

Octopush

MS Dynamics CRM extension

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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 :

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', a home icon, 'SETTINGS', and 'SMS templates'. Below the navigation bar are icons for 'NEW ACTIVITY', 'NEW RECORD', 'IMPORT DATA', and 'ADVANCED FIND'. The main content area is divided into two sections: 'Connection' and 'Preferences'.

Connection

Proxy:

API key:
[Create an account](#) to get your API key

Remaining credit

FR	189.00
XXX	241.92

[Show remaining credit](#)
[Get additional credit](#)

Preferences

Single SMS

SMS type choice: Show Hide

SMS type: Marketing Transactional

Personalized sender choice: Show Hide

Personalized sender:

SMS campaigns

SMS type choice: Show Hide

SMS type: Marketing Transactional

Personalized sender choice: Show Hide

Personalized sender:

[Save parameters](#)

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.

Nom du modèle ↑	Créé le
Order validation (account)	17/04/2015 10:58
Order validation (contact)	17/04/2015 10:57

1 - 2 of 2 (0 selected) Page 1

http://localhost/Test/_root/homepage.aspx?etc=10006&pagemode=iframe&... J K L M N O P Q R S T U V W X Y Z

Click on « New » to create a new template.

SMS TEMPLATE : INFORMATIONS

New SMS template

Template name * ✖ --

Status **Creating**

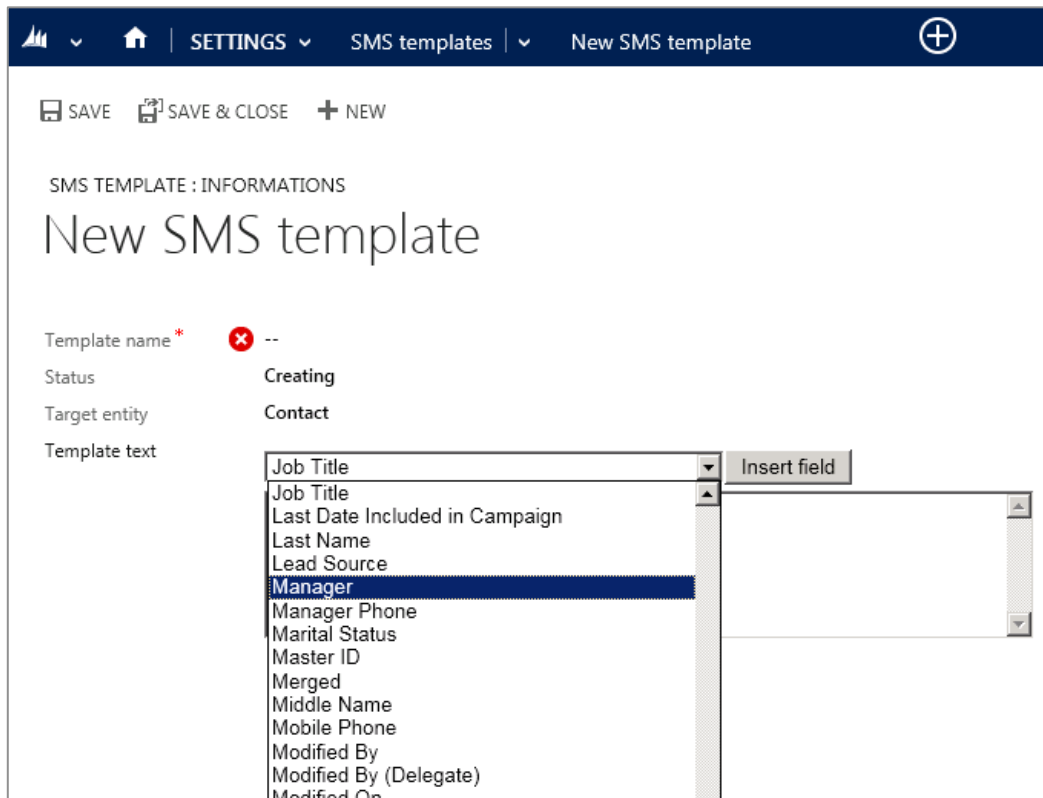
Target entity --

Template text

Insert field

- 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.

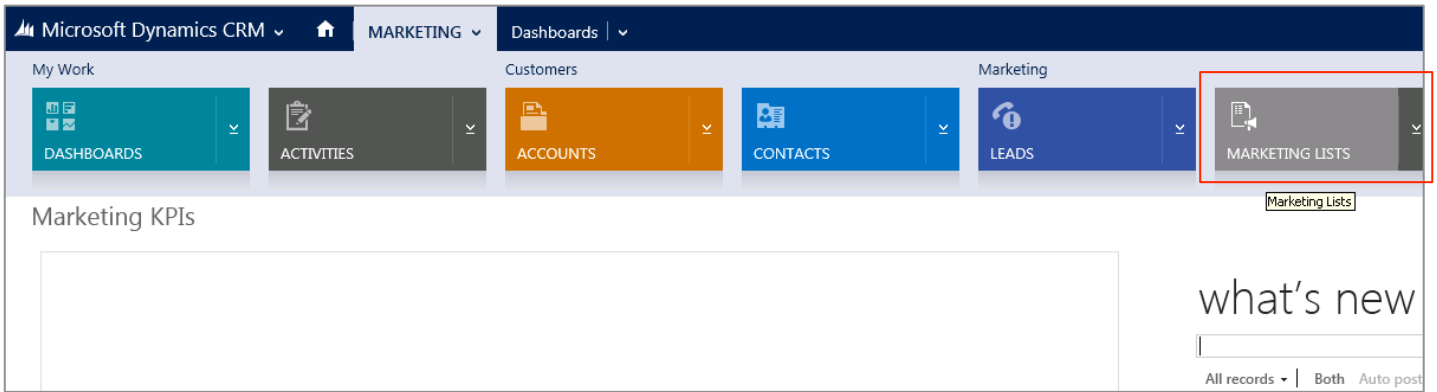
Once you're done, give the users access to the template, by changing its status to « Published ». Then click on « Save » or « Save and close ».

Marketing lists

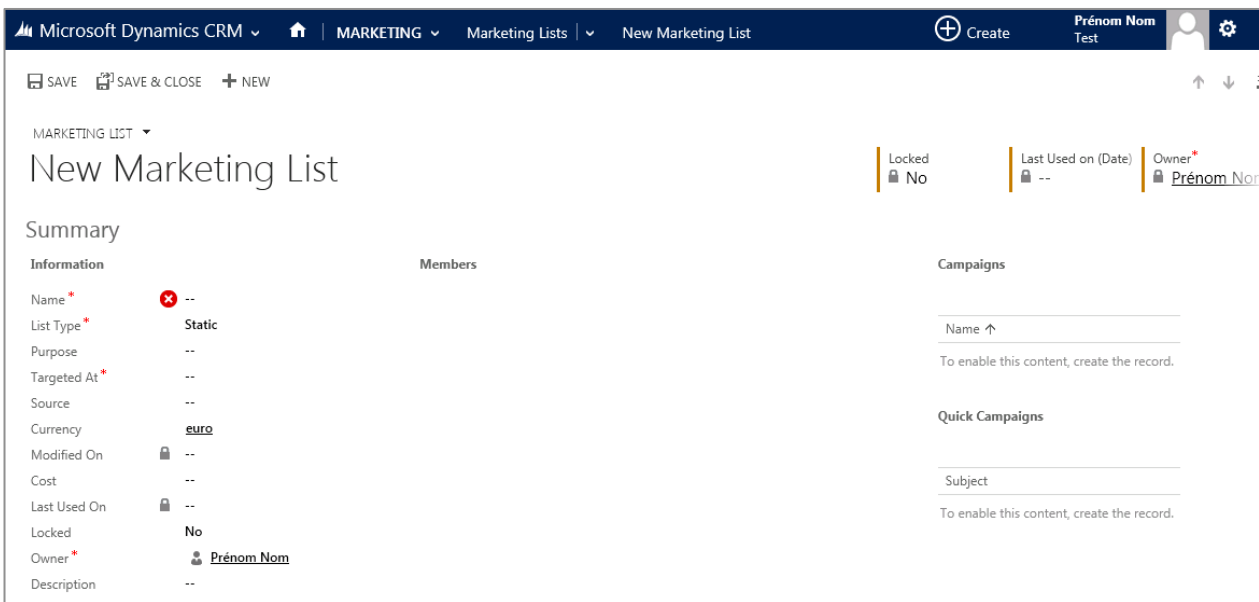
Marketing lists are the targets of SMS campaigns. They can address leads, contact and accounts.

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 » :
 - o In a static list, members can be added manually or according to search criterias. The members list doesn't evolve by itself.
 - o 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 :

+ NEW DEACTIVATE DELETE MANAGE MEMBERS COPY TO STATIC ASSIGN SHARE ...

