Octopush

MS Dynamics CRM extension

User guide

Installation

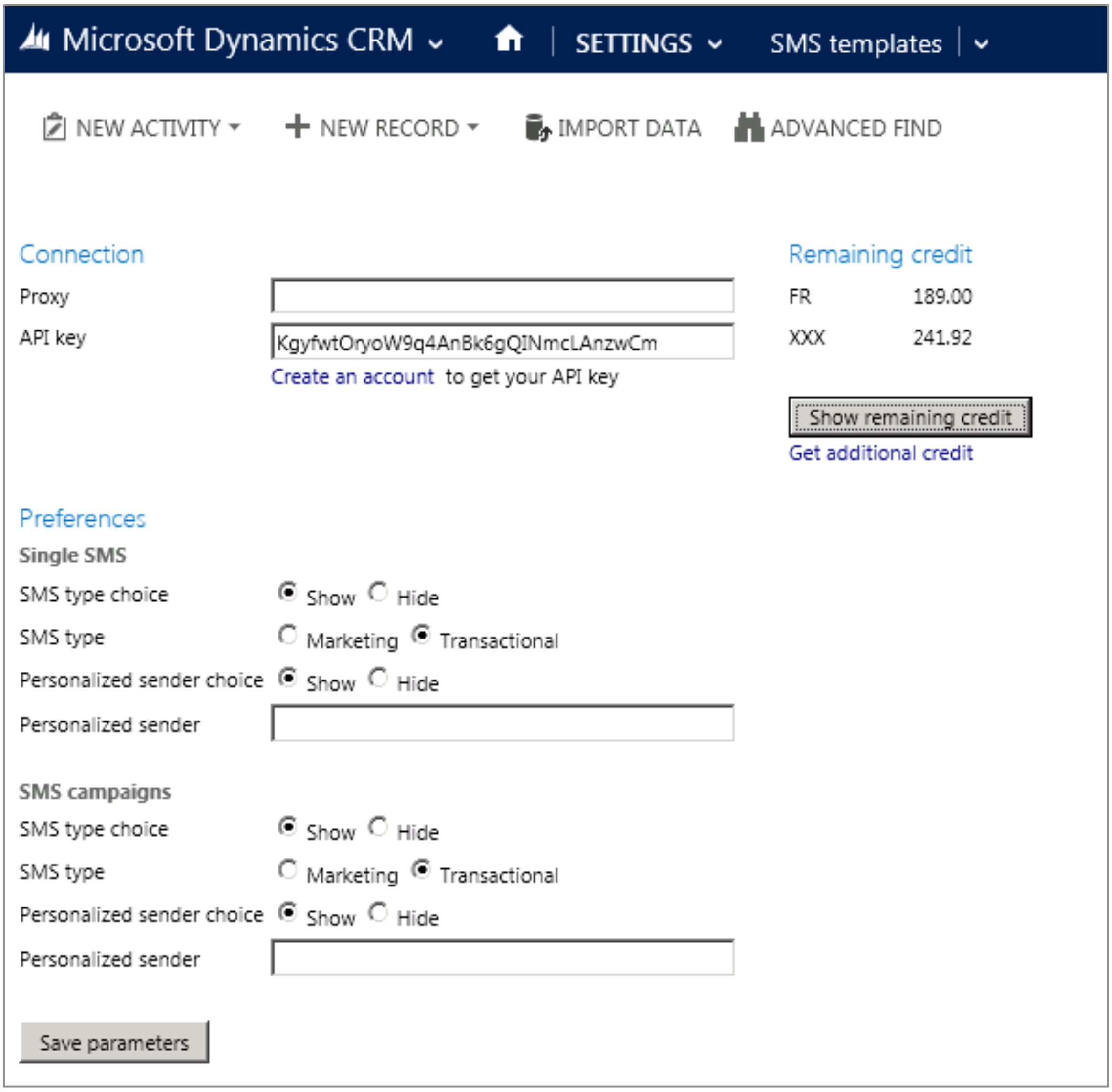
Importing the Dynamics CRM solution

To import the « Octopush » Dynamics CRM solution :

- Download the « Octopush Dynamics CRM 1.0.zip » file, from the Octopush website (http://xxxxxx)
- Within the Settings section of your Dynamics CRM instance, go to Customization > Solutions.
- Click on Import
- Browse to the location of the zip file containing the managed solution
- Select « Activate any processes and enable any SDK message processing steps included in the solution » and click Next until the import starts.
- After installation, click on « Publish all customizations »

Configuration

Go to the « Settings > Configuration » section :



Connection

- Proxy : Proxy server used by your Dynamics CRM server to access Internet. Your Dynamics CRM server must be able to access Internet, in order to communicate with Octopush servers. The server name must be specified in the format « SERVER_NAME:PORT » (for example : « proxy.domain.com:8080 »).

- API key : Your Octopush identification key. If you don't have an API key, get one by clicking on « Create an account ».

Preferences

Single SMS

- SMS type choice : Indicates if the users should be able to choose between a « marketing » SMS and a « transactional » SMS.

- SMS_type : The default SMS type, « marketing » or « transactional ».

- Personalized sender choice : Indicate if the users should be able to choose a personalized sender

- Personalized sender : the default personalized sender (optional)

SMS campaigns

- SMS type choice : Indicate if the users should be able to choose between a « marketing » SMS and a « transactional » SMS.

- SMS_type : The default SMS type, « marketing » or « transactional ».

- Personalized sender choice : Indicates if users can choose a personalized sender

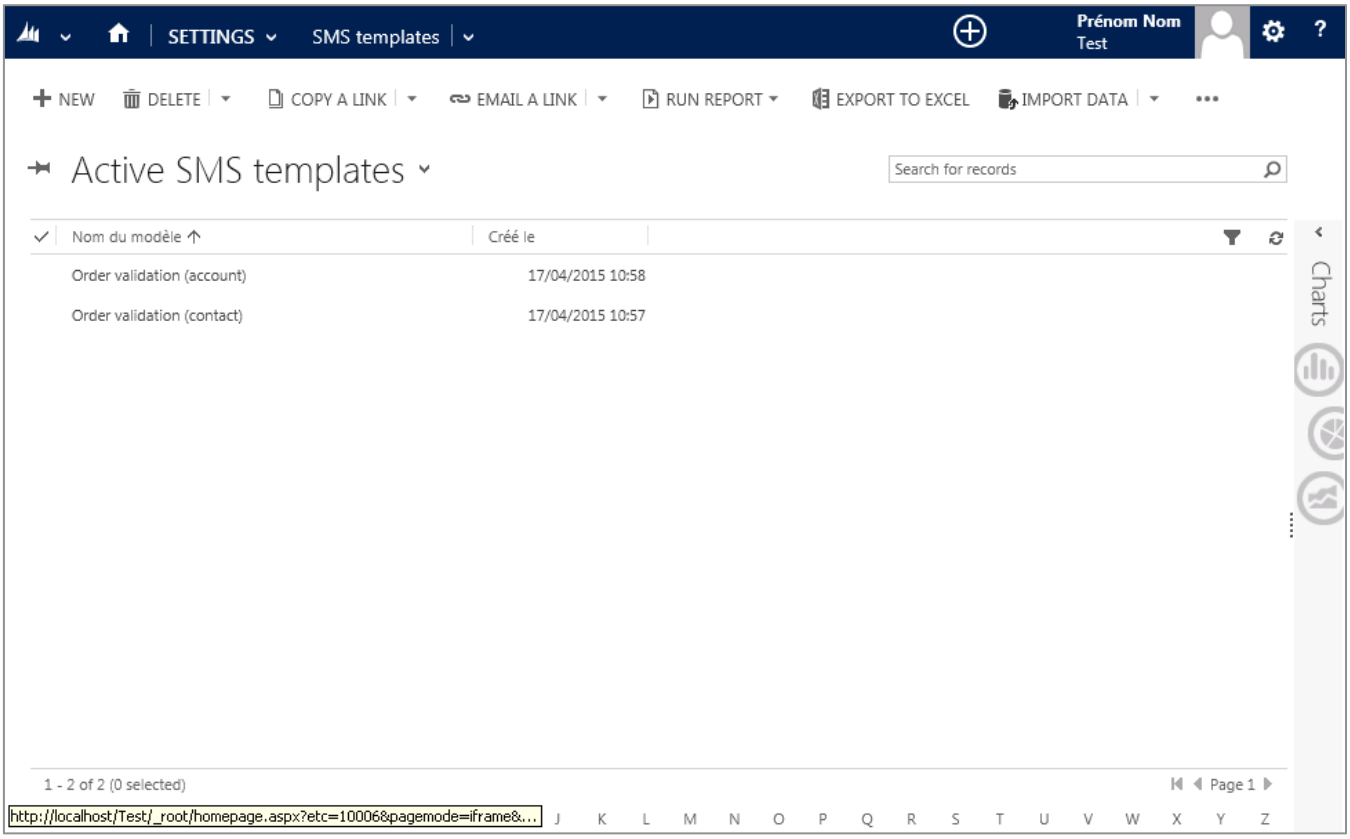
- Personalized sender : the default personalized sender (optional)

Remaining credit

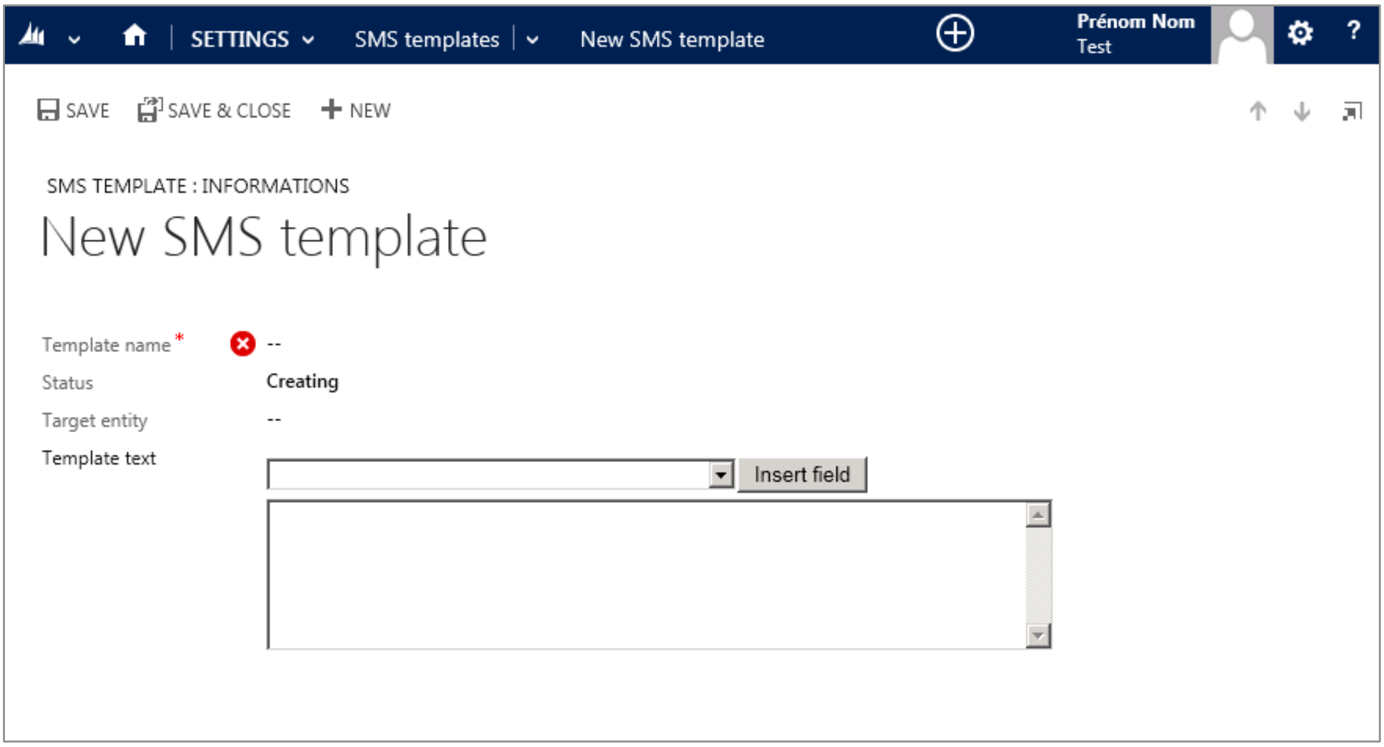
Click on « Show remaining credit » to show the number of SMS remaining on your account.

SMS templates

To create SMS templates, which can include dynamics fields, go in the « Settings > SMS templates » section.



Click on « New » to create a new template.

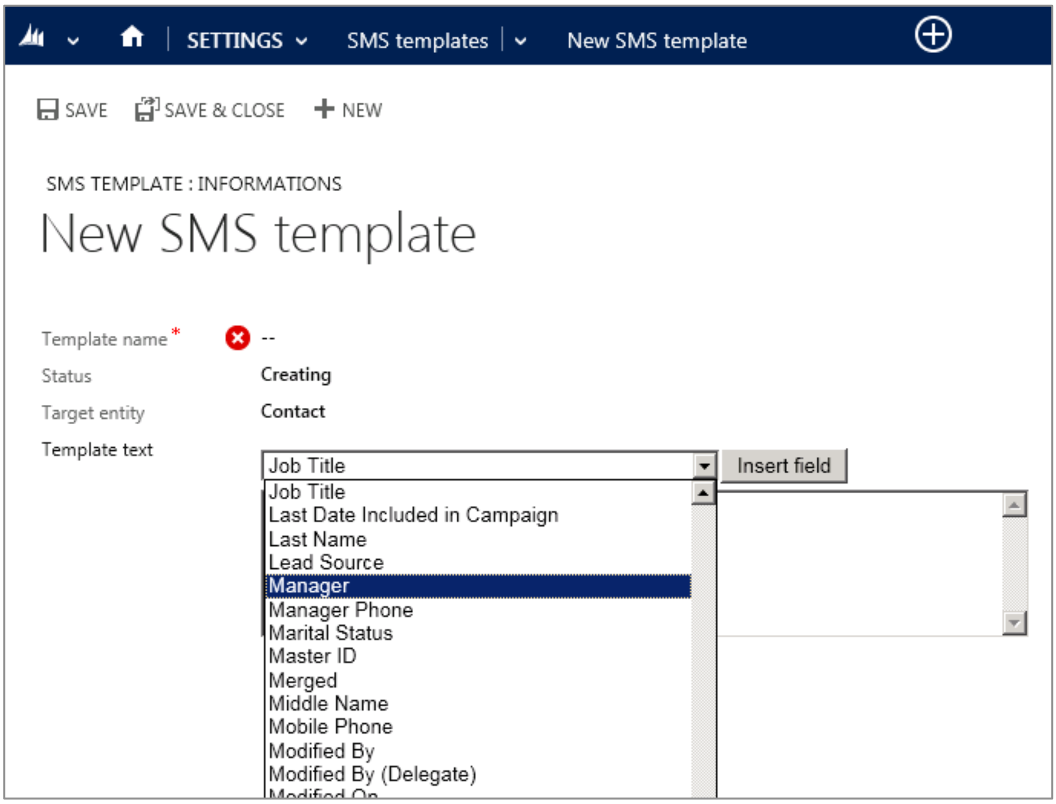


- Template name : this field is mandatory.

- Status : « Creating » or « Published ». Templates in « Creating » status are not visible to users

- Target entity : SMS can be sent to leads, contacts or accounts. Choose the record type for which you want to create a template.

- Template text : The template can contains dynamic fields. To add a dynamics field, select it in the dropdown list and click on « Insert » :



NB : the dropdown list contains all the fields of the chosen record type (lead, contact or account). If you have added custom fields to one of these record types, those fields will automatically be available in the dropdown list.

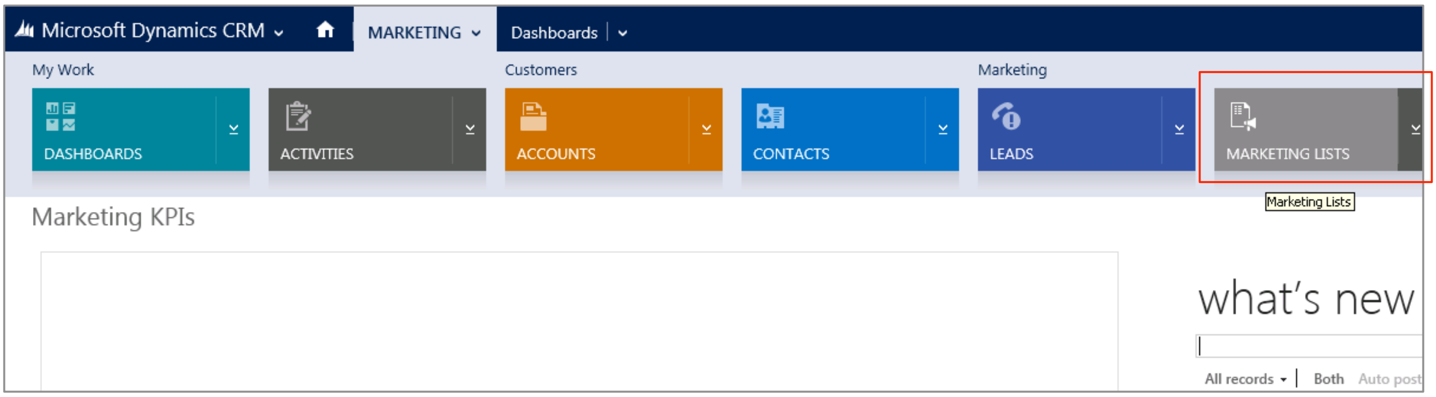
Once you're done, give the users access to the template, by changing its status to « Published ». Then click on « Save » or « Save and close ».

Marketing lists

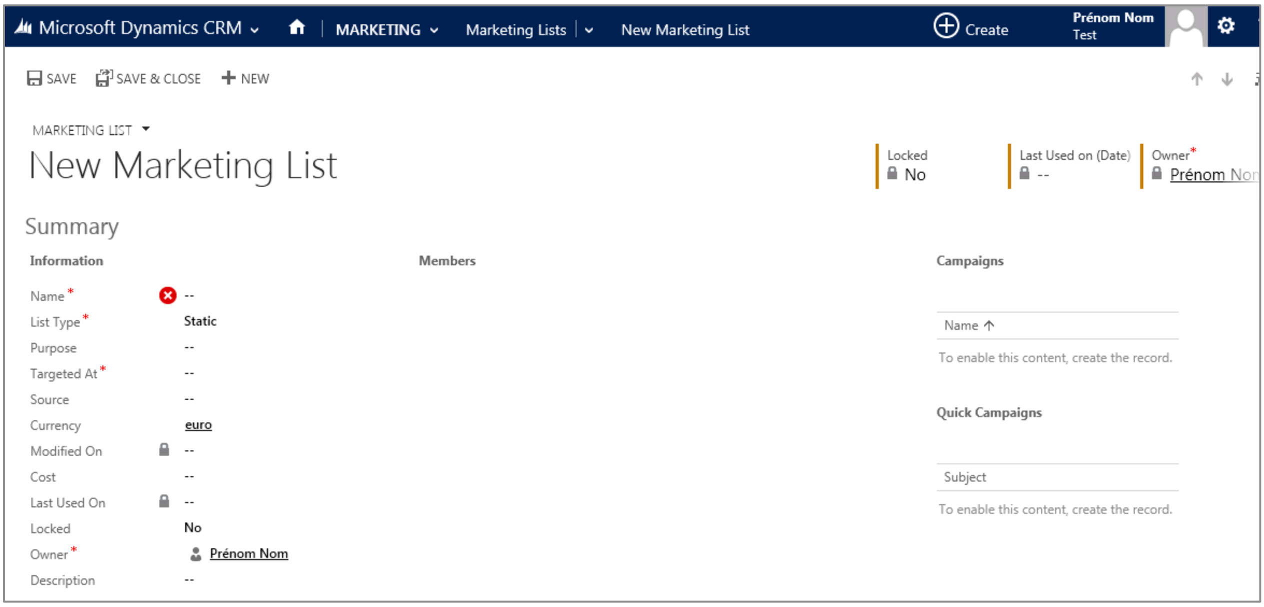
Marketing lists are the targets of SMS campaigns. They can address leads, contact and accounts.

Creating a marketing list

To create a marketing list, go to the « Marketing > Marketing lists » section.



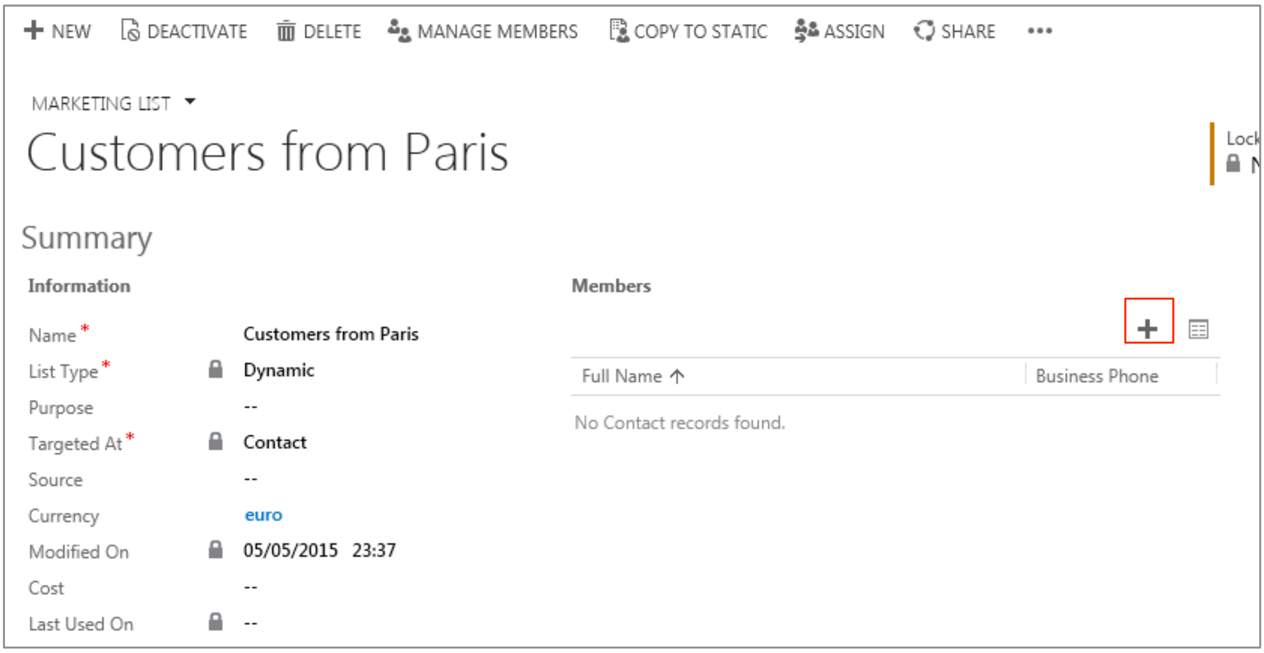
Click on « New » to create a new marketing list.

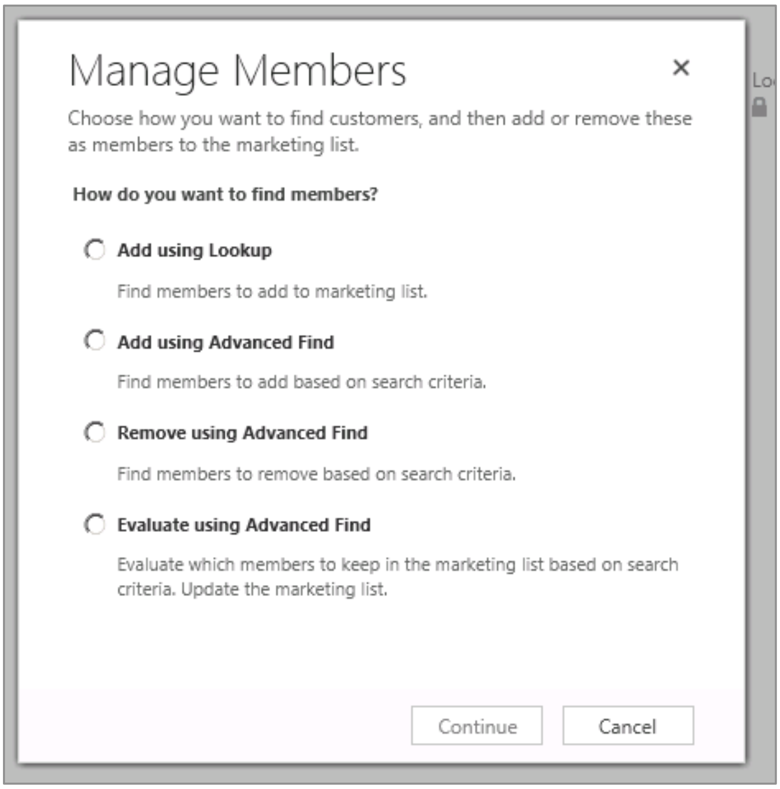


- Name : This field is mandatory.
- List type : « Static » or « Dynamic » :
  - In a static list, members can be added manually or according to search criterias. The members list doesn't evolve by itself.
  - In a dynamic list, members are added according to search criterias. The list is automatically populated with records matching those criterias. When new records are created, they are then automatically added to the marketing list, if they match the list criterias.
- Target : Lead, contact or account. A marketing list can only contains records from the same type. If you want to send SMS to multiple records types, multiple marketing lists should be created.

Add members to a marketing list

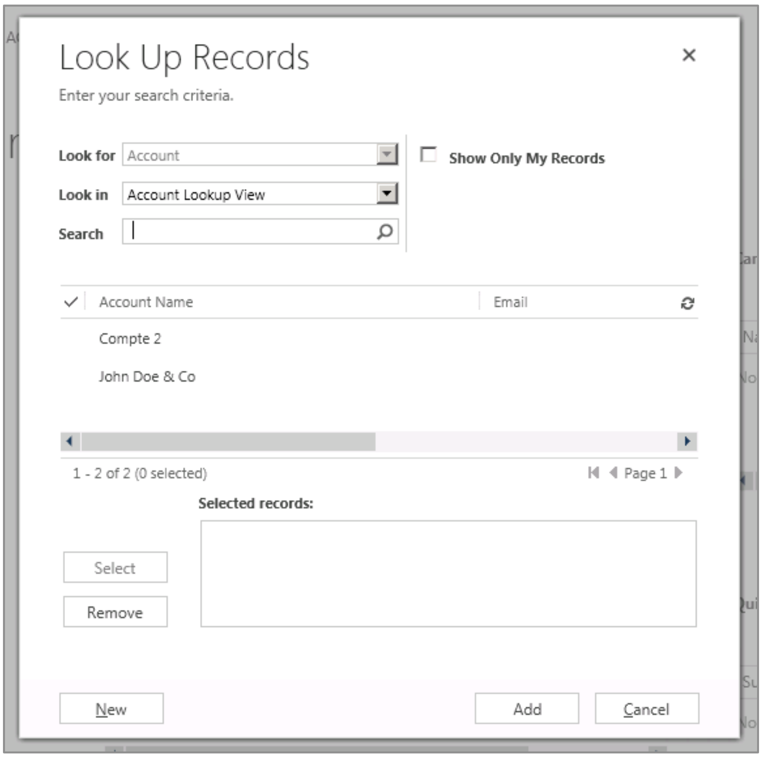
After the marketing list has been saved, click on the « + » icon in the « Members » zone :



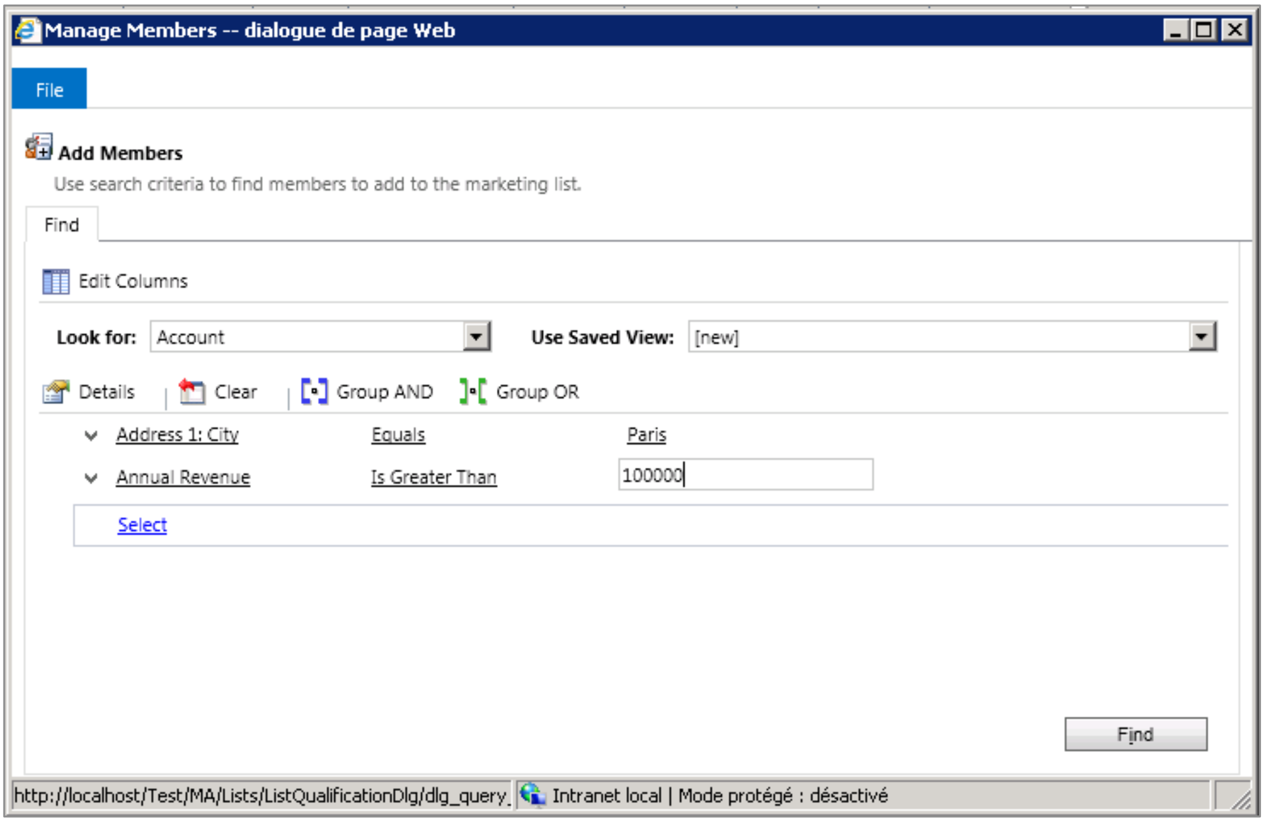


The members list can be managed in various ways :

- Add using Lookup : Allow to search and add members from a simple search (for example a search by the name of the members)



- Add using Advanced Find : Search and add members from an advanced multi-criterias search.



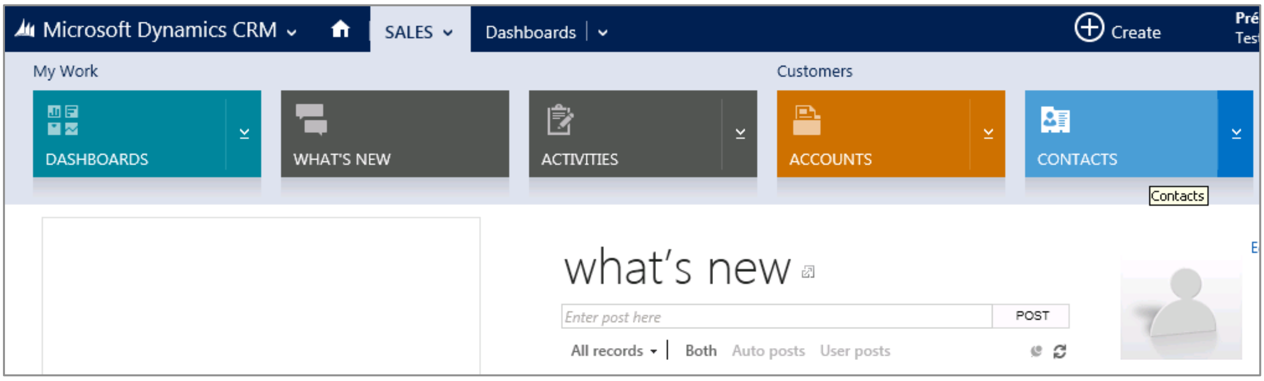
- Remove using Advanced Find : Remove the members who match the results of an advanced search.

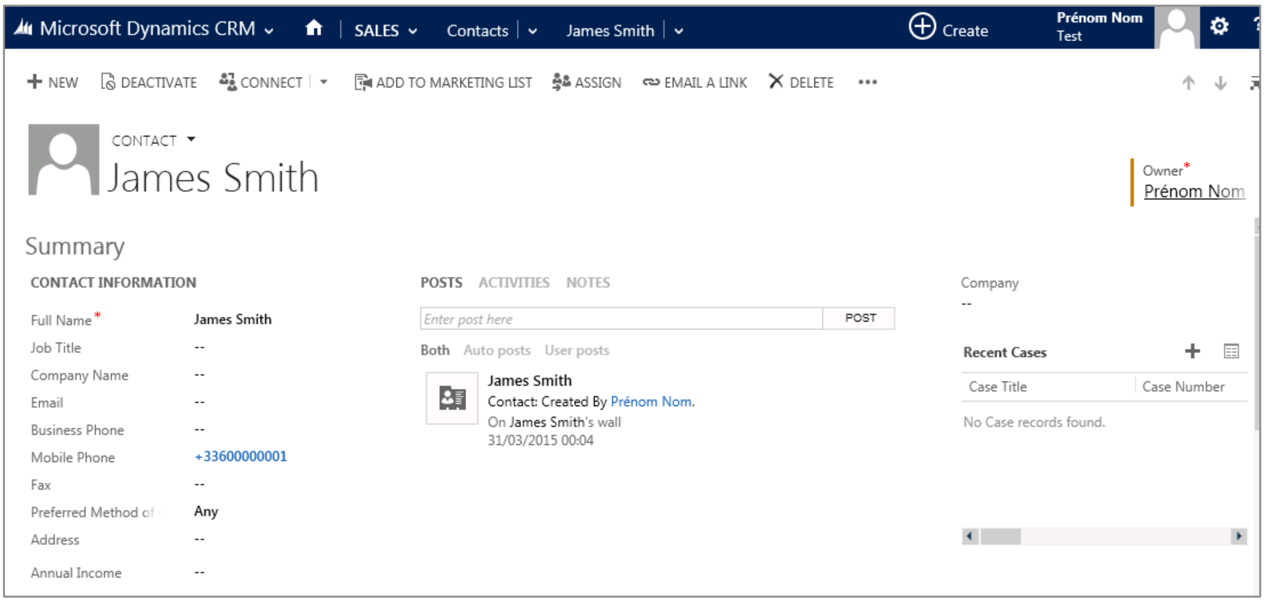
- Evaluate using Advanced Find : Only keep members who match the results of an advanced search.

Using the extension

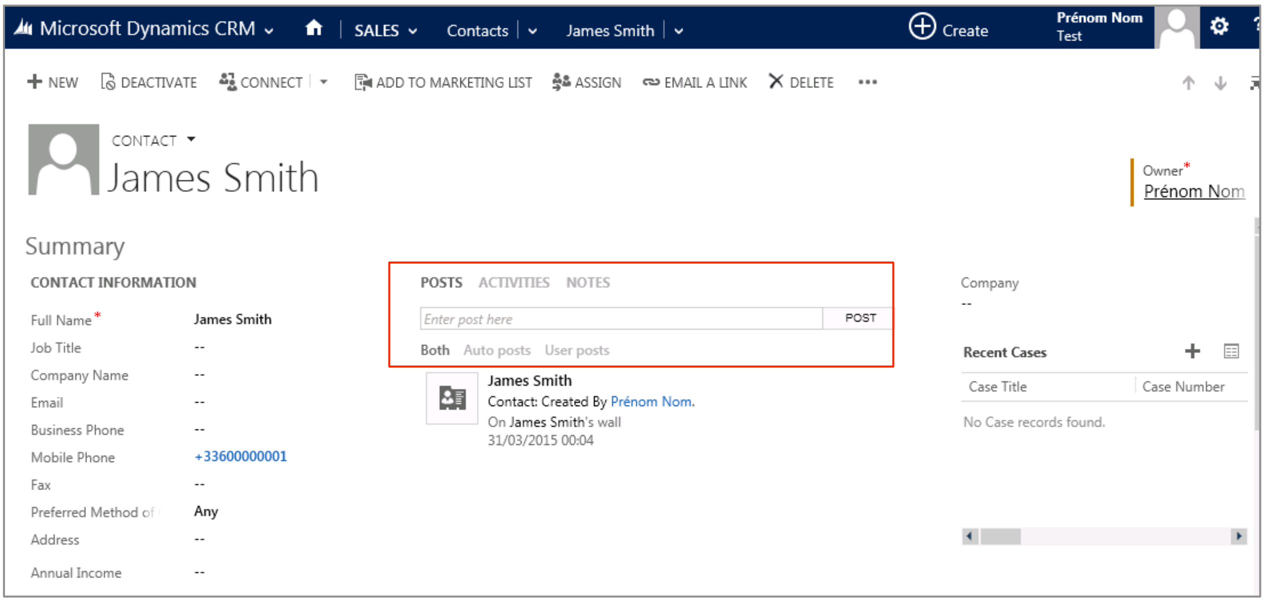
Sending a single SMS

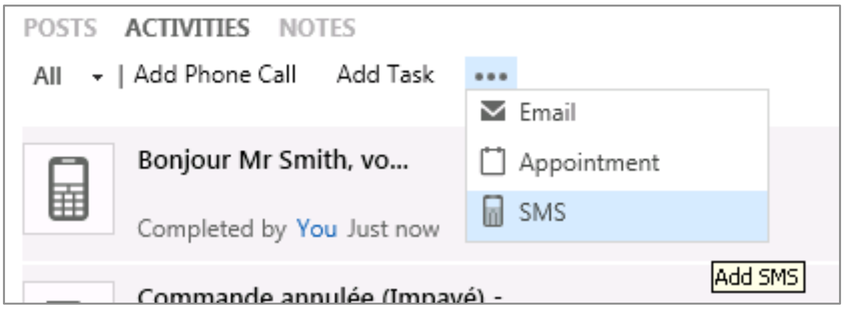
Open the lead, contact or account to which you want to send a SMS.



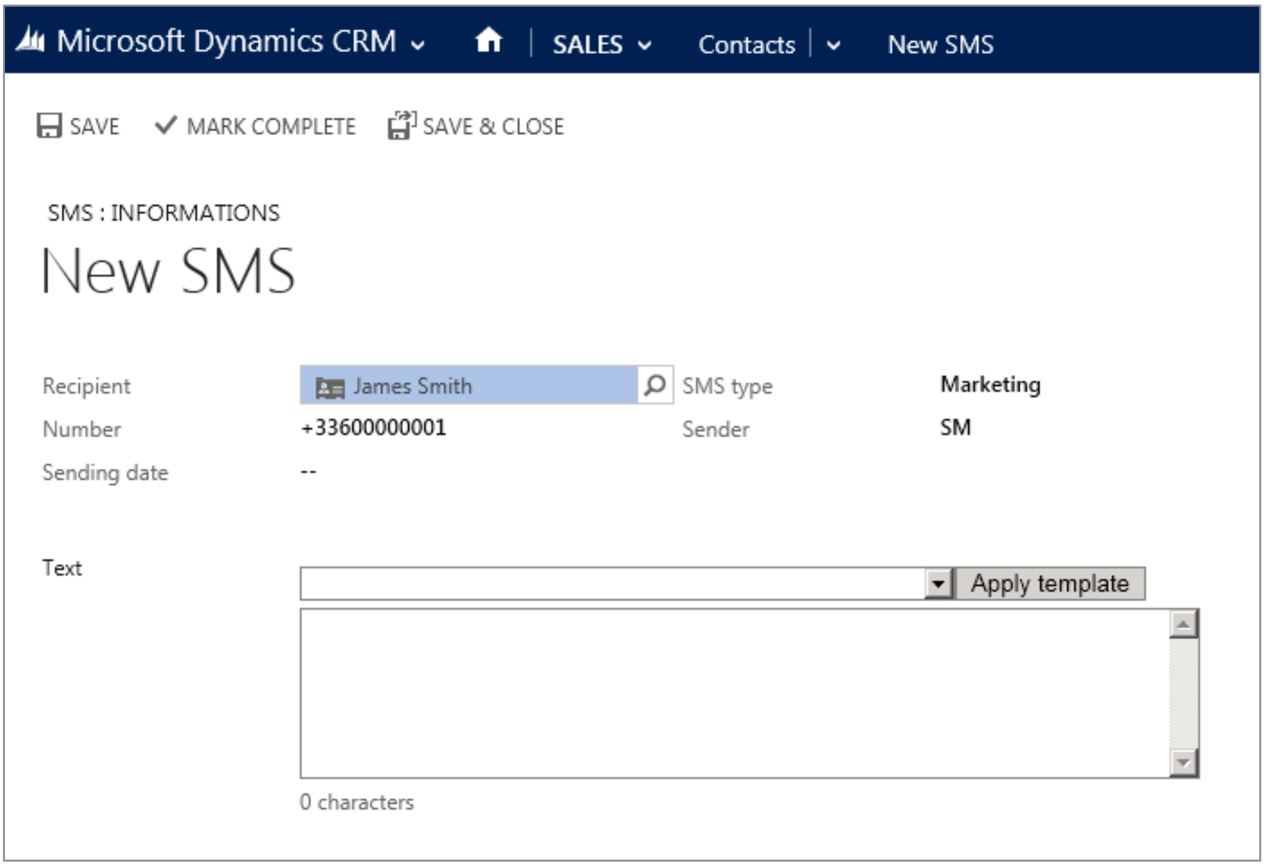


In the Activities zone, choose « add SMS » :





The new SMS form opens :



- Recipient : link to the SMS recipient. This field is automatically filled.

- Number : mobile number of the recipient. This field is automatically filled and can be modified before sending the SMS.
  NB : For leads and accounts, the number retrieved is the « mobile number » of the lead/account. For accounts, the mobile number retrieved is the « mobile number » of the account principal contact.

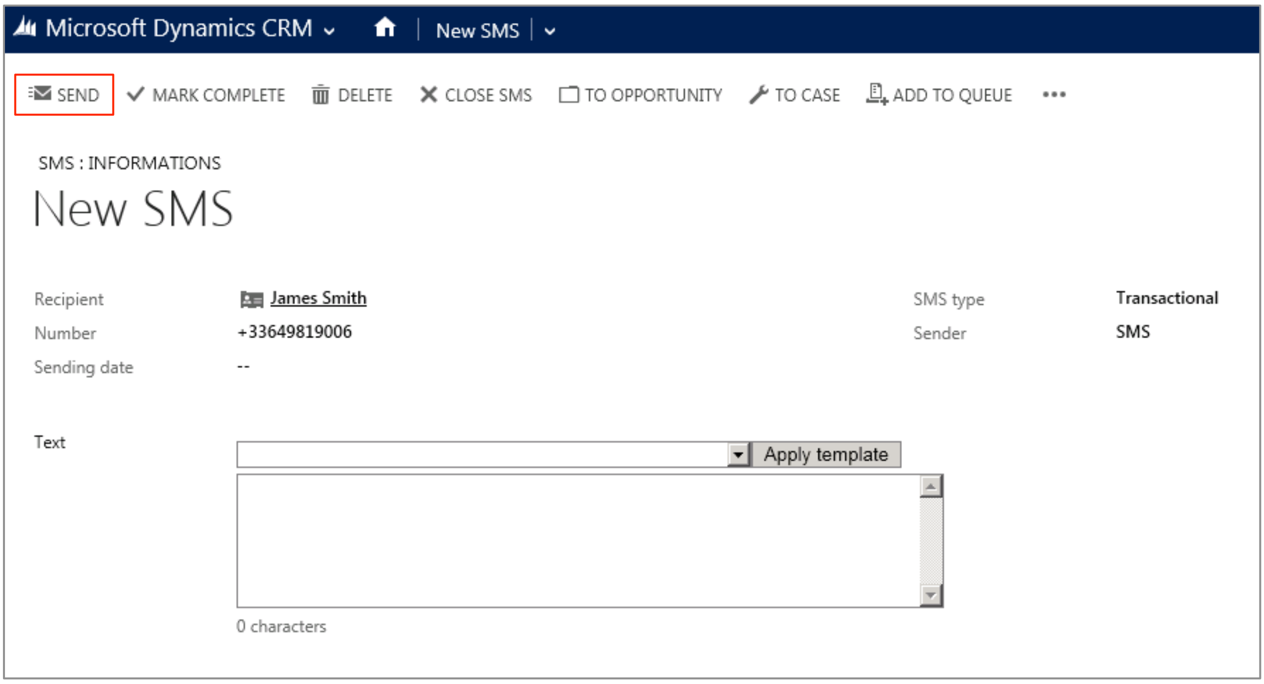
- SMS type : marketing or transactional. NB : this field is visible only if the SMS type choice has been allowed if the preferences (see Preferences).

- Sender : A personalized sender, optional. NB : this field is only visible if the sender choice has been allowed in the preferences.

- Date d'échéance : Choose the date and time at which you want the SMS to be sent. Leave this field empty if you want your SMS to be sent immediately.

Type in your message in the « Text » field. Your message can be based upon a SMS template, by selecting one in the dropdown list and clicking on « Apply template ».

Click on « Save », then « Send », to send the SMS.

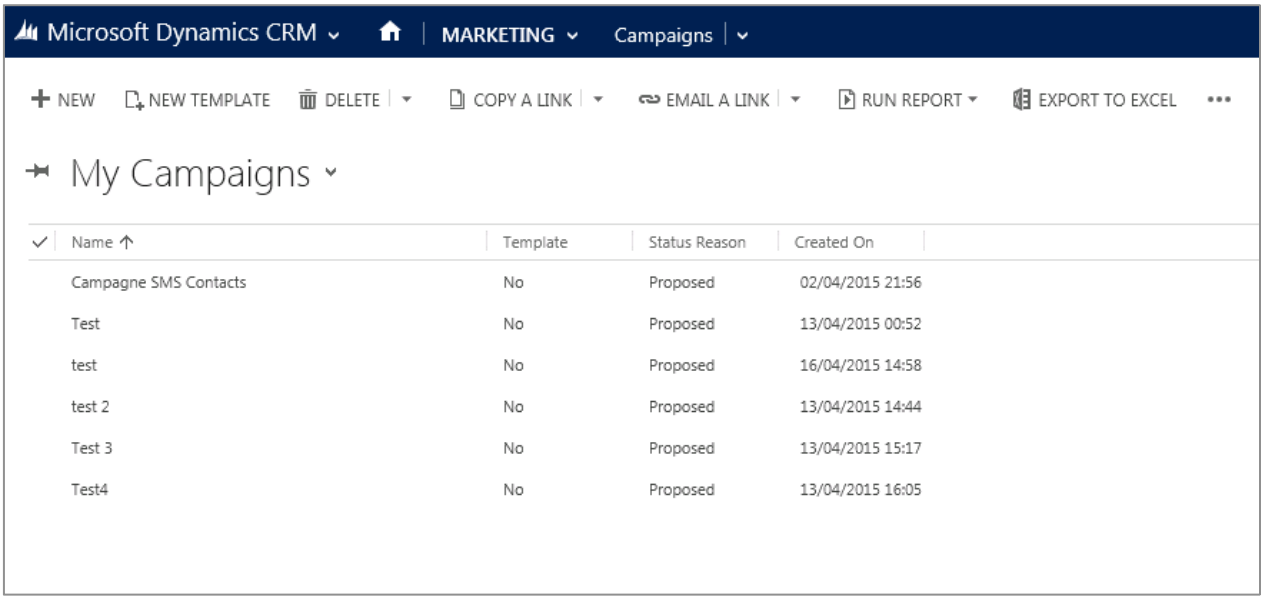


An « SMS » activity is automatically added to the recipient history.

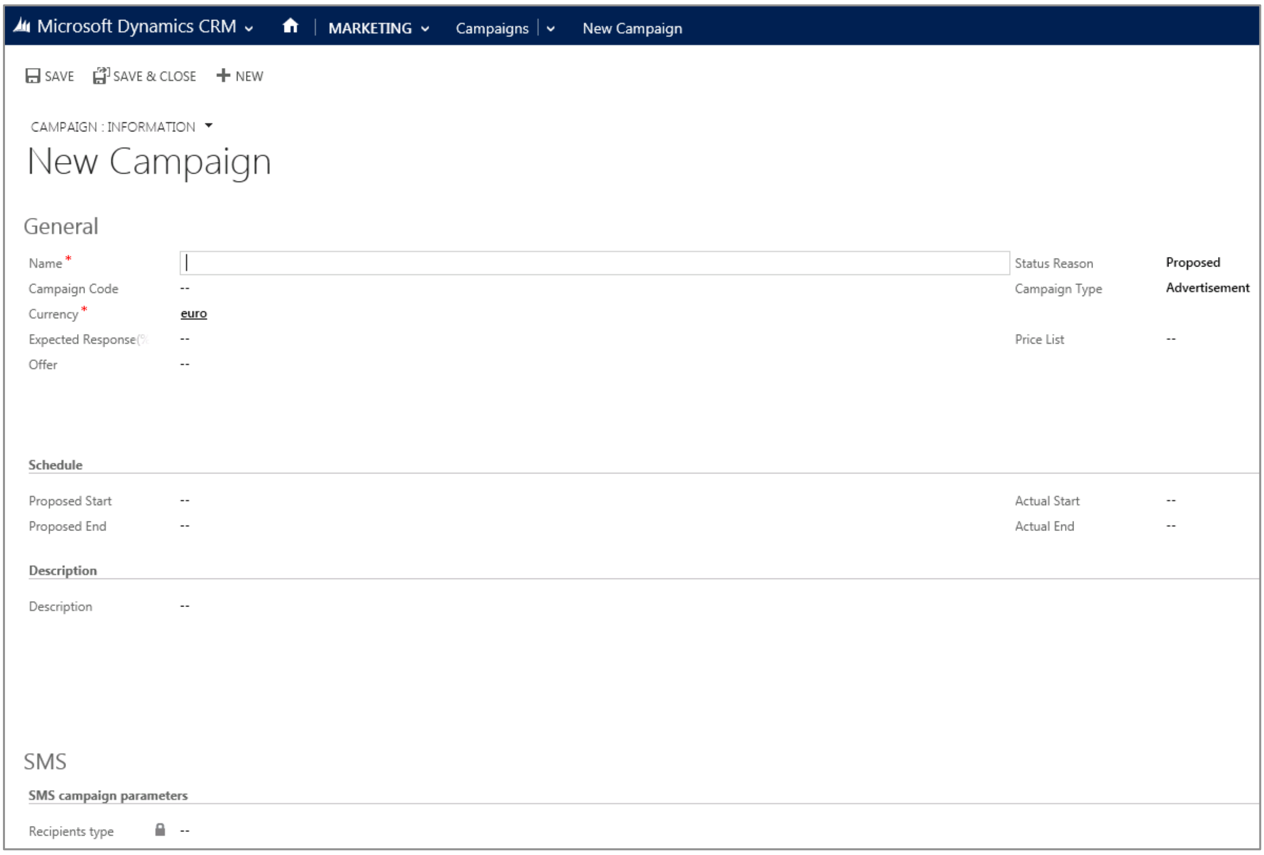
SMS campaigns

Creating a campaign

To create a new campaign, go to the « Marketing > Campaigns » section.



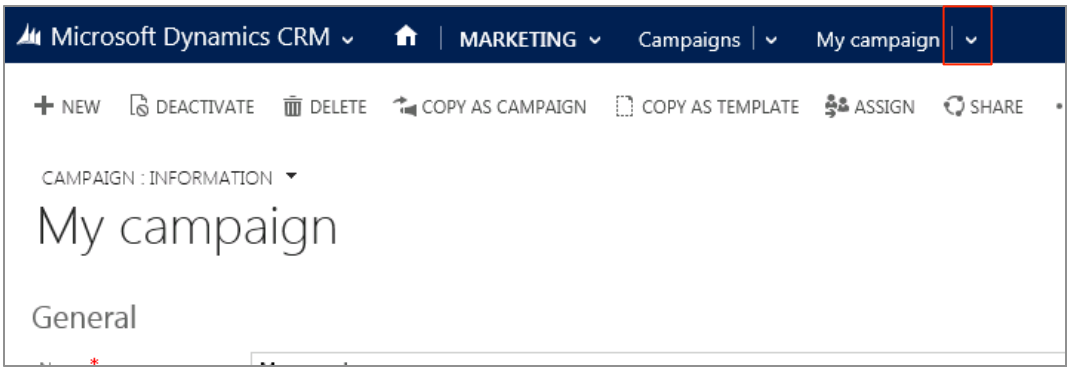
Click on « New » to create a new campaign.



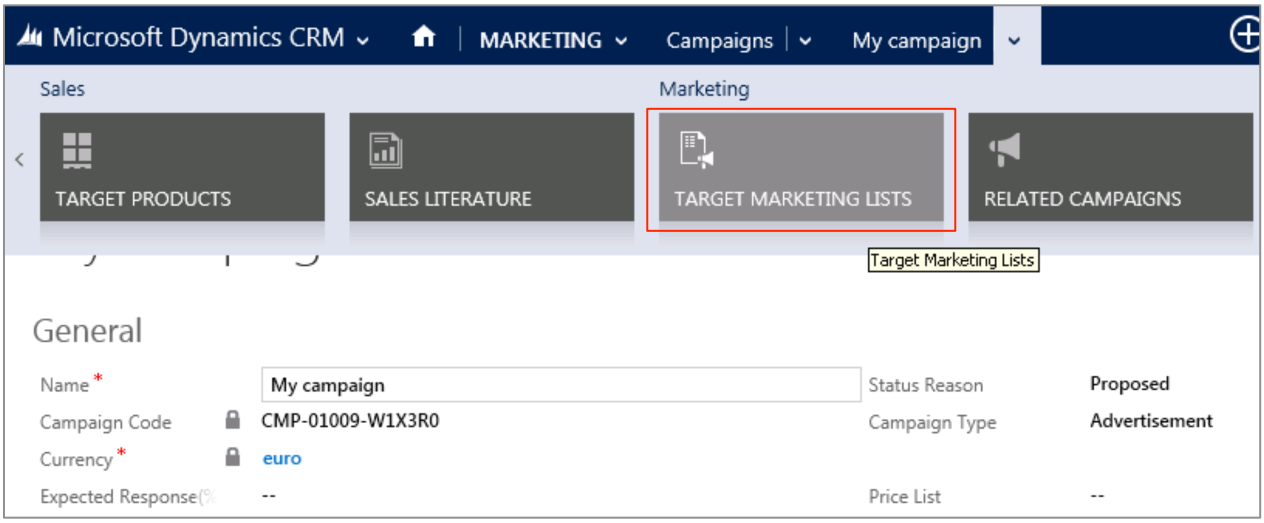
Fill in the campaign name and click on « Save ».

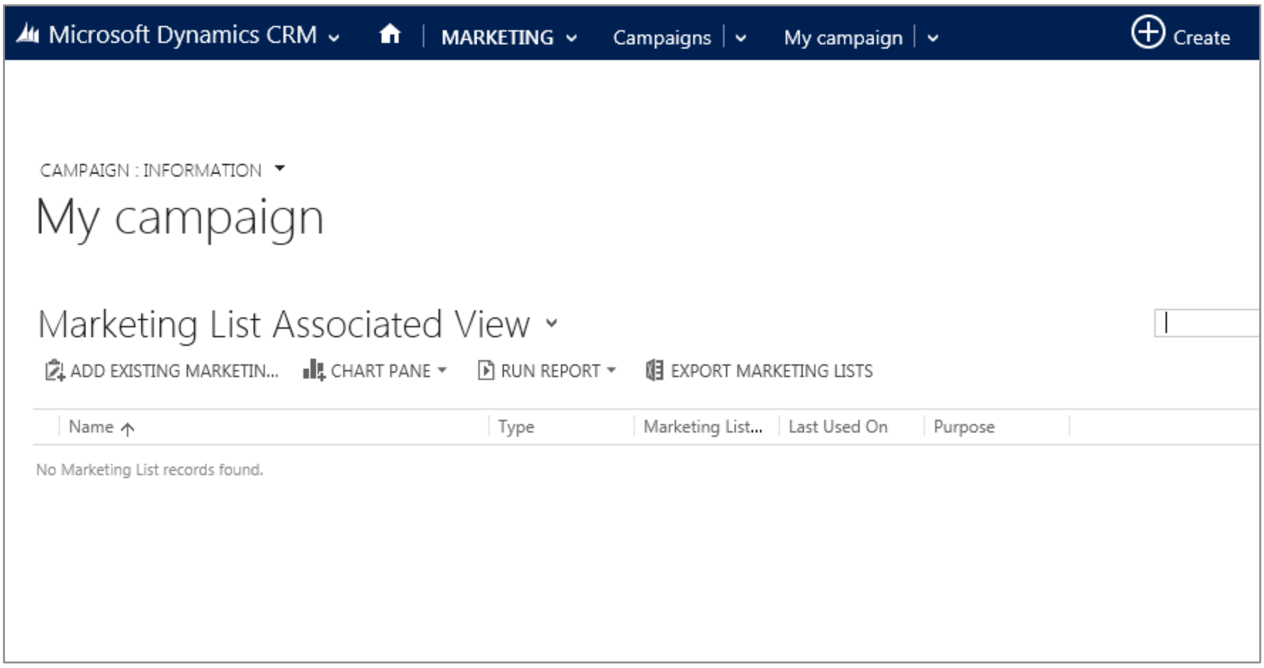
Choosing the recipients

After saving the campaign, click on the « down arrow » icon next to the campaign name, in the ribbon located on top of the window :

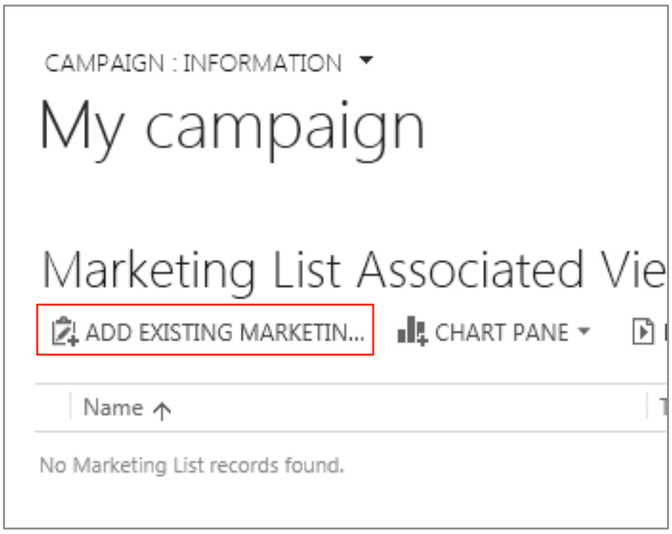


In the opening ribbon, click on « Target marketing lists ».

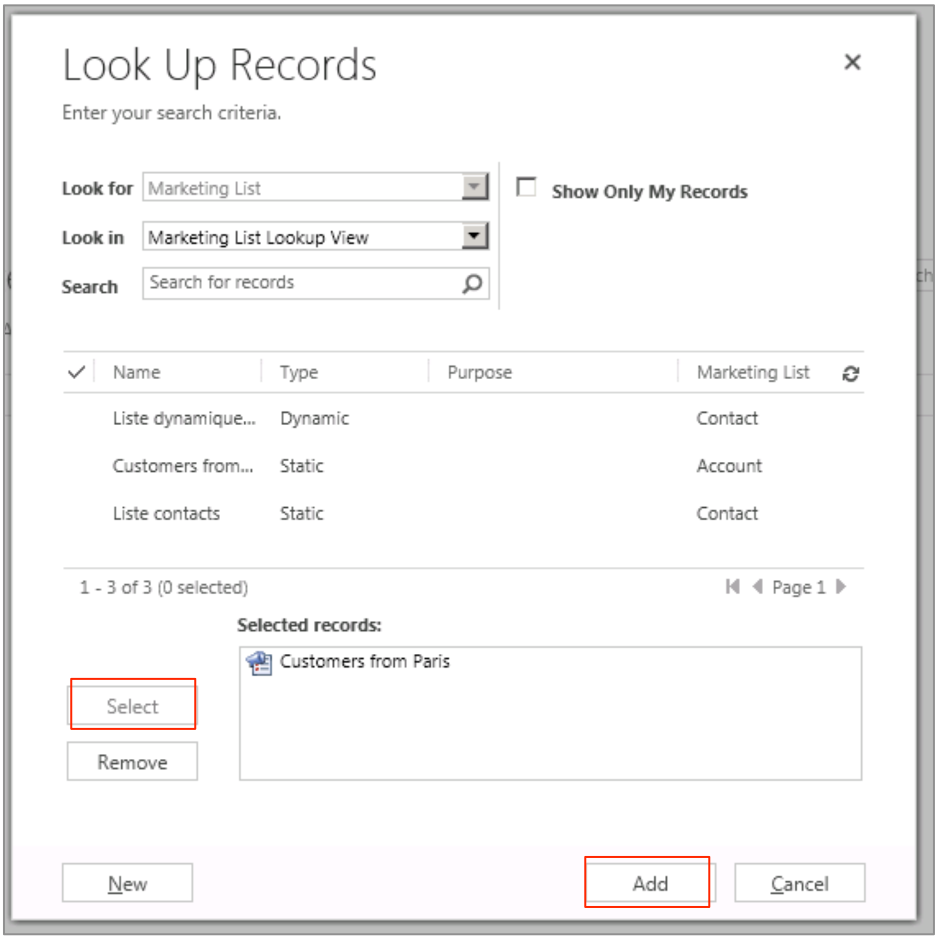


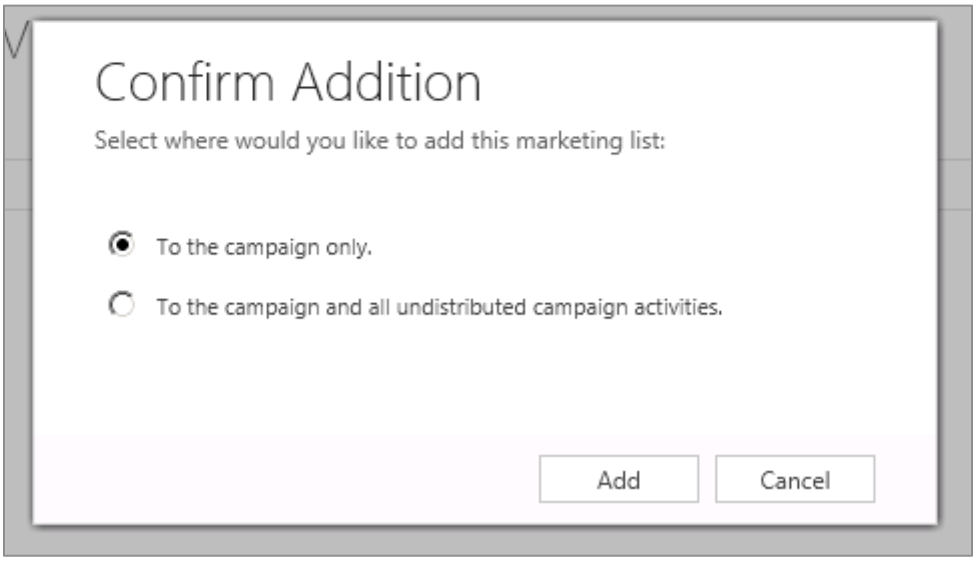


Click on « Add a marketing list » :



Select the marketing lists you want to target, click on "select" and on « Add ».

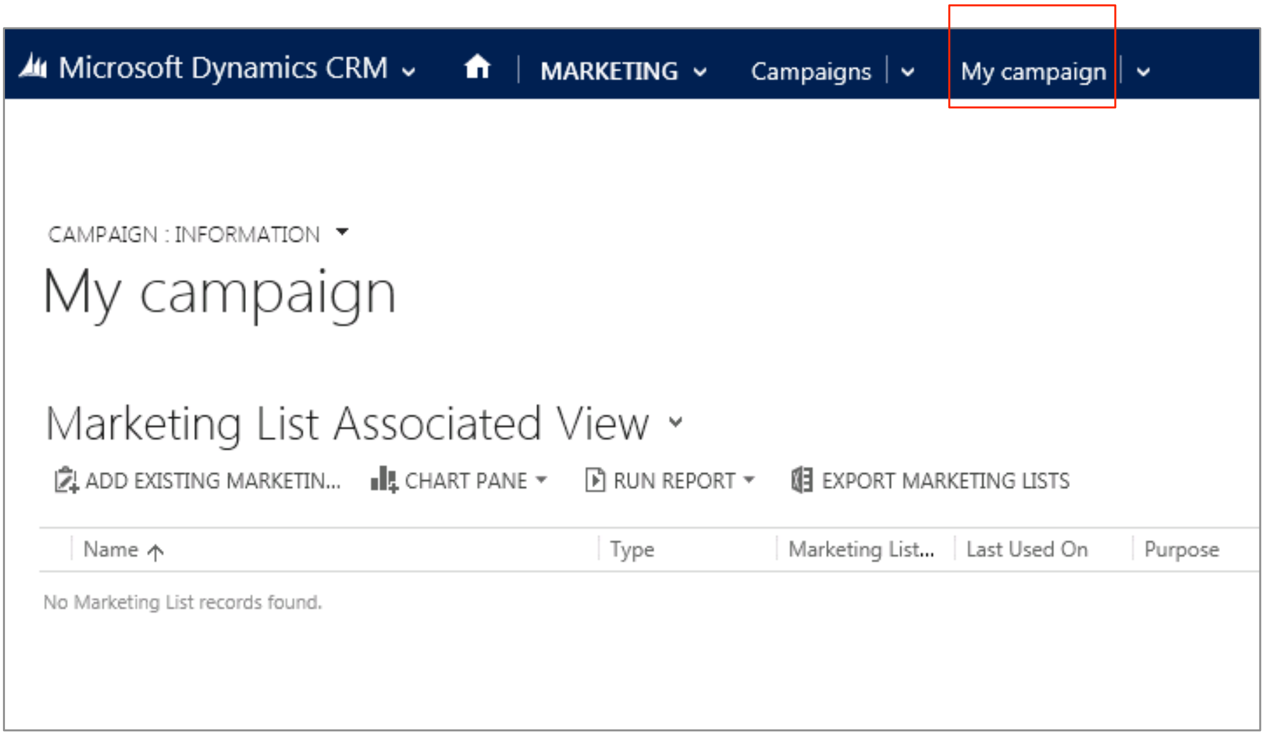




Choose « To the campaign only » and then click on « Add ».

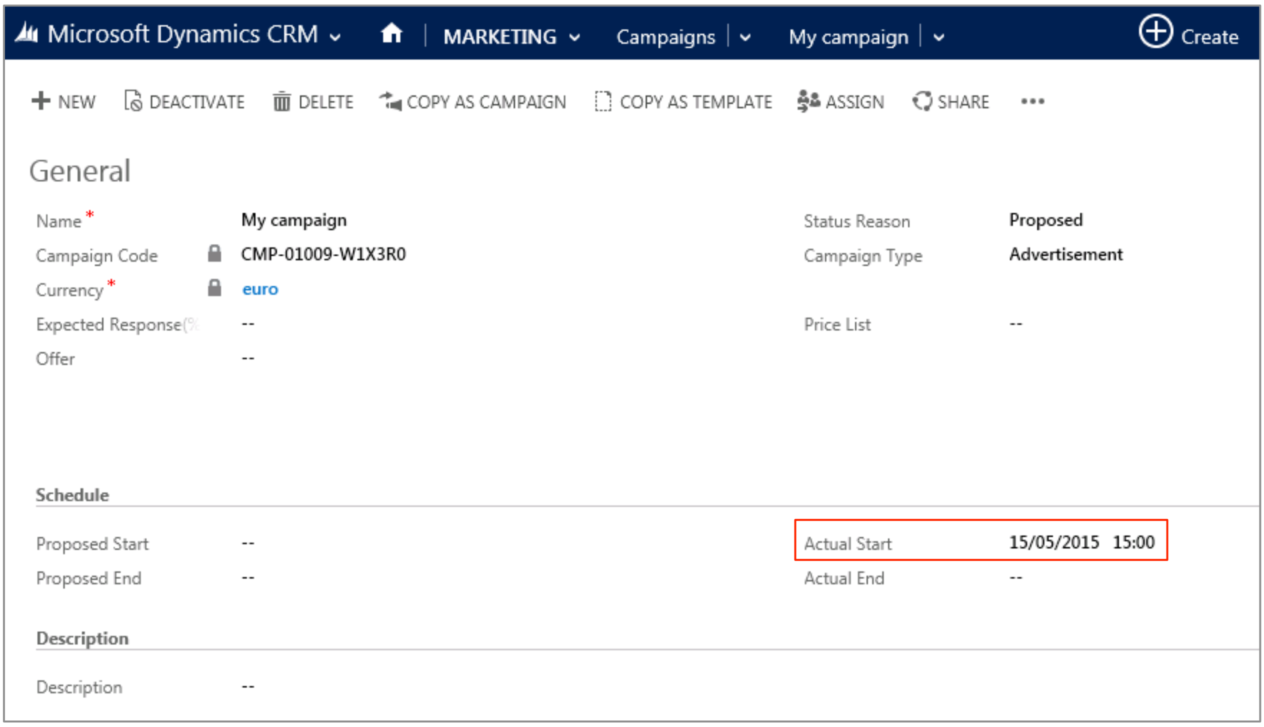
NB : You can associate multiple marketing lists to the same campaign. Each list can be static or dynamics. However, these lists must target the same record type (lead, contact or account).

Click on this button to go back to the campaign :



Delayed sending

In the « actual start » field, indicate the date and time at which the campaign to be executed. Let this fill empty if you want the SMSes to be sent immediately.



Composing the SMS

Type in your message text in the « Text » field :

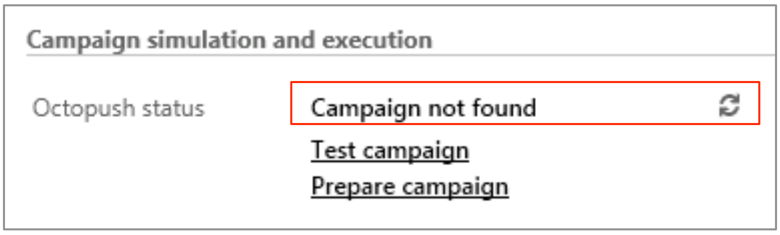
- Text : The message text cannot exceed 489 characters. This indication is only valid if the message doesn't contains dynamic fields. If dynamic fields exists, the message length can eventually exceeds the indicated characters count. Should this happen, you will receive a warning when simulating the campaign.

  To use a SMS template, select it in the dropdown list and click on « Apply template ».

- SMS type : marketing or transactional. NB : this field is visible if the SMS type choice is allowed in the preferences (cf. Preferences).

- Sender : Type in a personalized sender, if necessary. NB : this field is visible if the personalized sender choice is allowed in the preferences.

Campaign status



The status give you informations about the campaign state on Octopush servers.

- Campaign not found : the campaign has not been yet transmitted to Octopush. A new campaign is by default in this status.

- Campaign compiling : the campaign has been transmitted to Octopush and is compilating. You will be able to execute the campaign as soon as the compilation is over.

- Campaign sent : the campaign has been executed. The SMSes will be sent soon after.

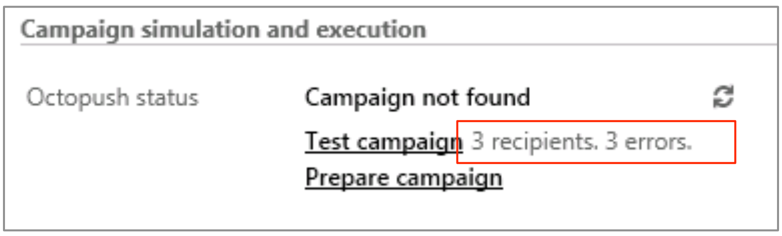
Campaign simulation

Before transmitting your campaign, you can simulate simulate to check for potential errors. To do so, click on « Test campaign ».

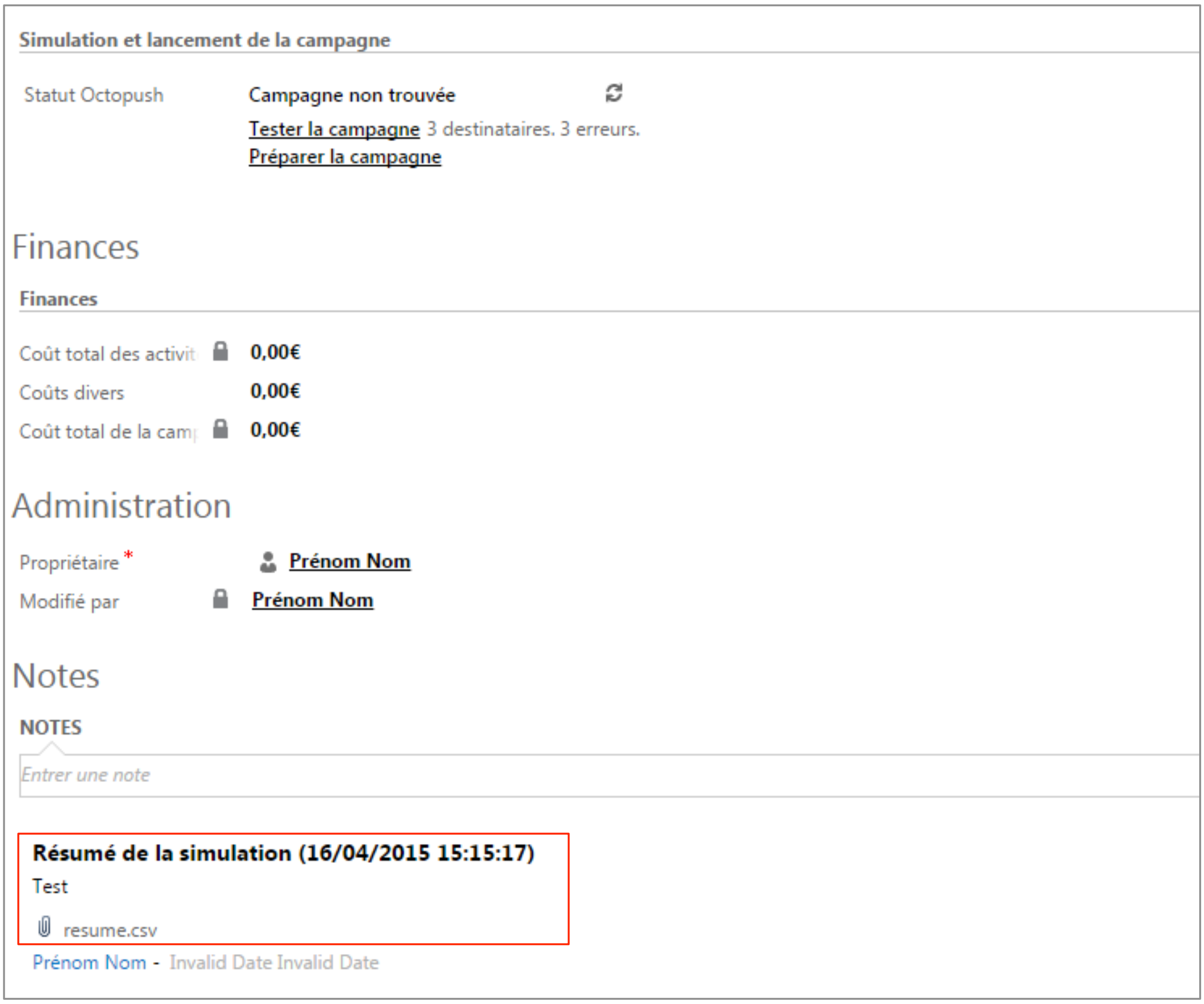
The simulation checks that :

- The SMS message is not empty
- The message length doesn't exceed 489 characters for each recipient
- A mobile phone number exists for each recipient
- The mobile phone numbers are in international format (+XXXXXX or 00XXXXX)
- The text « STOP au XXXXX » exists for messages sent to french recipients (mobile numbers who starts with « +33 » or « 0033 »)

The simulation results are displayed next to the « Test campaign » link :



Errors details can be visualized in the Notes of the campaign :



Click on the file « resume.csv » to download the complete result of the simulation :

```
STATUS;DETAIL;NUMBER;MESSAGE
ERROR;The text 'STOP au XXXXX' is missing.;+33627588010;test
ERROR;The text 'STOP au XXXXX' is missing.;+33600000001;test
ERROR;The text 'STOP au XXXXX' is missing.;+33649819006;test
```

The simulation result lists all the SMS, showing :

- The SMS status : ERROR or SUCCESS. Error occures if the simulation didn't pass one the tests mentioned above.
- The error detail, if applicable
- The recipient number
- The message that will be sent to the recipient

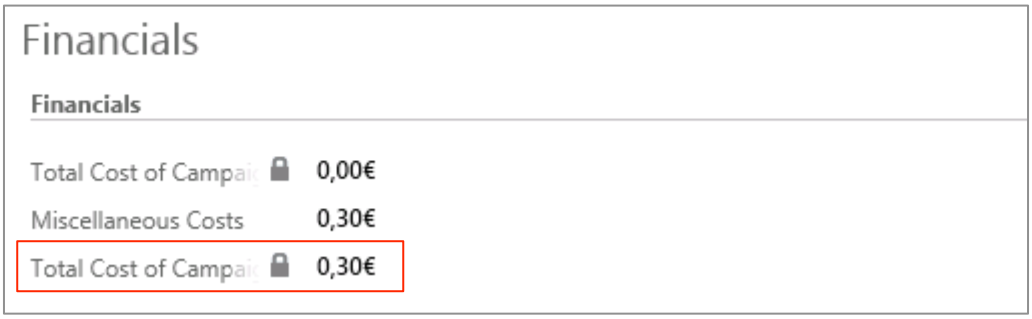
When all potential errors have been corrected, you can transmit the campaign.

Transmitting the campaign

To transmit the campaign, click on « Prepare campaign ».

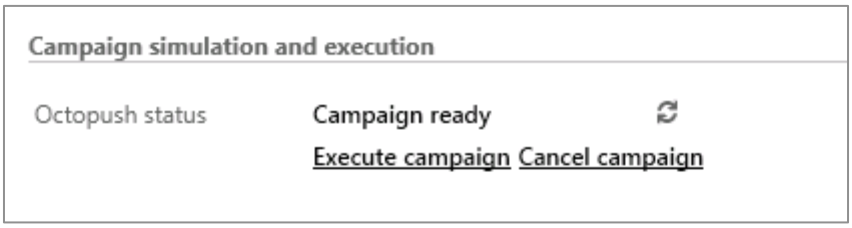
Once the campaign has been transmitted, its status change to « Campaign compiling ». This means that the campaign has been received by Octopush and that it soon will be ready to be executed.

In the « Financials » section, you can check for the estimated cost of your campaign :



After you have transmitted the campaign, you can visualize a complete report, in the « Notes » section.

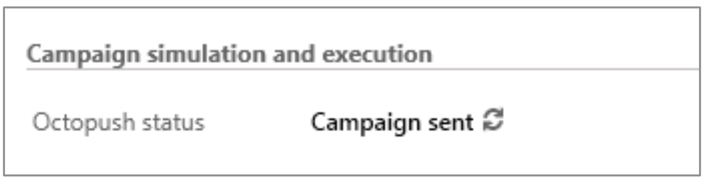
Refresh the status to check if the campaign is ready to be executed. When the campaign is ready to be executed, its status changes to « Campaign ready »:



You can now either execute the campaign to send the SMS, or cancel it.

Executing the campaign

Click on « Execute campaign ». The campaign status then changes to « Campaign sent ».

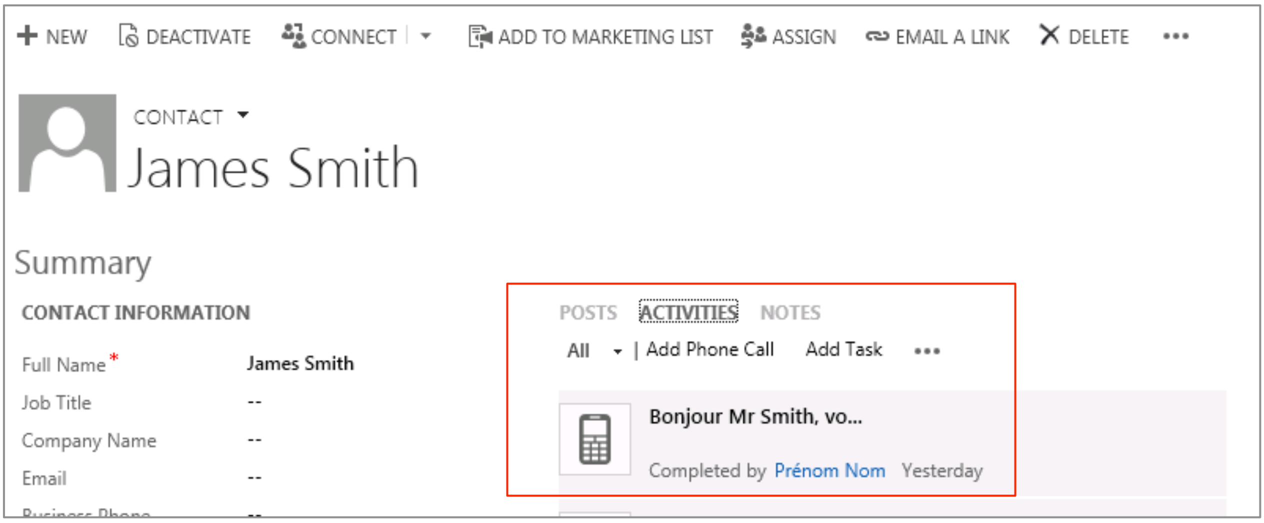


Canceling the campaign

Click on « Cancel the campaign ». The campaign status then change to « Campaign not found » and you can then simulate it or transmit it again.

History of SMS sent via a campaign

Once the campaign has been transmitted and executed, an « SMS » activity is automatically created in the history of each recipient:

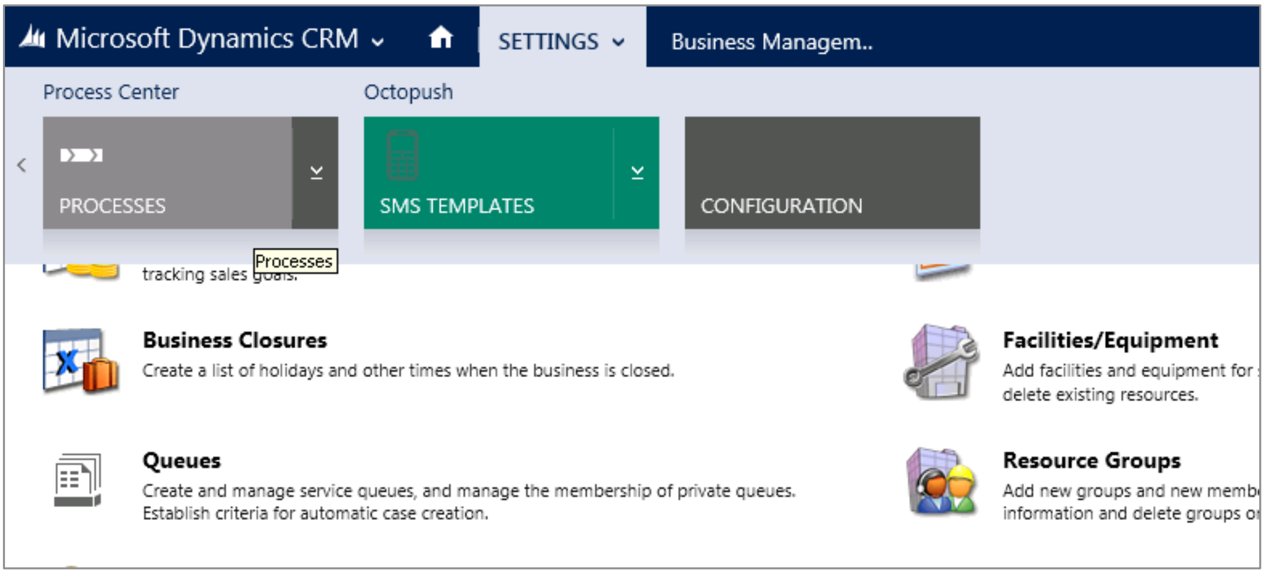


Sending an SMS on a hook

SMS can be sent automatically when some events occur (order validation, creation of a contact, bill payment…)

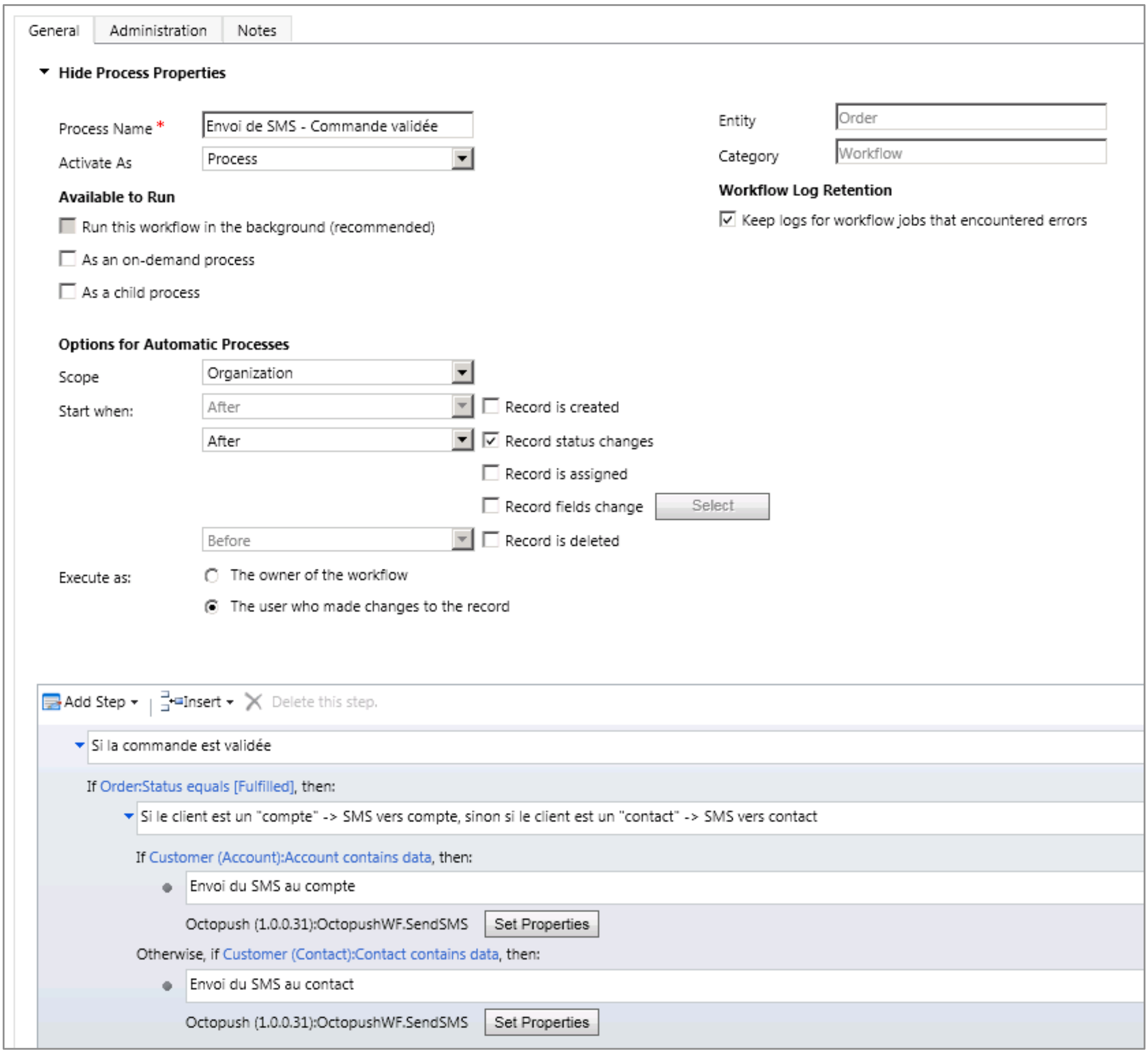
Pre-registered hooks

Some hooks are ready to use out-of-the-box. You can find them in the « Settings > Processes » section :



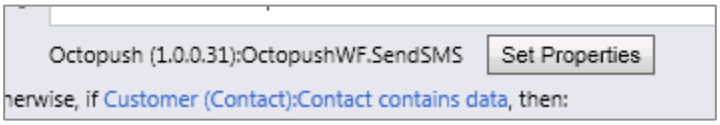
Order validation

Sends a SMS when an order has been validated, and its status changes to “Fulfilled”.

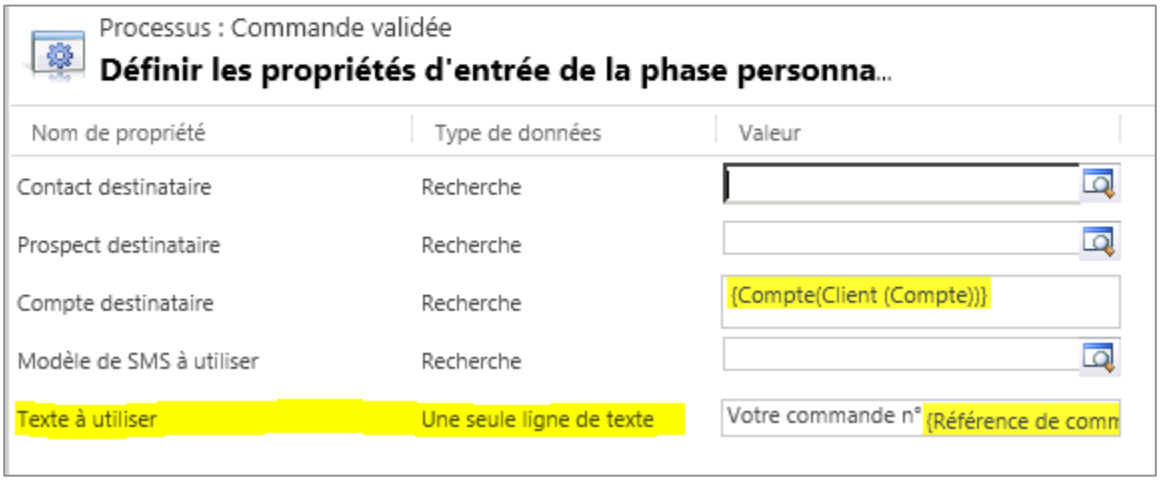


To modify the default text :

- Go to the « Settings → Processes » section
- Open the process « Envoi de SMS - Commande validée »
- Deactivate the process
- Click on each of the « Set properties » buttons :

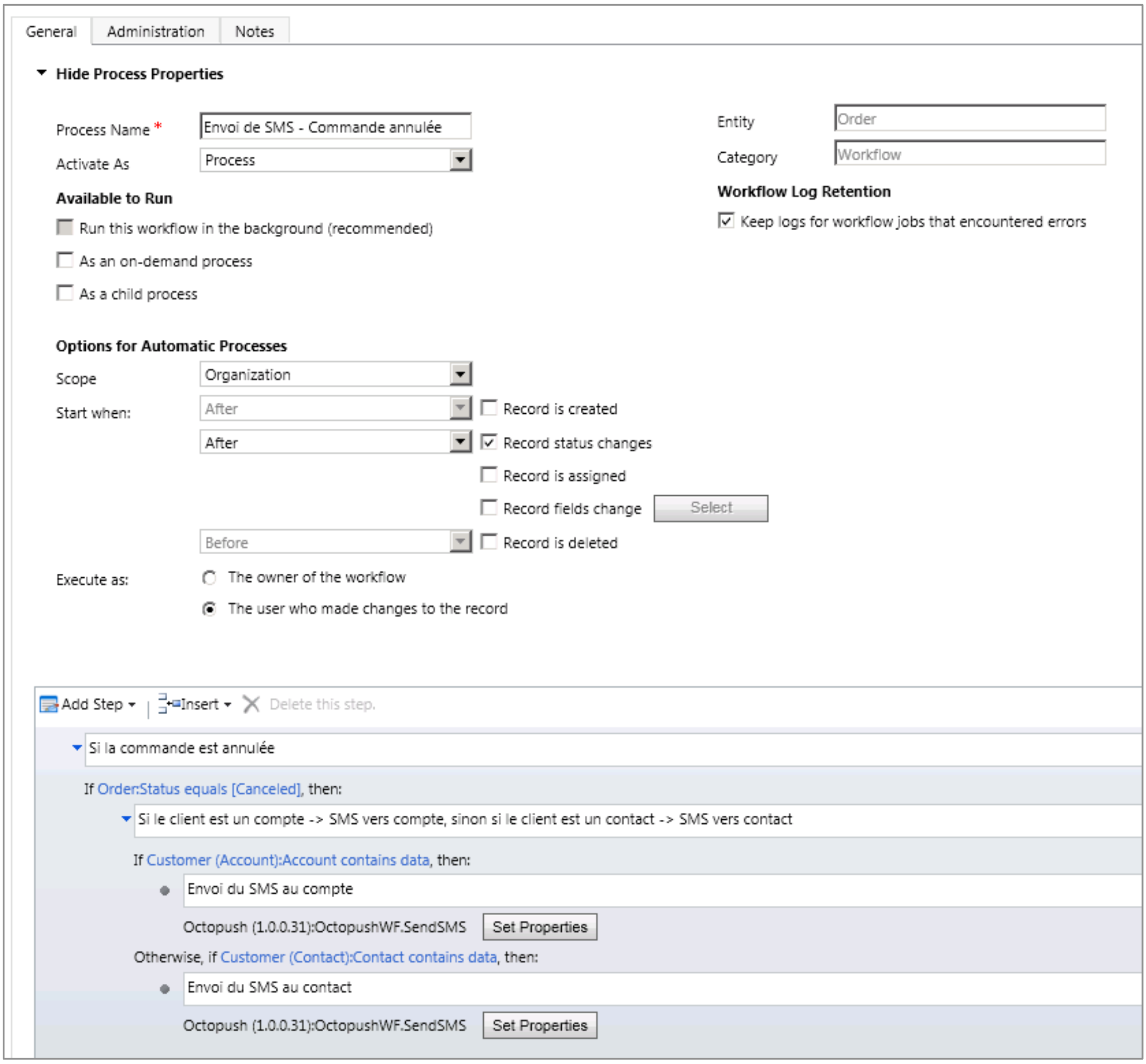


- Modify the text in the « Texte à utiliser » field



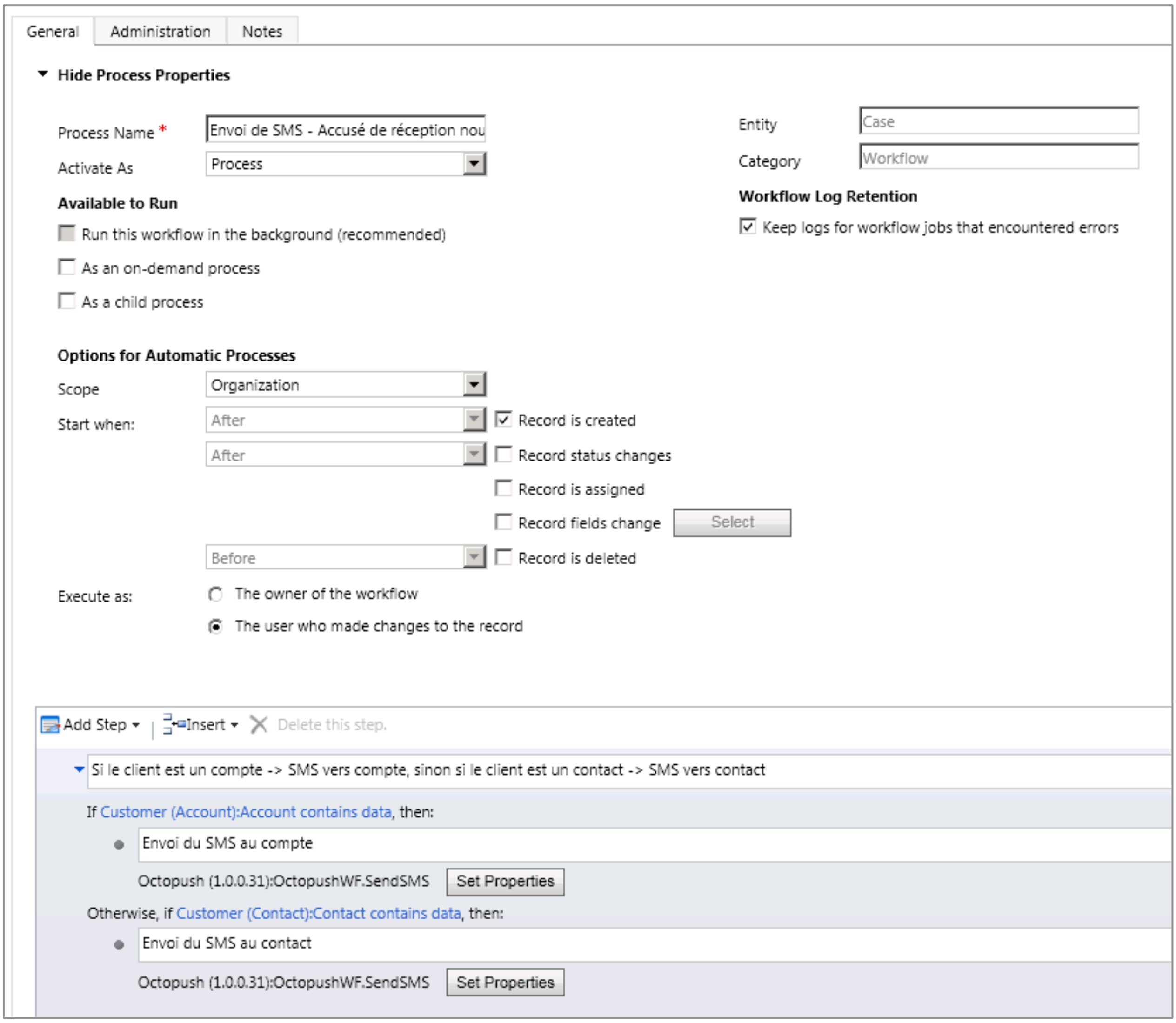
Canceled order

Send an SMS when an order status changes to “Canceled”



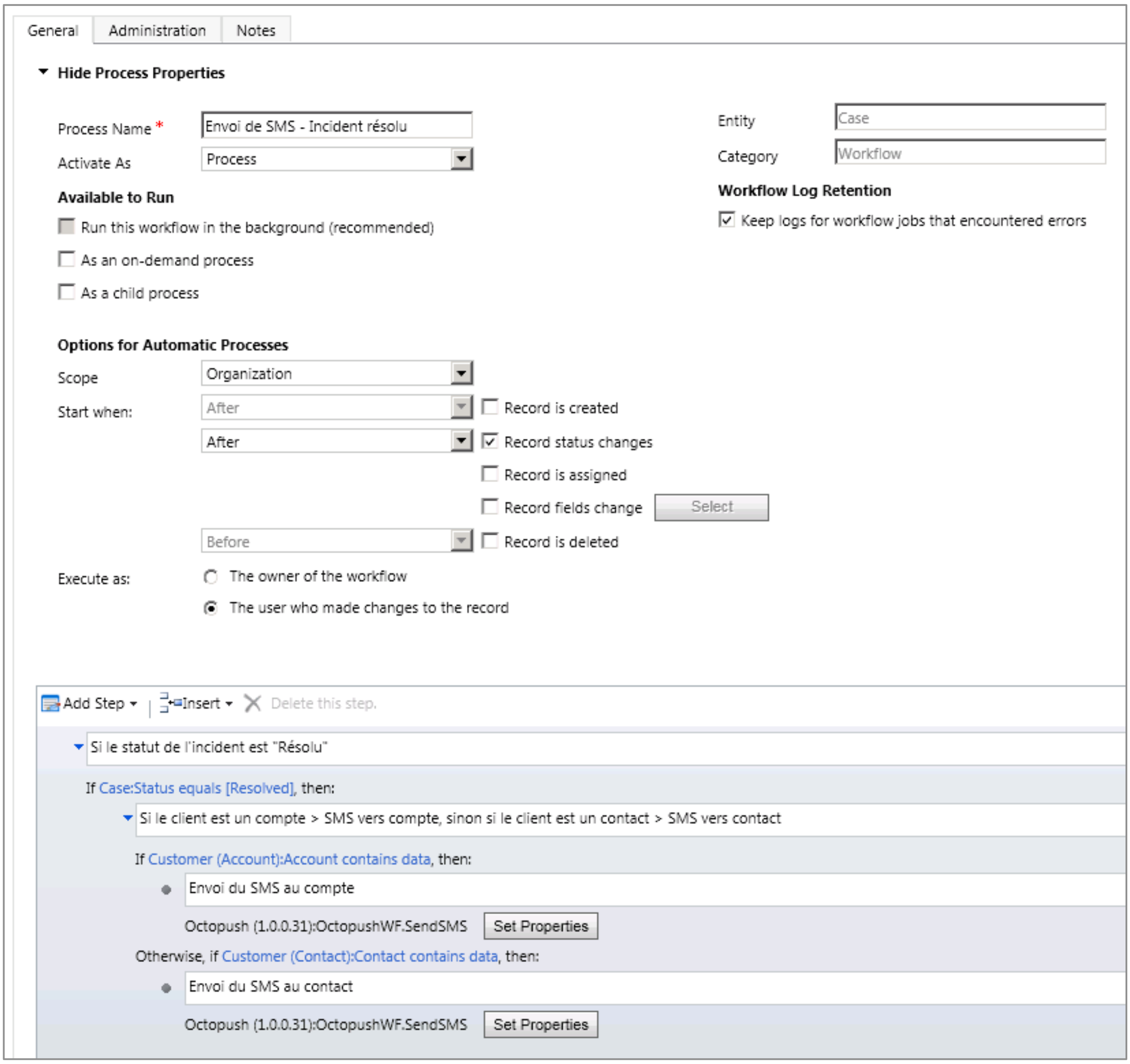
New incident acknowledgement

Sends a SMS when a new incident is created.



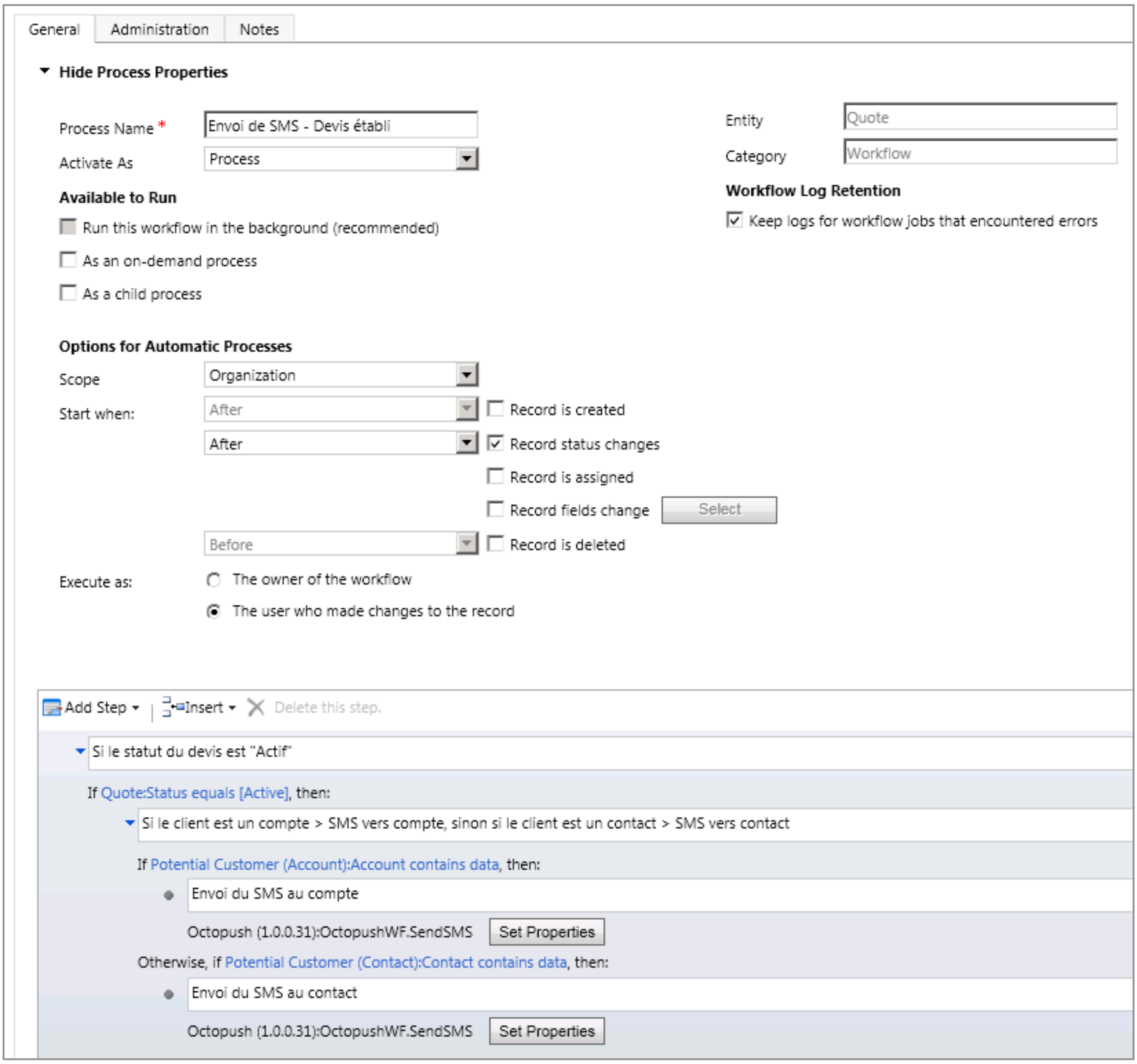
Incident resolution

Sends a SMS when an incident status changes to “Resolved”



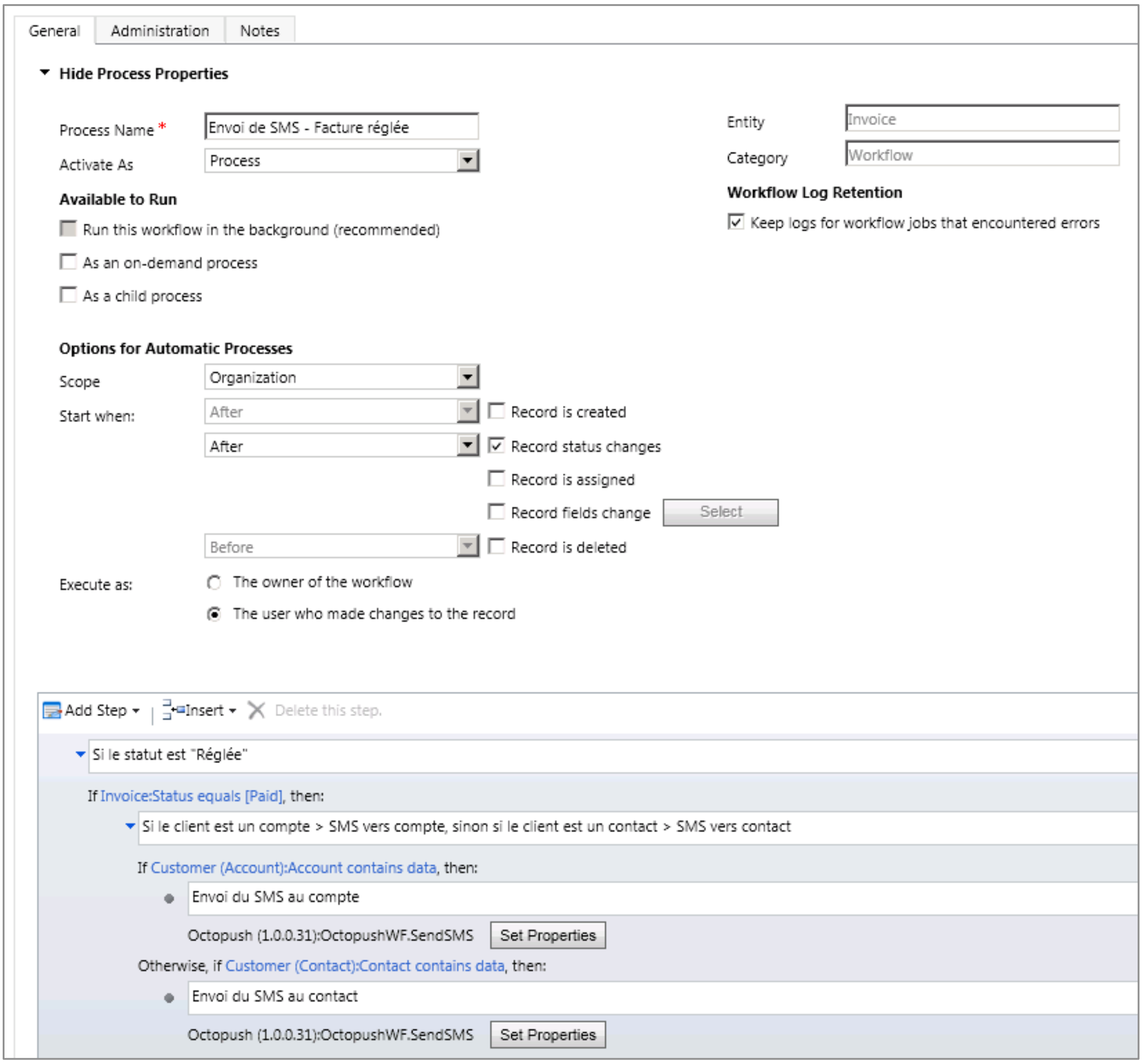
New quote

Sends a SMS when a quote status switch from « draft » to « active ».



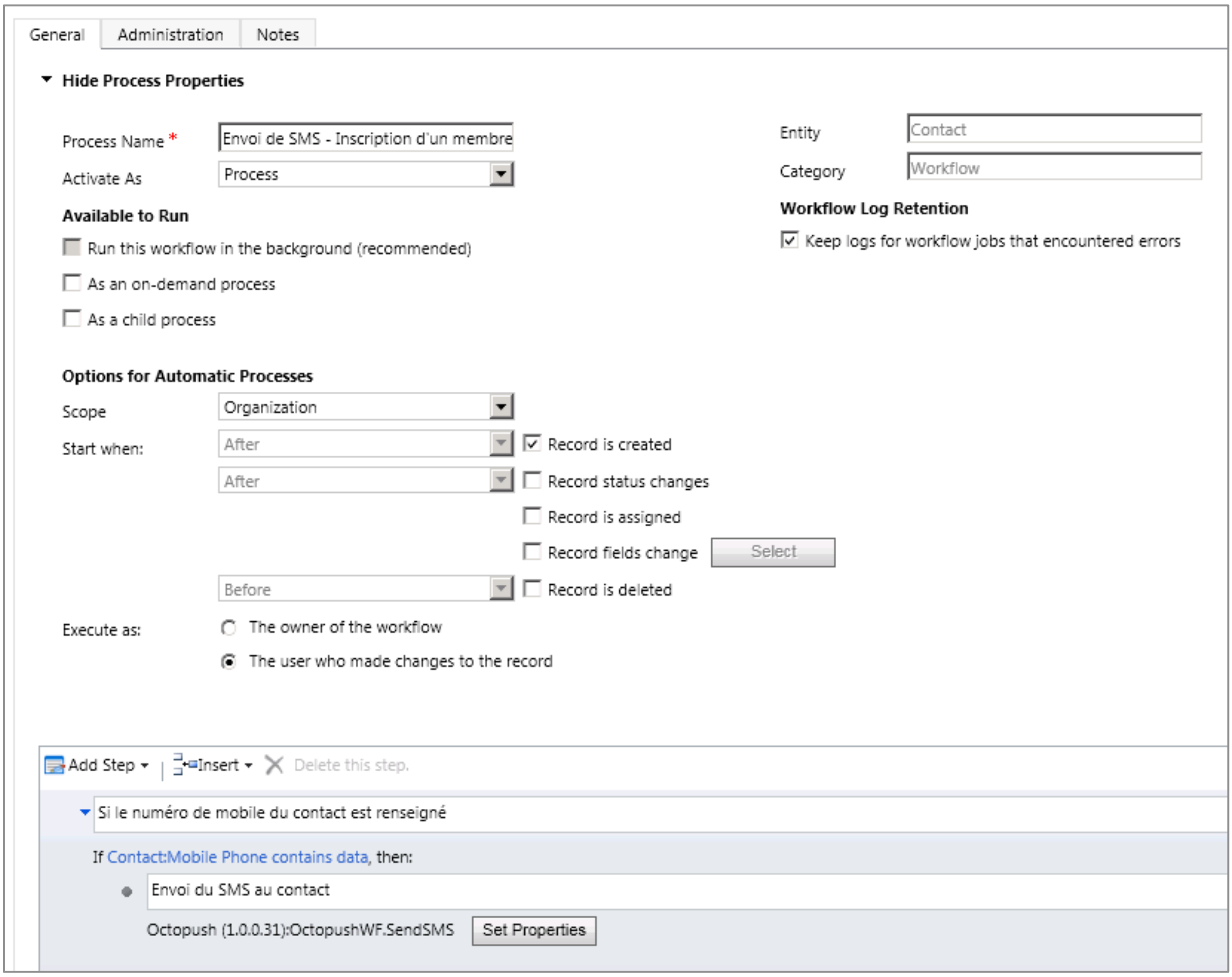
Paid invoice

Sends a SMS when an invoice status changes to « Paid ».



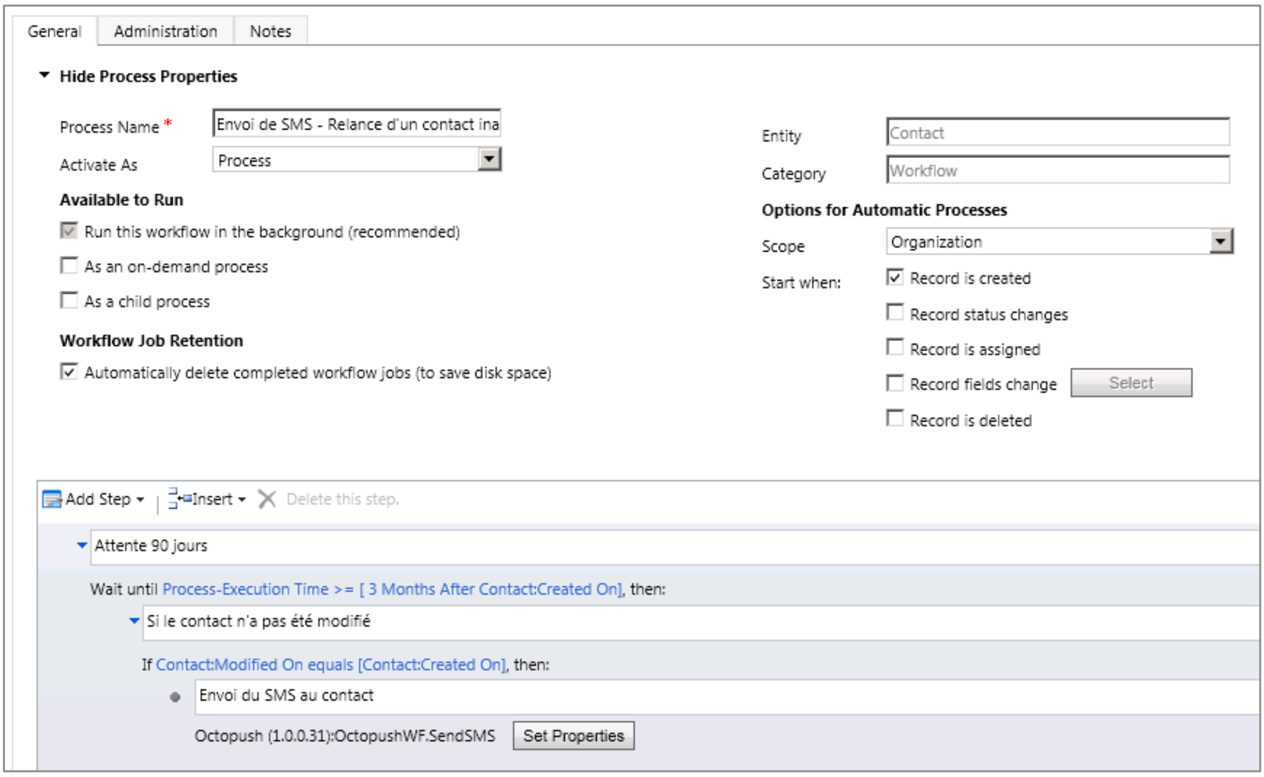
Member registering

Sends a SMS when a new contact is created.



Inactive contact follow-up

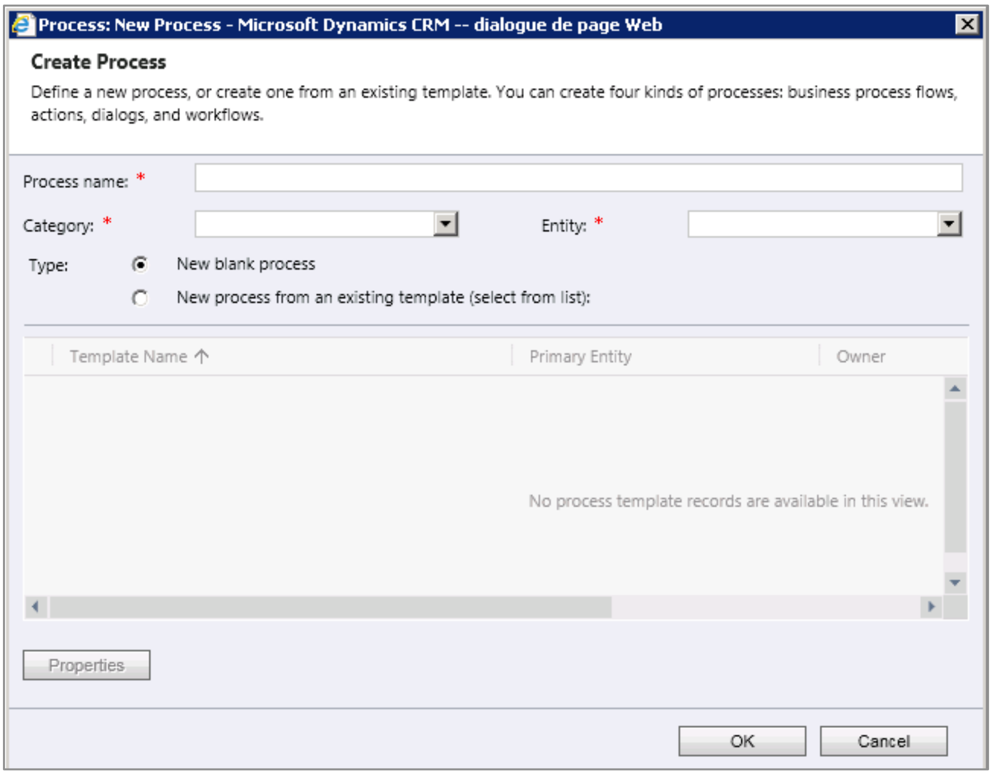
Sends a SMS to a contact which have no activities for the past 90 days.



Create a new hook

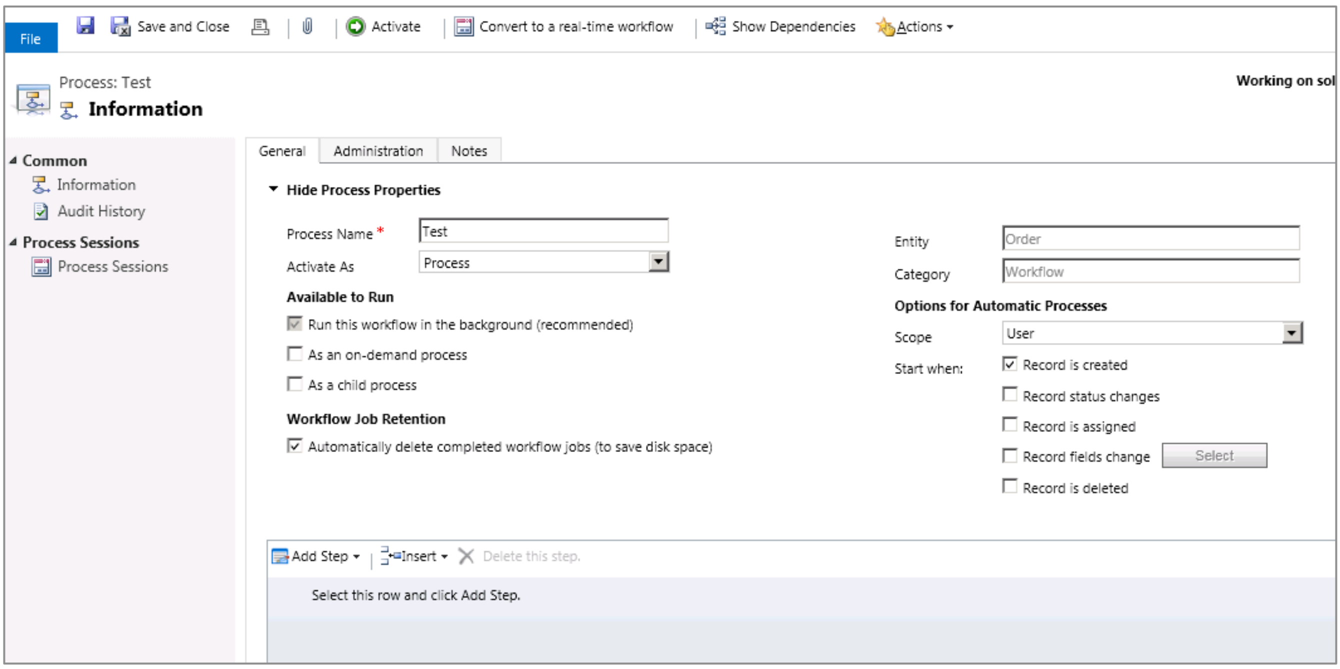
Hooks are created as Dynamics CRM workflows. Workflows let you determine the conditions of an event, and the action (sending a SMS) to be triggered when this event occurred.

To create a new workflow, go to the “Settings > Processes” section of Dynamics CRM and click on “New”:



- Process name : choose a name for your workflow
- Category : choose « Workflow »
- Entity : The record type that will trigger the event. For example, for an order validation, choose the « Order » entity.

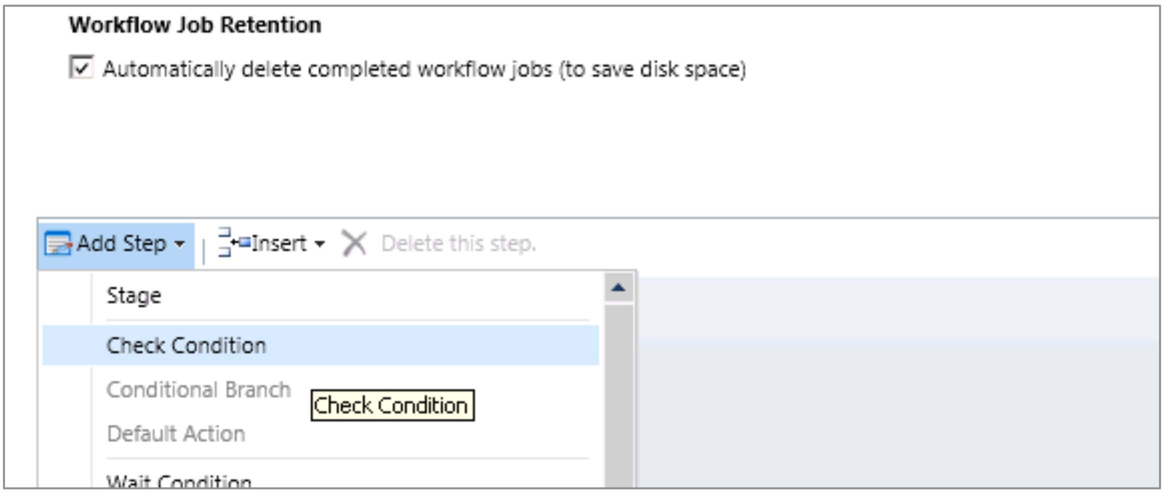
Click on « OK » to start configuring the workflow.



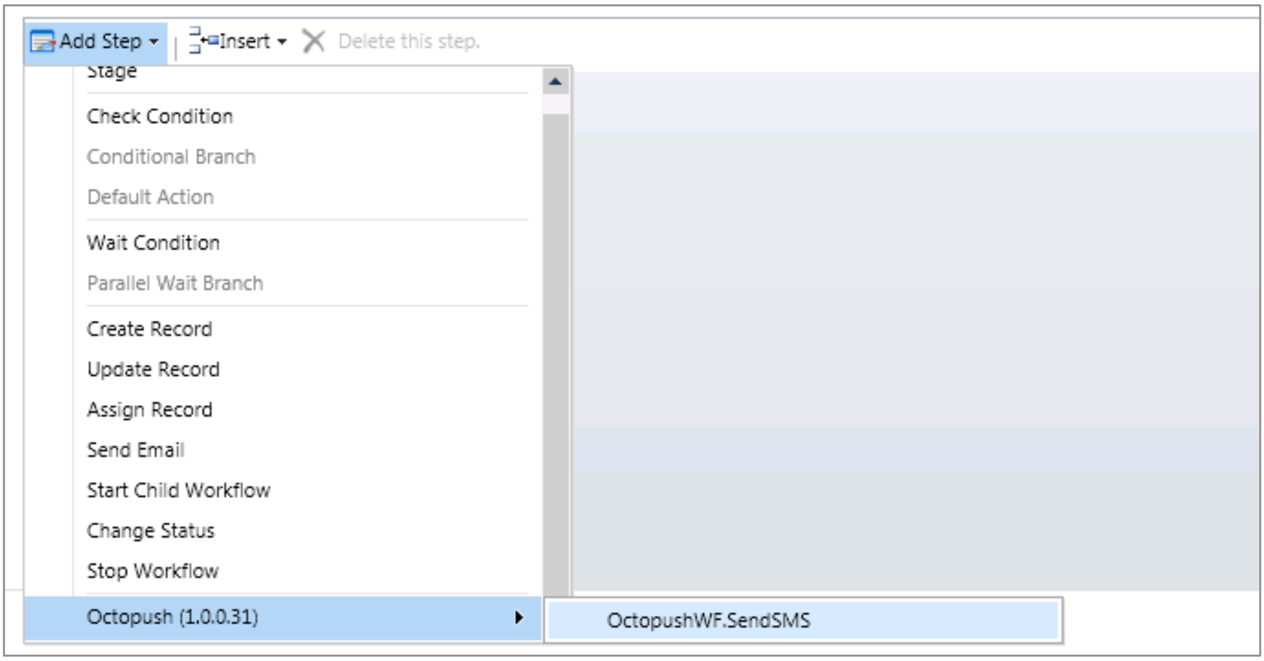
In the « Scope » dropdown list, choose “Organization”.

In the “Start when” section, choose the events that will trigger the workflow.

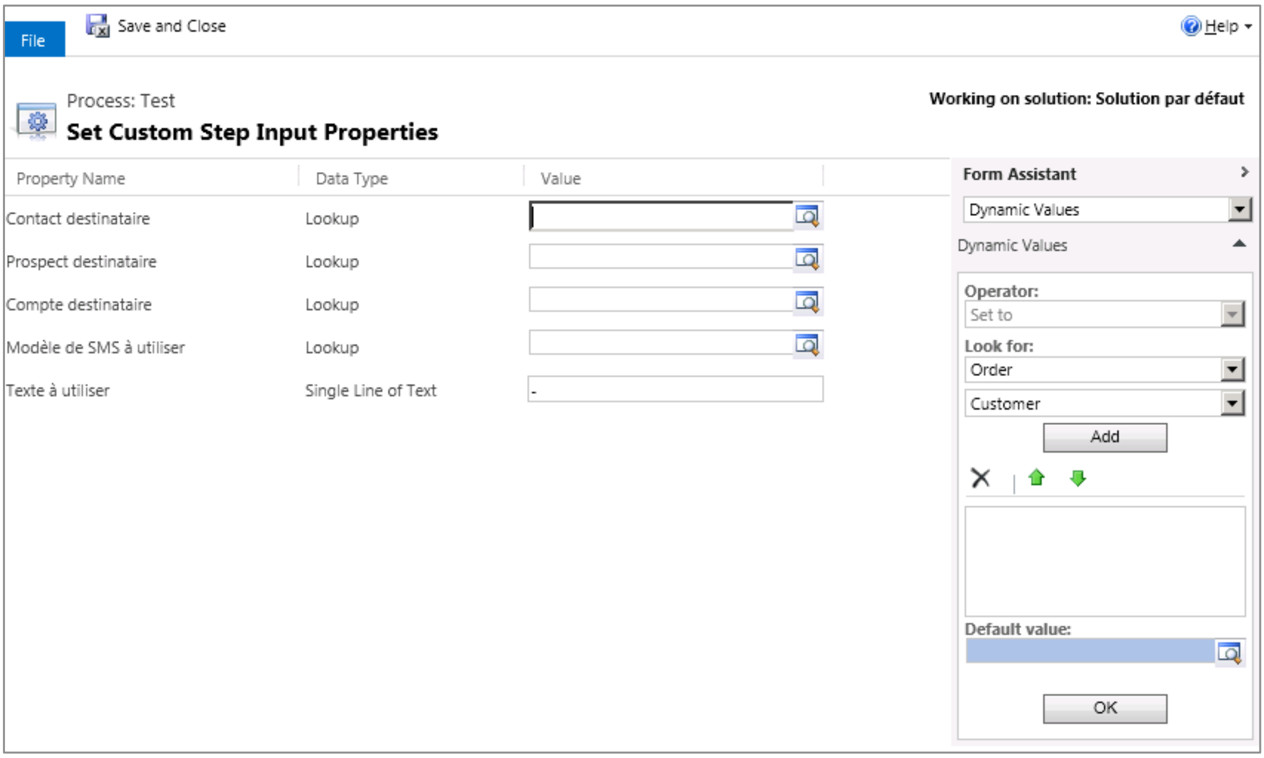
You can add tests that will check some conditions before sending the SMS. To add a test, click on “Add Step”, then click on “Check condition”:



To add the « send SMS » action to your workflow, click on « Add Step », then click on « Octopush (1.0.0.31) », then click on « OctopushWF.SendSMS » :



Type a description for your action, then click on « Set Properties » :

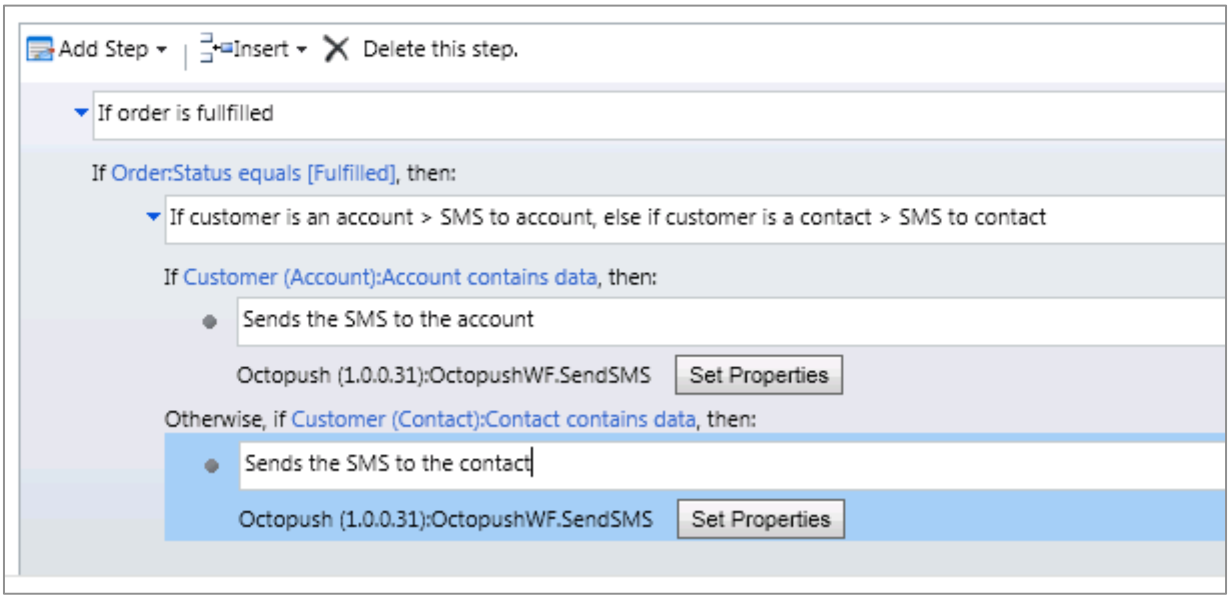


2 fields must be filled :

- The SMS recipient (which can be a lead, a contact or an account)
- The text to user for your SMS. The text can contain dynamic fields.

As the recipient can be a lead, contact or account, you can see 3 « recipients » fields : « Contact destinataire », « Prospect destinataire » and « Compte destinataire ». Only 1 of these fields should be filled. If the hook applies to various record types, you will need to create 1 action per record type. Each of these actions will target a specific record type.

For example, a hook regarding an order validation can target contacts or accounts (the customer of an order can be a contact or an account).
A test like the one below is then mandatory in your workflow :



Click on « Activate » when your workflow is finished: