



USER GUIDE

# PowerSMS

CRM 2011



Service



Support



Education



Add-ons

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# Overview

This guide will walk you through how to use the PowerSMS add-on for Microsoft Dynamics CRM. It will go over various ways to send an SMS message, how to track if the SMS has been successfully sent, and where to view past sent SMS messages. It will also go over (if you are using Twilio as your gateway) where SMS replies are tracked in the system. Please note that this guide has two parts – one for clients using CallFire as their third party provider and the other for clients using Twilio, please make sure you are reading the right section.

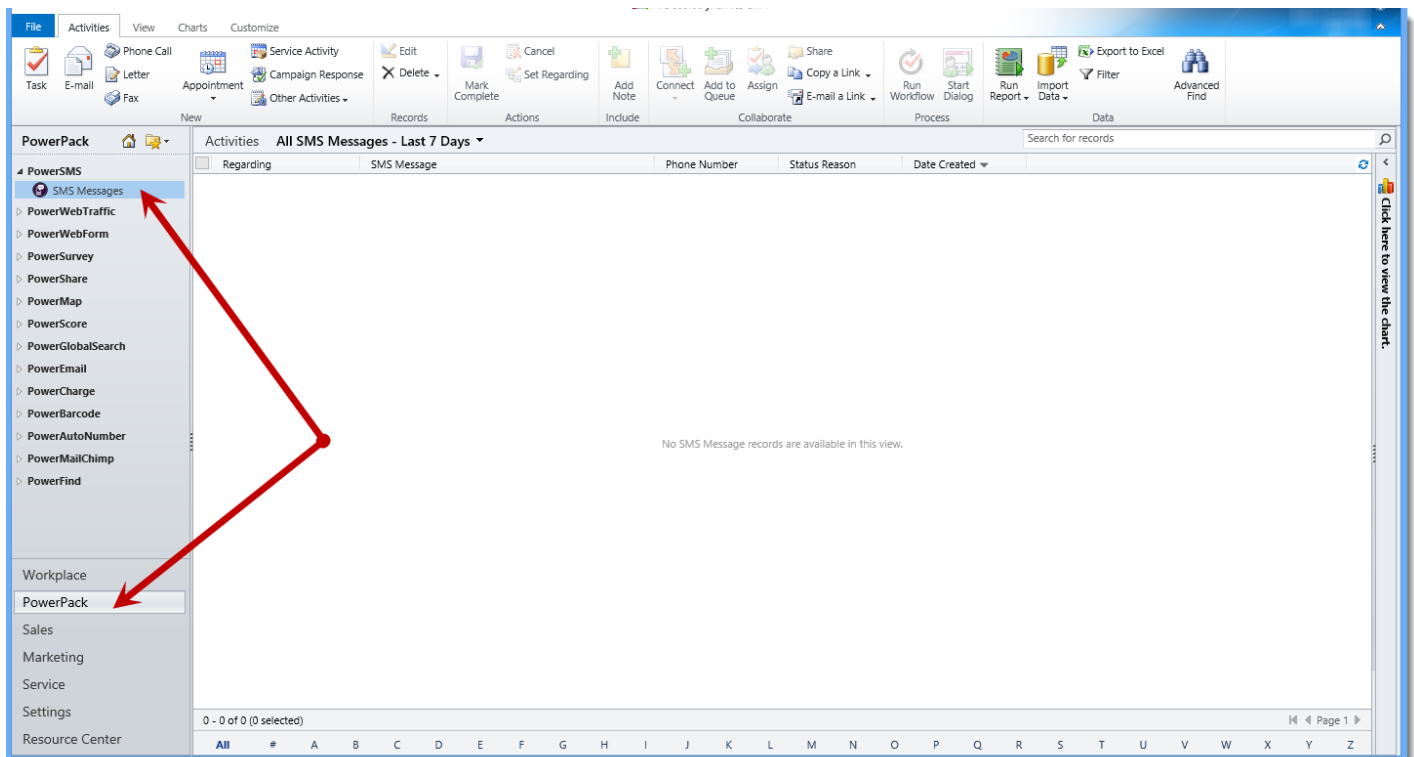
## Navigating PowerSMS

Once you have PowerSMS imported and registered for your CRM, you will see a new section under the PowerPack section that will show SMS Messages.

Additionally there will be a new activity created in your system called “SMS Message” which can be found in any activity section of your CRM system.

## Sending PowerSMS

A SMS message can be sent to any CRM record that allows activities to be added to it. There are a number of different ways to send a PowerSMS from your CRM.



## Sending a SMS to One Person

If you would like to send a SMS to just one person, navigate to their record in CRM and open their record. From the toolbar select 'Other Activities' and then 'SMS Message.'

The screenshot shows the PowerObjects CRM interface. On the left, the 'Customers' section is expanded, and 'Contacts' is selected (labeled 1.). The main area displays a list of contacts under the 'PowerPack Subscribers' group. The contact 'PowerPack Girl' is selected (labeled 2.). The 'Other Activities' dropdown menu is open, and 'SMS Message' is highlighted (labeled 3.).

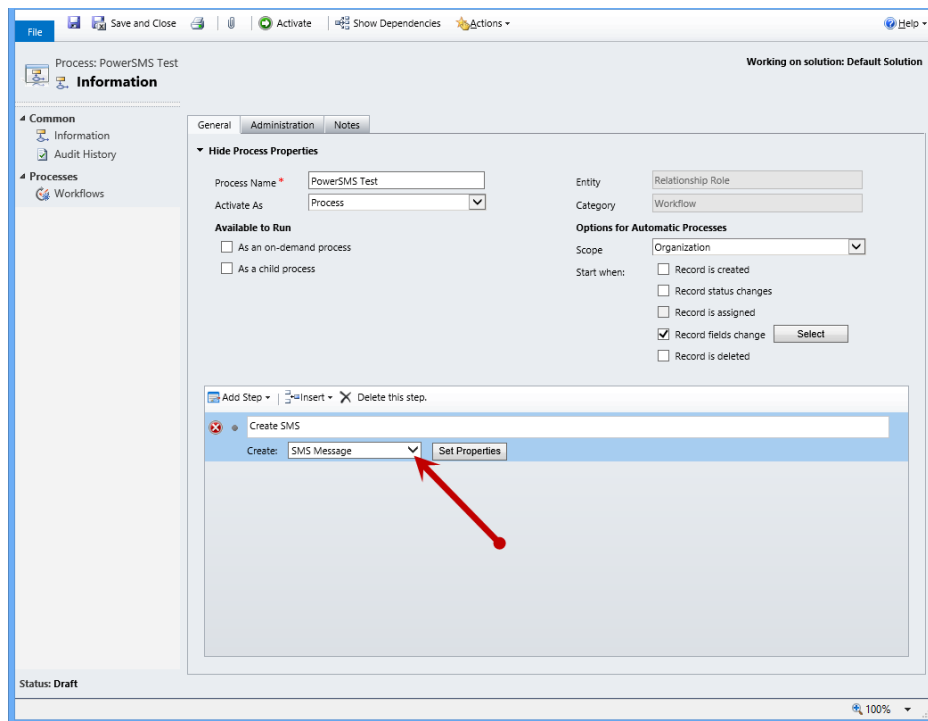
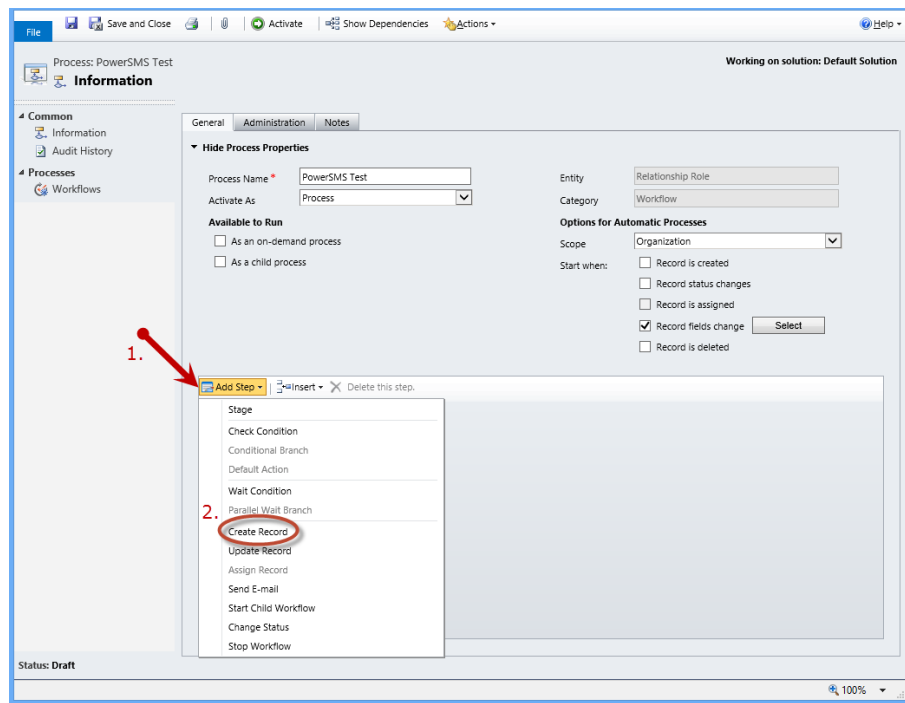
Full Name	Job Title	Parent Customer	Business Phone	Mobile Phone	Street 1	City	State/Provi...	E-mail	Owner
Jim Glynn (sample)	Owner	Coho Winery (sample)	555-0109		7165 Brock Lane	Reniton	WA	someone_j@example.com	
PowerPack Girl	PowerPack Pro	PowerObjects	612-339-3355		718 Washington Ave N	Minneapolis	MN		

If that person has a mobile phone number on their record, that phone number will automatically be populated into the "Phone Number" field on the SMS activity record. The regarding field of the message will be filled in with the name of the person you are sending the SMS to. Type your message in the "SMS Message" field, and click on "Mark Complete" to send the message. Clicking "Save" or "Save & Close" will not send the message.

**Note:** The user who is trying to send the SMS message must either be a system administrator or have the PowerSMS security role assigned to them.

## Sending a SMS via Workflow

Another option for sending a PowerSMS message would be by using a workflow, which automatically fires off the SMS when something happens in your CRM. To send a SMS message through a workflow, you would build the workflow as usual, setting up what trigger you would like to send the SMS message. For example, send a SMS message when a case is closed, or when an opportunity is set to won. Then add a "Create Record" step, and choose SMS Message.



Click on Set Properties, to the right of where you selected to create an SMS Message, and use the Form Assistant on the right hand side of the screen to dynamically fill in the phone number field with a cell phone number, and type the SMS message.

The screenshot shows the 'Create SMS Message' form in the PowerObjects interface. The 'General' section contains fields for 'Phone Number' (with a dynamic value '{Mobile Phone(Contact))'), 'SMS Message' (with the text 'Come visit us at booth 1441'), 'Regarding' (with a dynamic value '{Contact(Contact))'), 'Status Reason' (set to 'Open'), and 'Owner'. The 'Additional Fields' section includes various metadata fields like 'Actual Duration', 'Actual Start', 'CC', 'From', 'Optional Attendees', 'Outsource Vendors', 'Required Attendees', 'Scheduled Duration', 'Start Date', 'Currency', 'Actual End', 'BCC', 'Customers', 'Left Voice Mail', 'Organizer', 'Priority', 'Resources', 'Due Date', and 'To'. On the right, the 'Form Assistant' panel is open, showing 'Dynamic Values' and an 'Add' button circled in red. Red arrows point from the 'Add' button to the 'Phone Number' and 'Regarding' fields, indicating the dynamic values being added.

Then Save and Close. Next, add another step, a "Change Status" step, that will change the status of the SMS to "Pending Sent." This will actually send the SMS message.

The screenshot shows the 'Send SMS' step configuration in the workflow editor. The 'Create' dropdown is set to 'SMS Message' and the 'Set Properties' button is visible. The 'Change record status to:' section is highlighted with a red box, showing 'Create SMS (SMS Message)' selected in the first dropdown and 'Pending Sent' selected in the second dropdown. A red arrow points to the 'Send SMS' step name.

Finally, Save, Activate and test your workflow.



## Sending to a Marketing List

To send a SMS to a marketing list of accounts, contacts or leads, you first need to create a workflow that can be run manually. To do this, navigate to CRM Settings > Processes and click New. Name the process, and choose the type of entity that your marketing list will be made up of (either contacts, leads or accounts). Then click OK.

The 'Create Process' dialog box is shown. It has a title bar 'Create Process' and a subtitle '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.' The form contains the following fields and options:

- Process name: \* (Text field) Value: PowerSMS for Marketing Lists
- Entity: \* (Dropdown menu) Value: Contact
- Category: \* (Dropdown menu) Value: Workflow
- Type: (Radio buttons)
  - ☒ New blank process
  - ☐ New process from an existing template (select from list):
- Table with columns: Template Name, Primary Entity, Owner. It is currently empty with the message 'No process template records are available in this view'.
- Page indicator: 0 - 0 of 0 (0 selected) Page 1
- Buttons: Properties, OK, Cancel

The status bar at the bottom shows the URL: <https://kristitest.crm.powerobjects.net/sfa/w> and 'Internet | Protected Mode: On'.

Next, uncheck the box that says "Start when: Record is created", and check the box that says "Available to Run: As an on-demand process."

The 'Process: PowerSMS for Marketing Lists' configuration window is shown. It has a title bar with 'File', 'Save and Close', 'Activate', 'Show Dependencies', 'Actions', and 'Help'. The window is divided into several sections:

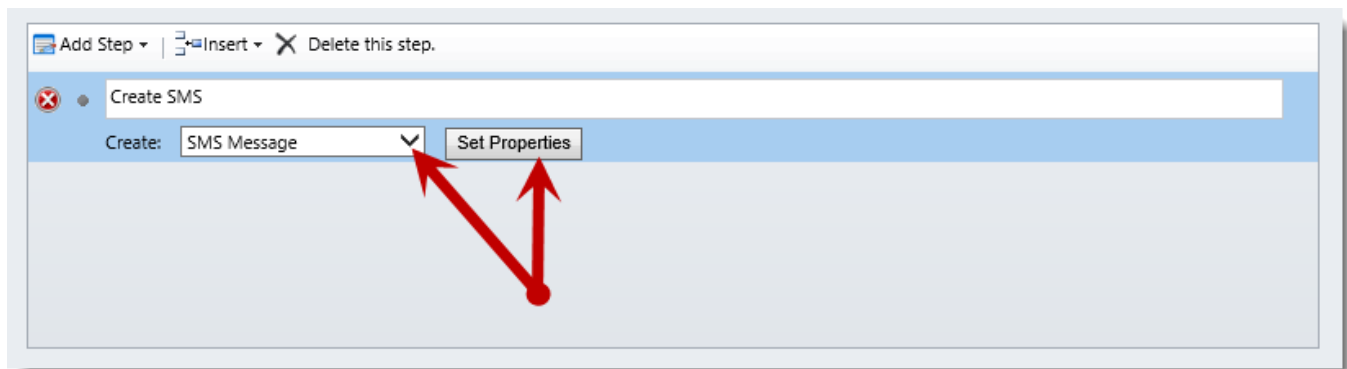
- Information** (selected in the left sidebar):
  - Process Name: \* (Text field) Value: PowerSMS for Marketing Lists
  - Entity: (Text field) Value: Contact
  - Category: (Text field) Value: Workflow
  - Activate As: (Dropdown menu) Value: Process
  - Options for Automatic Processes:
    - Scope: (Dropdown menu) Value: User
    - Start when: (List of checkboxes)
      - ☒ Record is created
      - ☐ Record status changes
      - ☐ Record is assigned
      - ☐ Record fields change (with a 'Select' button)
      - ☐ Record is deleted
- Available to Run** (List of checkboxes)
  - ☒ As an on-demand process
  - ☐ As a child process
- Add Step** (List of buttons) Value: Add Step, Insert, Delete this step.

- Status:** Draft

The status bar at the bottom shows '100%' zoom.

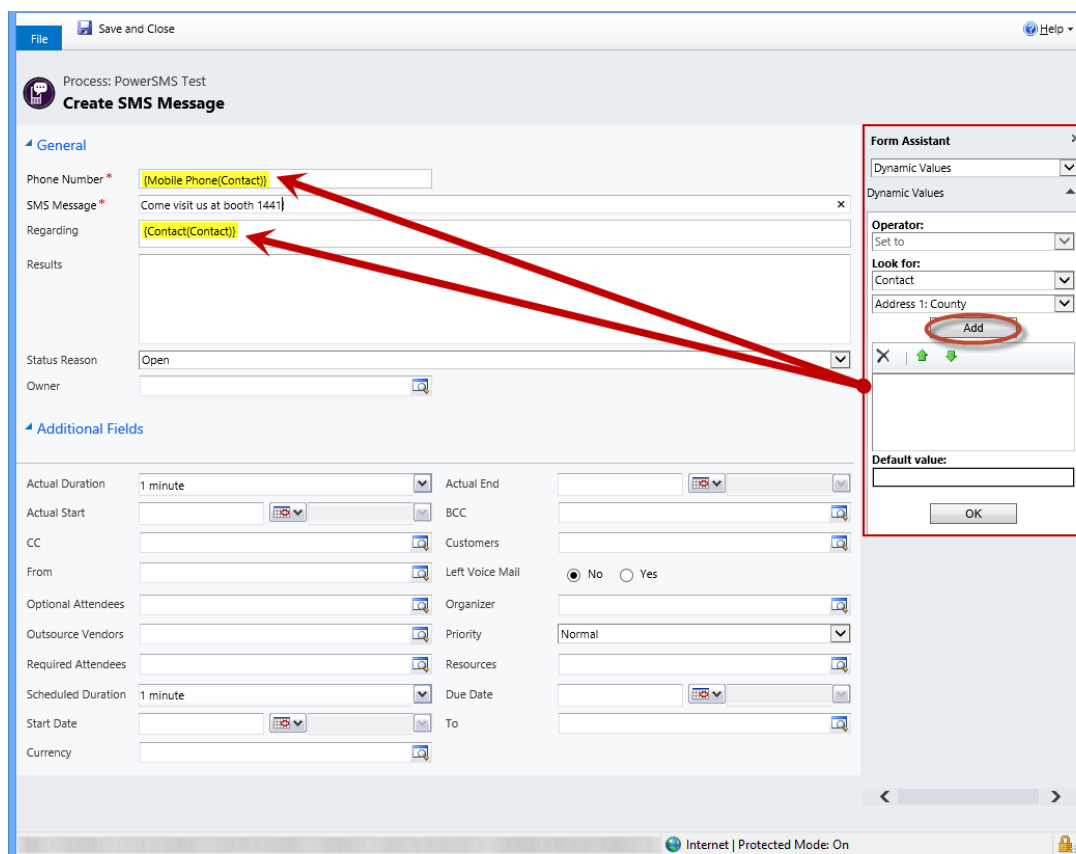


Add a Step, choose "Create Record" and choose "SMS Message" in the drop down. Then click on Set Properties.



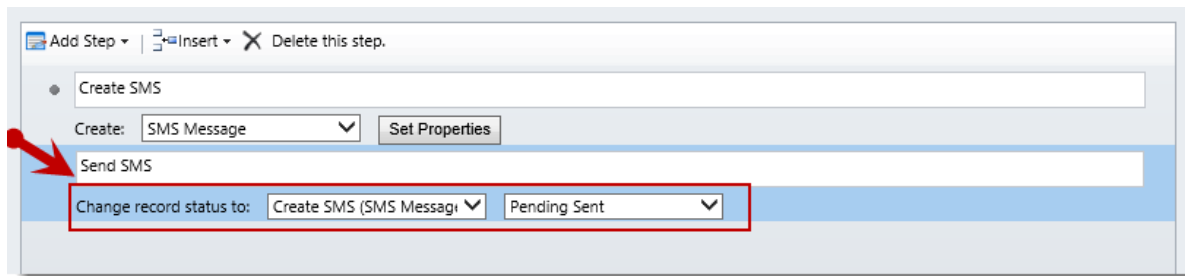
Use the form assistant on the right side to dynamically insert the mobile number of the lead, contact, or account. Type the SMS message you would like to send, and click Save and Close.

**Note:** You can also use the form assistant on the right-hand side to insert dynamic values (such as the person's name) into the text message.



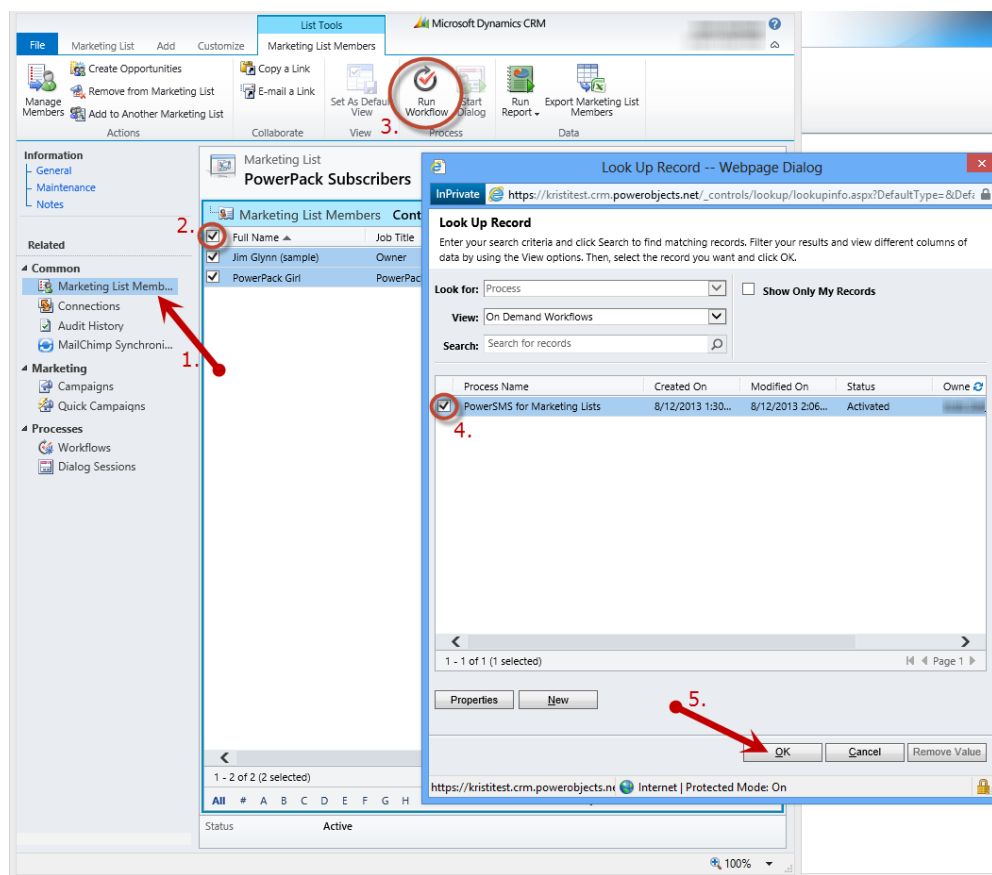


Now, add a step that will change the status of the SMS message to "Pending Sent", which will send the message. To do this, click on "Add Step" and add a "Change Status" step. Choose "SMS Message" in the first dropdown and "Pending Sent" in the second dropdown, so that your workflow steps look similar to the below.



Then Save and Activate your workflow.

Next, create a marketing list, as you normally would in CRM. Once you have pulled together your marketing list members, click on marketing list members on the left hand side, and click to select all members at the top of the view. Click on Run Workflow at the top of the window, and select the workflow you just created. Then click OK.



Remember to repeat this with each page of marketing list members.

**Note:** It is the user's responsibility to comply with mass SMS laws.



## Opt-ins

It is the CRM user's responsibility to ensure that people they are sending SMS messages to have opted in to receive that text message. There are a number of ways to keep track of opt-ins in CRM. One option to keep track of SMS opt-ins would be to add a radio button to the contact/lead form called "Allow SMS Message" and set that to radio button to "yes" or "no" depending on that person's SMS preference.

## Unsubscribes

If someone would like to unsubscribe to your SMS messages, all they have to do is reply "stop" to your message. This ensures that they will not receive your messages any longer. If you try to send an SMS message to someone who has unsubscribed, they will never receive your message, and you will not be charged for that SMS message. If you are using Twilio as your SMS gateway, that "stop" response will be tracked back in CRM.

If someone unsubscribes by replying "stop," they will receive a message letting them know they have unsubscribed.

Twilio's unsubscribe message reads: "You have been successfully unsubscribed. You will not receive any more messages from this number. Reply START to re-subscribe."

**Note:** Currently, PowerSMS does not record an SMS unsubscribe in CRM, but we hope to offer this as an enhancement in a future version,

## PowerSMS Send Results

After your SMS message is sent, you will get a message in the "Status Reason" field, letting you know either that your message was sent successfully, that it's pending send, or that the sending failed. You will also get a message in the "Results" field on the message, letting you know if the message was sent successfully and, if it was not, why not.

The screenshot displays the 'SMS Message' record in the CRM. The message content is 'Come visit us at booth 1441!'. The 'Results' field, highlighted with a red border, contains the text 'Message is successfully sent'. The 'Status Reason' dropdown menu is also highlighted with a red border and shows 'Sent Successful'. Other visible fields include 'Phone Number', 'SMS Message', 'Regarding' (set to 'PowerPack Girl'), and 'Owner'.

Under the PowerPack tab, you will also find an SMS Message area that lists all SMS messages that were sent, what the message was and who it was sent to. You can change this view to see all SMS messages, all failed SMS messages, all successful SMS messages, all SMS message sent today or in the last 7 days, or you can create your own SMS view.

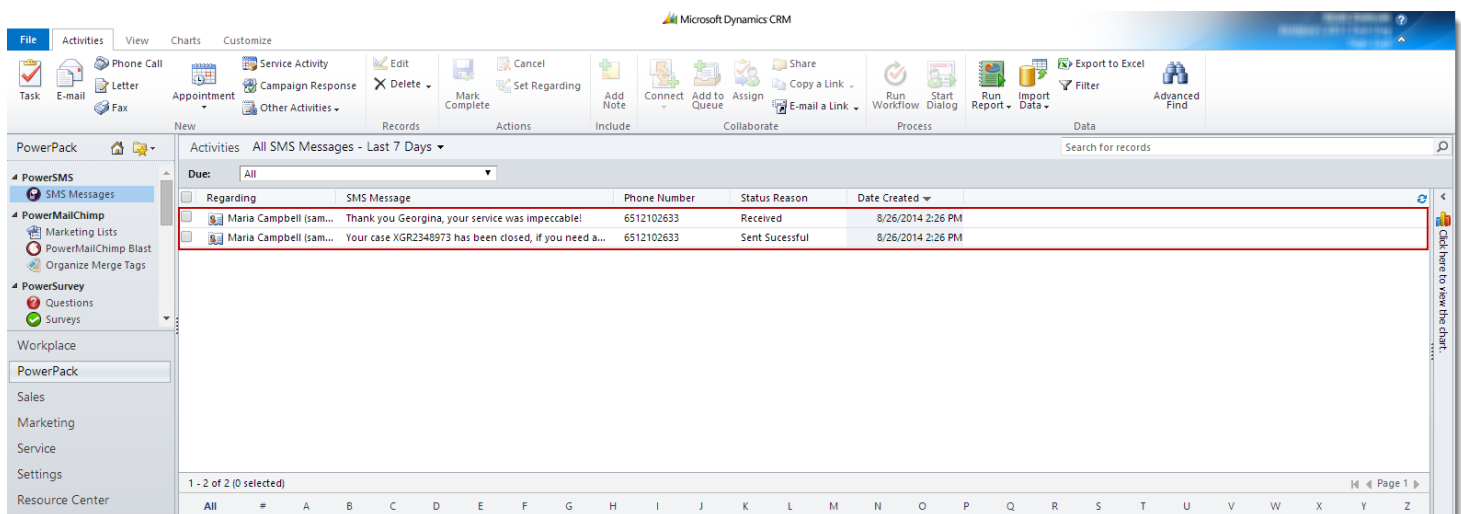
## Twilio Users

If you're using Twilio as your SMS provider, you will be able not only send messages to international phone numbers, but will also be able to track SMS replies back in CRM.

## Responses

If someone replies to your SMS message, their message will also be tracked back in CRM. If the phone number coming back in matches a phone number on a record in your system, the SMS message will automatically be set regarding that record. The status reason of the SMS message will be "Received." Even if the recipient replies "STOP" to unsubscribe, this will also be tracked in CRM.

Responses can be found in the PowerPack section of CRM under SMS Messages. This section will give you a list of all sent and received SMS messages. If a received SMS message does not match a phone number format in CRM it's regarding will not be set.



Regarding	SMS Message	Phone Number	Status Reason	Date Created
Maria Campbell (sam...)	Thank you Georgina, your service was impeccable!	6512102633	Received	8/26/2014 2:26 PM
Maria Campbell (sam...)	Your case XGR2348973 has been closed, if you need a...	6512102633	Sent Successful	8/26/2014 2:26 PM

Additionally, you will be able to see sent and received SMS messages on the individual contact or lead records that you send the SMS messages to under closed activities.

Thanks for your interest in PowerSMS. Should you have any questions, contact us at 612-339-3355 or email [powerpackpro@powerobjects.com](mailto:powerpackpro@powerobjects.com). Remember, your trial will expire 30 days from the date of installation. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and enter your credit card information – you will be charged \$1/CRM user/month.

Interested in more CRM tips and tricks? Check out our [blog](#) or subscribe to our [newsletter](#).