MARKETING LIST ▾

Customers from Paris

Summary

Information	Members
Name *	Customers from Paris
List Type *	Dynamic
Purpose	--
Targeted At *	Contact
Source	--
Currency	euro
Modified On	05/05/2015 23:37
Cost	--
Last Used On	--

Members

Full Name ↑ Business Phone

No Contact records found.

Manage Members

Choose how you want to find customers, and then add or remove these as members to the marketing list.

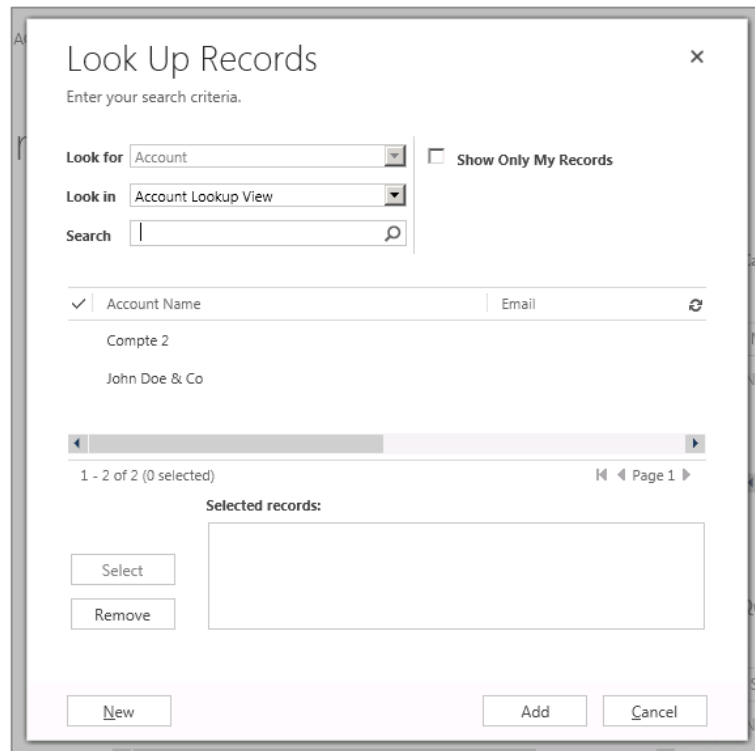
How do you want to find members?

- Add using Lookup**
Find members to add to marketing list.
- Add using Advanced Find**
Find members to add based on search criteria.
- Remove using Advanced Find**
Find members to remove based on search criteria.
- Evaluate using Advanced Find**
Evaluate which members to keep in the marketing list based on search criteria. Update the marketing list.

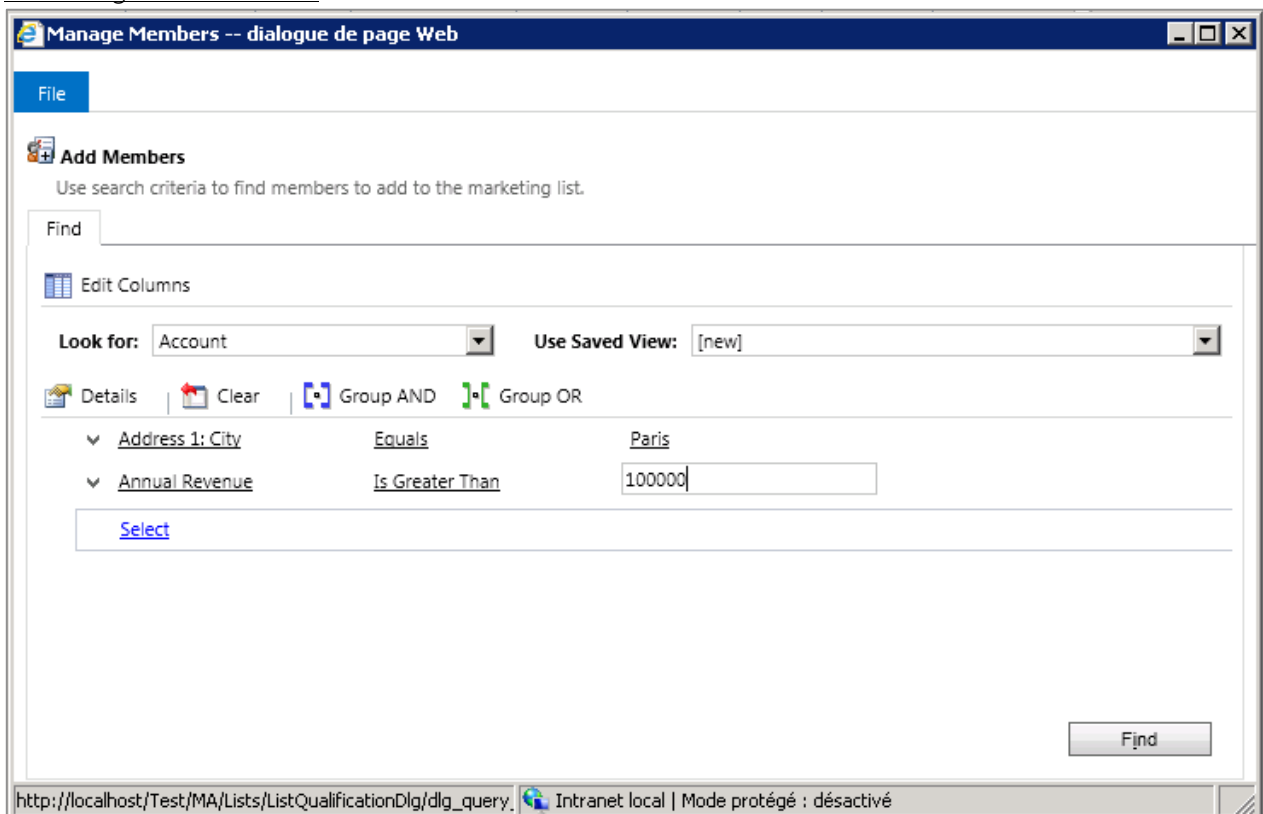
Continue Cancel

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.

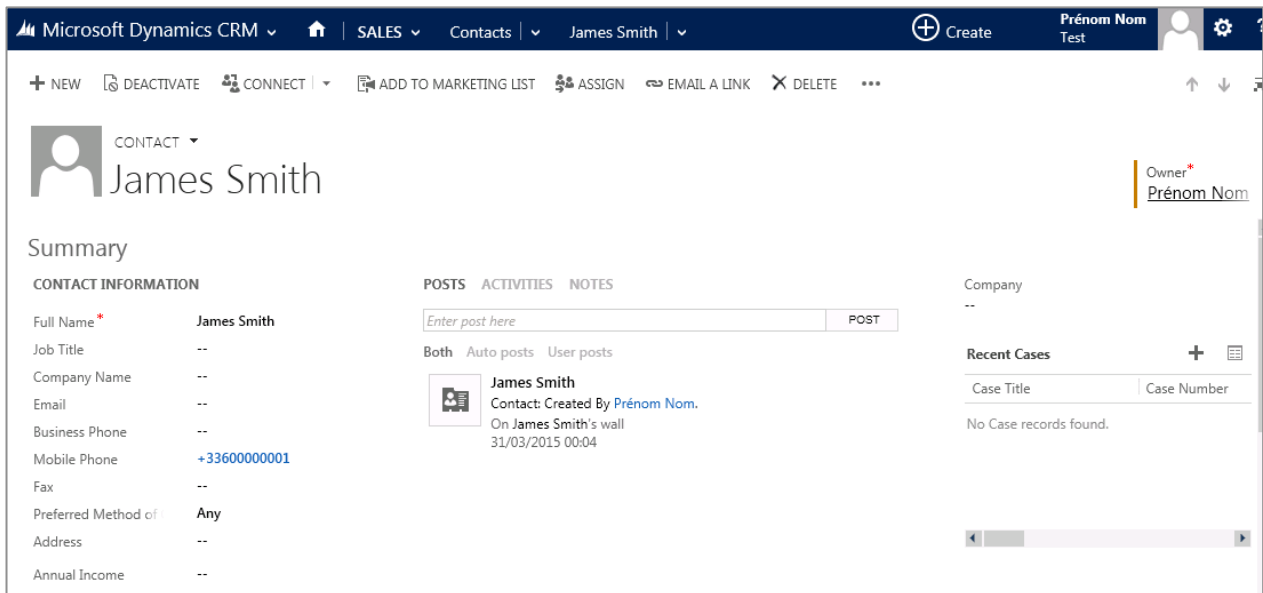
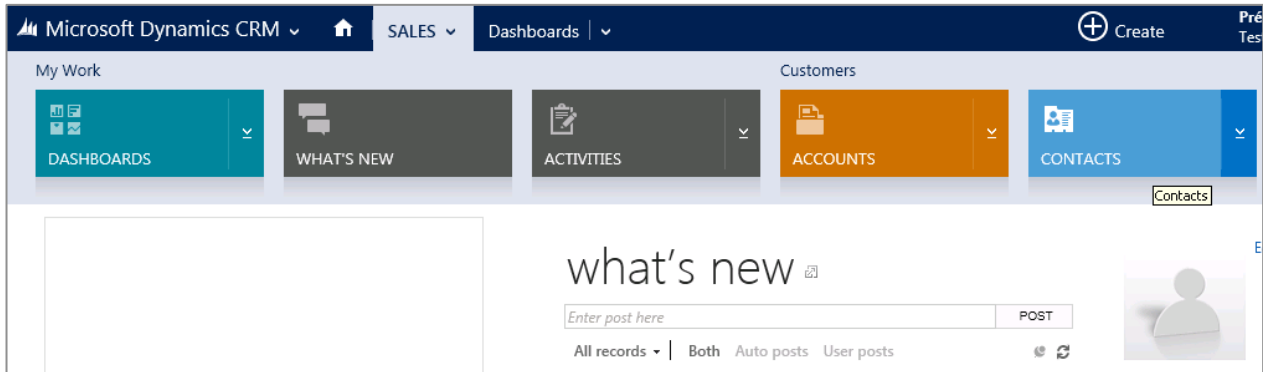


- Remove using Advanced Find : Remove the members who match the results of an advanced search.
- Evaluate using Advanced Find : Only keep members who match the results of an advanced search.

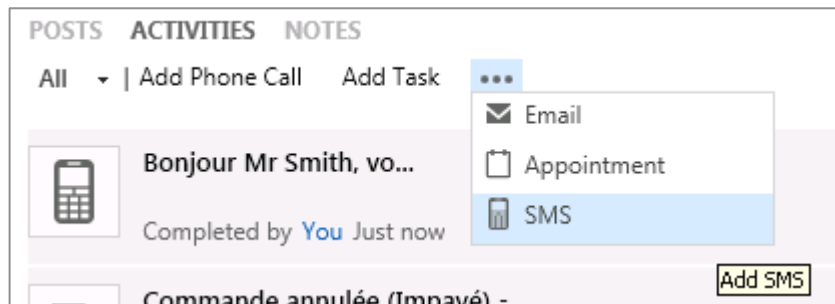
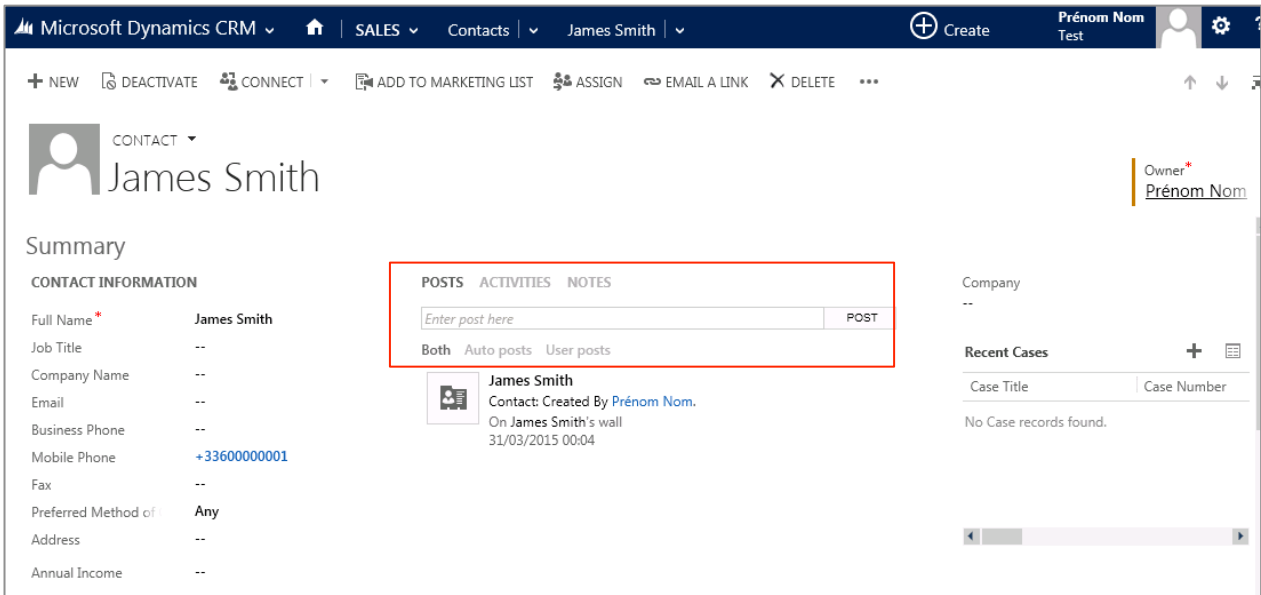
Using the extension

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 :

Microsoft Dynamics CRM | SALES | Contacts | New SMS

SAVE | MARK COMPLETE | SAVE & CLOSE

SMS : INFORMATIONS

New SMS

Recipient	James Smith	SMS type	Marketing
Number	+33600000001	Sender	SM
Sending date	--		

Text

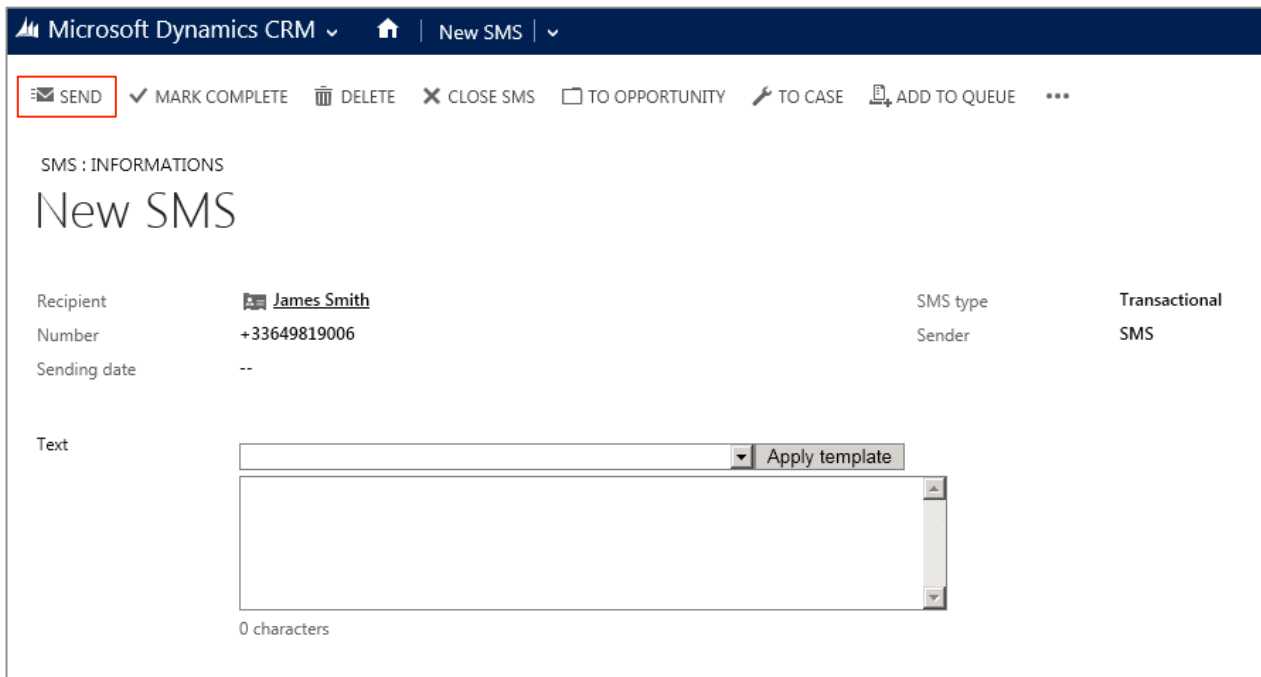
Apply template

0 characters

- 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.

Microsoft Dynamics CRM | MARKETING | Campaigns

NEW | NEW TEMPLATE | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL

My Campaigns

Name	Template	Status Reason	Created On
Campagne SMS Contacts	No	Proposed	02/04/2015 21:56
Test	No	Proposed	13/04/2015 00:52
test	No	Proposed	16/04/2015 14:58
test 2	No	Proposed	13/04/2015 14:44
Test 3	No	Proposed	13/04/2015 15:17
Test4	No	Proposed	13/04/2015 16:05

Click on « New » to create a new campaign.

Microsoft Dynamics CRM | MARKETING | Campaigns | New Campaign

SAVE | SAVE & CLOSE | NEW

CAMPAIGN : INFORMATION

New Campaign

General

Name* Status Reason **Proposed**

Campaign Code -- Campaign Type **Advertisement**

Currency* **euro**

Expected Response -- Price List --

Offer --

Schedule

Proposed Start -- Actual Start --

Proposed End -- Actual End --

Description

Description --

SMS

SMS campaign parameters

Recipients type --

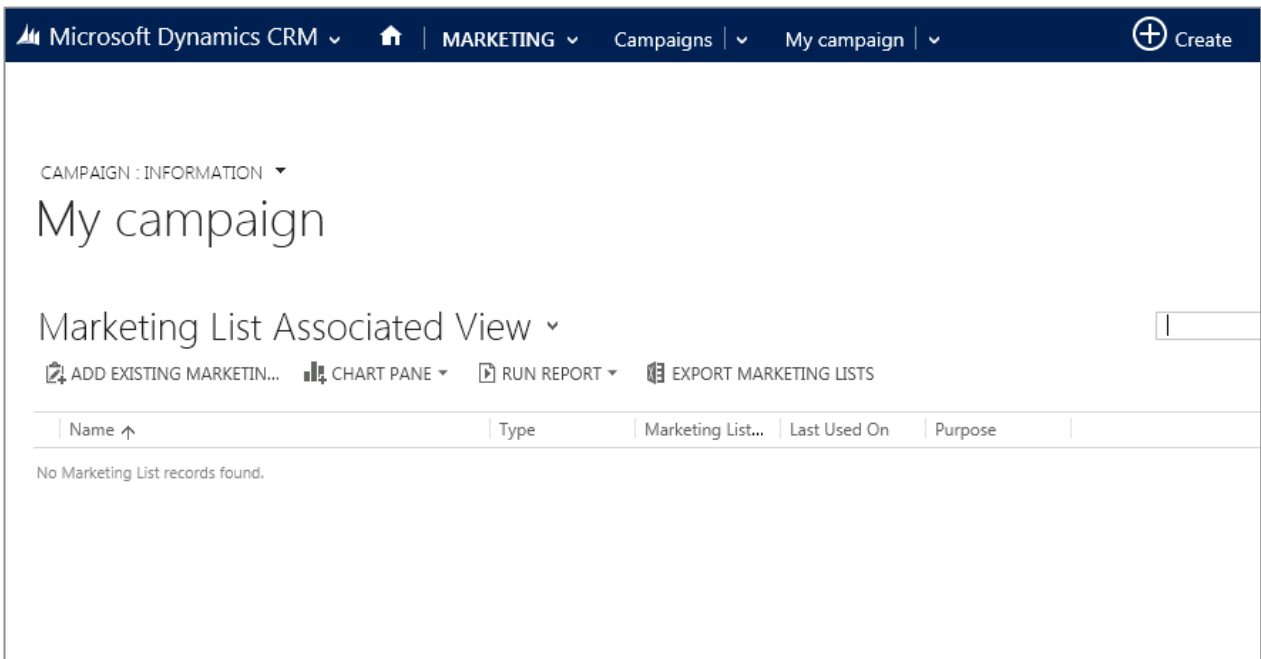
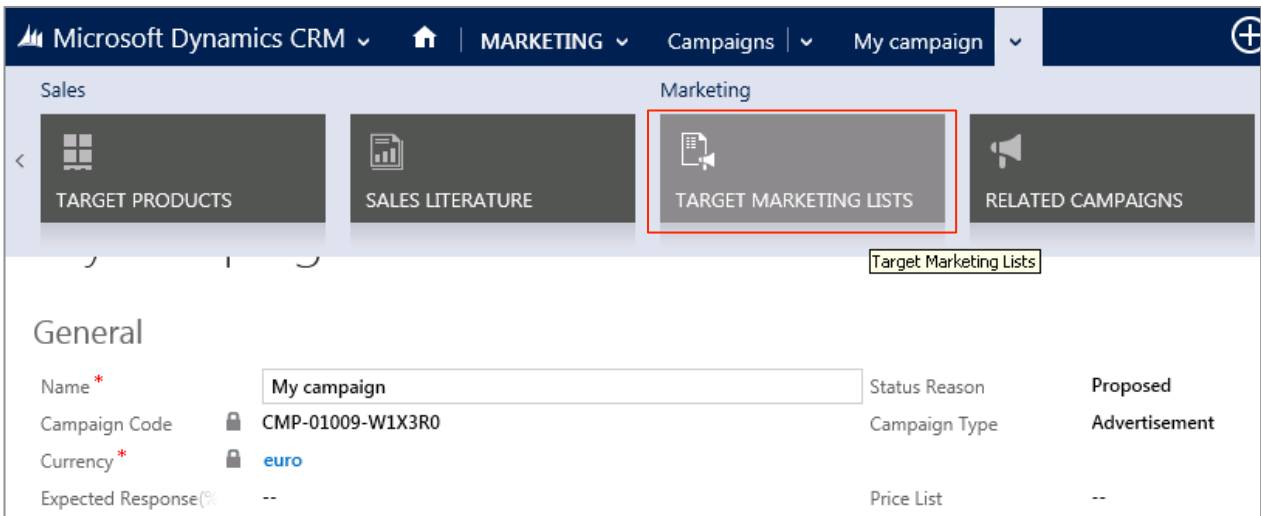
Fill in the campaign name and click on « Save ».

Choosing the recipients

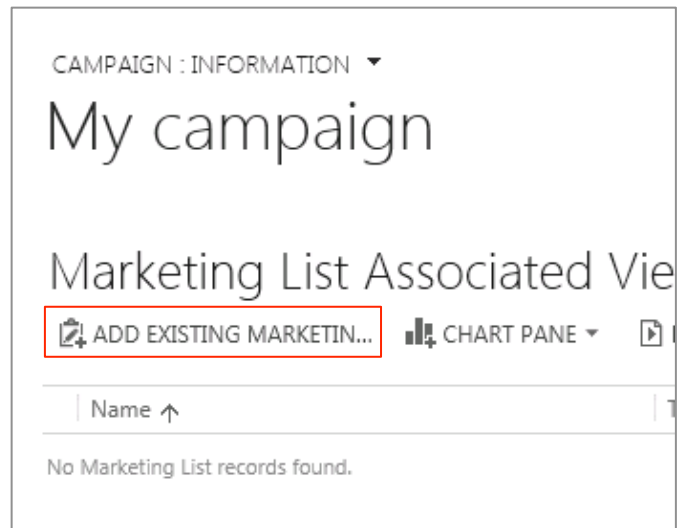
After saving the campaign, click on the « down arrow » icon next to the campaign name, in the ribbon located on top of the window :



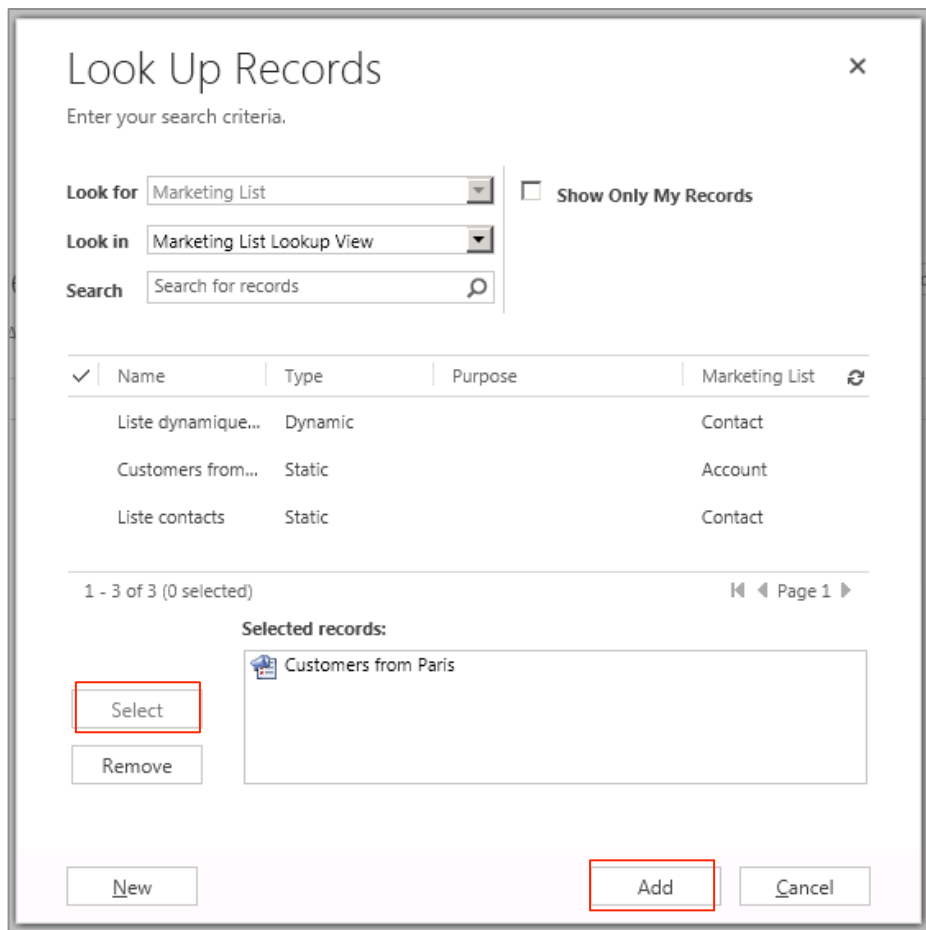
In the opening ribbon, click on « Target marketing lists ».

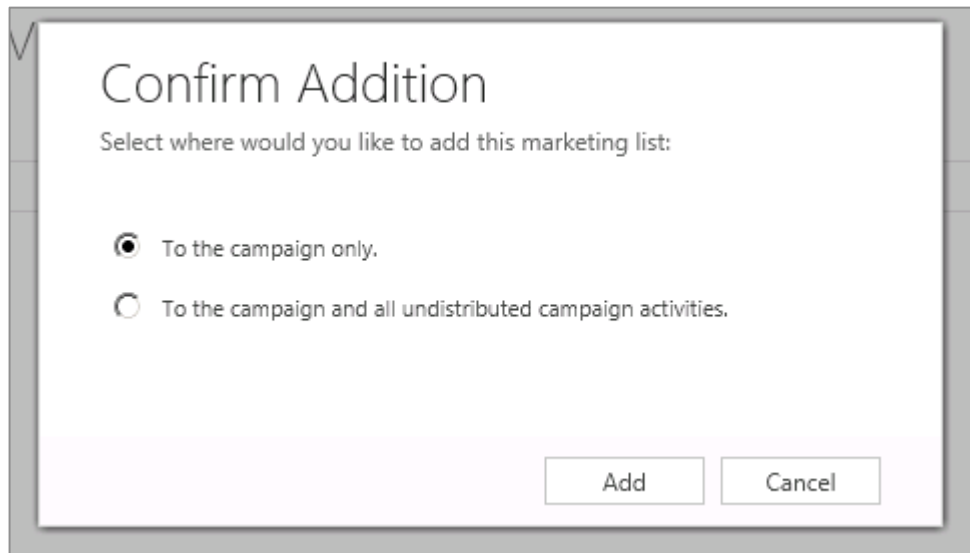


Click on « Add a marketing list » :



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

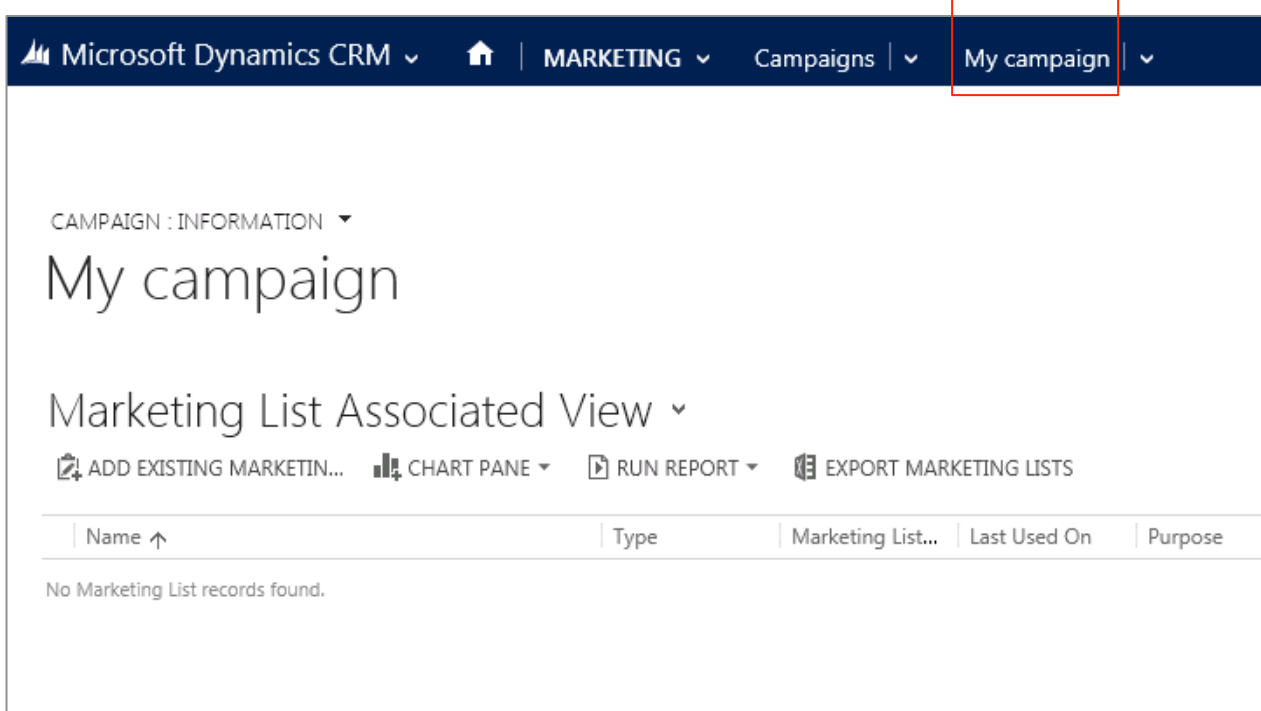




Choose « To the campaign only » and then click on « Add ».

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.

Microsoft Dynamics CRM | MARKETING | Campaigns | My campaign | Create

+ NEW DEACTIVATE DELETE COPY AS CAMPAIGN COPY AS TEMPLATE ASSIGN SHARE ...

General

Name *	My campaign	Status Reason	Proposed
Campaign Code	CMP-01009-W1X3R0	Campaign Type	Advertisement
Currency *	euro	Price List	--
Expected Response(%)	--		
Offer	--		

Schedule

Proposed Start	--	Actual Start	15/05/2015 15:00
Proposed End	--	Actual End	--

Description

Description	--
-------------	----

Composing the SMS

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

SMS

SMS campaign parameters

Recipients type	Contact
Text	<input type="text"/> ▼ Apply template
	<div style="border: 1px solid gray; height: 60px; width: 100%;"></div>
	0 characters
SMS type	Marketing
Sender	fsfs

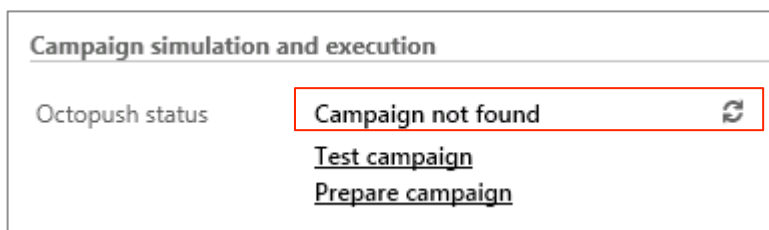
- **Text** : The message text cannot exceed 489 characters. This indication is only valid if the message doesn't contains dynamic fields. If dynamic fields exists, the message length can eventually exceeds the indicated characters count. Should this happen, you will receive a warning when simulating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

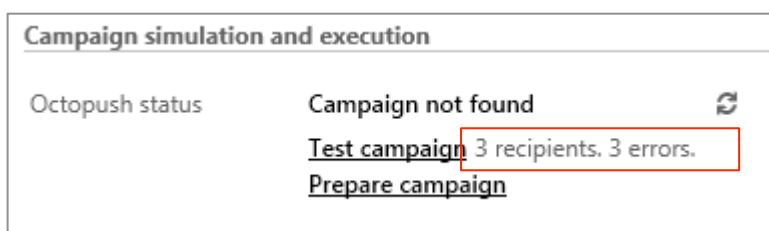
Campaign simulation

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 :

Simulation et lancement de la campagne



Statut Octopush **Campagne non trouvée** 
Tester la campagne 3 destinataires. 3 erreurs.
Préparer la campagne

Finances

Finances

Coût total des activit  **0,00€**
Coûts divers **0,00€**
Coût total de la camp  **0,00€**

Administration

Propriétaire*  **Prénom Nom**
Modifié par  **Prénom Nom**


Notes

NOTES

Entrer une note

Résumé de la simulation (16/04/2015 15:15:17)

Test

 resume.csv

Prénom Nom - Invalid Date Invalid Date

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

```

1 STATUS;DETAIL;NUMBER;MESSAGE
2 ERROR;The text 'STOP au XXXXX' is missing.;+33627588010;test
3 ERROR;The text 'STOP au XXXXX' is missing.;+33600000001;test
4 ERROR;The text 'STOP au XXXXX' is missing.;+33649819006;test
5

```

The simulation result lists all the SMS, showing :

- The SMS status : ERROR or SUCCESS. Error occurs if the simulation didn't pass one of 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.


Campaign simulation and execution	
Octopush status	Campaign compiling 

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

Financials	
Financials	
Total Cost of Campaign 	0,00€
Miscellaneous Costs	0,30€
Total Cost of Campaign 	0,30€

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 »:

Campaign simulation and execution	
Octopush status	Campaign ready 
	Execute campaign Cancel campaign

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 ».

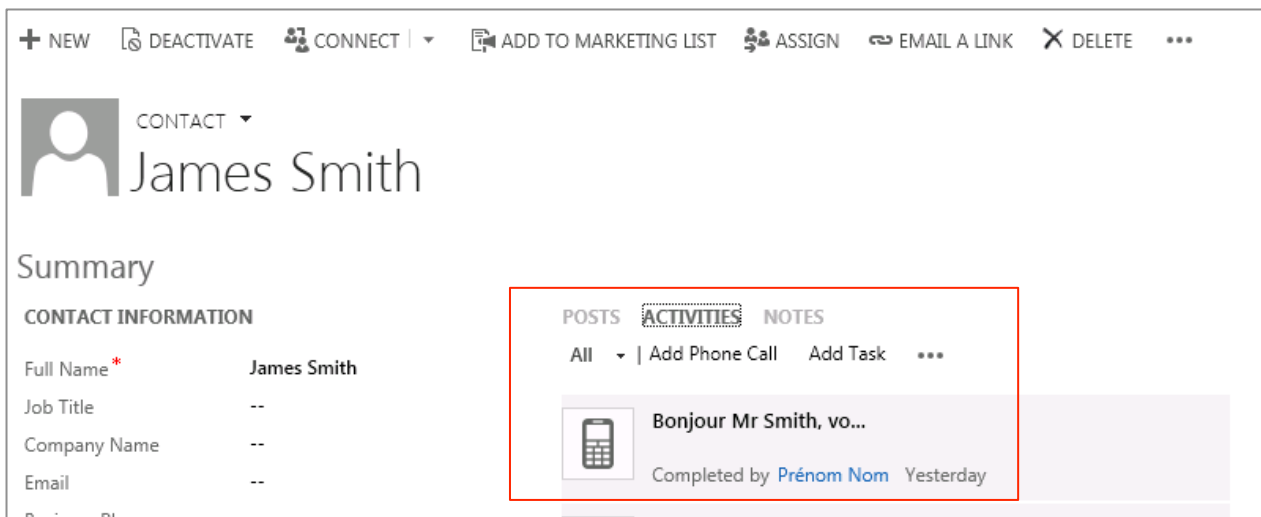
Campaign simulation and execution	
Octopush status	Campaign sent 

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:

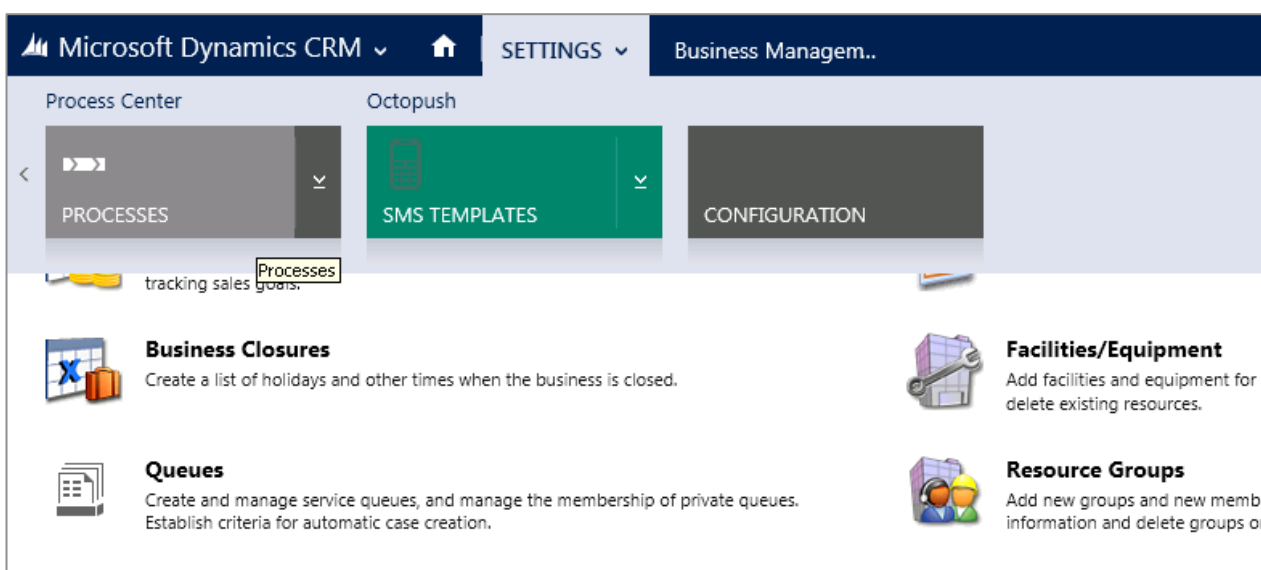


Sending an SMS on a hook

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".

General Administration Notes

▼ Hide Process Properties

Process Name * Entity

Activate As Category

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Options for Automatic Processes

Scope

Start when: Record is created

Record status changes

Record is assigned

Record fields change

Record is deleted

Execute as: The owner of the workflow

The user who made changes to the record

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Add Step | Insert | Delete this step.

▼ Si la commande est validée

If Order:Status equals [Fulfilled], then:

▼ Si le client est un "compte" -> SMS vers compte, sinon si le client est un "contact" -> SMS vers contact

If Customer (Account):Account contains data, then:

- Envoi du SMS au compte

Octopush (1.0.0.31):OctopushWF.SendSMS

Otherwise, if Customer (Contact):Contact contains data, then:

- Envoi du SMS au contact

Octopush (1.0.0.31):OctopushWF.SendSMS

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 :

Octopush (1.0.0.31):OctopushWF.SendSMS

Otherwise, if Customer (Contact):Contact contains data, then:

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

Processus : Commande validée

Définir les propriétés d'entrée de la phase persona...

Nom de propriété	Type de données	Valeur
Contact destinataire	Recherche	<input type="text"/>
Prospect destinataire	Recherche	<input type="text"/>
Compte destinataire	Recherche	{Compte(Client (Compte))}
Modèle de SMS à utiliser	Recherche	<input type="text"/>
Texte à utiliser	Une seule ligne de texte	Votre commande n° {Référence de commande}

Canceled order

Send an SMS when an order status changes to "Canceled"

General Administration Notes

Hide Process Properties

Process Name * Entity
 Activate As Category

Available to Run

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

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope
 Start when: Record is created
 Record status changes
 Record is assigned
 Record fields change
 Record is deleted

Execute as: The owner of the workflow
 The user who made changes to the record

Add Step | Insert | Delete this step.

▼ Si la commande est annulée

If Order:Status equals [Canceled], then:

▼ Si le client est un compte -> SMS vers compte, sinon si le client est un contact -> SMS vers contact

If Customer (Account):Account contains data, then:

- Envoi du SMS au compte
 Octopush (1.0.0.31):OctopushWF.SendSMS

Otherwise, if Customer (Contact):Contact contains data, then:

- Envoi du SMS au contact
 Octopush (1.0.0.31):OctopushWF.SendSMS

New incident acknowledgement

Sends a SMS when a new incident is created.

The screenshot shows a configuration window with three tabs: 'General', 'Administration', and 'Notes'. The 'Administration' tab is active.

Hide Process Properties

Process Name *: Envoi de SMS - Accusé de réception nou
Entity: Case
Activate As: Process
Category: Workflow

Available to Run

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

Workflow Log Retention

- Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope: Organization
Start when: After
Record is created:
Record status changes:
Record is assigned:
Record fields change: Select
Record is deleted:
Execute as: The owner of the workflow
 The user who made changes to the record

Workflow Steps

▼ Si le client est un compte -> SMS vers compte, sinon si le client est un contact -> SMS vers contact

If Customer (Account):Account contains data, then:

- Envoi du SMS au compte
Octopush (1.0.0.31):OctopushWF.SendSMS Set Properties

Otherwise, if Customer (Contact):Contact contains data, then:

- Envoi du SMS au contact
Octopush (1.0.0.31):OctopushWF.SendSMS Set Properties

Incident resolution

Sends a SMS when an incident status changes to "Resolved"

General Administration Notes

Hide Process Properties

Process Name * Entity
 Activate As Category

Available to Run

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

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope
 Start when: Record is created
 Record status changes
 Record is assigned
 Record fields change
 Record is deleted

Execute as: The owner of the workflow
 The user who made changes to the record

Add Step | Insert | Delete this step.

▼ Si le statut de l'incident est "Résolu"

If Case:Status equals [Resolved], then:

▼ Si le client est un compte > SMS vers compte, sinon si le client est un contact > SMS vers contact

If Customer (Account):Account contains data, then:

- Envoi du SMS au compte
 Octopush (1.0.0.31):OctopushWF.SendSMS

Otherwise, if Customer (Contact):Contact contains data, then:

- Envoi du SMS au contact
 Octopush (1.0.0.31):OctopushWF.SendSMS

New quote

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

General Administration Notes

Hide Process Properties

Process Name * Entity
 Activate As Category

Available to Run

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

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope
 Start when: Record is created
 Record status changes
 Record is assigned
 Record fields change
 Record is deleted

Execute as:

The owner of the workflow
 The user who made changes to the record

Add Step | Insert | Delete this step.

▼ Si le statut du devis est "Actif"

If Quote:Status equals [Active], then:

▼ Si le client est un compte > SMS vers compte, sinon si le client est un contact > SMS vers contact

If Potential Customer (Account):Account contains data, then:

- Envoi du SMS au compte
 Octopush (1.0.0.31):OctopushWF.SendSMS

Otherwise, if Potential Customer (Contact):Contact contains data, then:

- Envoi du SMS au contact
 Octopush (1.0.0.31):OctopushWF.SendSMS

Paid invoice

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

General Administration Notes

Hide Process Properties

Process Name * Entity
 Activate As Category

Available to Run

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

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope
 Start when: Record is created
 Record status changes
 Record is assigned
 Record fields change
 Record is deleted

Execute as:

The owner of the workflow
 The user who made changes to the record

Add Step | Insert | Delete this step.

▼ Si le statut est "Réglée"

If Invoice:Status equals [Paid], then:

▼ Si le client est un compte > SMS vers compte, sinon si le client est un contact > SMS vers contact

If Customer (Account):Account contains data, then:

- Envoi du SMS au compte
 Octopush (1.0.0.31):OctopushWF.SendSMS

Otherwise, if Customer (Contact):Contact contains data, then:

- Envoi du SMS au contact
 Octopush (1.0.0.31):OctopushWF.SendSMS

Member registering

Sends a SMS when a new contact is created.

General Administration Notes

Hide Process Properties

Process Name * Entity
 Activate As Category

Available to Run

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

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope
 Start when: Record is created
 Record status changes
 Record is assigned
 Record fields change
 Record is deleted

Execute as:

The owner of the workflow
 The user who made changes to the record

Add Step | Insert | Delete this step.

▼ Si le numéro de mobile du contact est renseigné

If Contact:Mobile Phone contains data, then:

- Envoi du SMS au contact

Octopush (1.0.0.31);OctopushWF.SendSMS

Inactive contact follow-up

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

General Administration Notes

Hide Process Properties

Process Name * Entity

Activate As Category

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

Scope

Start when:

Record is created

Record status changes

Record is assigned

Record fields change

Record is deleted

Add Step | Insert | Delete this step.

Attente 90 jours

Wait until **Process-Execution Time >= [3 Months After Contact:Created On]**, then:

Si le contact n'a pas été modifié

If **Contact:Modified On equals [Contact:Created On]**, then:

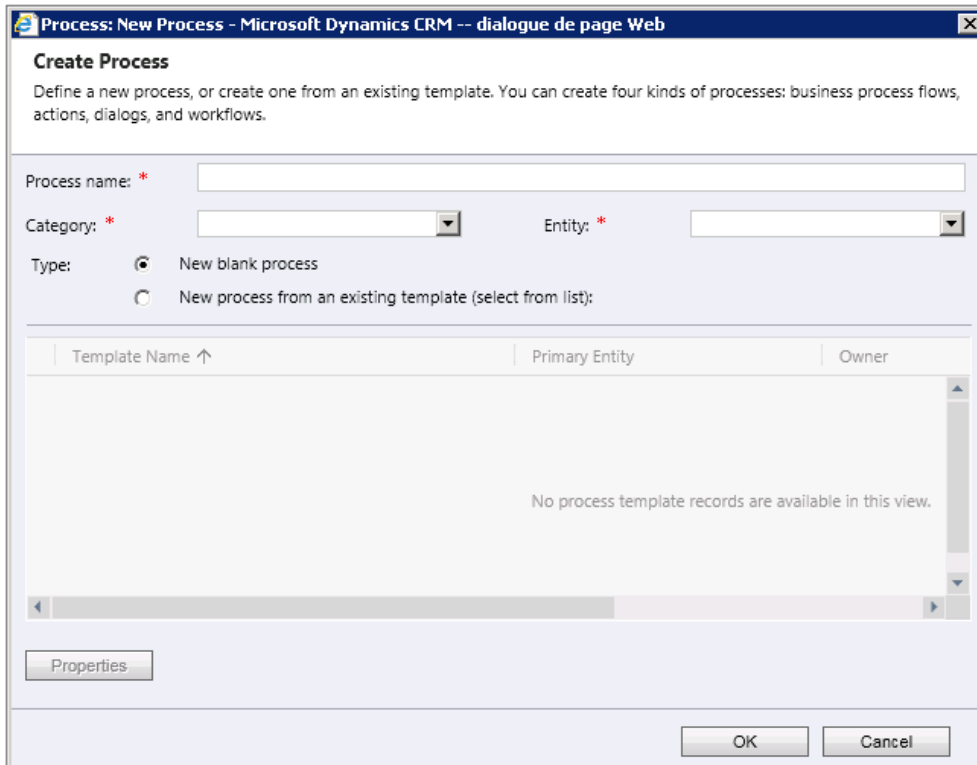
- Envoi du SMS au contact

Octopush (1.0.0.31):OctopushWF.SendSMS

Create a new hook

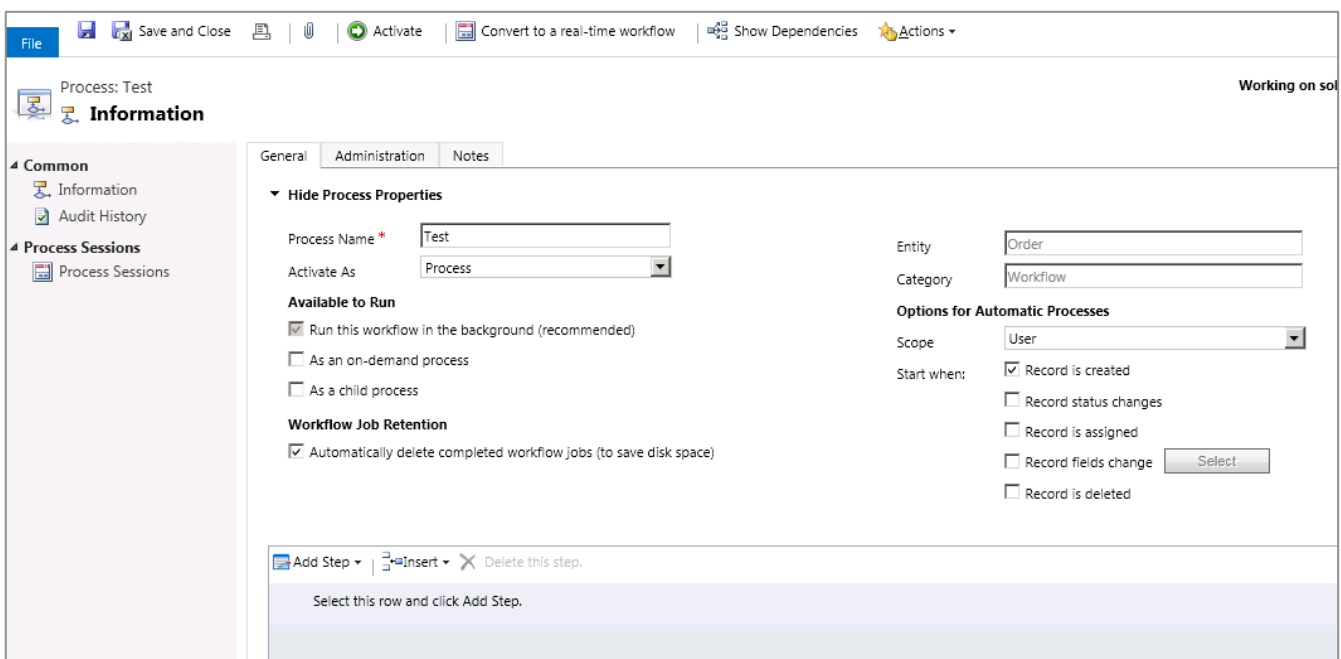
Hooks are created as Dynamics CRM workflows. Workflows let you determine the conditions of an event, and the action (sending a SMS) to be triggered when this event occurred.

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.

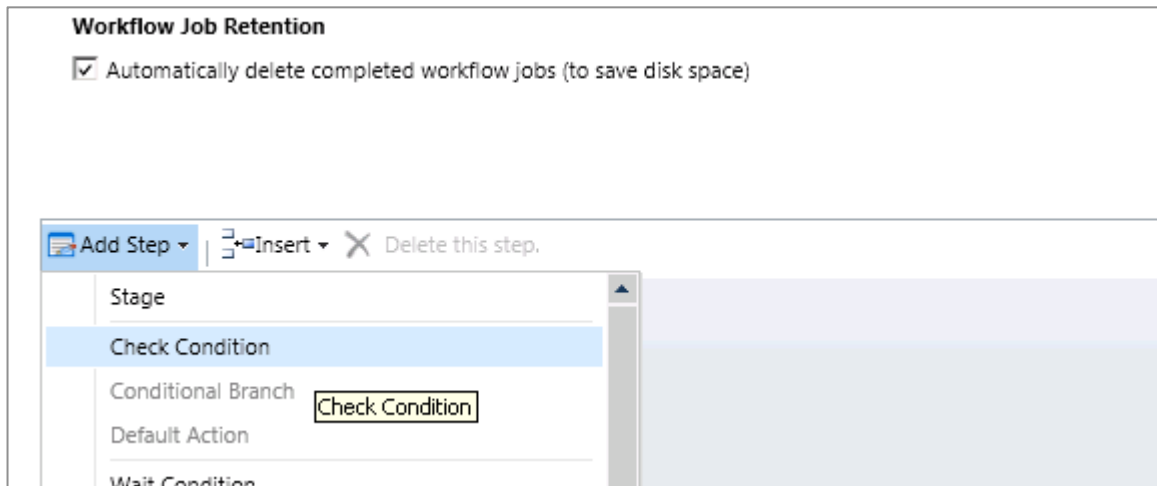
Click on « OK » to start configuring the workflow.



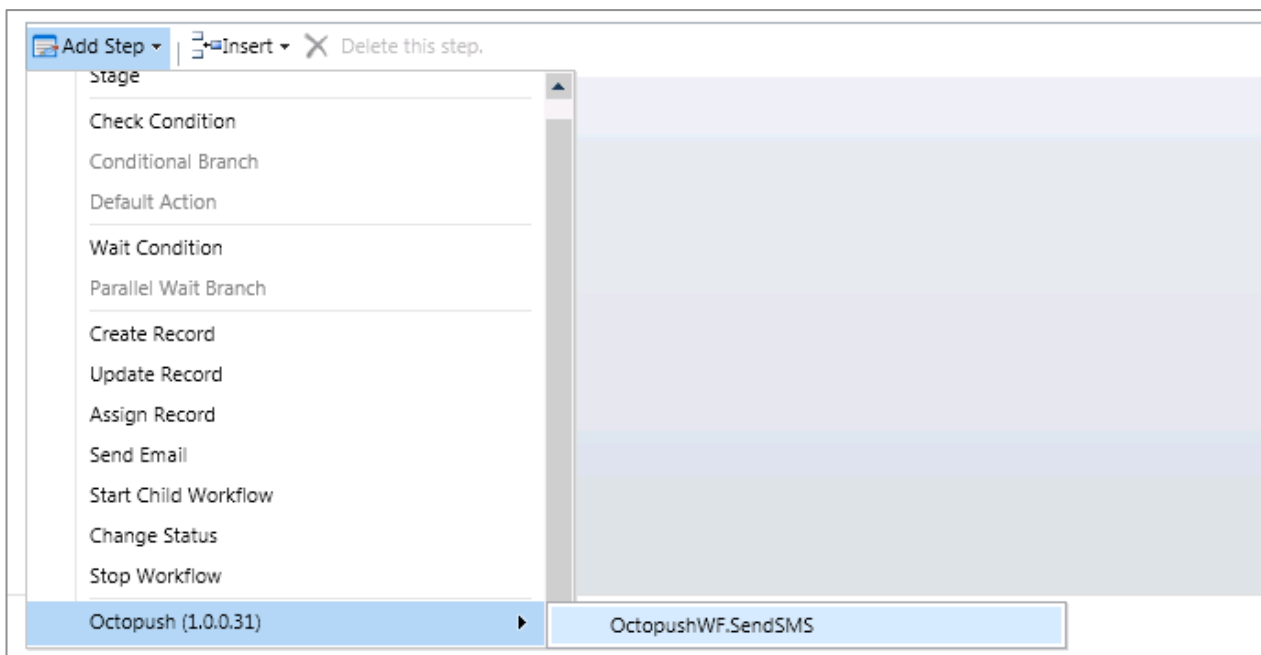
In the « Scope » dropdown list, choose “Organization”.

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 » :

The screenshot shows a window titled 'Process: Test' with the subtitle 'Set Custom Step Input Properties'. The window is working on a solution named 'Solution par défaut'. It contains a table with the following data:

Property Name	Data Type	Value
Contact destinataire	Lookup	[Empty field with lookup icon]
Prospect destinataire	Lookup	[Empty field with lookup icon]
Compte destinataire	Lookup	[Empty field with lookup icon]
Modèle de SMS à utiliser	Lookup	[Empty field with lookup icon]
Texte à utiliser	Single Line of Text	-

On the right side, there is a 'Form Assistant' panel. It includes a 'Dynamic Values' dropdown menu, a 'Dynamic Values' list area, an 'Operator' dropdown menu (set to 'Set to'), a 'Look for' dropdown menu (set to 'Order'), and a 'Customer' dropdown menu. Below these are 'Add', 'Remove', and 'Move' buttons. At the bottom of the panel is a 'Default value' field and an 'OK' button.

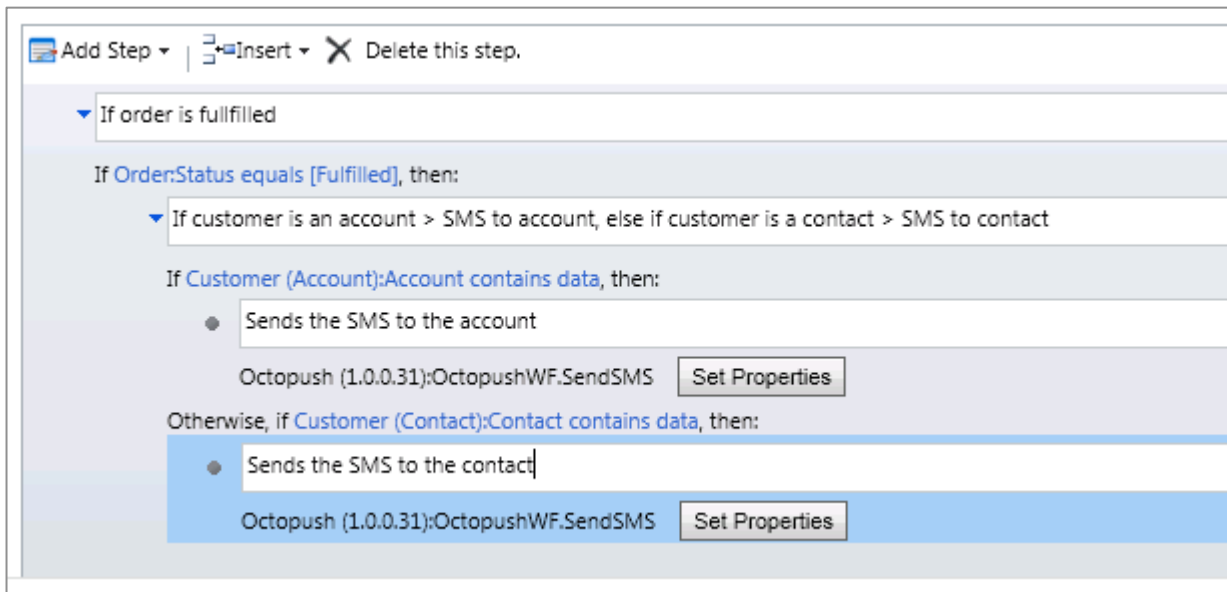
2 fields must be filled :

- 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:

