilio before proceeding with the configuration.

New Configuration - Unsaved

Details Record Type Message Template

Medium SMS

Mobile Number +16562185892

Description ---

Twilio Account SID ACe5eeb022e3710913d2296220f4c68569

Twilio Auth Token ZZZZZ FQLINE HWOJH BIANM FSKUF NKKAO AUXIL NXEXI IHJUJ NVFJT VSHUJ XDNAI GNNJB RQRHN HECVL DCIHE PCVAX SWKMP JPKEC GQHCN XOUVH JOFKE

Callback Url ---

Callback Url: Required fields must be filled in.

Settings

Allow Create To Select an option

Session Timeout 1 day

Idle Timeout 5 minutes

In Twilio Configuration Details

- The Account SID,
- Auth Token (Once user adds this in normal text, it will be automatically encrypted)

Dynamics 365 TextSMS4Dynamics

Try the new look

Please copy the URL from the Power Automate Flow - 'Real-time Chat Logging' and paste it into Phone Numbers → Manage → Active numbers → Select Mobile Number → Configure Tab → Messaging Configuration Section → Default Messaging Service for Conversations → 'Request URL' and 'Callback URL' in Twilio before proceeding with the configuration.

New Configuration - Unsaved

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Twilio Account SID ACe5eeb022e3710913d2296220f4c68569

Twilio Auth Token ZZZZZ FQLINE HWOJH BIANM FSKUF NKKAO AUXIL NXEXI IHJUJ NVFJT VSHUJ XDNAI GNNJB RQRHN HECVL DCIHE PCVAX SWKMP JPKEC GQHCN XOUVH JOFKE

Callback Url ---

Callback Url: Required fields must be filled in.

Settings

Allow Create To Select an option

Session Timeout 1 day

Idle Timeout 5 minutes

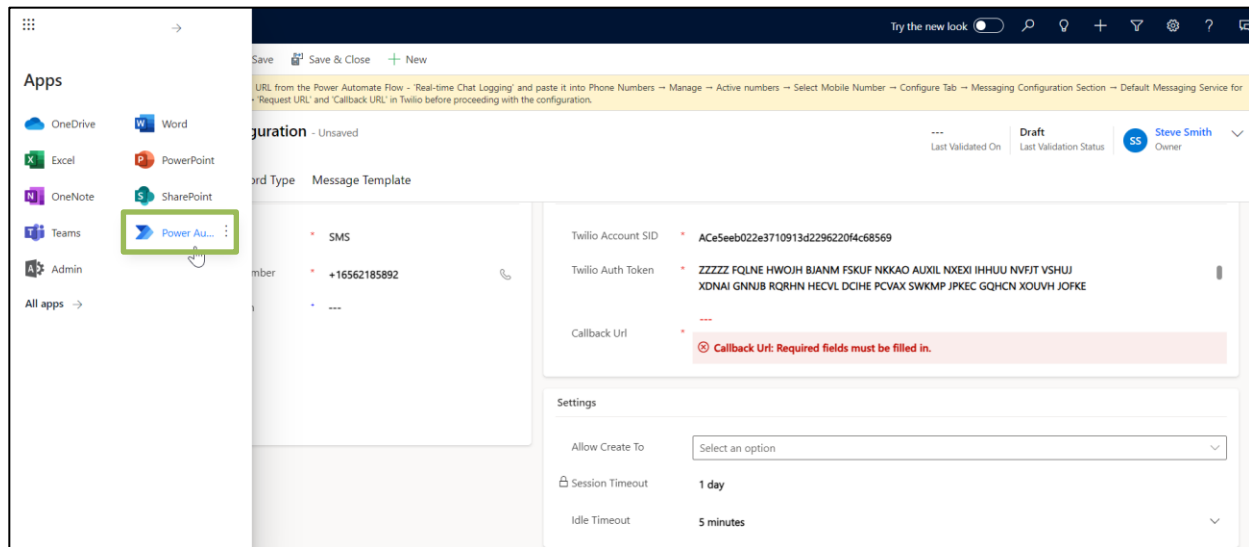
Provide Power Automate URL

Before proceeding with the Configuration, you need to copy the URL of Power Automate Flow – **“TextSMS4Dynamics Real-time Chat Logging”** which is shipped in our solution and paste it into “Callback URL” field in “Twilio Details” section in “Details” tab in your configuration.

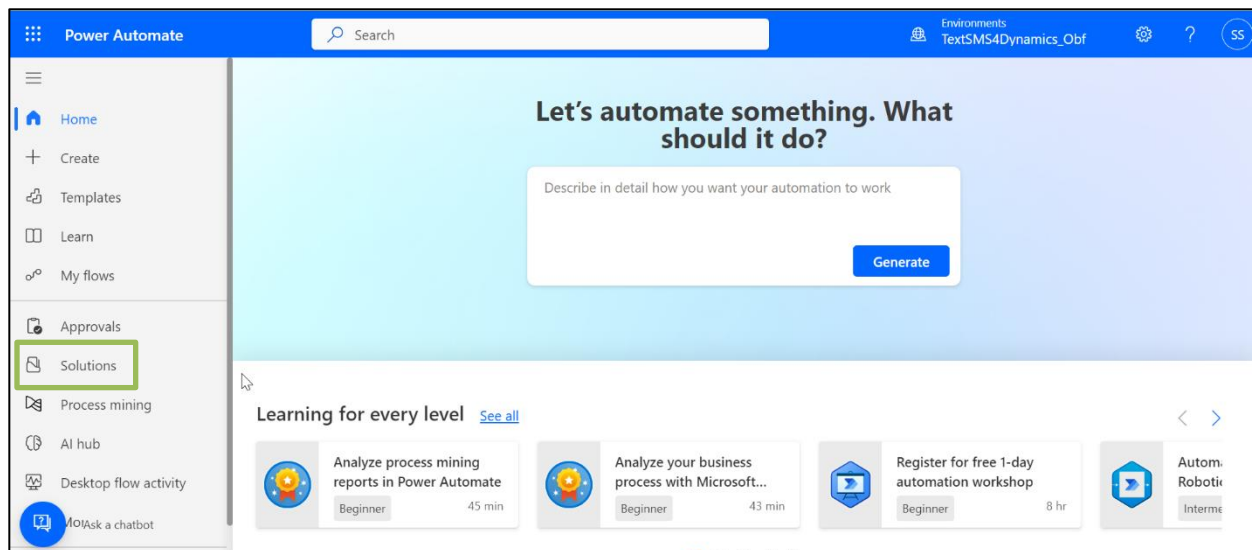
Please Note: If this step is not performed, you will not be able to send any messages on the CRM.

- Go to Power Automate in Dynamics 365

TextSMS4Dynamics – User Manual

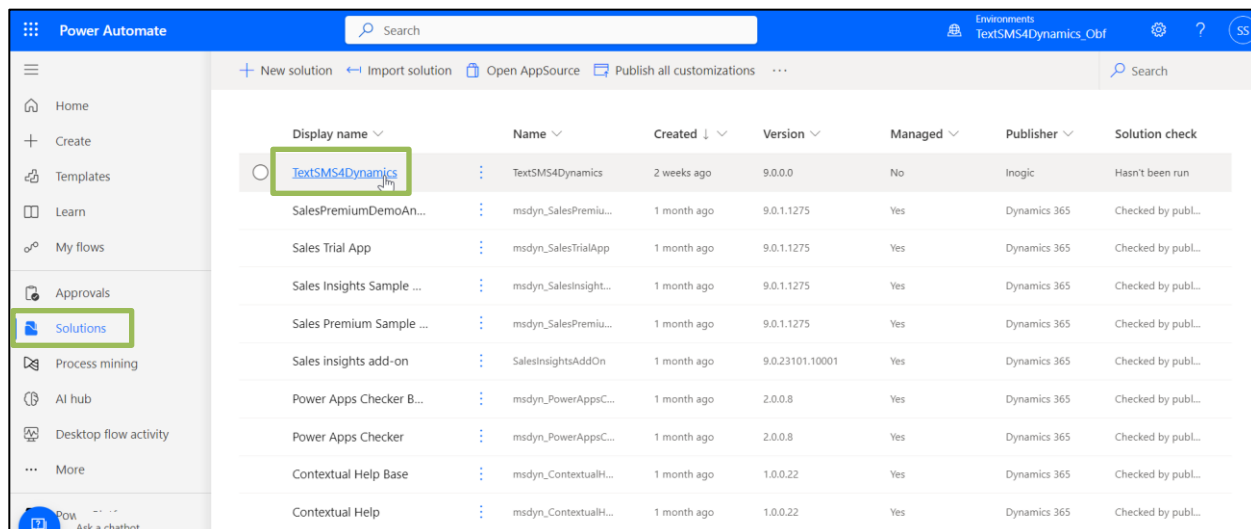


- Choose the environment in which the **Solution** is imported.

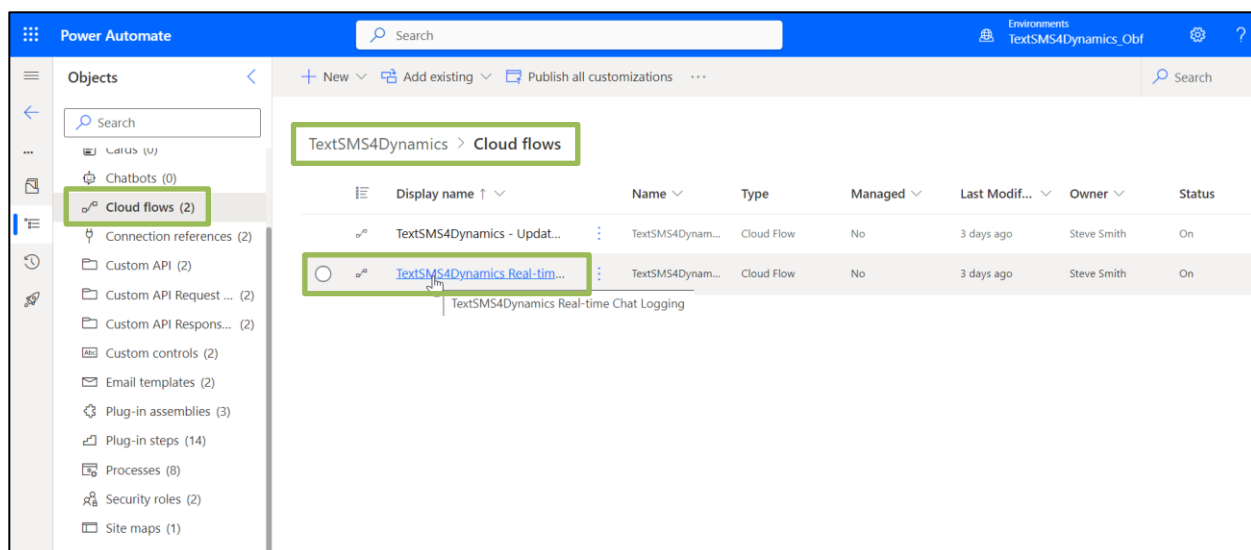


- In the list of **Solutions**, click **TextSMS4Dynamics**.

TextSMS4Dynamics – User Manual

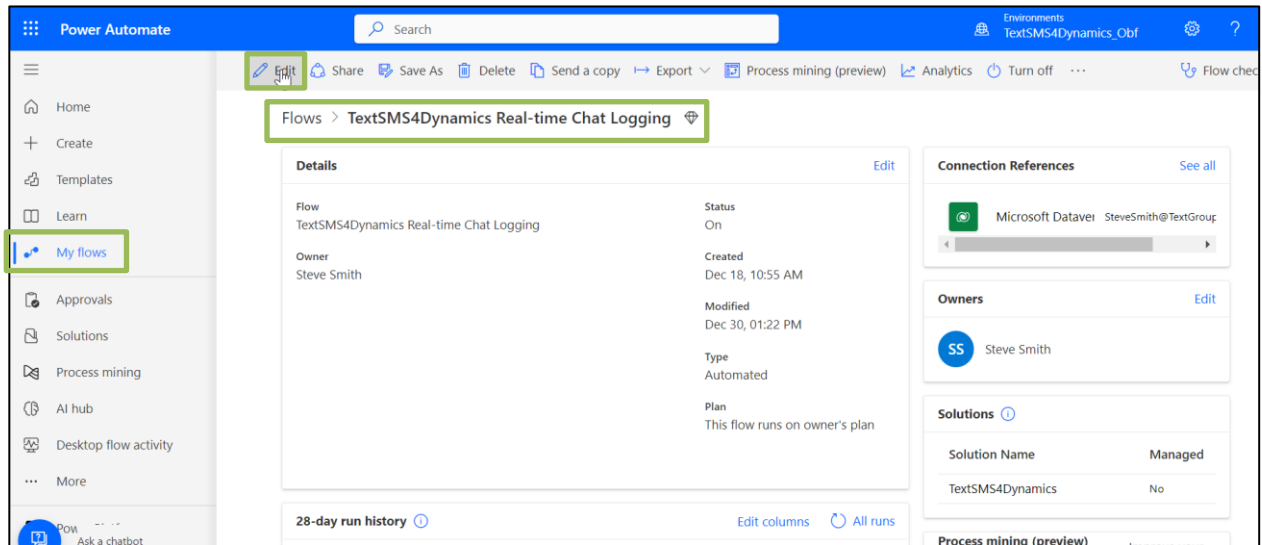


- TextSMS4Dynamics Solution will open, then navigate to **Cloud Flows** and click **TextSMS4Dynamics Real-time Chat Logging**.

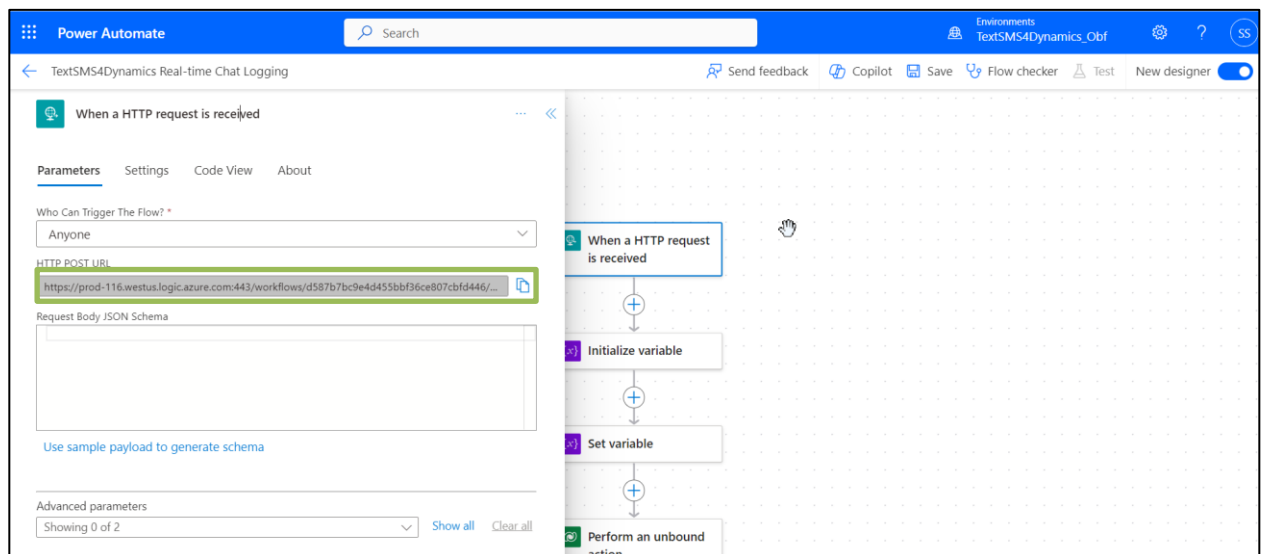


- Click on the **Edit** button inside **TextSMS4Dynamics Real-time Chat Logging** in **My Flows**

TextSMS4Dynamics – User Manual



- Copy the **HTTP POST URL**



- Paste this **HTTP POST URL** in “**Callback URL**” field.

TextSMS4Dynamics – User Manual

Dynamics 365 TextSMS4Dynamics

Try the new look

Please copy the URL from the Power Automate Flow - 'Real-time Chat Logging' and paste it into Phone Numbers → Manage → Active numbers → Select Mobile Number → Configure Tab → Messaging Configuration Section → Default Messaging Service for Conversations → 'Request URL' and 'Callback URL' in Twilio before proceeding with the configuration.

New Configuration - Unsaved

--- Last Validated On | Draft Last Validation Status | Steve Smith Owner

Details | Record Type | Message Template

Communication Medium Information

Medium: SMS

Mobile Number: +16562185892

Description: ---

Twilio Details

Twilio Account SID: ACeSeeb022e3710913d2296220f4c68569

Twilio Auth Token: ZZZZZ FQLNE HWOJH BIANM FSKUF NKKAO AUXIL NXEXI IHUUU NVFJT VSHUJ XDNAI GNNUB RQRHN HECVL DCIHE PCVAX SWKMP JPKEC GQHCH XOUVH JOFKE

Callback Url: https://prod-116.westus.logic.azure.com:443/workflows/d587b7bc9e4d455bbf36ce807cbfd446/triggers/manu...

Settings

Allow Create To: Select an option

Session Timeout: 1 day

Idle Timeout: 5 minutes

- Click on **Save**.

Once Account Information is added, update the General Setting:

- **Allow Create To** - In this section you can enable multiple entities such as Case, Order, Opportunity, any OOB or Custom Entities. These entities will be available on **"Create Record"** button in the Message UI and you can easily create any OOB or custom entity record from it.
- **Session Timeout** – This specifies how long will Message session be active (This is by default for 24 hours / 1 day).
- **Idle Timeout** - By default, the message notifications are only visible to the owner of the session. But the message notification becomes visible to all users, if there is no activity for the specified minutes in this field.

Dynamics 365 TextSMS4Dynamics

Try the new look

To validate this Configuration, kindly click on 'Validate' button.

SMS +16562185892 - Saved

--- Last Validated On | Draft Last Validation Status | Steve Smith Owner

Details | Record Type | Message Template | Related

Communication Medium Information

Medium: SMS

Mobile Number: +16562185892

Description: ---

Twilio Details

Twilio Account SID: ACeSeeb022e3710913d2296220f4c68569

Twilio Auth Token: ZZZZZ FQLNE HWOJH BIANM FSKUF NKKAO AUXIL NXEXI IHUUU NVFJT VSHUJ XDNAI GNNUB RQRHN HECVL DCIHE PCVAX SWKMP JPKEC GQHCH XOUVH JOFKE

Callback Url: https://prod-116.westus.logic.azure.com:443/workflows/d587b7bc9e4d455bbf36ce807cbfd446/triggers/manu...

Settings

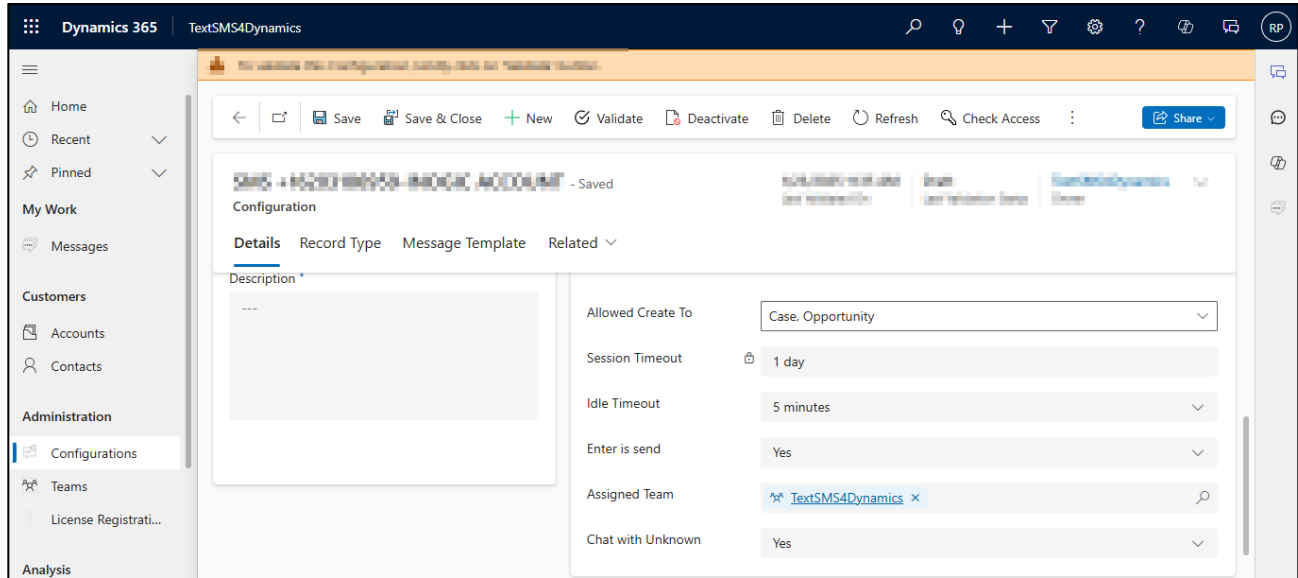
Allow Create To: Case, Opportunity

Session Timeout: 1 day

Idle Timeout: 5 minutes

- **Enter is Send:** When set to **"Yes,"** pressing the **"Enter"** key will send the message. When set to **"No,"** pressing **"Enter"** will insert a new line below the written text in message box. This field proves helpful in multi-line messaging within chat UI.

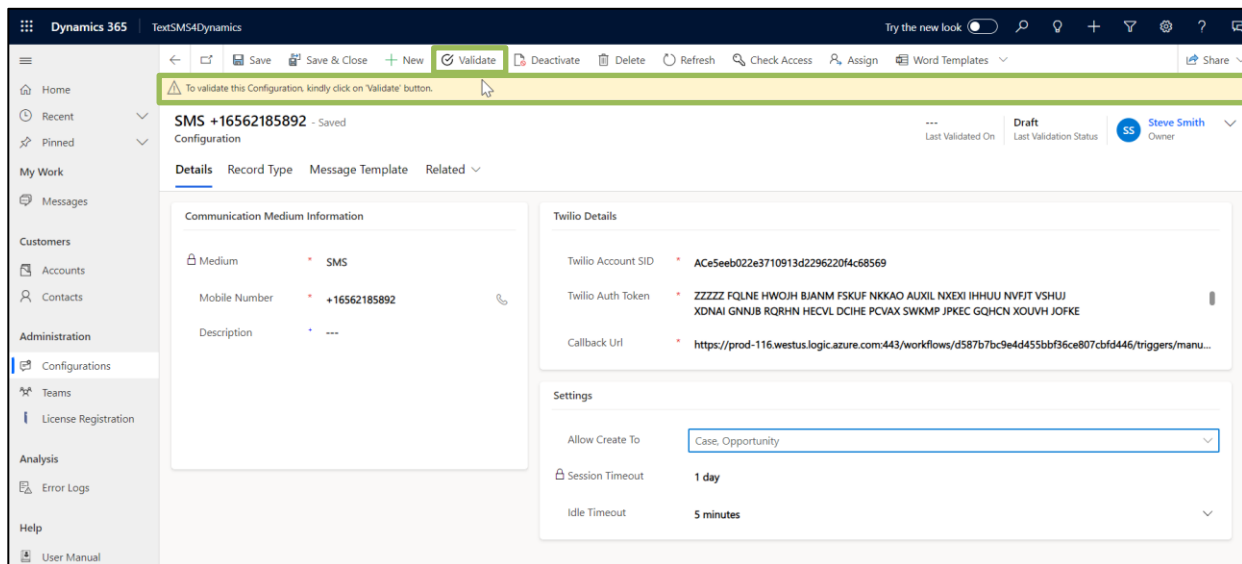
- **Assigned Team:** Choose the team that will have access to and work on the specified conversation. For example, if you assign access to your desired, team then the members of other team will not be able to view, access, or handle communications designated to the desired team.



Validate Configuration

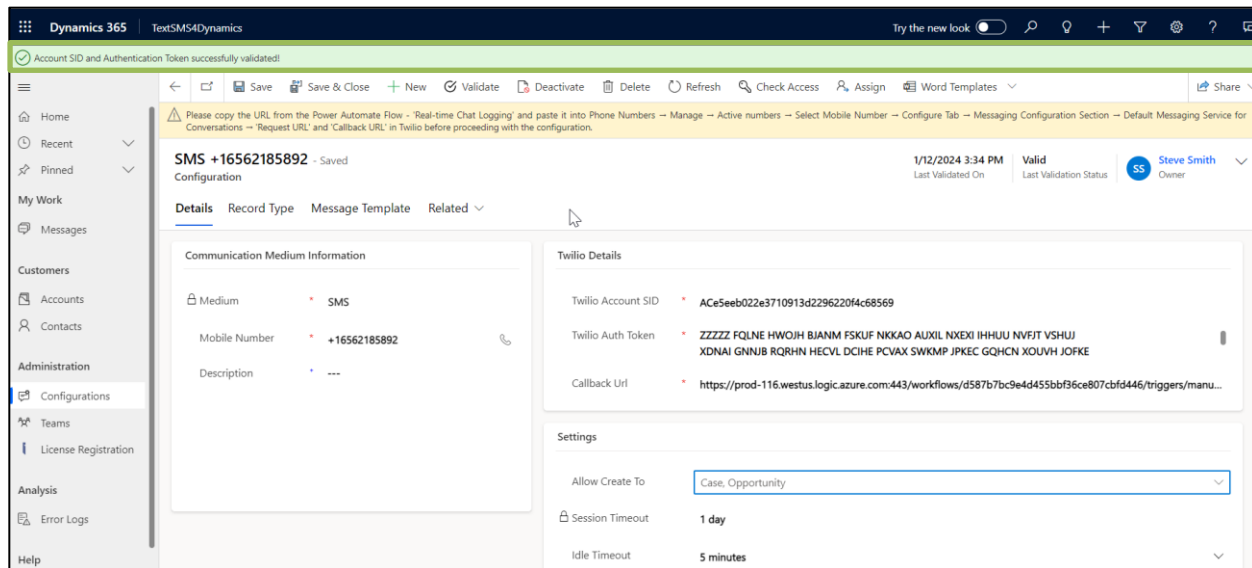
Validate the configuration in TextSMS4Dynamics after adding the Account SID and Authentication Token from the Twilio account. Validating the configuration helps ensure that the integration between TextSMS4Dynamics and Twilio is set up correctly and functioning as expected.

Once the Configuration is done it will be saved as Draft and you will have to validate the Configuration.



- Click **Validate**. The Account SID & Authentication Token added from the Twilio Account will be validated by Dynamics 365 CRM. You will receive a notification for the same.

TextSMS4Dynamics – User Manual



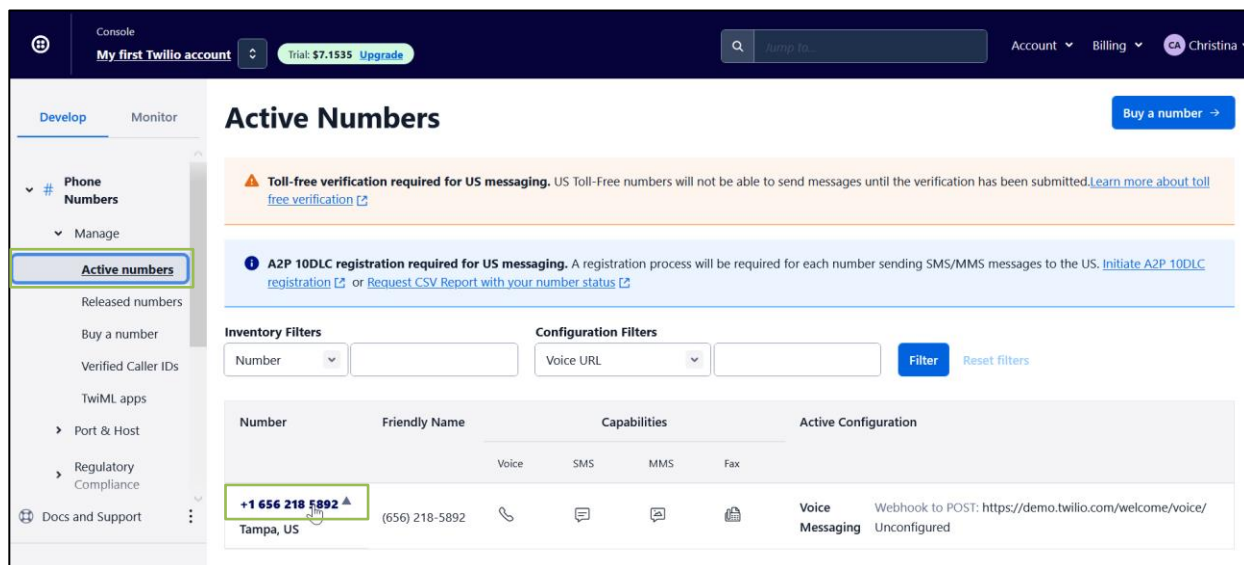
Copy the Call-back URL from Configuration

To receive messages, you need to copy the URL of “**Callback URL**” field to “**Request URL**” as well as the “**Callback URL**” field in your Twilio Account.

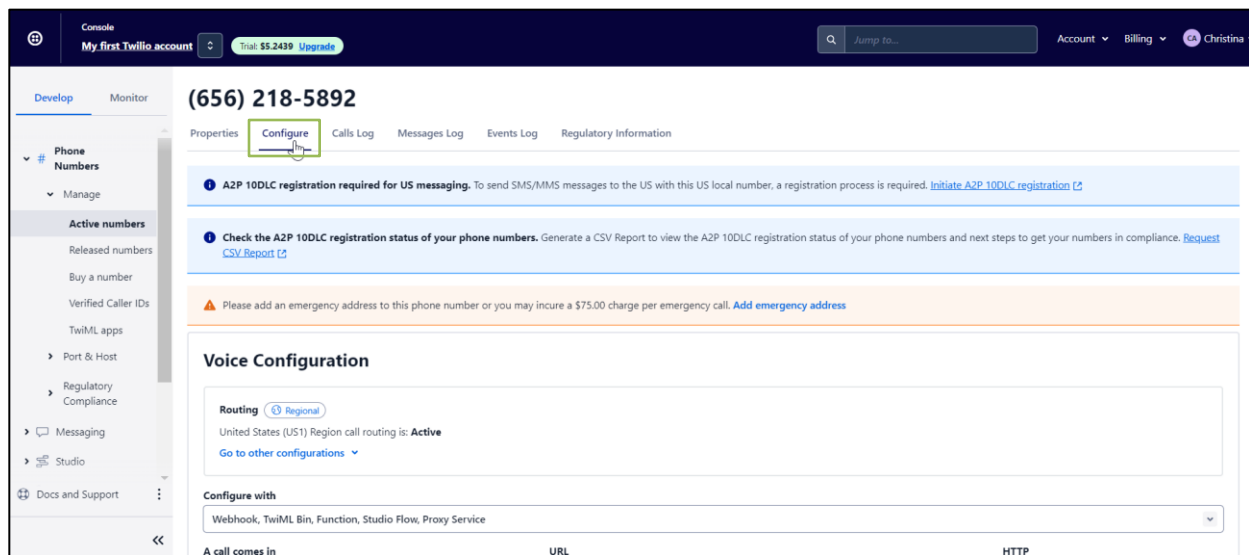
Please Note: If this step is not performed, you will not be able to receive any messages on the CRM.

Access the Messaging Service Settings.

- Go to the **Phone Numbers → Manage → Active number** section.
- Click on your **configured number**.



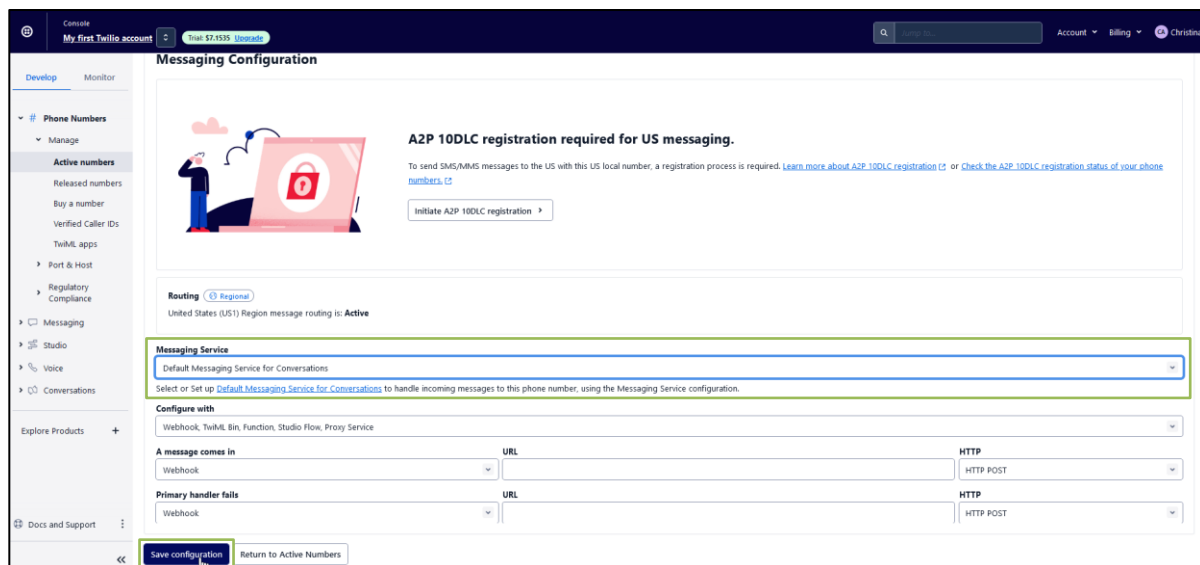
- Select “**Configure**” tab.



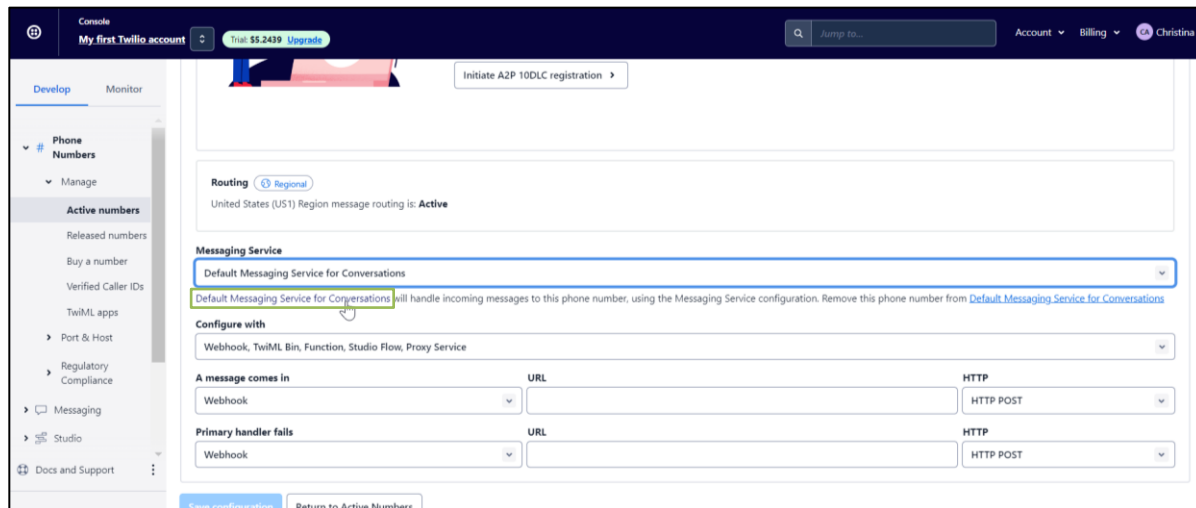
- Scroll down to “Messaging Configuration” section.

Set Default Messaging Service for Conversation.

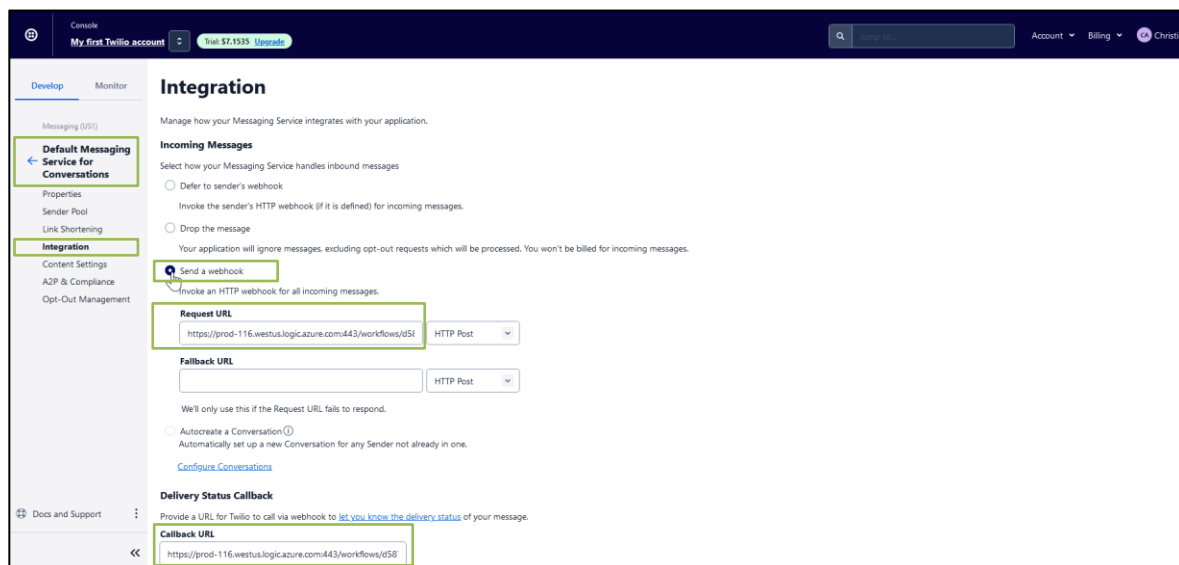
- From the **Messaging Service** dropdown, select "Default Messaging Service for Conversations."
- Click on "Save configuration".



- Click on “Default Messaging Service for Configurations” hyperlink.



- The copied **Callback URL** will be pasted in the **Default Messaging Service for Conversations** → **Integration** section.
- Select **Send a webhook** to invoke an HTTP webhook for all incoming messages.
- Paste the copied **Callback URL** in the “**Request URL**” section as well as the “**Callback URL**”.



- Click **Save** to save the changes.

Console
My first Twilio account
Toll \$7.1535 Update

Develop Monitor

Messaging (US)

Default Messaging Service for Conversations

Properties

Sender Pool

Link Shortening

Integration

Content Settings

A2P & Compliance

Opt-Out Management

Your application will ignore messages, excluding opt-out requests which will be processed. You won't be billed for incoming messages.

Send a webhook

Invoke an HTTP webhook for all incoming messages.

Request URL

sig=EW12WjYKcyPaw4G3m_5UPleKm3u3WWKWZ08f6E HTTP Post

Fallback URL

HTTP Post

We'll only use this if the Request URL fails to respond.

Autorecreate a Conversation

Automatically set up a new Conversation for any Sender not already in one.

Configure Conversations

Delivery Status Callback

Provide a URL for Twilio to call via webhook to let you know the delivery status of your message.

Callback URL

sig=EW12WjYKcyPaw4G3m_5UPleKm3u3WWKWZ08f6E

Validity Period

After the Validity Period has elapsed, any unsent messages will not be sent.

Twilio Queue time limit (seconds)

14400

This only affects messages that are in queue on Twilio and have not yet been sent to the carrier. Learn more about Twilio message queues and rate limits [here](#).

Twilio Queue time limit can be maximum of 14400 Seconds (4 hours)

Save Reset

Configuring Record Type

Users need to configure **Record Types** for all those entities with whom they want to message. Also, at times a record can have **multiple phone numbers**. Messages will be sent to the phone numbers selected in the 'Phone Number Field'.

Please Note:

- Against one Entity, only one Record Type can be created.

Dynamics 365 TextSMS4Dynamics

Try the new look

Please copy the URL from the Power Automate Flow - 'Real-time Chat Logging' and paste it into Phone Numbers - Manage -> Active numbers -> Select Mobile Number -> Configure Tab -> Messaging Configuration Section -> Default Messaging Service for Conversations -> 'Request URL' and 'Callback URL' in Twilio before proceeding with the configuration.

SMS +16562185892 - Saved

1/10/2024 3:33 PM Valid

Last Validated On Last Validation Status

SS Steve Smith Owner

Details Record Type Message Template Related

Active Record Types

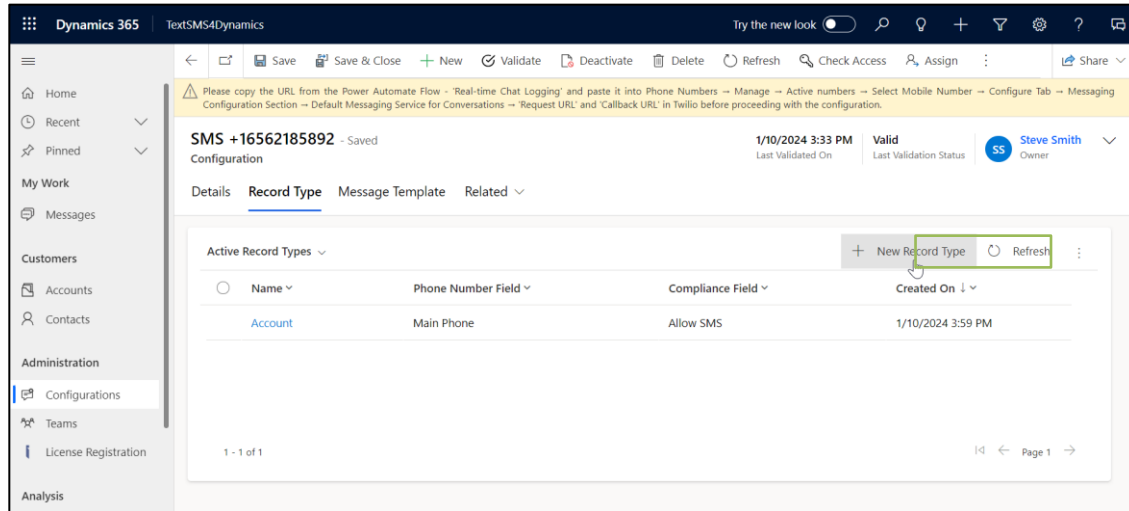
+ New Record Type Refresh

Name	Phone Number Field	Compliance Field	Created On
Account	Main Phone	Allow SMS	1/10/2024 3:59 PM
Contact	Business Phone	Allow SMS	1/10/2024 3:06 PM

1 - 2 of 2

Page 1

- Click on **+New Record Type** to create New Record.



- Fill in the following details

- **Record Type:** Select the entity to which the message should be sent.

Please Note: While configuring, in background, we have a logic to create field. Due to this, it is extremely important that System Admins give privileges to the users.

- **Related record type:** Select entity to initiate chat related to entity set in record type.
- **Compliance Field:** For the system to decide, whether the message should be sent, the message **Compliance Field** is used. The **Compliance Field** lists all the Boolean Fields within the **Record**.
 - If the value is selected as **Yes**, messages will be sent.
 - If the value is selected as **No**, messages will not be sent.

Please Note: In case Compliance Field is not set, the message will be directly sent without validation. In the screenshot below, we have selected '**Allow Conversation**', you may select a field as per your preference.

- **Phone Number Field:** In the **Phone Number Field**, all the multiple phone number fields within a Record are listed and you can choose whichever contact as preferred. But please note that the particular field selected should have a working contact number.

Dynamics 365 | TextSMS4Dynamics

Address 2: Telephone 1
Address 2: Telephone 2
Address 2: Telephone 3
Address 3: Telephone1
Address 3: Telephone2
Address 3: Telephone3
Assistant Phone
Business Phone
Business Phone 2
Callback Number
Company Phone
Home Phone
Home Phone 2
Manager Phone
Mobile Phone
Telephone 3

New Record Type - Unsaved

Details

Record Type * Contact

Related Record Type Select an option

Compliance Field Allow Conversation

Phone Number Field * Select an option

Default Country Code * +91

Priority Order * ---

Save Save & Close New Record Type

Please Note: It is extremely important for the selected contact numbers to have **Country Codes**.

- **Default Country Code:** Provide the required country code.
- **Priority Order:** lets you choose which type of record (e.g., Contact, Account) should be used first in the **customer field** when a chat comes in. If multiple records match, the system picks the one with the highest priority.

Dynamics 365 | TextSMS4Dynamics

Save Save & Close Deactivate Delete Refresh Check Access Assign Share

Contact - Saved

Record Type

Details Related

Record Type * Contact

Related Record Type Select an option

Compliance Field Allow Conversation

Phone Number Field * Business Phone

Default Country Code * +91

Priority Order * 1

Message Configuration SMS

Status * Active

Configuring Message Templates

Configuring message templates in TextSMS4Dynamics allows users to set up predefined message formats for commonly used responses or communication scenarios.

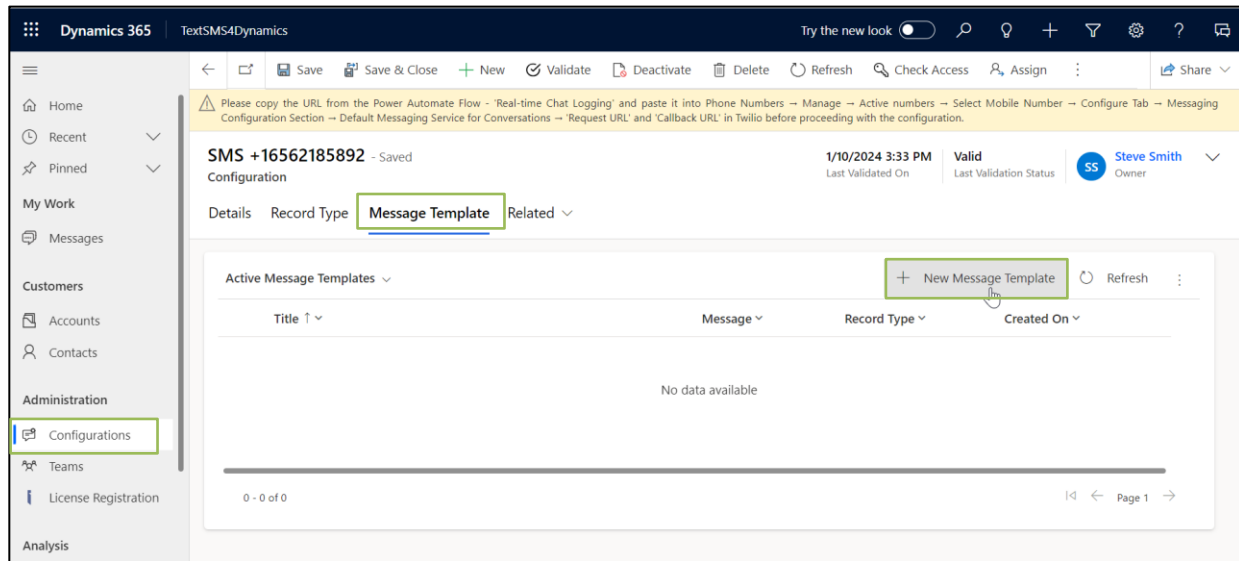
These templates can then be easily accessed and used when sending messages from within the Dynamics environment.

1. Create Messages Templates in Microsoft Dynamics 365 CRM:

You can now create message templates on Microsoft Dynamics 365 CRM after you have done the setup.

To do so, follow the steps;

- In TextSMS4Dynamics click **Configurations**, and navigate to **Message Templates**.
- Click **+New Message Template** to create a new Message Template

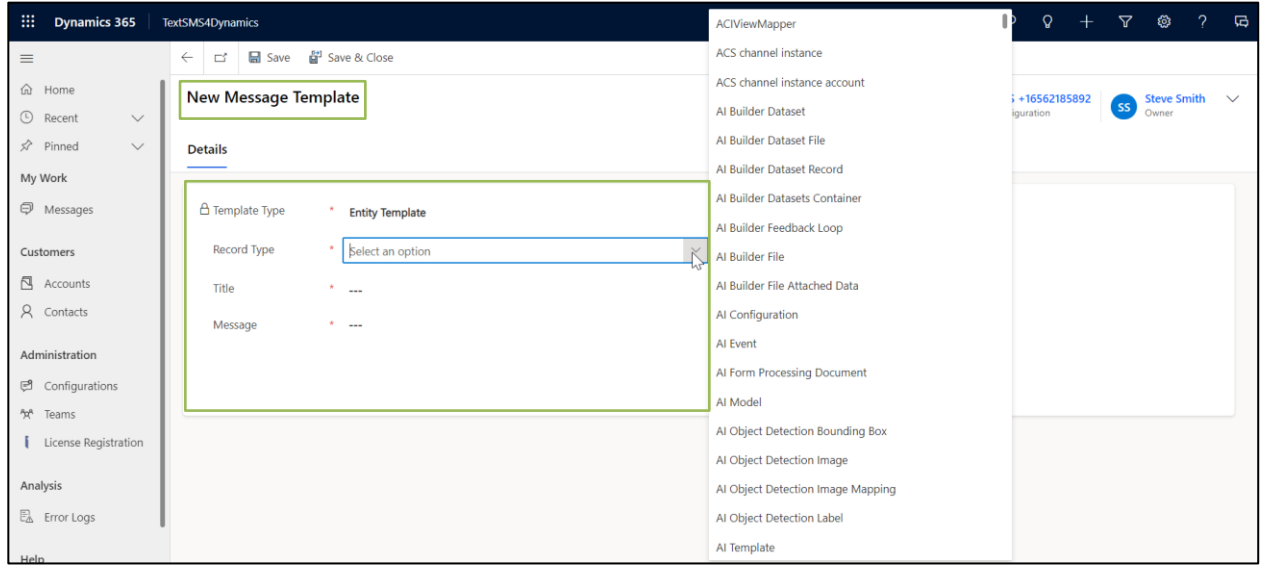


• Fill Up All the Fields:

- **Select Template Type** – Choose between Entity or Global template:

1. Entity Template

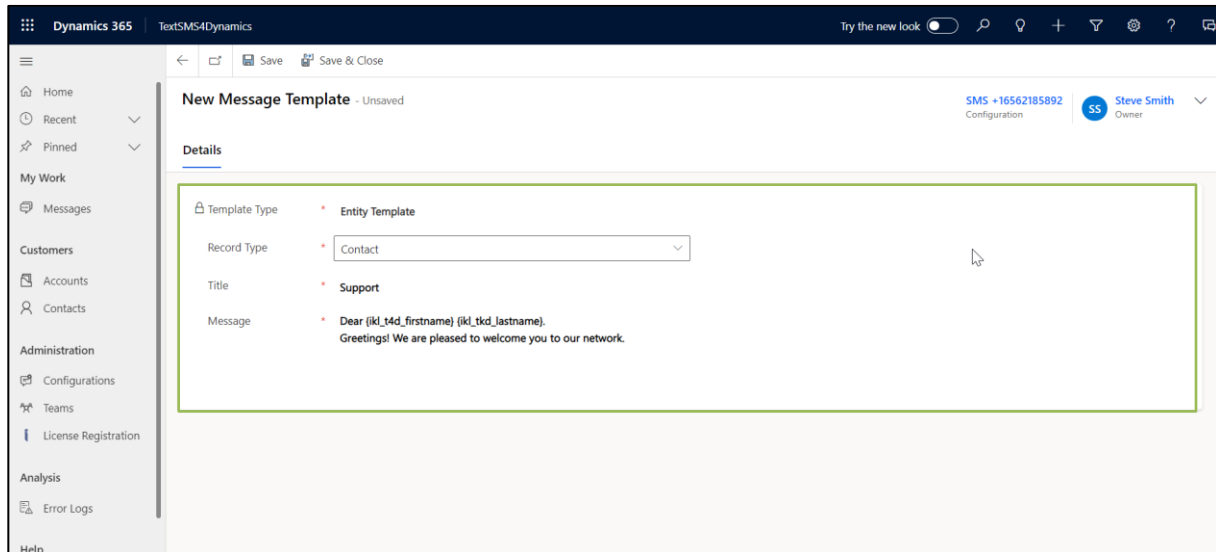
- If you select the entity template, the custom message template will only be visible for selected entities Chat Interface.
- **Record Type** – Choose the Entity in which the message template needs to be shown.
- **Title** – Add a desired title or describe the message template.



- **Message** – customize the curly brackets, add dynamic values or CRM fields as values to create message templates in the message section according to your requirements.

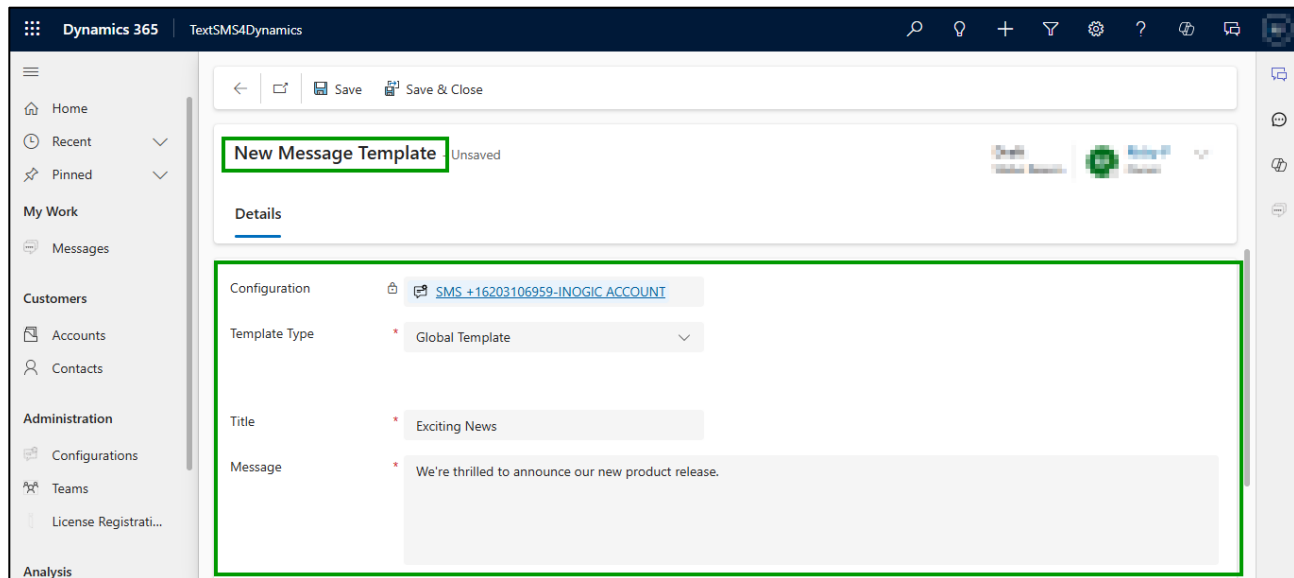
For Example: As shown in the screenshot below, the **Support** team has created a greeting message for the CRM Record (**Contact**).

Dear {ikl_t4d_firstname} {ikl_tkd_lastname}.
Greetings! We are pleased to welcome you to our network.

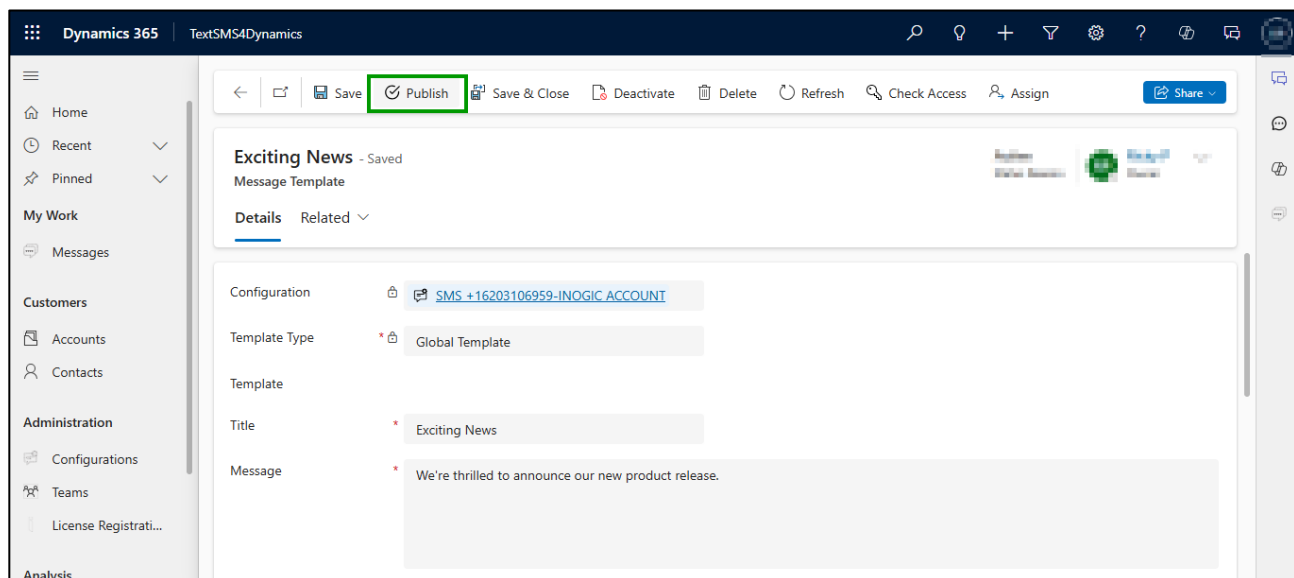


2. Global Template

- If you select the Global Template, the custom message template will be available for all entities in the Chat Interface.
- **Title** – Add a desired title or describe the message template.
- **Message** – Write the content of your message in the message field.



- **Save the Template:** Click the "Save" button to store your new message template. Once you save the message template, make sure to **"Publish"** it to reflect in the chat UI in both template types.



Access Messaging UI on CRM Records

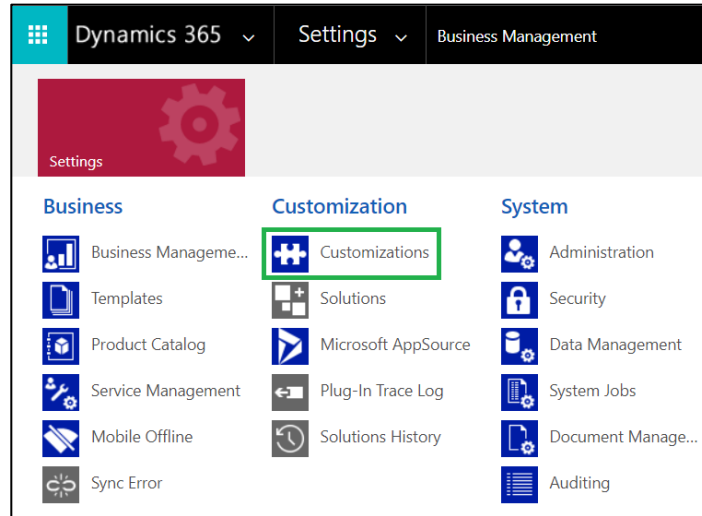
TextSMS4Dynamics provides a feature that allows users to access a Message User Interface (UI) directly on CRM records. Moreover, having the Messaging UI within CRM records enhances the overall user experience, as it eliminates the need to switch between different applications or interfaces to access messaging conversations. It allows for a seamless and integrated approach to customer communication, which can lead to improved customer service and relationship management.

I. Access Messaging UI When "Regarding" of Messaging Session Is Set

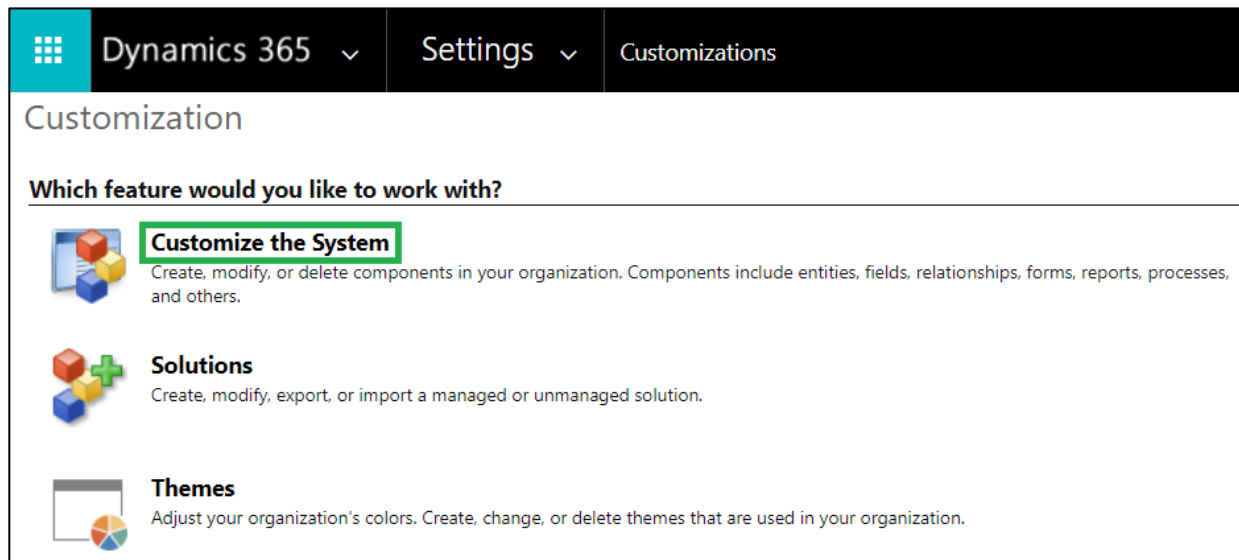
Message UI is accessible from any CRM Records as well when **"Regarding"** is Set.

For Example: If a **Case** record is associated as “**Regarding**” to a particular session, then here is how you can access Message UI from **Case** record:

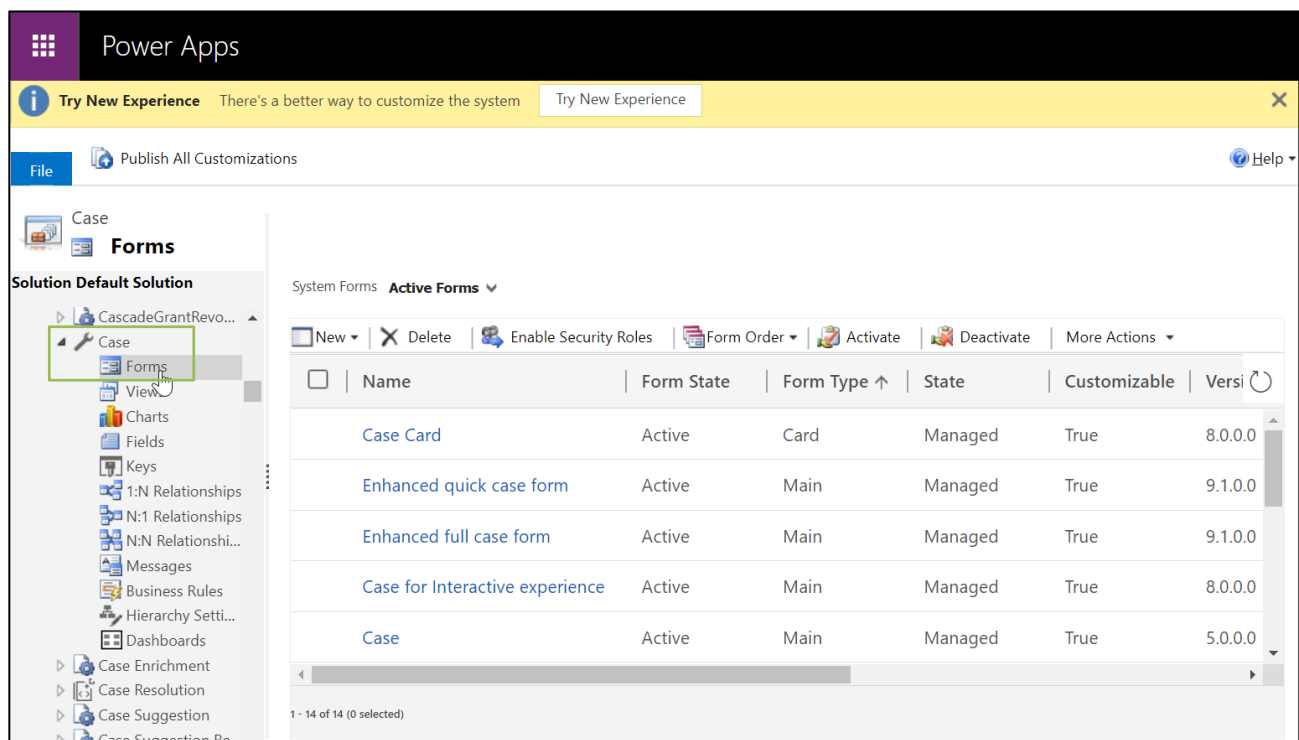
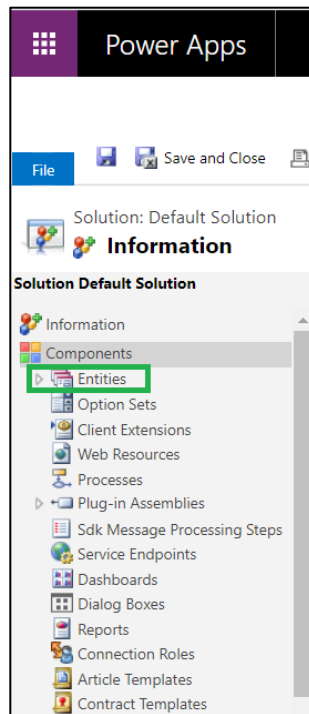
- Navigate to **Settings --> Customizations**.



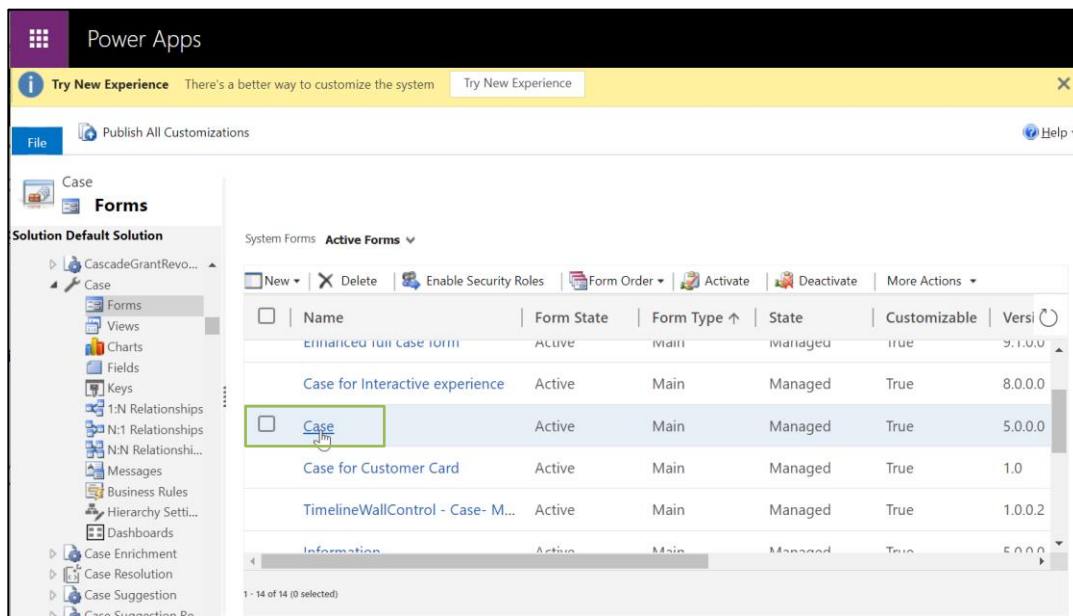
- Click on '**Customize the System**'.



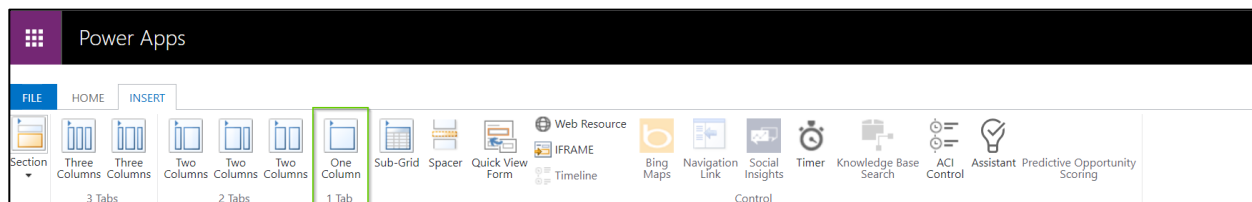
- Navigate to **Entities --> Case --> Forms**.



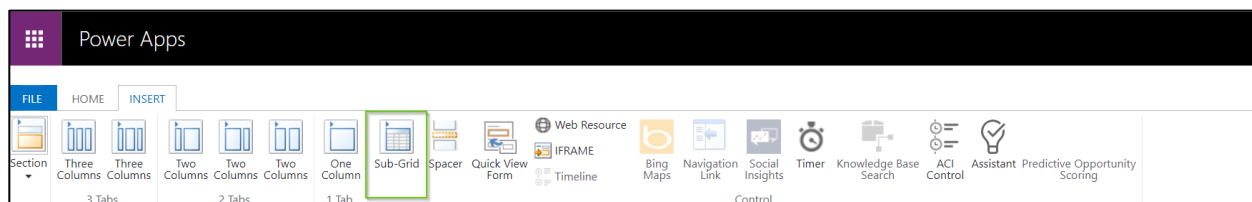
- Click on **Case** Entity with Form Type Main.



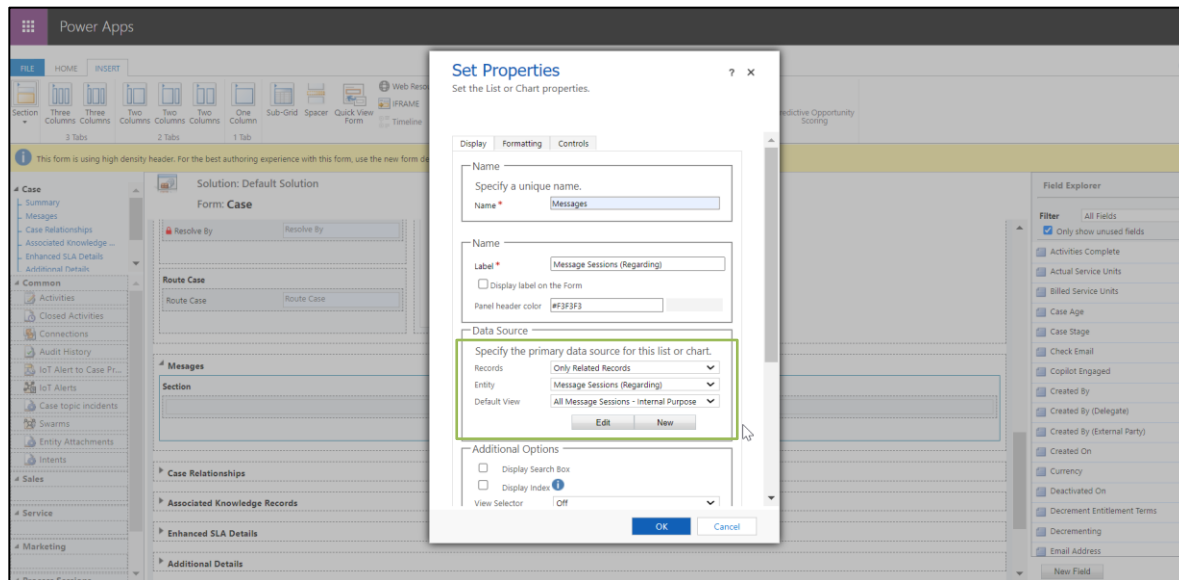
- Select (or Add) the Tab



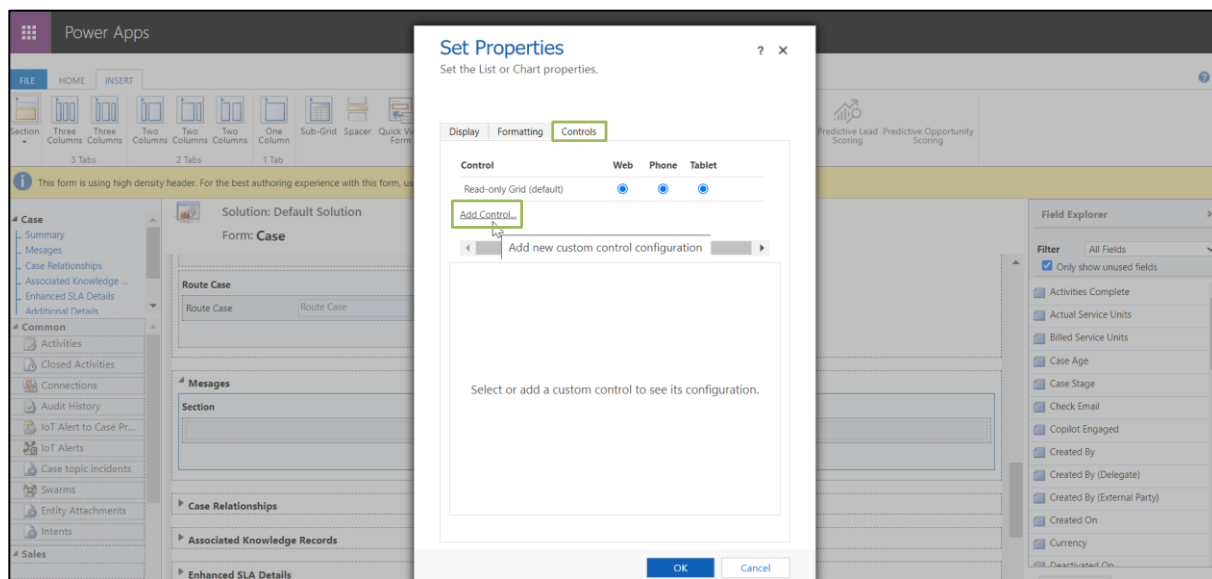
- Then select **Sub-Grid**



- A new window will pop up. Add the **Name**, **Label**, **Records as Only Related Records**, **Entity as Message Sessions (Regarding)**, **Default View as All Message Sessions - Internal Purpose**.

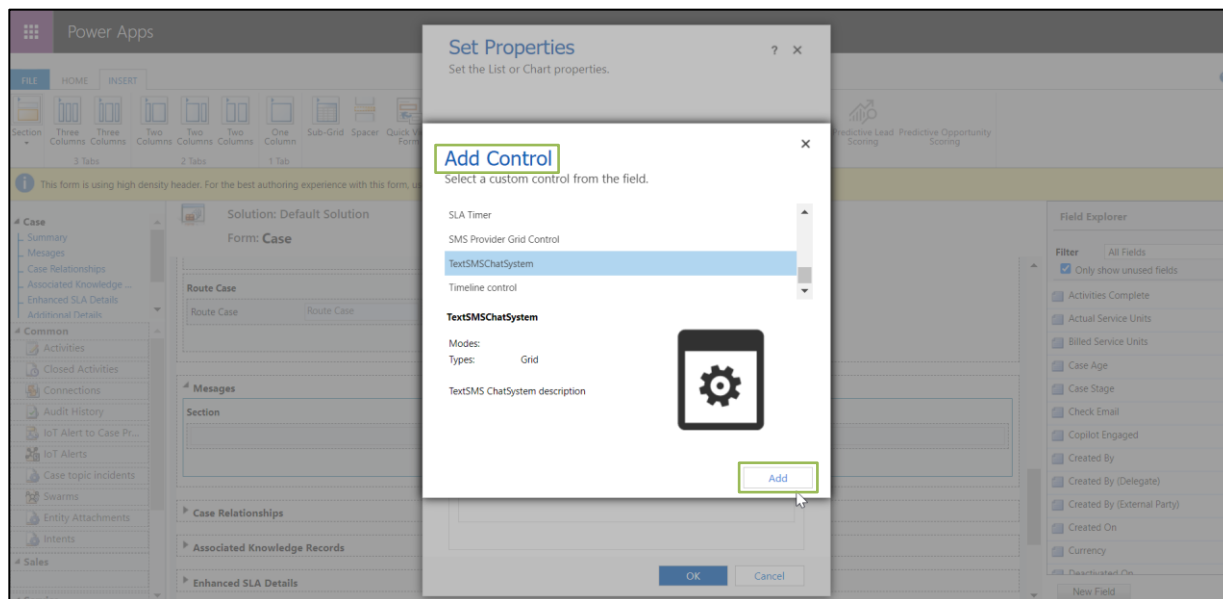


- Navigate to **Controls** and click **Add Controls**.

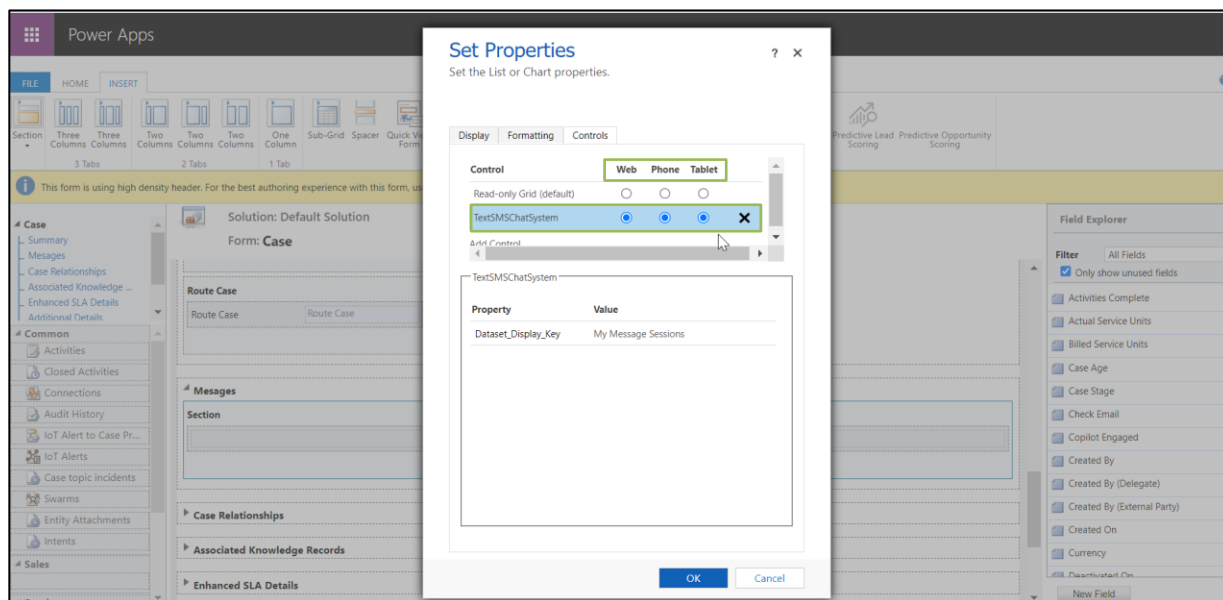


- From the dropdown list search for **TextSMSChatSystem** and add it as a control.

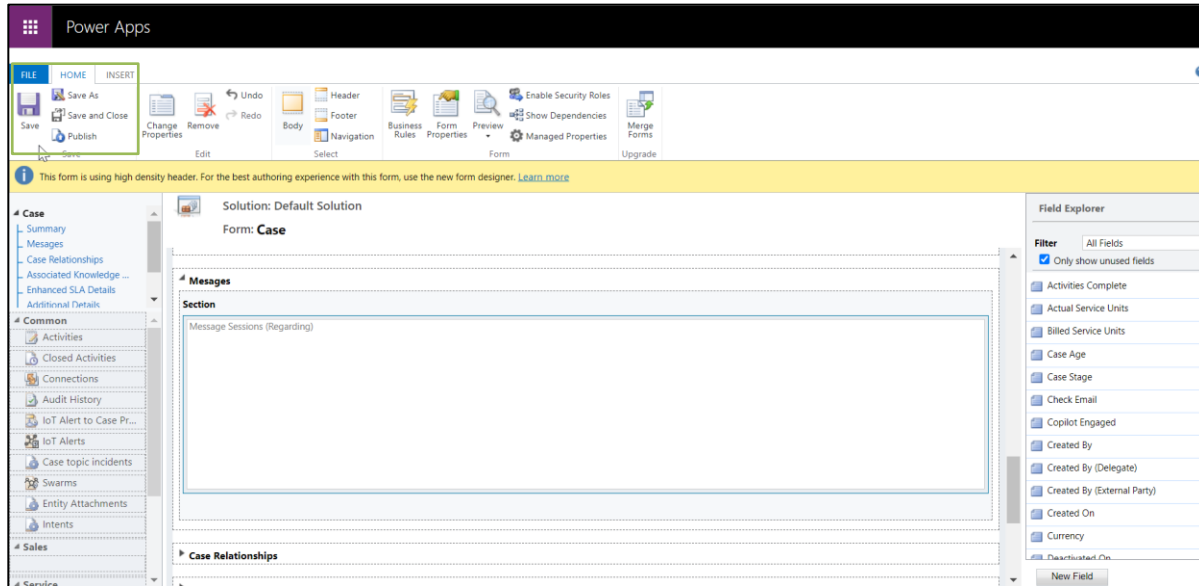
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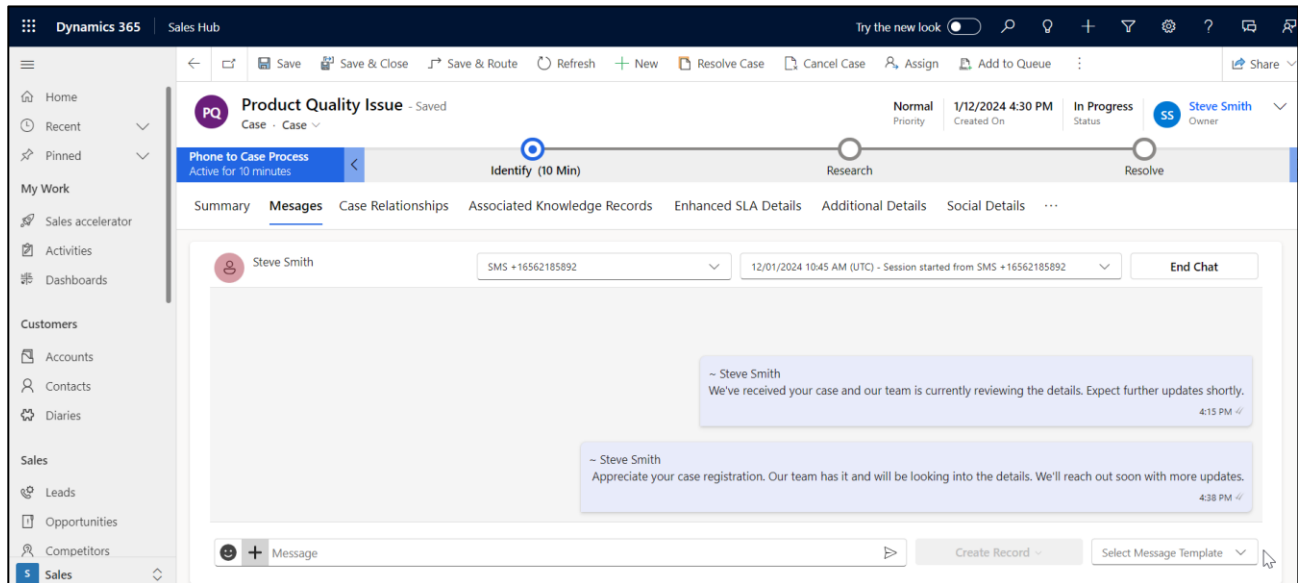
- Once done, **TextSMSChatSystem** will be shown under the **Controls Tab** and you can enable it for multiple devices to access it accordingly.



- After clicking **Ok**, and then click on **Save & Publish** for the grid to be visible.



- Once done, you can view the **Message UI** on the Case Record and communicate with the customers directly, as shown in the screenshot below.

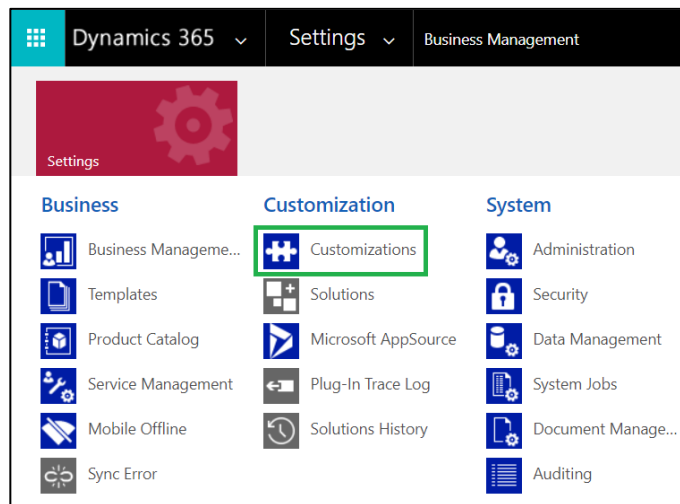


II. Access Messaging UI When “Customer” of Messaging Session Is Set

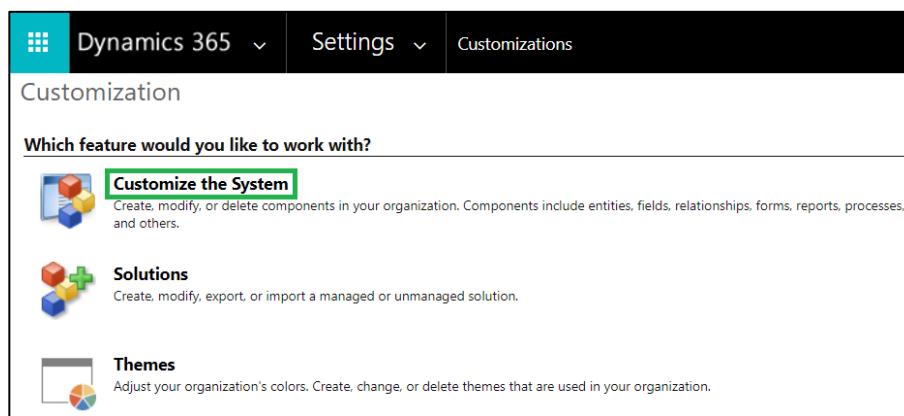
For Example: If a **Contact** record is associated as “**To**” to a particular session, then here is how you can access Message UI from **Contact** record. To do so, there are two approaches to access Messaging UI for “**Customer**”.

Approach 1 (Adding a Tab)

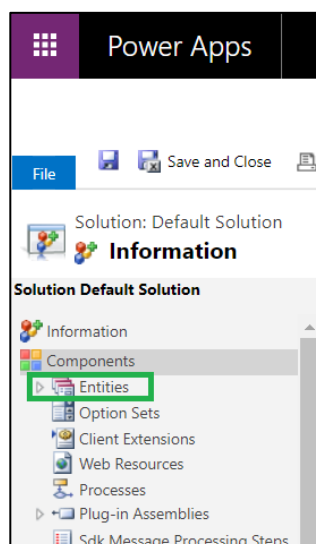
- Navigate to **Settings --> Customizations.**

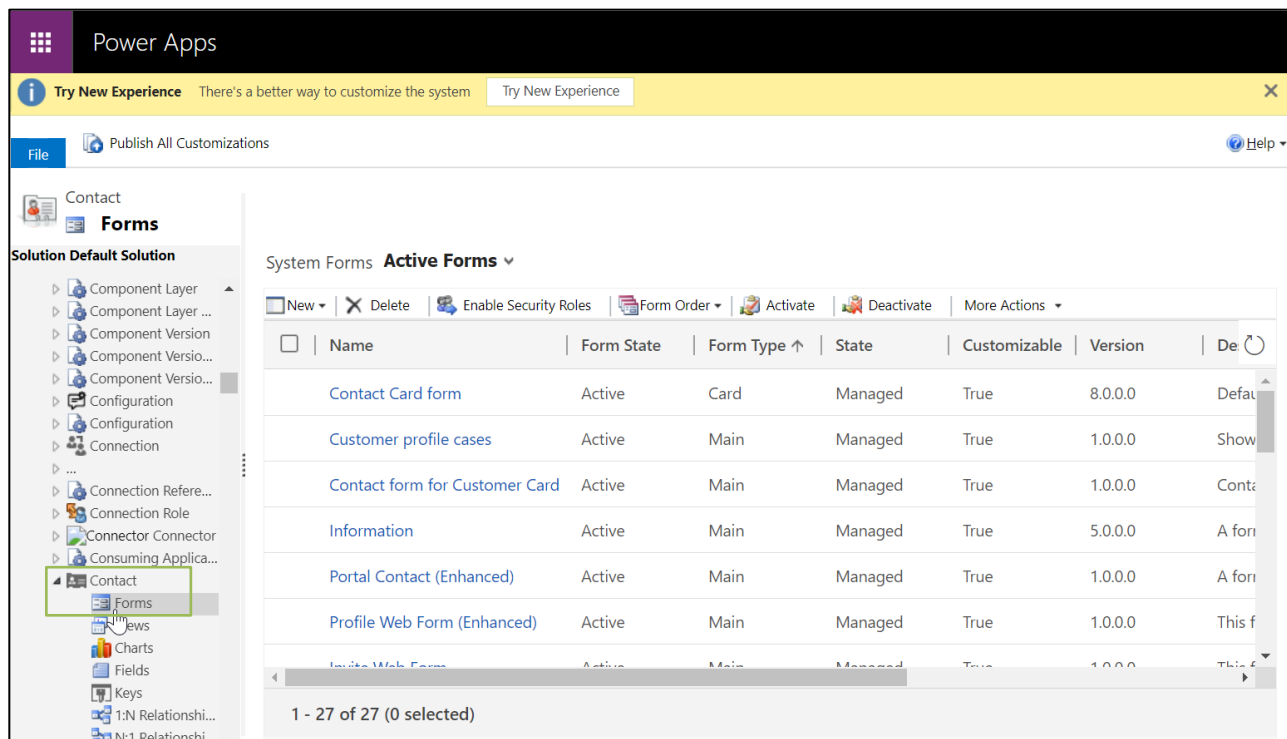


- Click on 'Customize the System'.

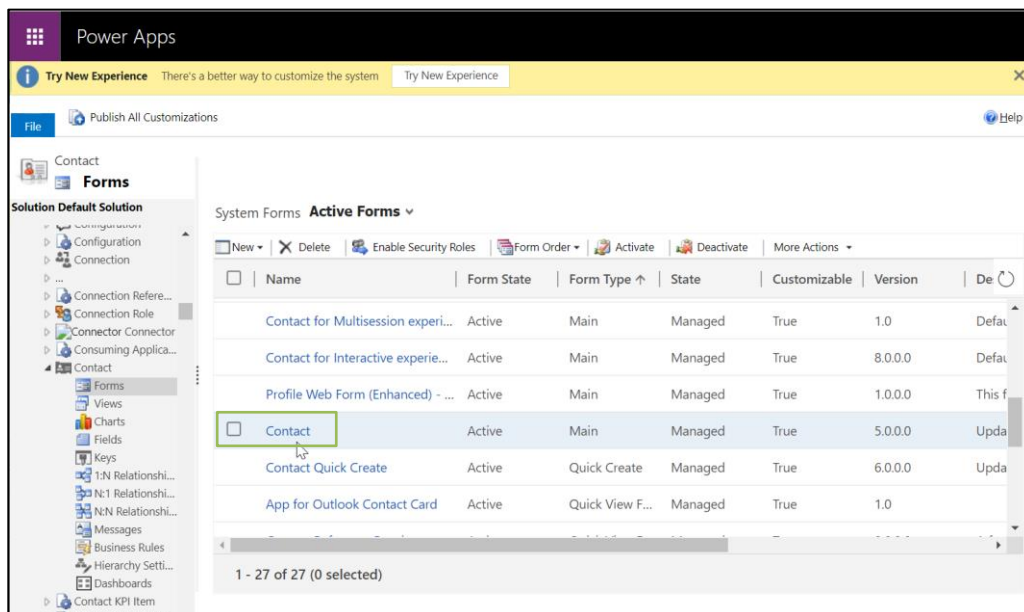


- Navigate to **Entities --> Contact --> Forms.**

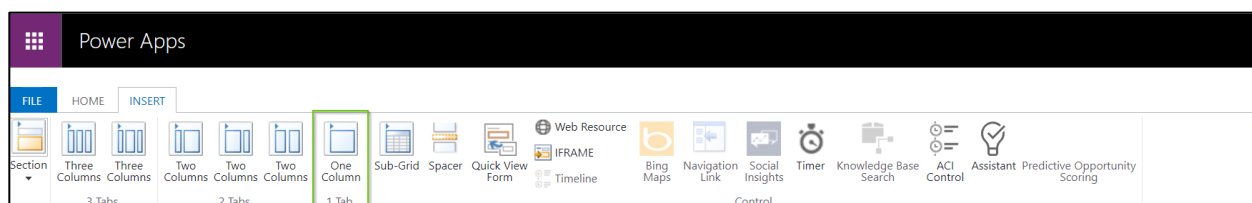




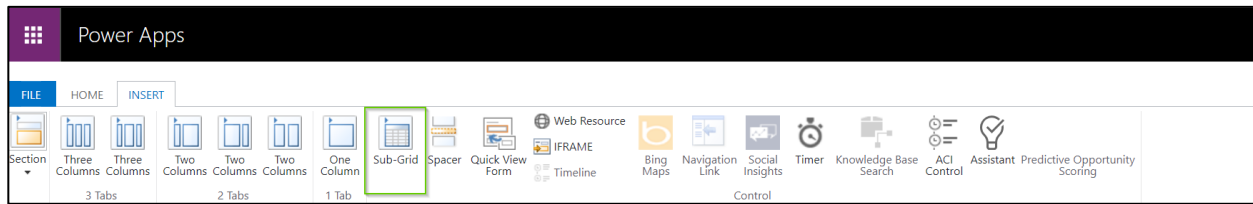
- Click on **Contact** Entity with Form Type Main.



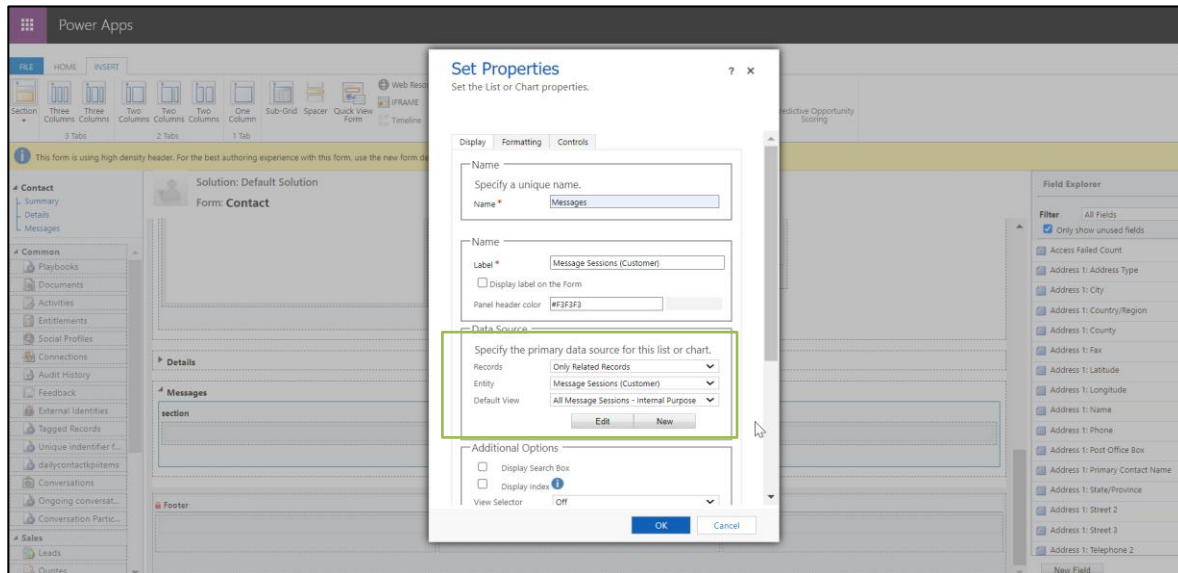
- Select (or Add) the Tab



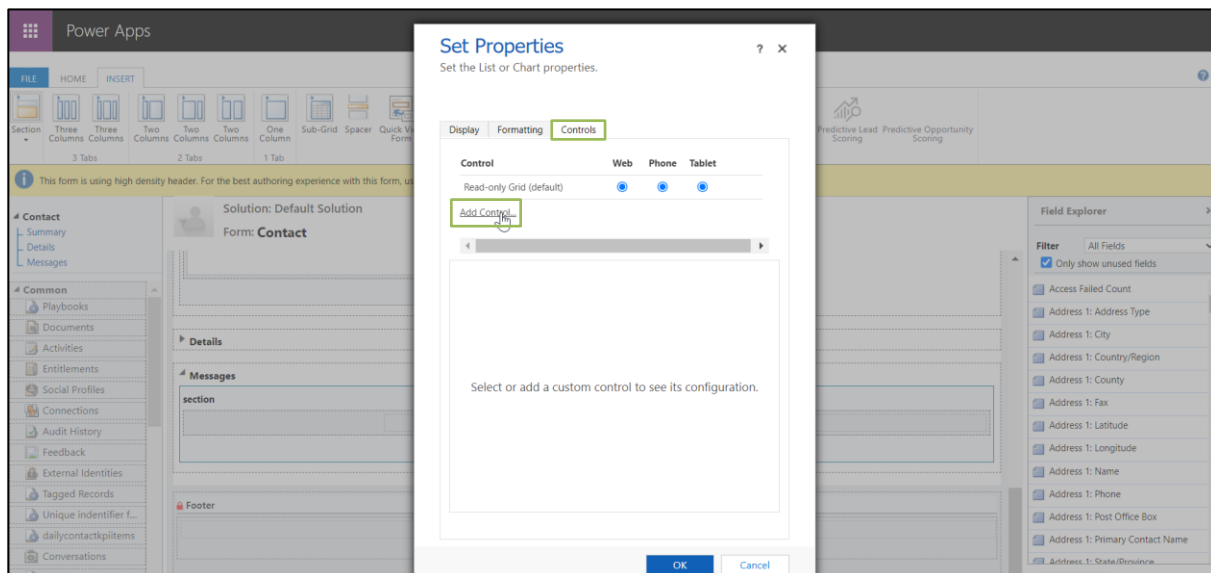
- Then select **Sub-Grid**



- A new window will pop up. Add the **Name**, **Label**, **Records as Only Related Records**, **Entity as Message Sessions (Customer)**, **Default View as All Message Sessions - Internal Purpose**.

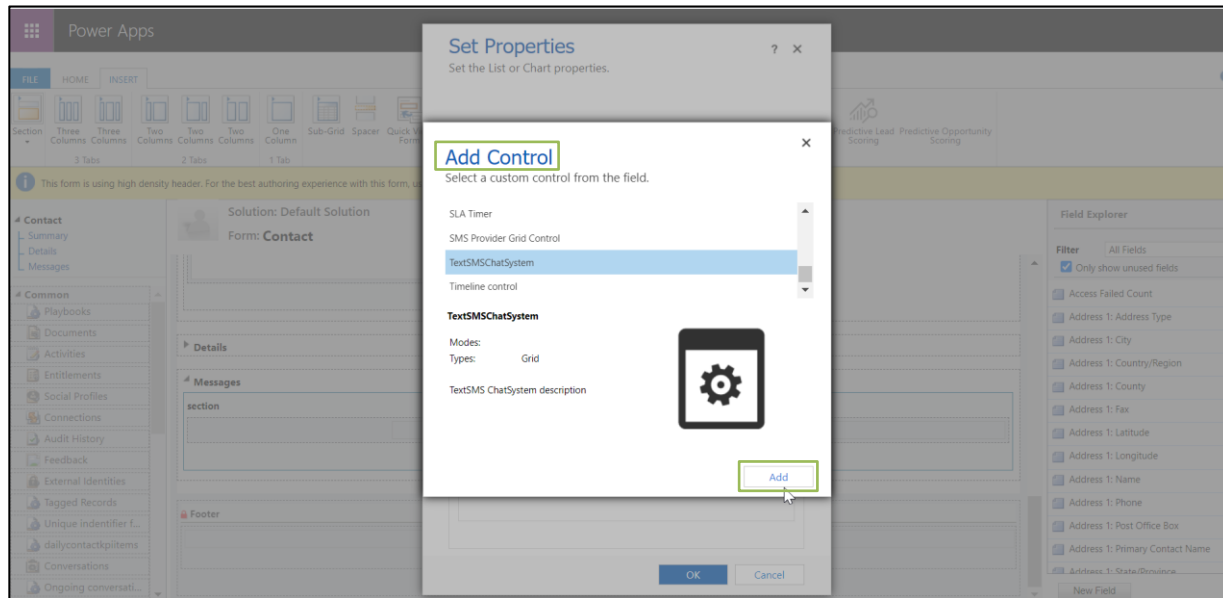


- Navigate to **Controls** and click **Add Controls**.

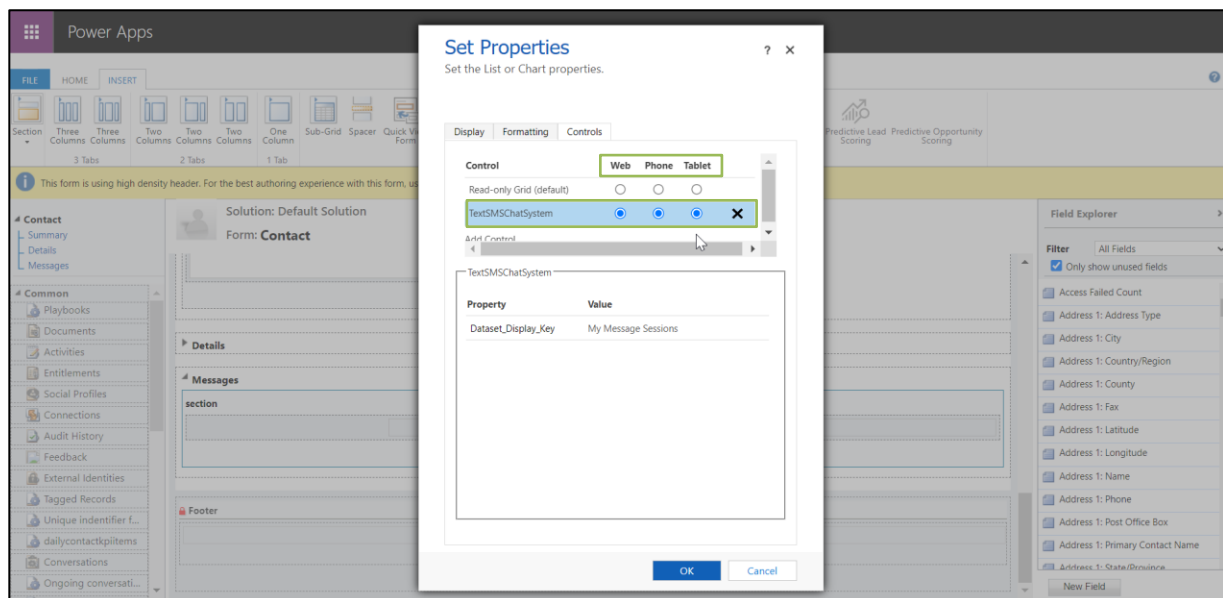


- From the dropdown list search for **TextSMSChatSystem** and add it as a control.

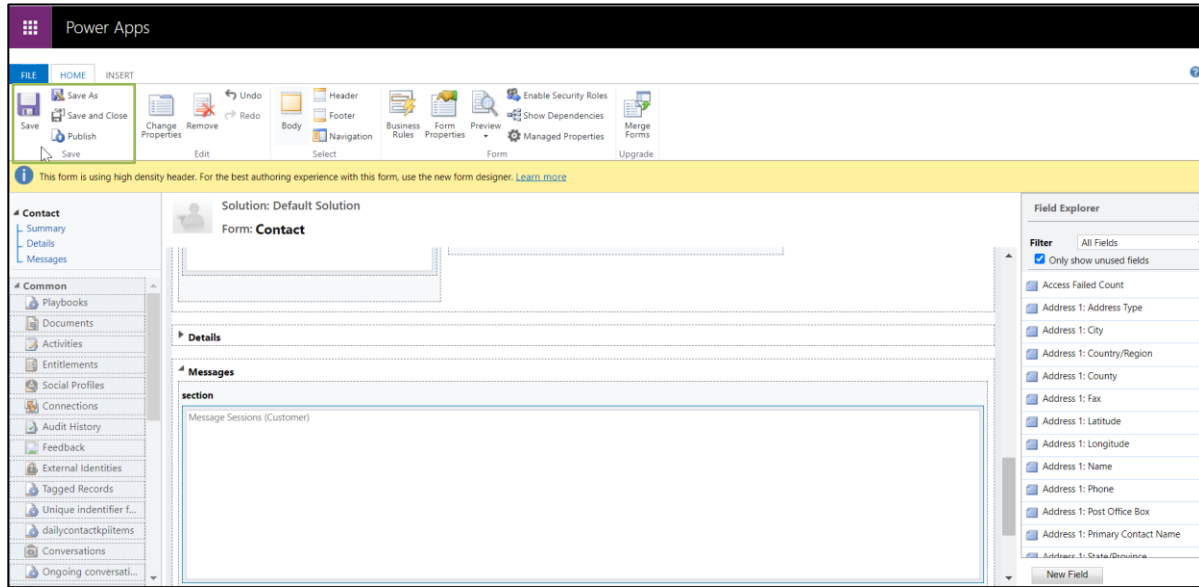
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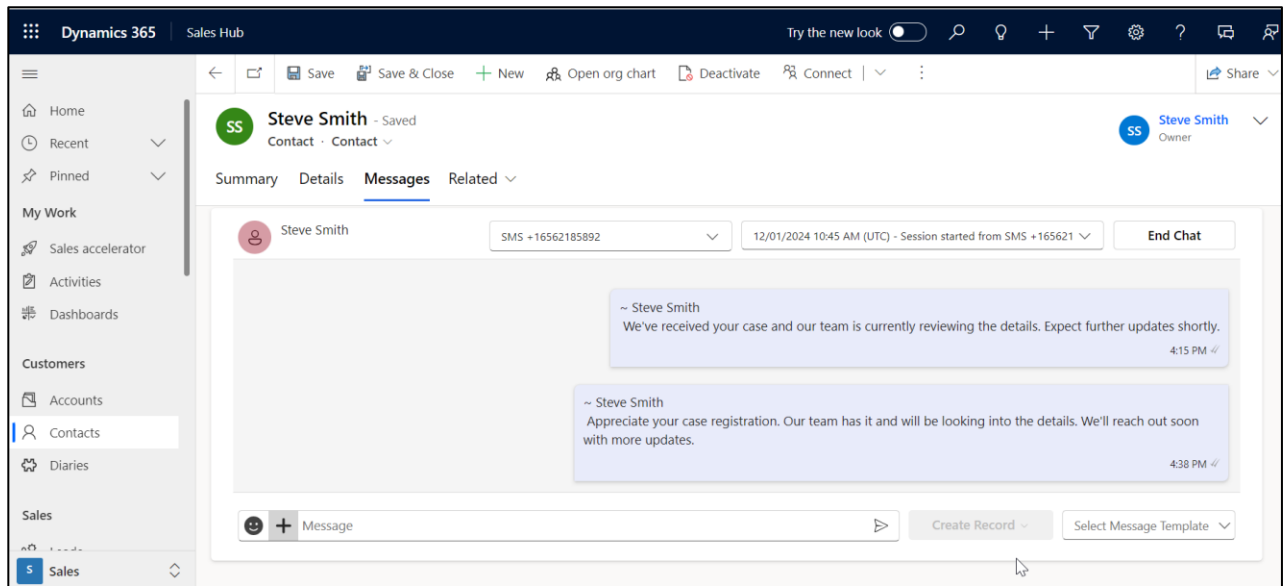
- Once done, **TextSMSChatSystem** will be shown under the **Controls Tab** and you can enable it for multiple devices to access it accordingly.



- After clicking **Ok**, and then click on **Save & Publish** for the grid to be visible.



- Once done, you can view the **Message UI** on the Contact Record and communicate with the customers directly, as shown in the screenshot below.



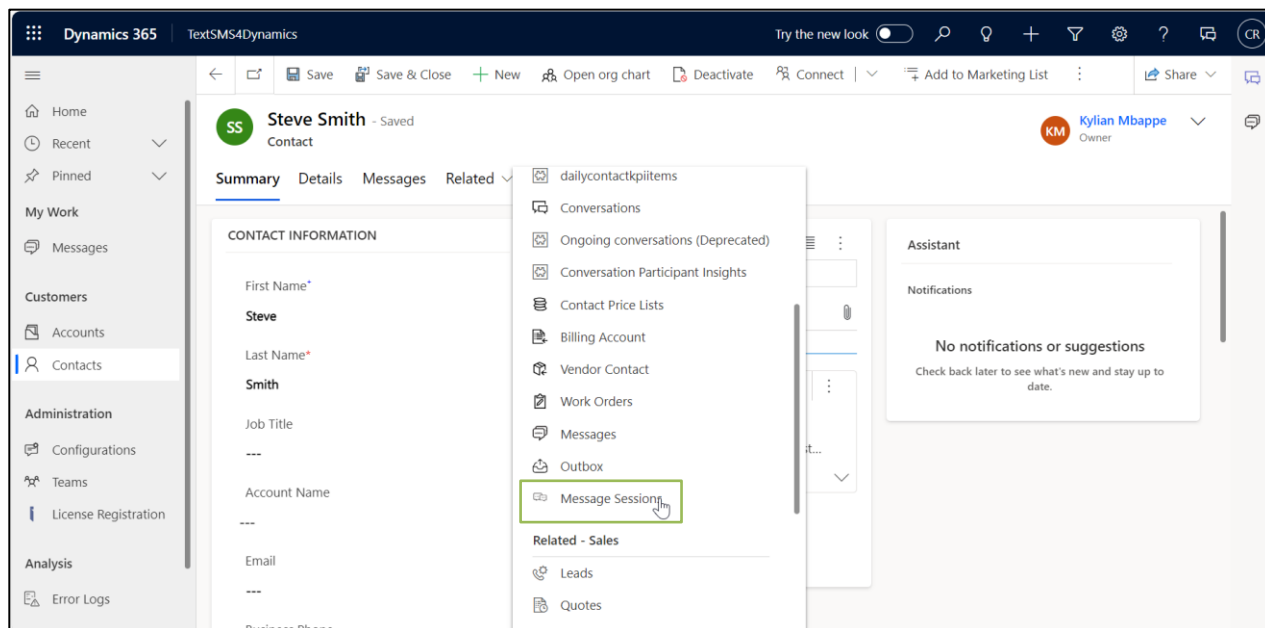
Approach – 2 (Without Adding Tab)

In case “To” is set in Contact field, then you can directly go into **Contact - CRM Record** and start communicating with the customers / contacts.

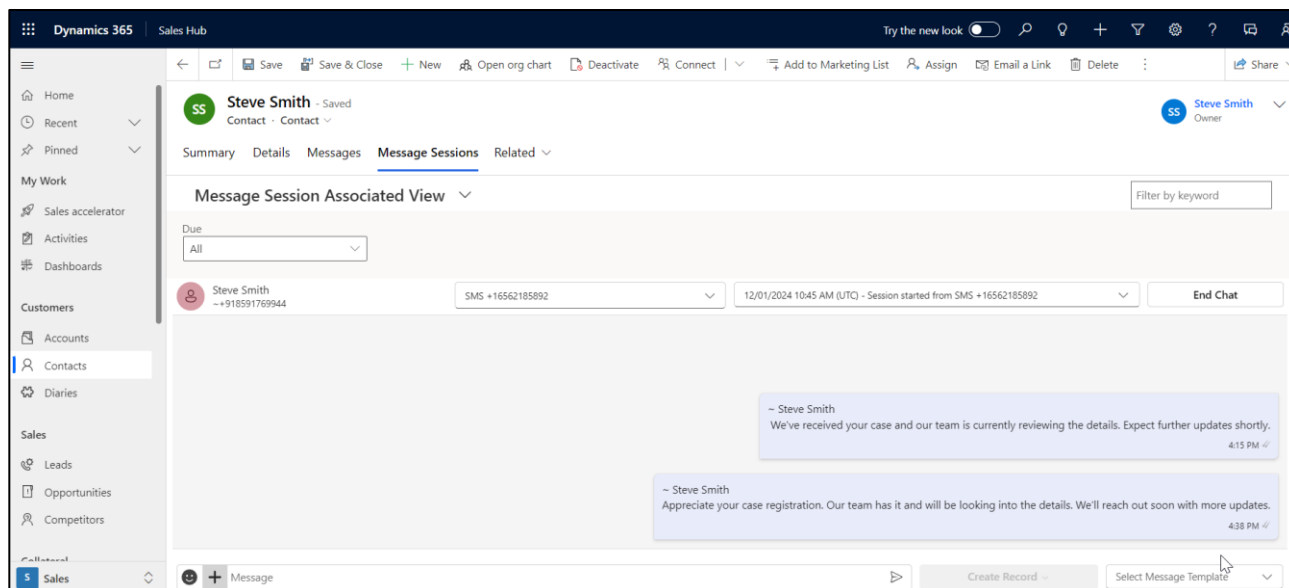
To do so,

- Go to **Contact**, Click **Related**.
- Navigate to **Message Sessions**

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- Start messaging with the respective **Contact**.



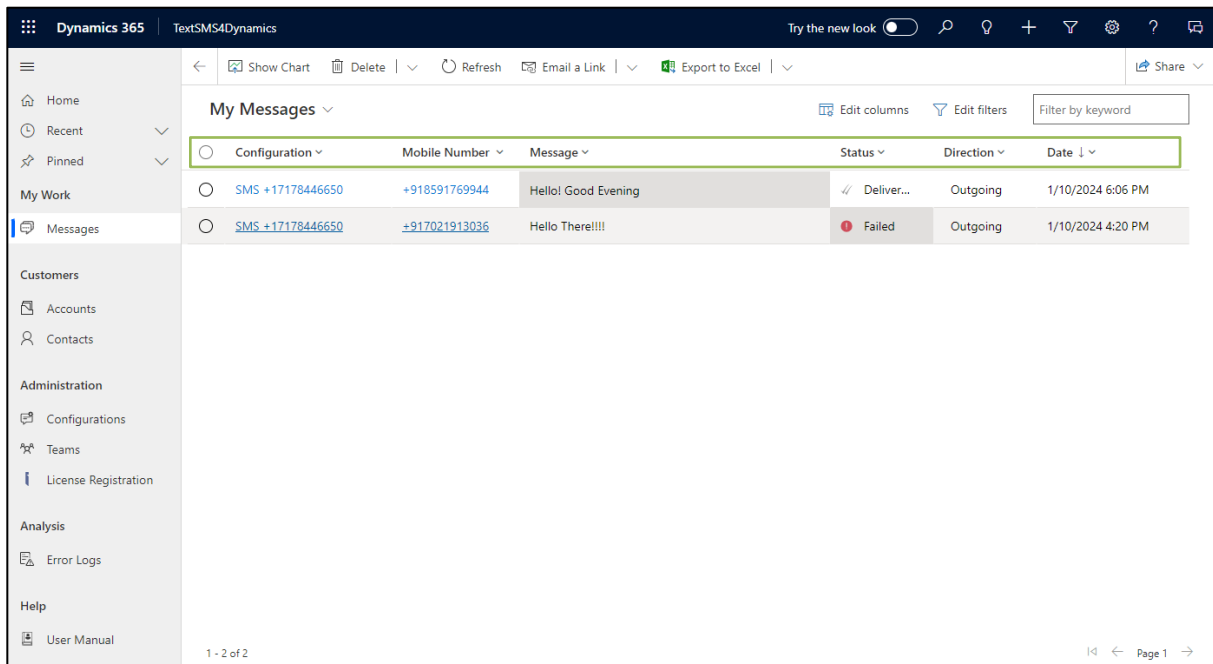
Features

Message Conversation Manager in CRM

TextSMS4Dynamics provides a seamless integration between Messaging Service and Microsoft Dynamics 365 CRM. It allows users to communicate with customers and partners directly within the Dynamics environment and eliminates the need to switch between different platforms.

With TextSMS4Dynamics, you can enjoy the same experience of messaging in Dynamics 365 CRM.

- Messages will show the following information:
 - Configuration – This shows the configured message number.
 - Mobile Number – This shows the Mobile number with Country Code of the user.
 - Message – Content of the message sent or received.
 - Status – This field describes the Status of the message, such as whether the message is sent, delivered, failed, received, etc.
 - Message Direction – In this field you can view if a message is an incoming or an outgoing message.
 - Date and Time - Similar to a native messaging interface, you can view the date and time of when a message was sent, delivered, failed, received, etc.



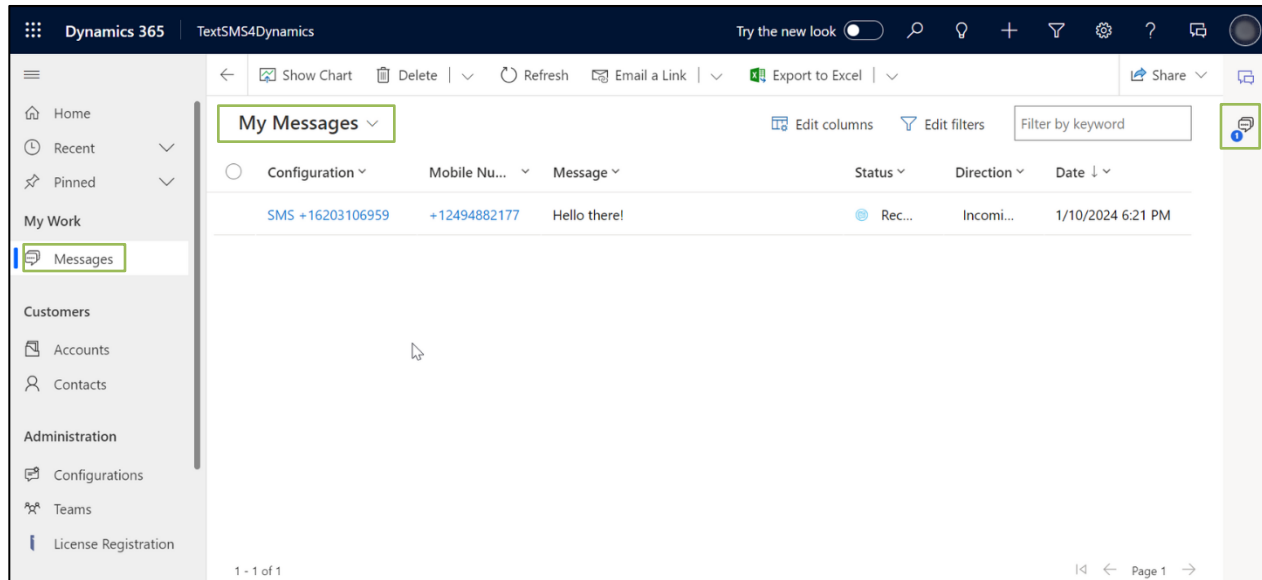
The screenshot displays the Dynamics 365 TextSMS4Dynamics interface. The left sidebar shows navigation options: Home, Recent, Pinned, My Work, Messages (selected), Customers (Accounts, Contacts), Administration (Configurations, Teams, License Registration), Analysis (Error Logs), and Help (User Manual). The main area is titled 'My Messages' and contains a table with columns: Configuration, Mobile Number, Message, Status, Direction, and Date. The table lists two messages: one delivered at 6:06 PM and one failed at 4:20 PM.

Configuration	Mobile Number	Message	Status	Direction	Date
SMS +17178446650	+918591769944	Hello! Good Evening	Deliver...	Outgoing	1/10/2024 6:06 PM
SMS +17178446650	+917021913036	Hello There!!!!	Failed	Outgoing	1/10/2024 4:20 PM

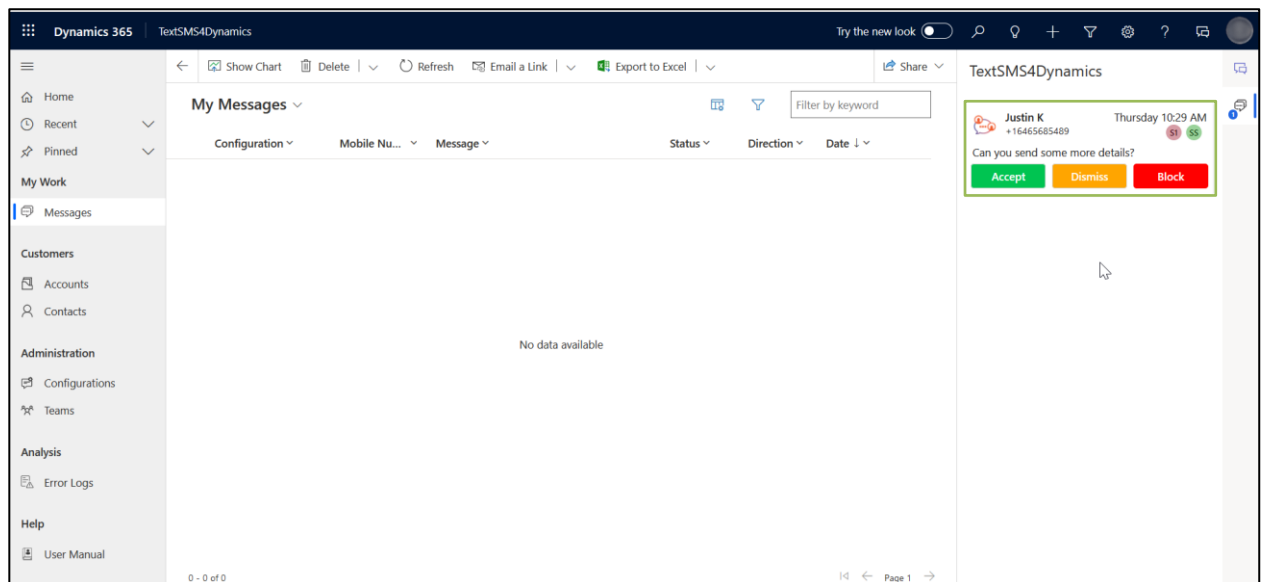
Message Notification

Message notifications in TextSMS4Dynamics are the new incoming messages that you receive within the Dynamics platform. These notifications play a crucial role in keeping users informed, ensuring they can respond promptly to customer inquiries and other important messages.

While navigating from entity to entity, if you receive a notification, then the Message bubble on the right-hand side will notify the total count of unread message.

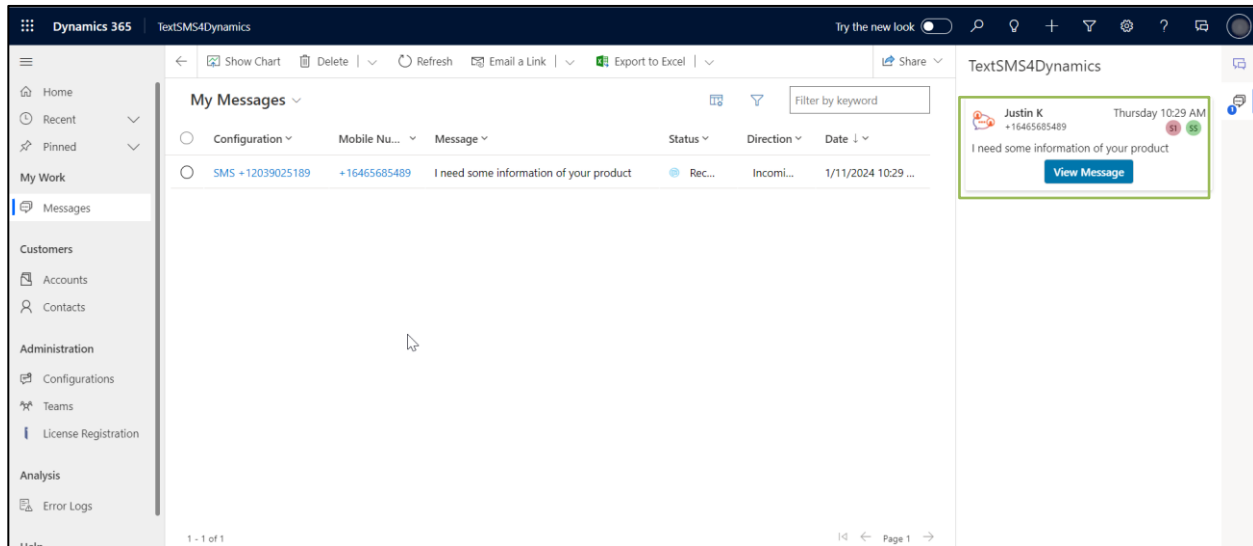


- **Once you click the Message Bubble**, various buttons will be accessible through which you can directly go to the Message UI.
 - In case you receive a message for the first time in the CRM, you need to either **Accept**, **Dismiss**, or **Block** the message.

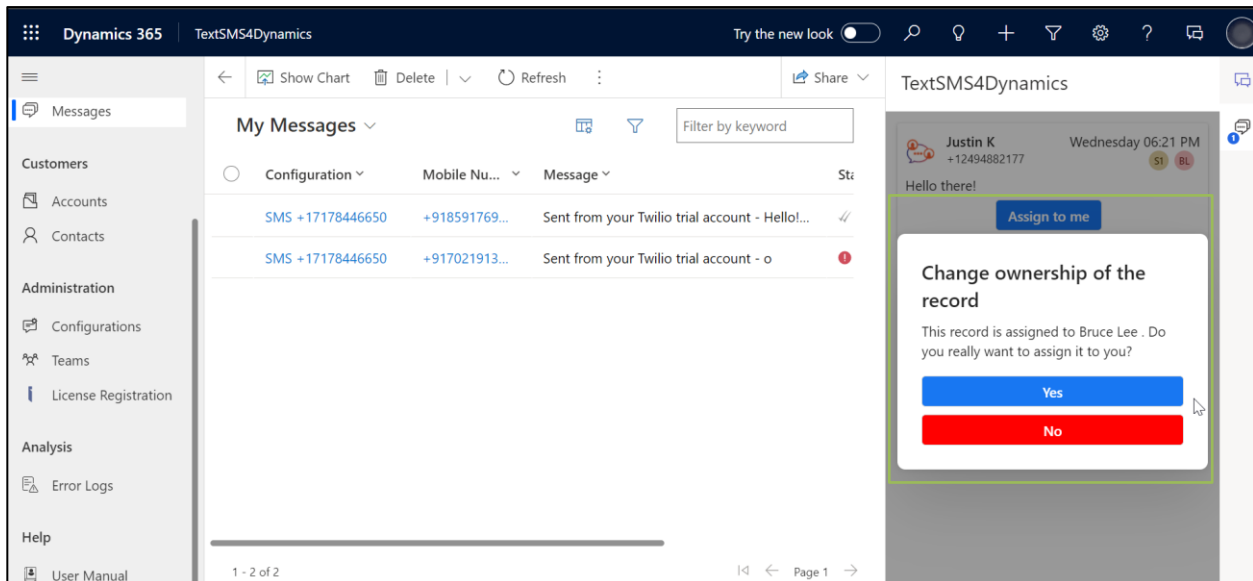


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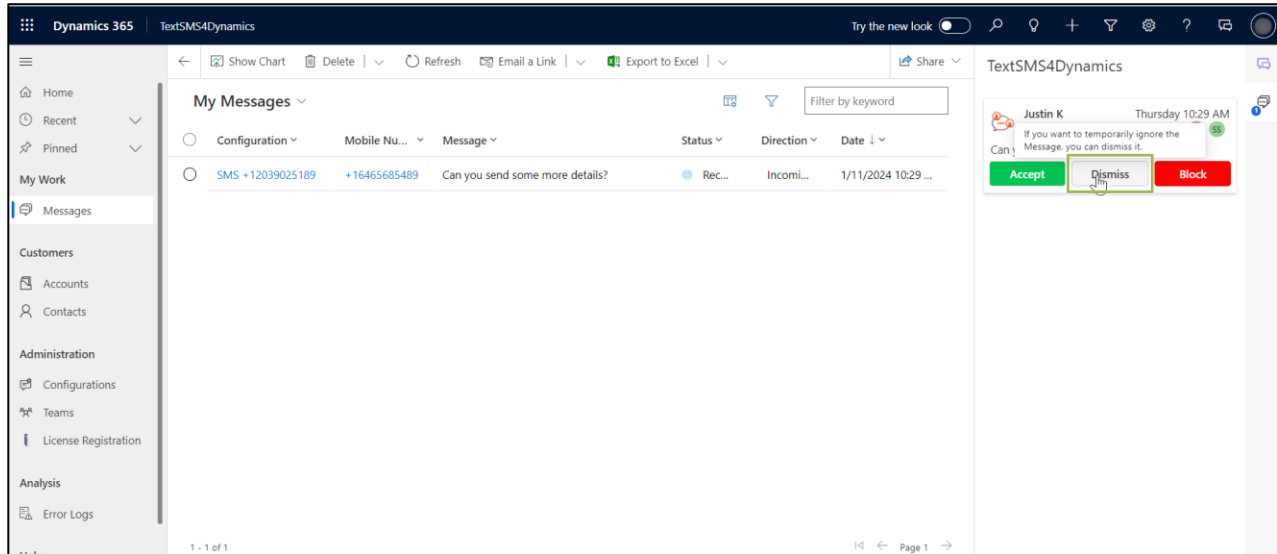
- Once Accepted, future messages from the same contact will be prompted as **View Message**.



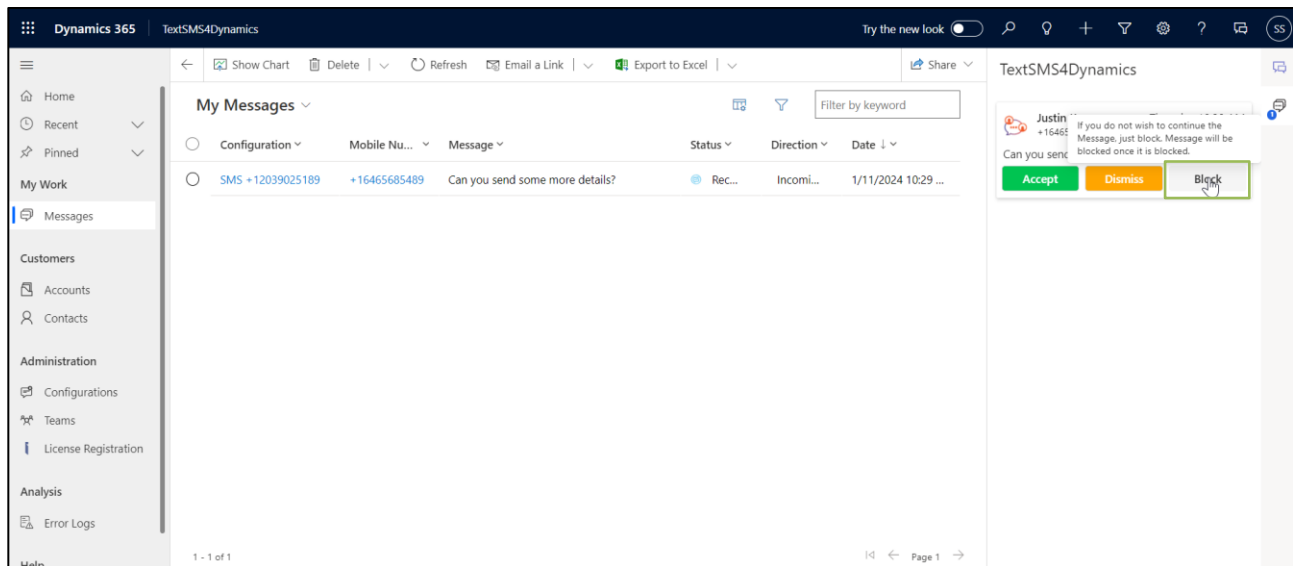
- Even if several CRM users have logged in, **View Message** button will only be displayed to the **Message Session Owner**. However, if the conversation exceeds idle timeout period, which was configured on the configuration record, then other users will be prompted to assign the messages to themselves with the **Assign to Me** button and **Change Ownership** by confirming **Yes / No** to continue messaging.



- Once Dismissed, the message no longer appears in the notification panel of logged-in users until a new message is received. However, the notification remains in the notification panel for other team members.



- Once Blocked, the contact number becomes inactive for all team members.



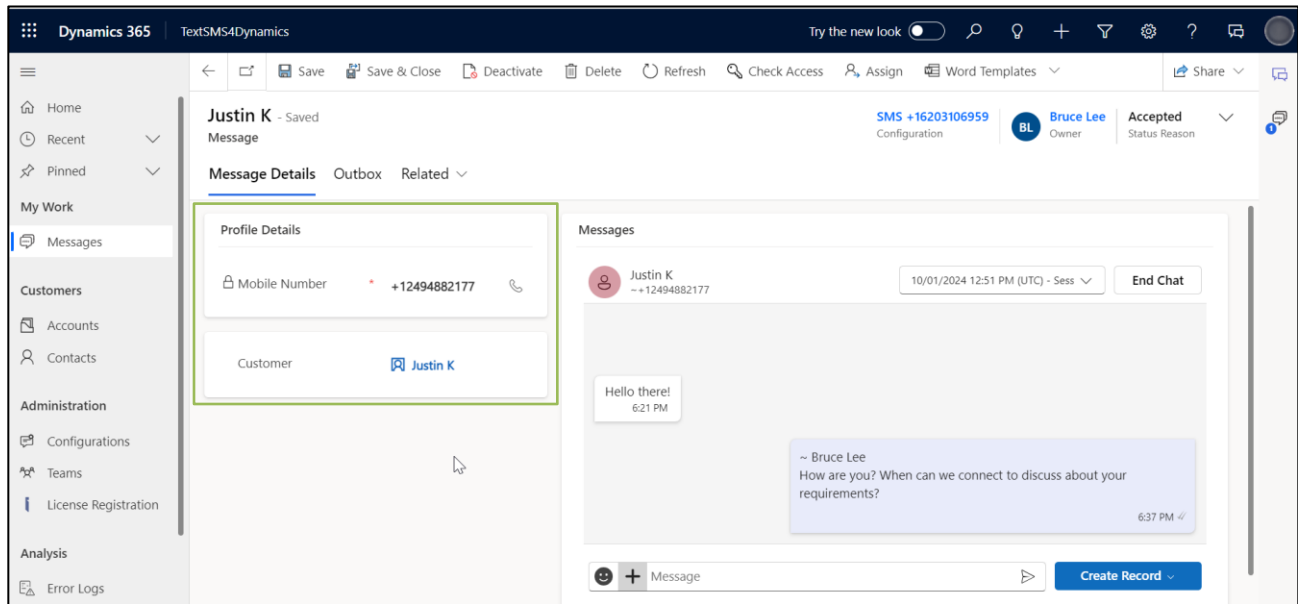
Please Note: Message notifications are fetched when the model-driven app is initially launched. However, if a user remains on a page for an extended period, new notifications will not be fetched until the user navigates to a different page.

Mapping CRM Records

Mapping CRM Records is possible with TextSMS4Dynamics! TextSMS4Dynamics finds CRM records (any record types created during the configuration process) and maps them with the new messages on the basis of their mobile number. This enables more informed and context-rich conversations and helps deliver personalized support.

For Example:

- In the below example, **Justin** is the **Contact** in the CRM that is **mapped by TextSMS4Dynamics** from the phone number associated.



Please Note: In case there are multiple entities with the same phone number, preference will be given to the first record type that was created.

Easy-To-Use Messaging User Interface

TextSMS4Dynamics allows users to access an easy-to-use Messaging User Interface (UI) within the CRM environment. This enables users to initiate and manage message interactions with customers from a single platform.

Here are some key features that you can benefit from this integration:

I. Communicate directly from CRM Records:

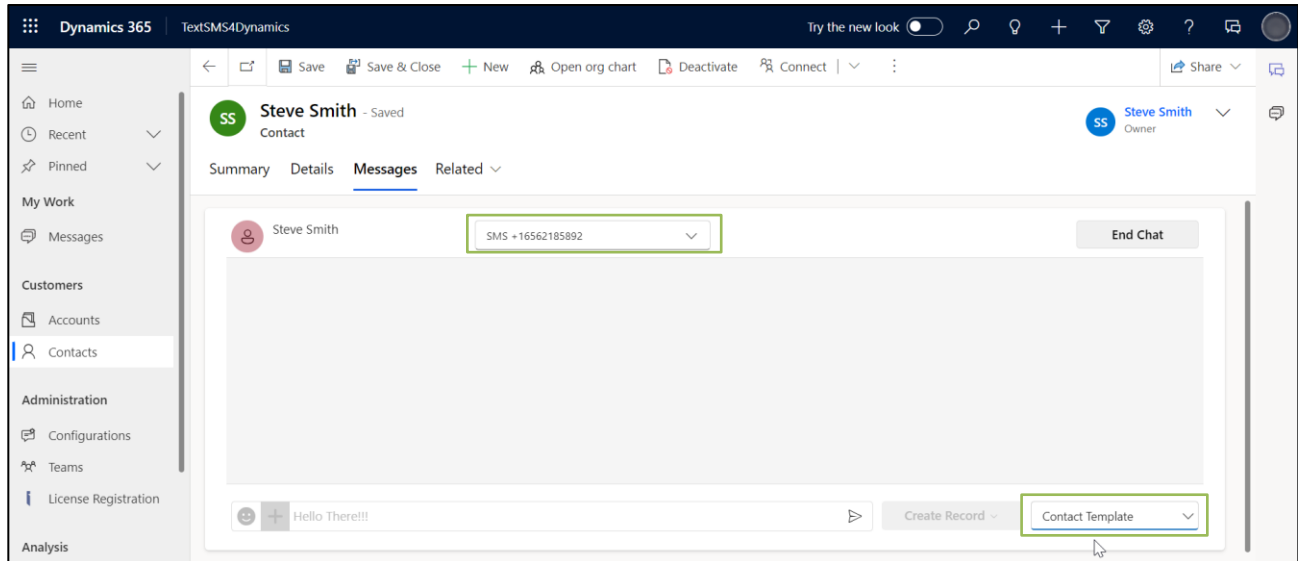
You can start sending message directly from CRM Records. This feature streamlines the process of interacting with clients and provides a convenient and familiar channel for direct communication, making it easier to manage and maintain customer relationships within the CRM system.

For Example: If you want to start a conversation with one of your contact using TextSMS4Dynamics.

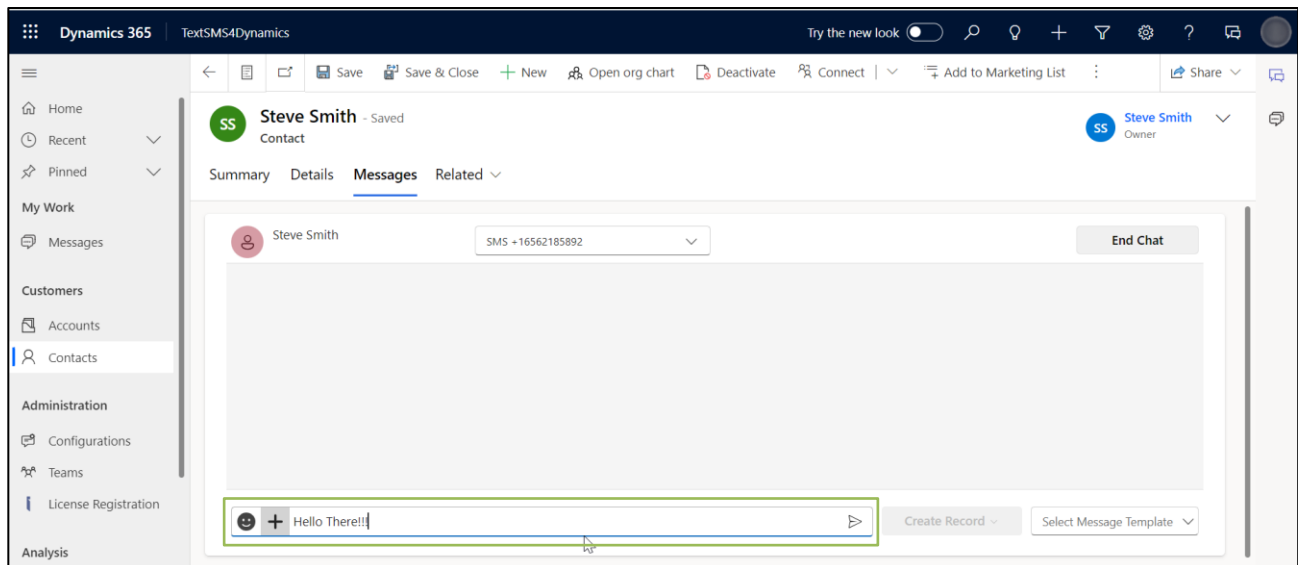
- Click on **Contacts** and select the **Contact** you want to communicate with.
- Go to **Message** and send messages directly to your customers from the CRM.

Choose the **configured number**, **Contact Template** to start messaging or start conversation using Message Box.

- Using **Contact Template**



- Using **Message Box**



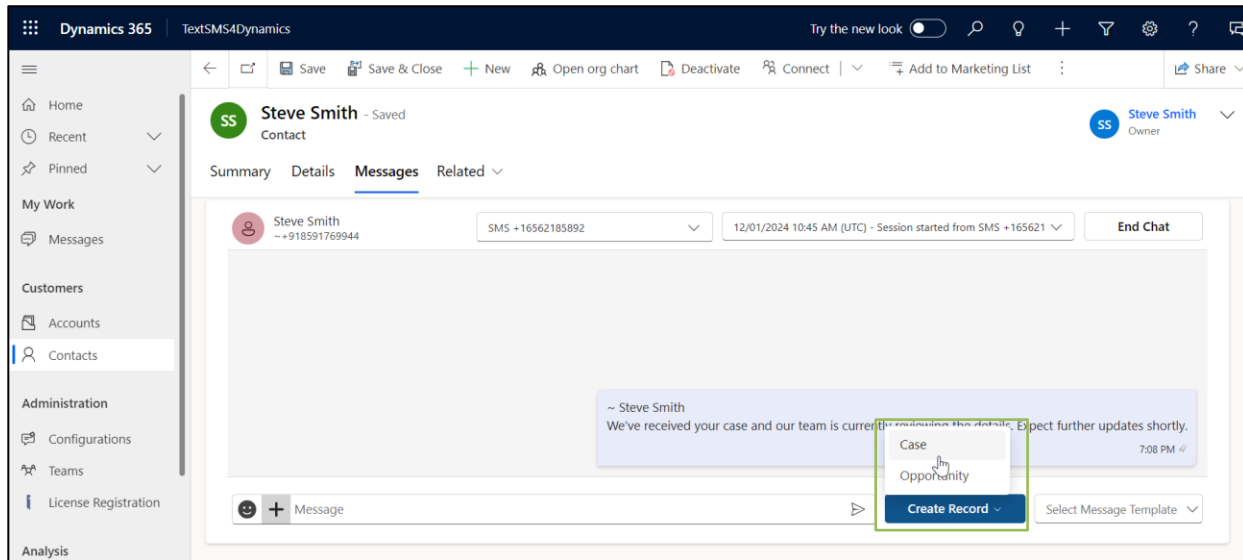
Please Note: If you wish to view the Message UI within any of the CRM Records you would have to configure it beforehand.

II. Create CRM Record (OOB or any Custom Entity):

TextSMS4Dynamics offers a convenient feature that allows users to create CRM records directly from message conversations. This integration streamlines the process of capturing customer interactions and converting them into actionable CRM data, making it easier for businesses to manage their customer relationships effectively.

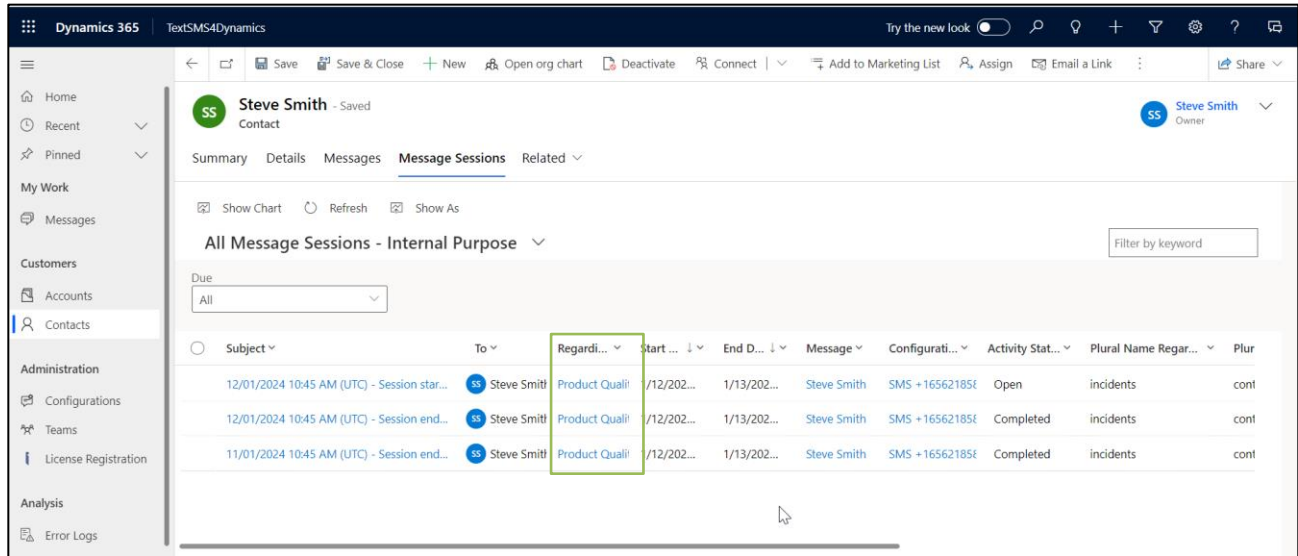
Create CRM records from message conversations, whether in an Out-of-the-Box (OOB) entity or a Custom Entity.

- Suppose you want to **Create Record** from an ongoing conversation, then you can click on **Case**, **Opportunity** or any other configured entity.



- As shown in the above screenshot, in case you would like create **Case** from the above conversation.
 - Click on **Create Record** and Select **Case**
 - The main form of CRM will open up, fill the details and click on **Save & Close** to create a **Case**.
 - The Record created here will be set as '**Regarding**' automatically for the related Message session.

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You can now directly chat with the Case from the CRM Records as well.

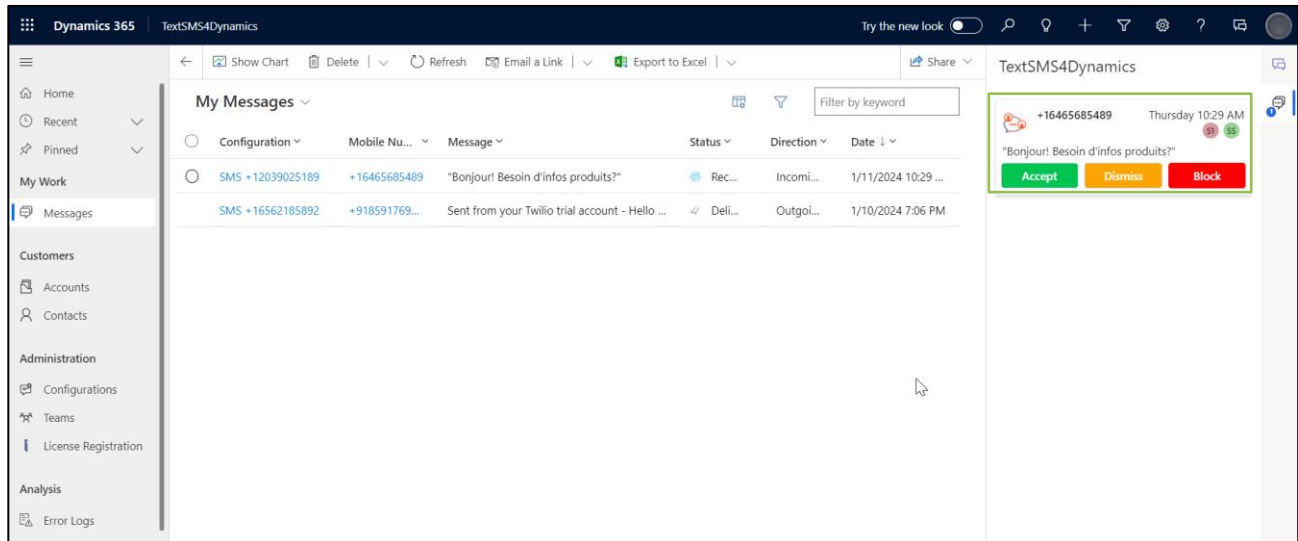
Please Note: During the configuration process, Records set in ‘Allow To’ will be listed in the **Create Record** button.

III. Supports multiple languages, emojis and image format in Message UI

TextSMS4Dynamics supports multiple languages, emojis and image format within its Message Interface(UI). This means that users can interact with customers using messages in their preferred language, along with files seamlessly within the CRM environment.

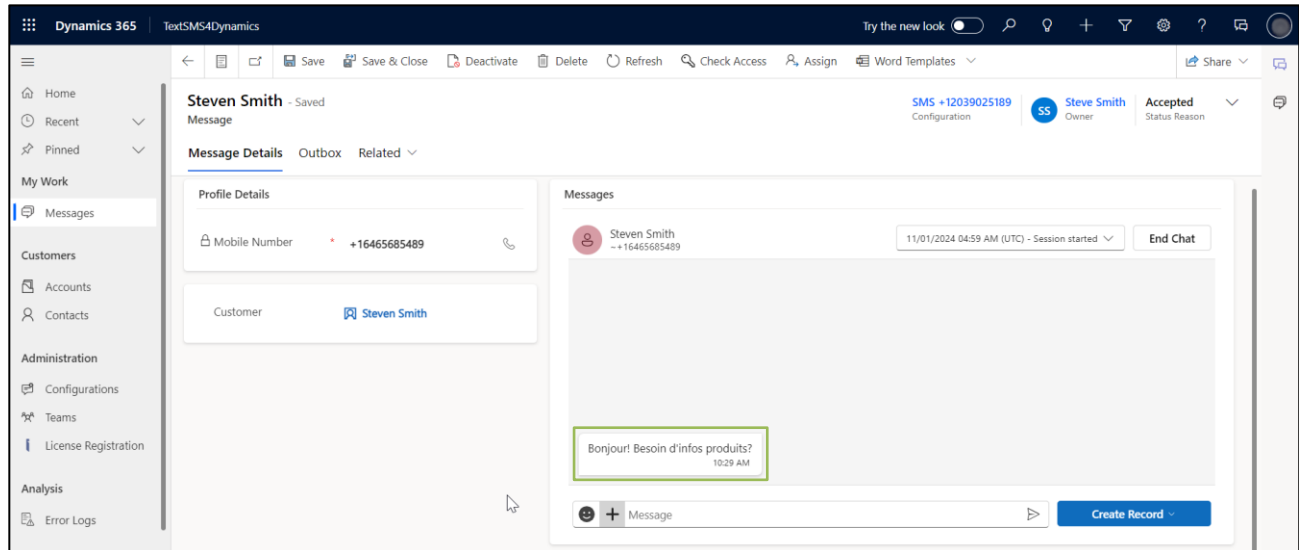
Users can send and receive messages in preferred language and emojis. As well as send images to enhance the overall user experience and accessibility.

As shown as the screenshot below.



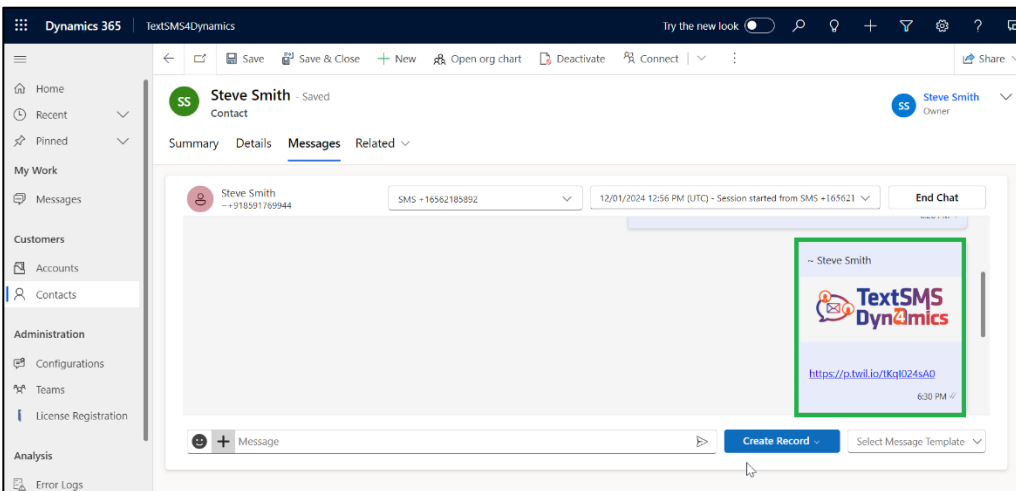
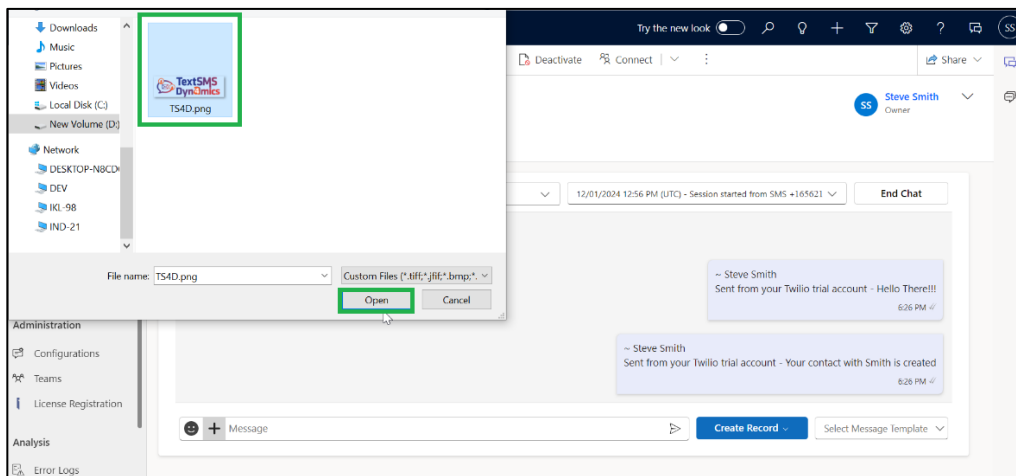
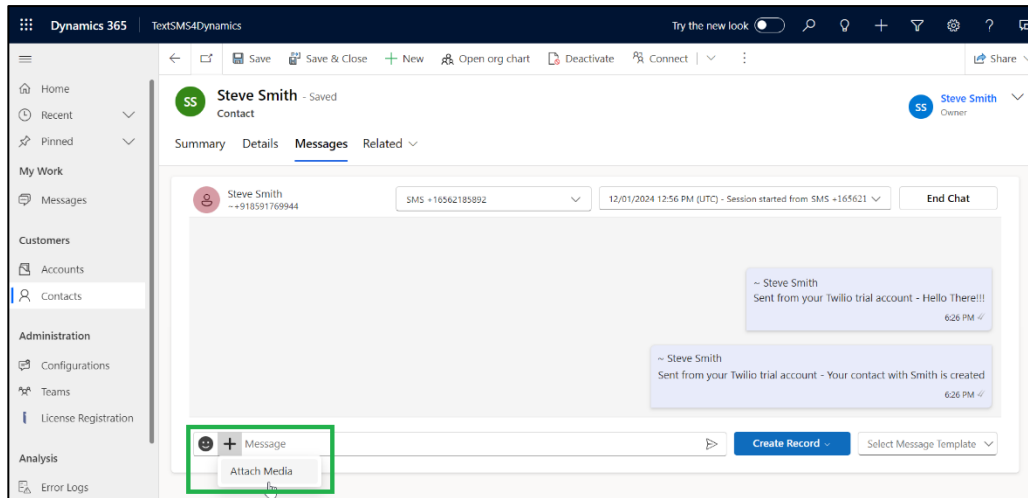
And within the Message UI,

- Here is a screenshot that shows a **French** text from a contact.

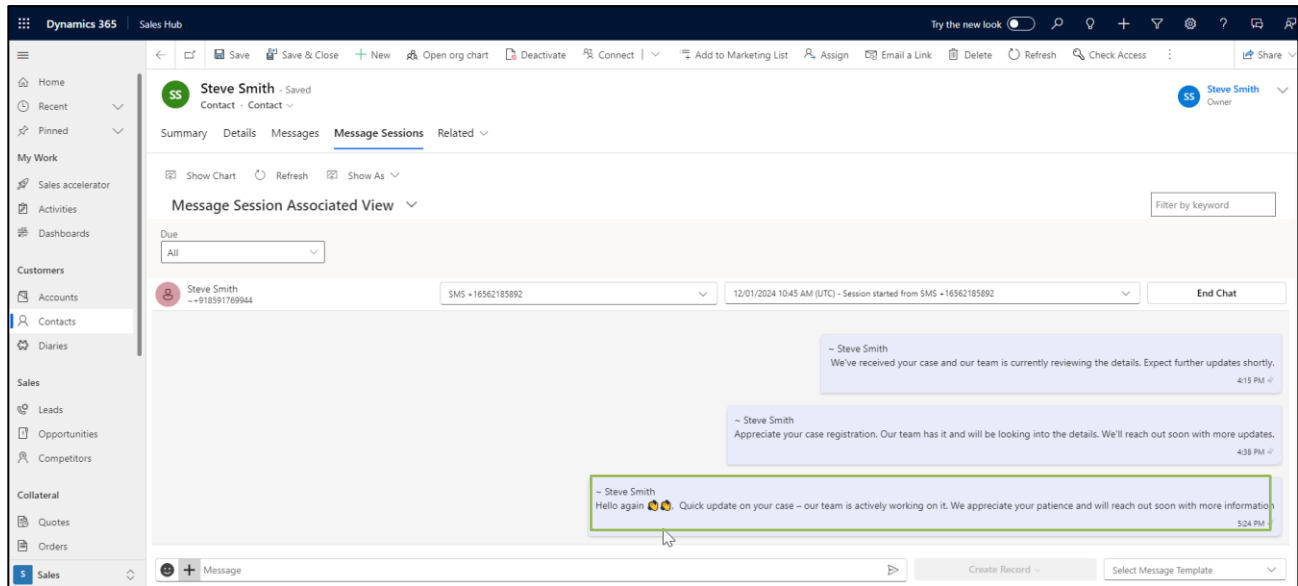
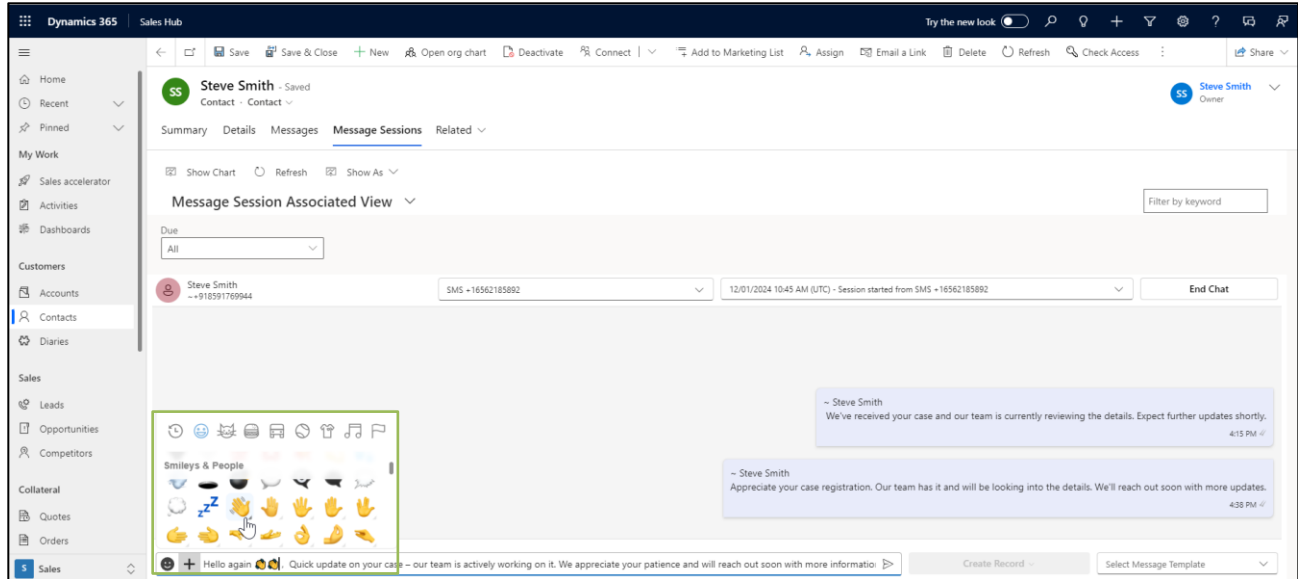


TextSMS4Dynamics – User Manual

- Here is a screenshot that shows an Image selected and delivered to a contact number.



- Here is a screenshot that shows emojis selection and delivered to a contact number.



Please Note:

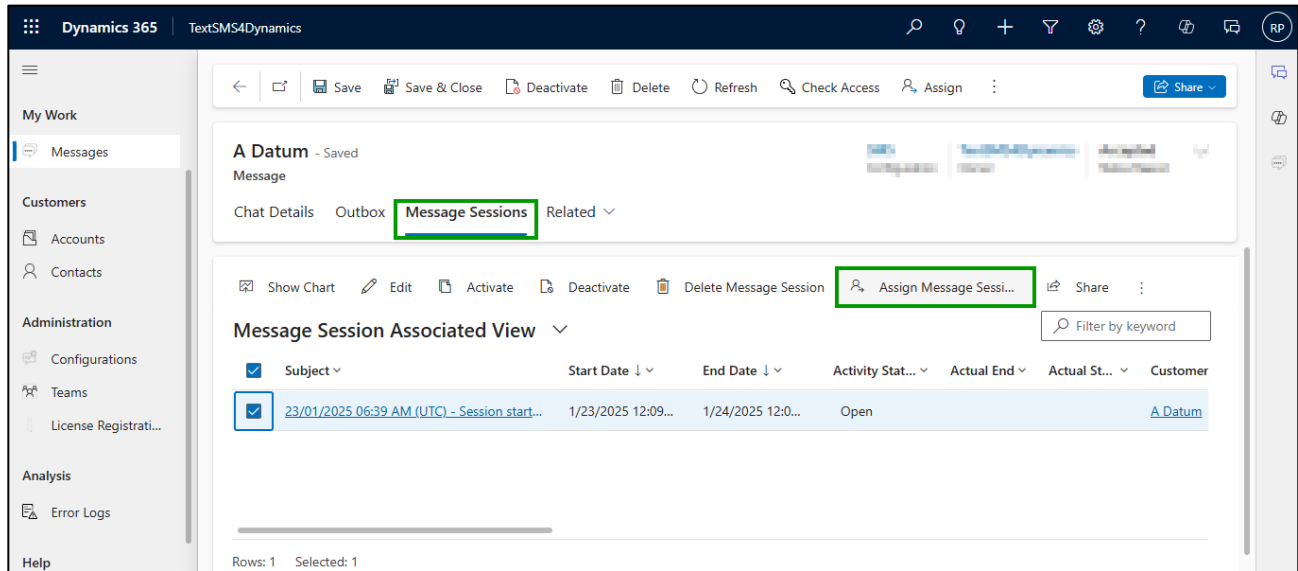
- In a Message UI, we employ polling to fetch messages at regular intervals when a message is sent. However, if a user remains on the same page for an extended period, new messages will not be fetched until the user navigates to another page and opens a specific chat record.
- We only support text messages & images.

Reassign Chat

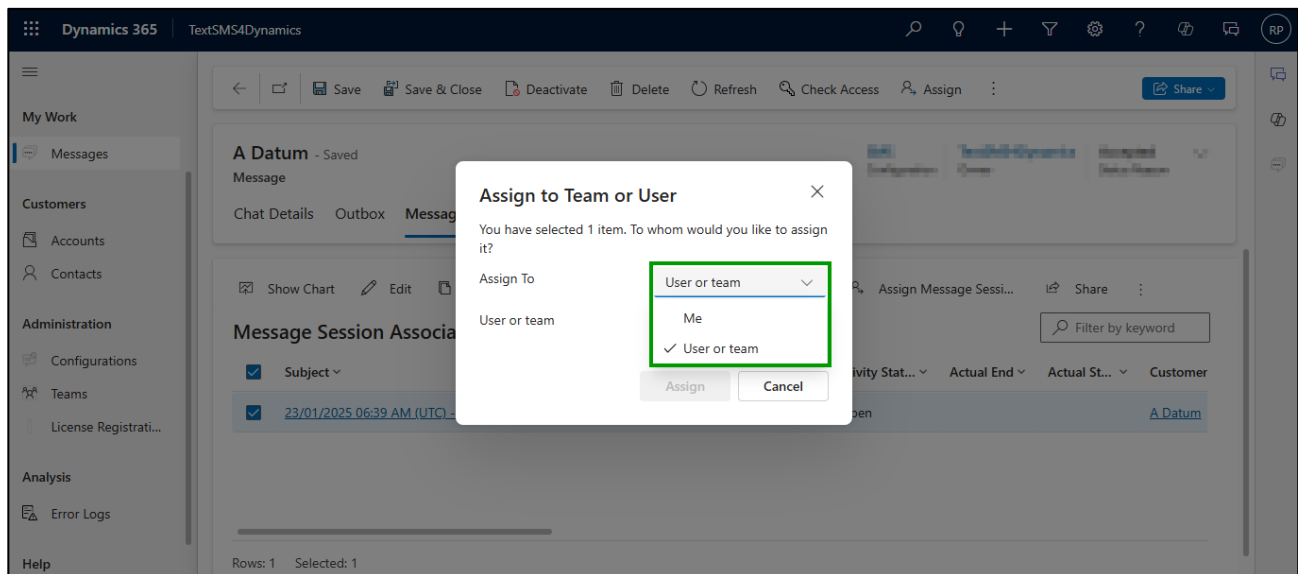
The **Reassign Chat** feature in Dynamics 365 CRM enables seamless chat transfers between users or teams for uninterrupted customer interactions. If a user, like Ricky Ponting, needs to reassign a chat, they can do it directly within CRM. With just a few clicks, the chat session can be transferred to another user, such as

Adam Gilchrist, ensuring smooth communication even when team members switch roles. Here's how it works:

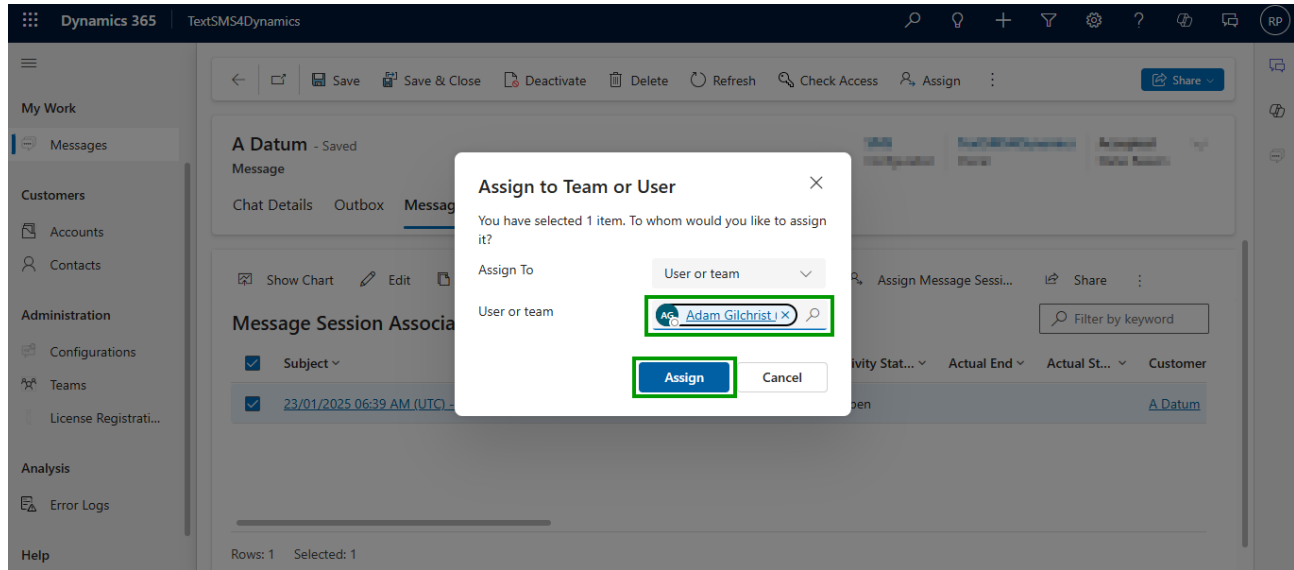
- Go to Message -> Message Session
- Click on “Assign Message Session.”



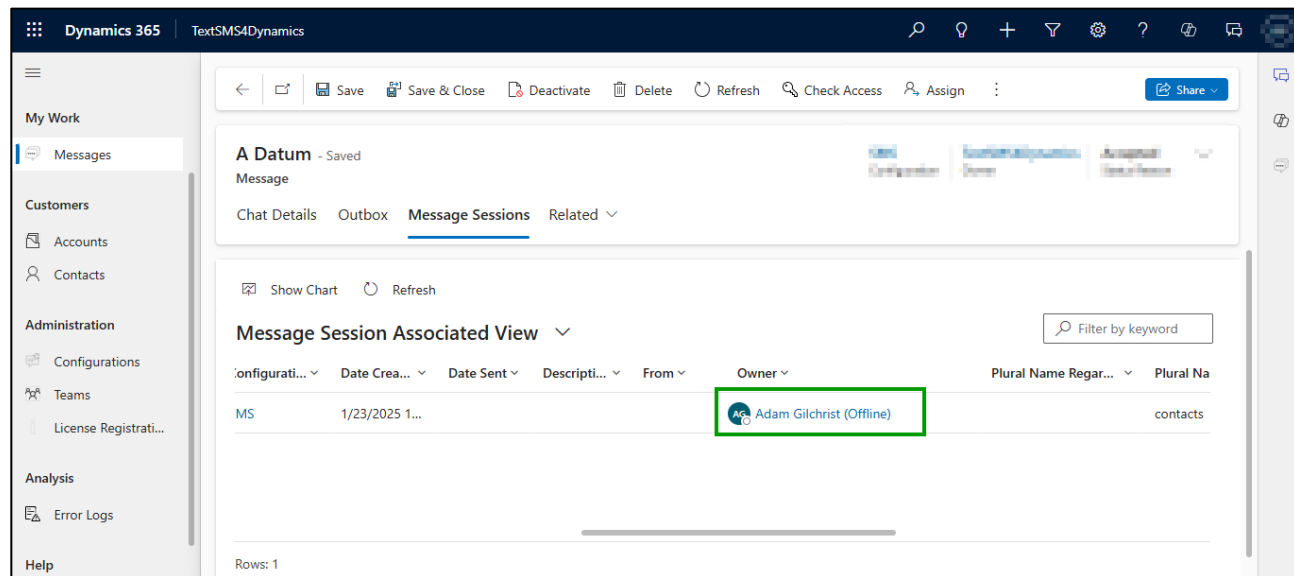
- The Assign To dialogue **Pop Up** will appear on the screen.
 - **Assign To:** Either choose yourself or another user/ team you want to assign the chat session to.
 - **User or Team:** Choose a specific user to handle the conversation individually or assign it to a team for collaborative management.



- **Assign:** Also, if Ricky Ponting leaves the chat, he can assign the chat to another user, such as Adam Gilchrist, to take charge of the conversation by clicking on the “Assign” button.



- Now the chat will be assigned to Adam Gilchrist.



With this, you can maintain seamless customer interactions with instant chat reassignment—ensuring uninterrupted communication and quick responses, even when team members switch roles.

Store Message History in Message Sessions

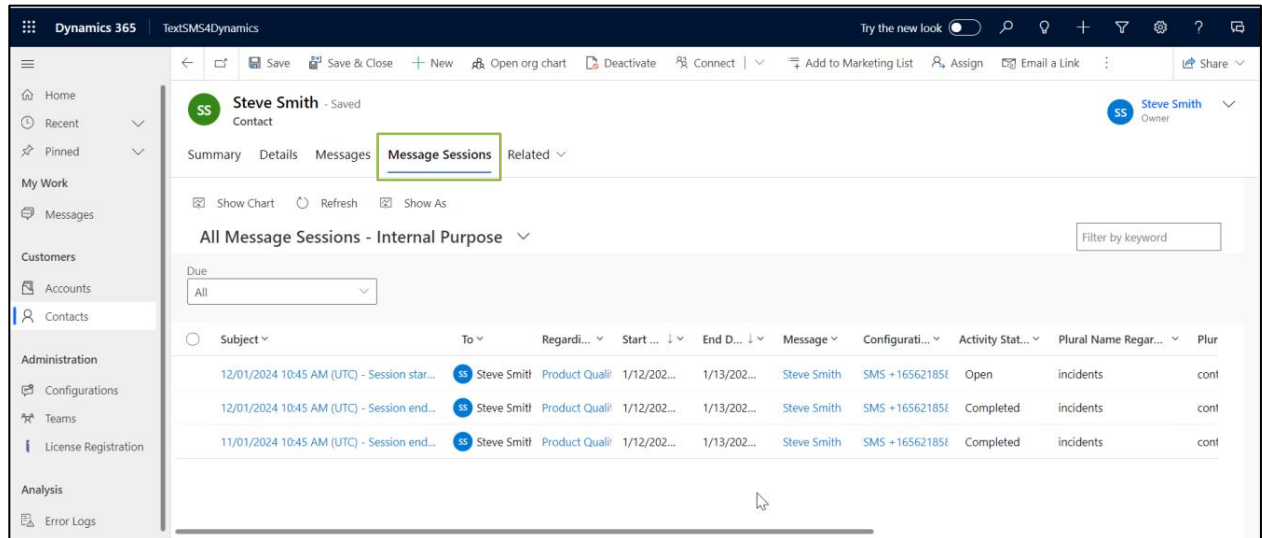
TextSMS4Dynamics provides the functionality to store message history in message sessions. This means that when you communicate with customers within the CRM, the message history is recorded and stored as a message session.

Users can maintain **message history** associated to each **Record with Dynamics 365 CRM** and track communication.

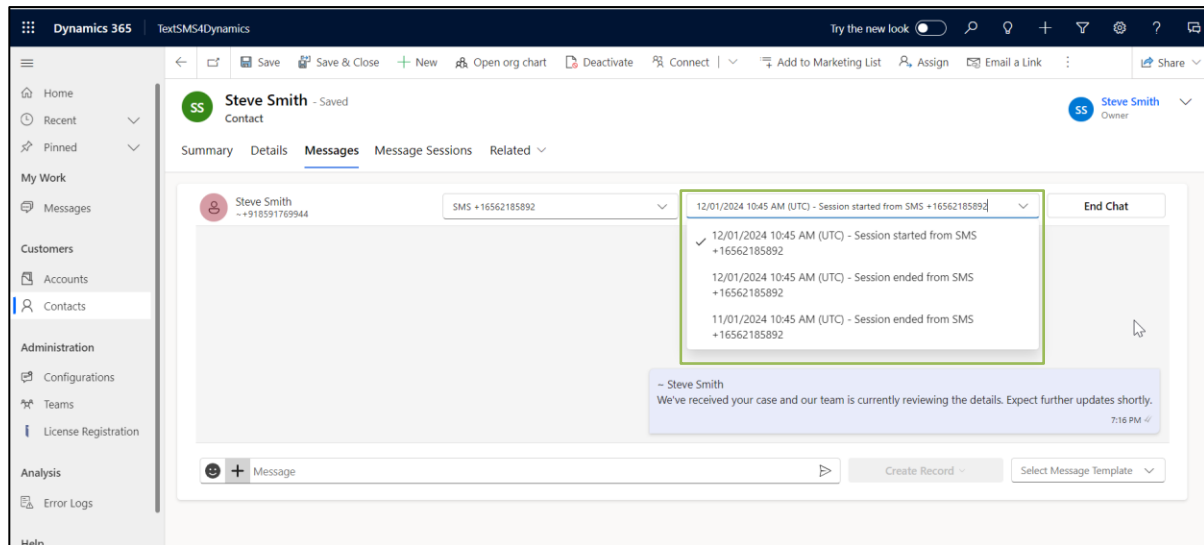
- To means the customer/partner with whom you would be messaging.
- **Regarding** defines the associated **Record**. (Record that was created from within the Message UI)

- “**Start /End Date & Time**” will be mentioned for each session. (Each message session will be maintained for 24 hours as per UTC Standard Time.)
- **Configuration** describes from which channel you are communicating.

Below is a screenshot showcasing the list view of the message sessions.



Message History can also be accessed from the **Message UI**.



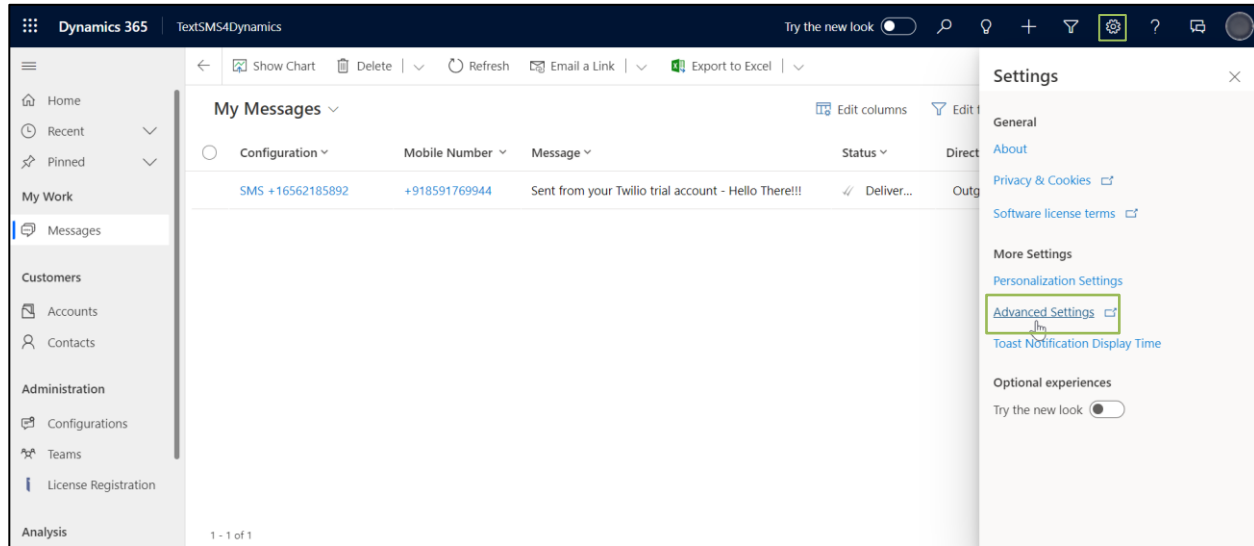
Trigger & Send Automate Messages

Automate sending messages through workflows within Dynamics 365 CRM. Users can set up triggers and actions based on specific events, such as sending automated messages for order confirmations or appointment reminders. This automation saves time, reduces manual effort, and ensures timely communication.

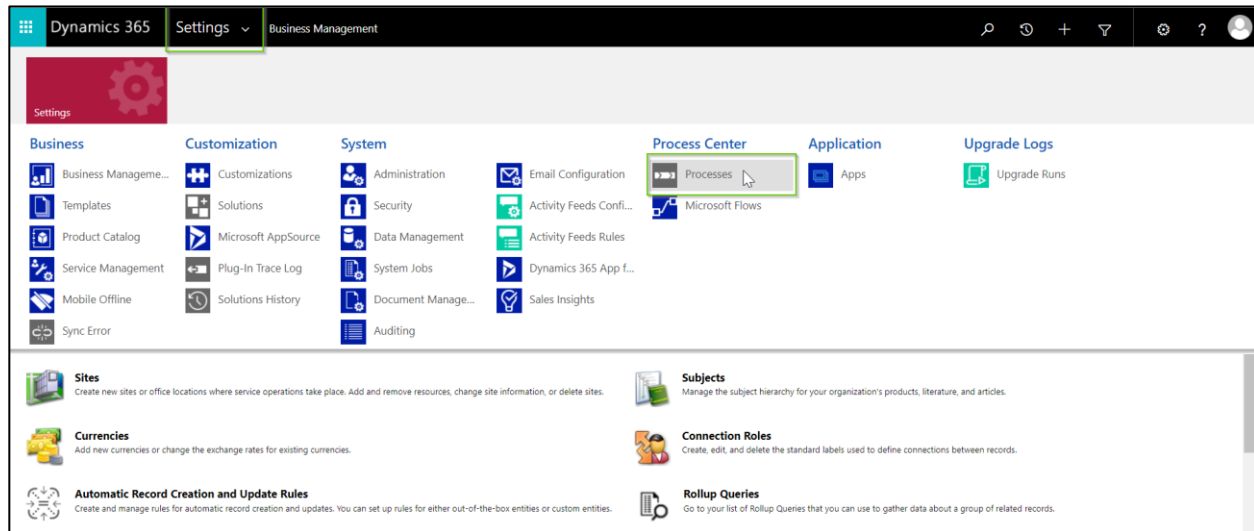
For Example: Here we have set an automated **Trigger** message on **Lead Creation**. Which means every time a case is created in CRM, the respective contact number associated to the lead will receive an automated

message.

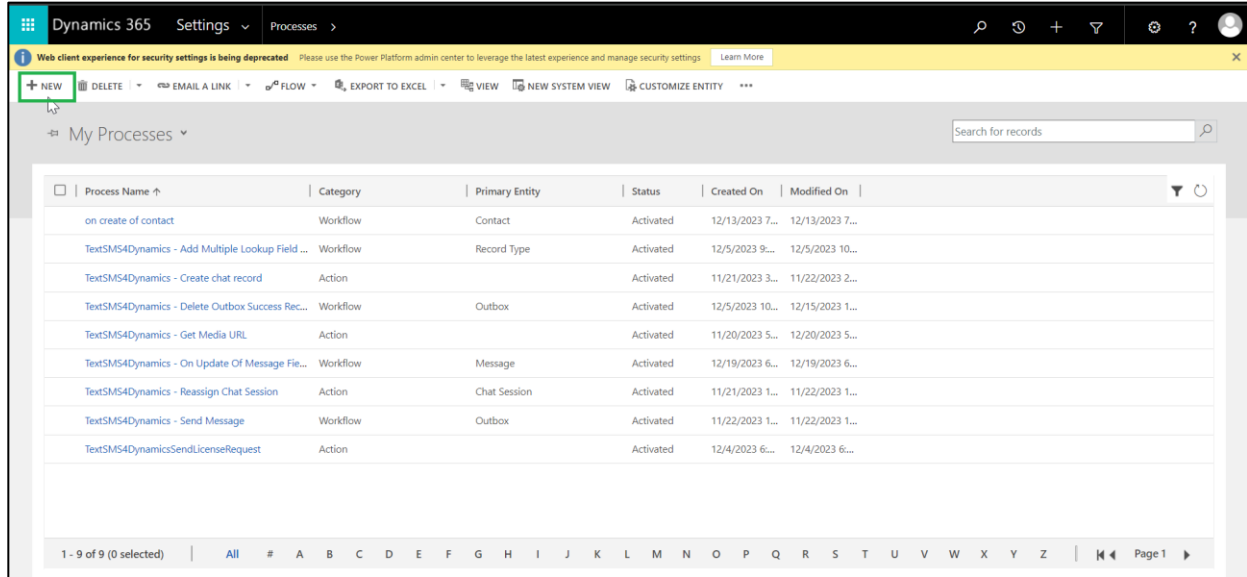
- In order to set triggers and automate workflow, click on the **Settings Icon** and navigate to **Advanced Settings**.



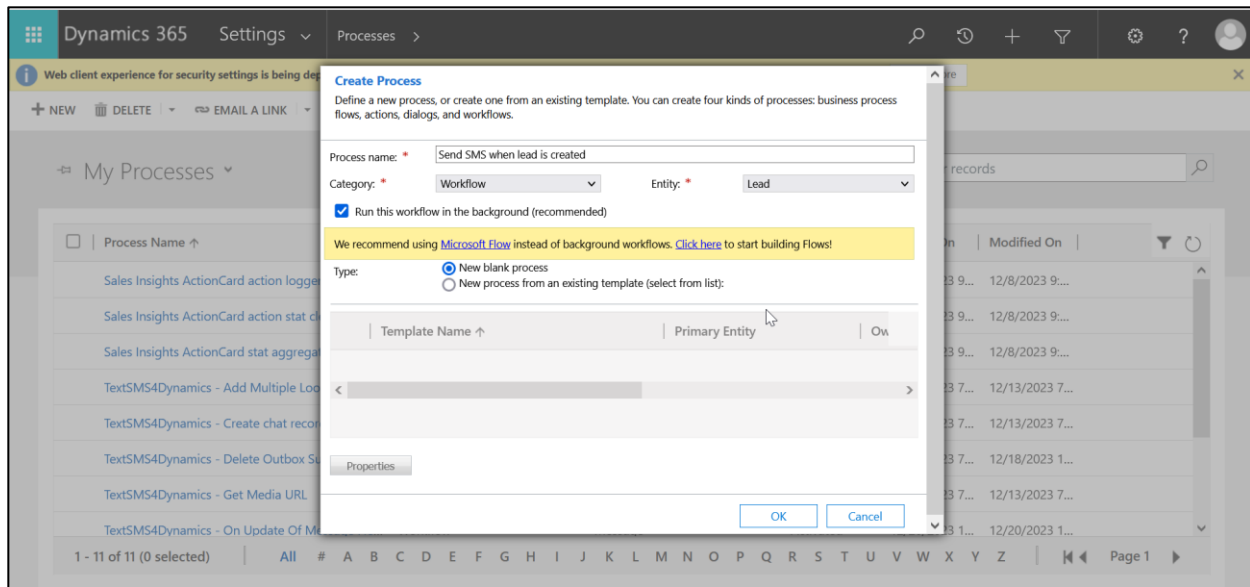
- Dropdown the **Settings** and click **Processes**



- You can create '**Workflow**' as per your requirements, by clicking the **+NEW** button.



- Mention '**Process Name**', select **Category** as '**Workflow**' and '**Entity**' as per your preference.



- After clicking **OK**, a new window will appear, as shown below. You will already see the **Process Name**, **Activate As**, **Entity**, and **Category**, as added in the previous window.
- And configure the '**Workflow**' as per your requirements.
- You now need to '**Add Step**' in the **Workflow** to select and configure messages to be sent. The step will represent a specific task, that the workflow will perform when triggered by a defined **event /condition**. Here we have navigated to **Create Record** and selected **Outbox** to set the **Properties**.

TextSMS4Dynamics – User Manual

Process: Send SMS to customer when lead is created

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Common

- Information
- Audit History
- Catalog Assignments
- Comments
- SLA Items
- PM Recordings
- Agent script steps
- Macro Run Histories
- Timecards
- Entities
- Entities
- Chatbot subcomponent...
- Card

Process Sessions

- Process Sessions

Hide Process Properties

Process Name: Send SMS to customer when lead is created

Entity: Lead

Category: Workflow

Available to Run

- ☐ Run this workflow in the background (recommended)
- ☐ As an on-demand process
- ☐ As a child process

Workflow Job Retention

- ☒ Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

- ☒ Record is created
- ☐ Record status changes
- ☐ Record is assigned
- ☐ Record fields change
- ☐ Record is deleted

Add Step

- Send Message to the customer when lead is created

Create: Outbox

Set Properties

Please Note: Users can set multiple trigger points, depending on their requirements and workflows. Each trigger that you create for a selected Entity can have a customized template.

- A new window will pop up when you click on **Set Properties**, as shown in the screenshot below.
- You need to enter the details like **Name**, **Message Template**, **From** (the configured number) and **Regarding** as well as **To Entities** as per your requirements.
- Once done, **Save and Close** the workflow.

Process: Send SMS to customer when lead is created

Create Outbox

Details

Name: Send SMS to (First Name(Lead)) (Last Name(Lead))

Message Template: Send SMS to customer when lead is created

Free Form:

Failure Reason:

From: SMS +16562185892

To: (Customer(Lead))

Additional Fields

Chat:

File Details:

Mobile Number:

Sid:

Regarding: Lead(Lead)

Owner:

Form Assistant

Dynamic Values:

Operator:

Look for: Lead

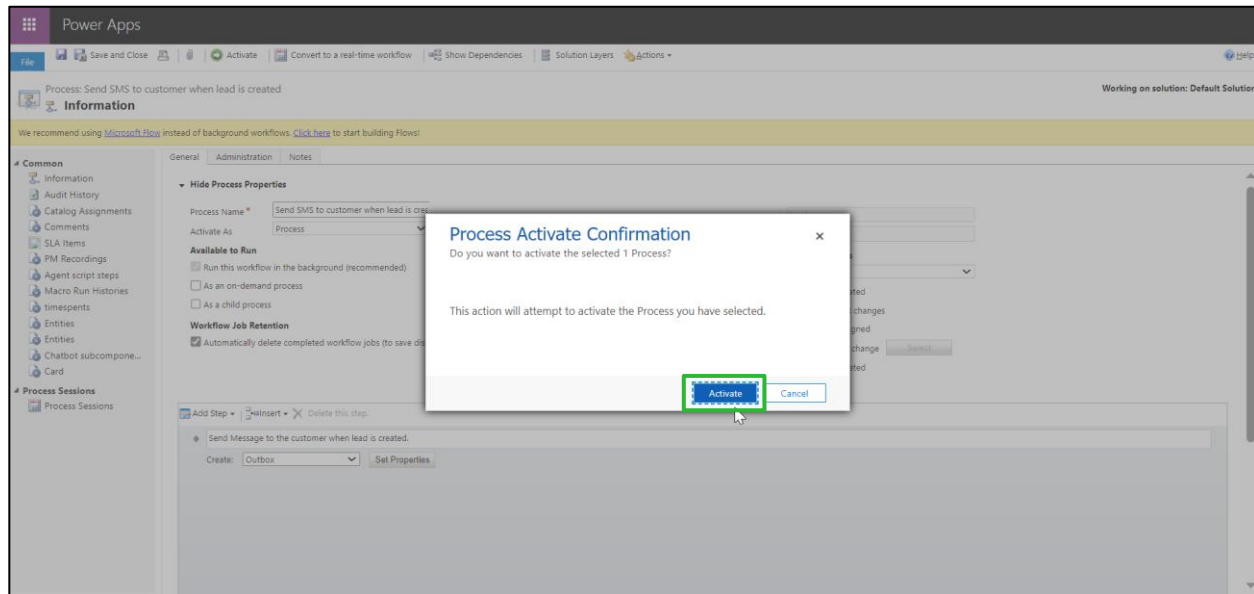
Add:

Default value:

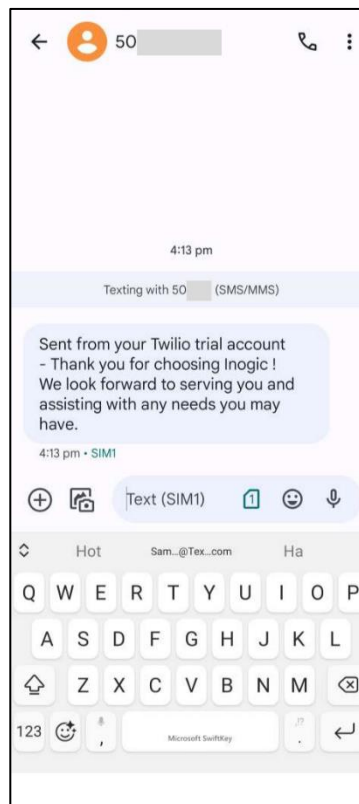
OK:

- Users can choose the preferred **Message Template**.

- Once added, click **Activate**.



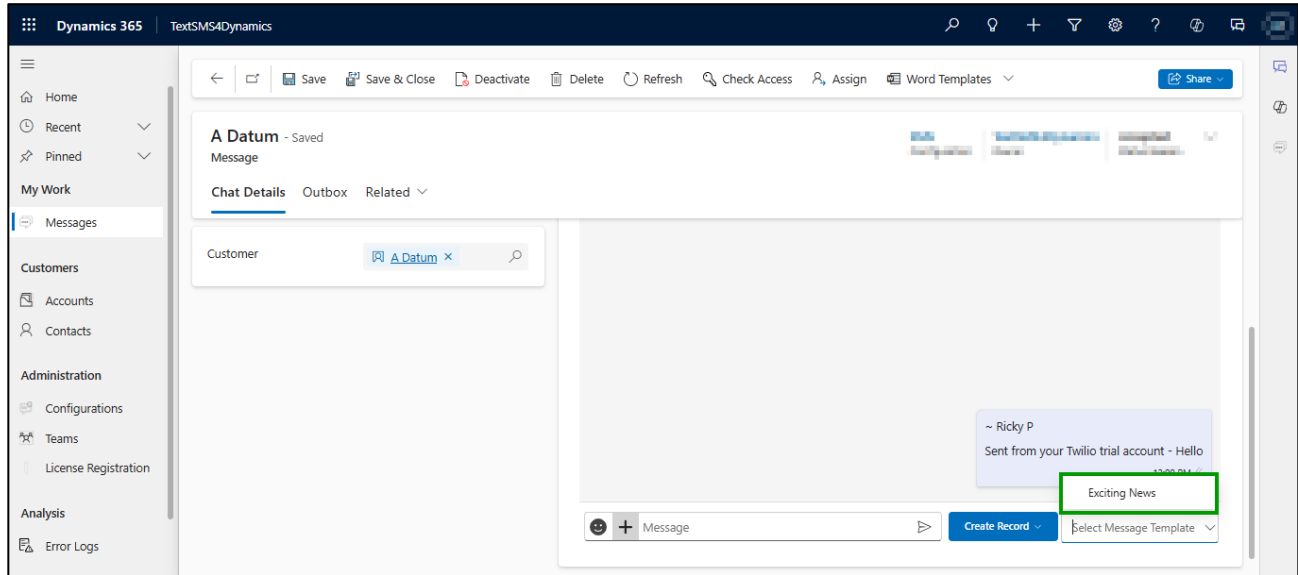
Once trigger is activated, the messages will be automatically sent on lead creation, appointment reminders etc. as shown in the screenshot below.



Message Template

Global Template:

Once you configure the global Message template, you can use it for all record types, here's how the message template appears from the sender's perspective when sent from CRM. The interface and structure mirror those of Text SMS, ensuring a seamless user experience.



FAQs

How to Verify any personal phone numbers you want to send messages?

Once you signed up for your Twilio Trial Account, you must verify any non-Twilio phone numbers you wish to send SMS messages while in trial mode. follow the configuration instructions from this [link](#) to do so.

Contact Us

M/S. INOGIC TECH (INDIA) PVT. LTD.

A/301, Everest Nivara InfoTech Park,

TTC Industrial Area, MIDC, Turbhe

Navi Mumbai, Maharashtra 400705

INDIA

E-mail: crm@inogic.com

Skype: [crm@inogic.com](https://www.skype.com/people/crm@inogic.com)

Twitter: @inogic