Incremental
Group

Auto SMS Release Notes

Contents

Section 1 - Introduction

Thank you for downloading and installing the Incremental Group Auto SMS solution.

This configuration document is for the Incremental Group SMS solution v8.0.0.0, released on 7th January 2016 and the Auto SMS Console Application version 8.0.0.0. Note: the Auto SMS Console Application is only required if inbound text messages are a requirement.
NOTE: This is only currently available for TextAnywhere and Esendex SMS providers.

These versions mark the latest official Release-To-Web (RTW) for Auto SMS for Microsoft Dynamics CRM.

1.1   Known Issues

There are no known issues for this release.

1.2   Version Notes

1. 8.0.0.0 RTW version for CRM2016.
2. 7.0.0.0 RTW version for CRM2015. Added a custom mobile number field to the SMS that if populated will override the use of the mobile number on the lead/contact/account/user.
3. 6.0.0.9 Fixed an issue with hidden characters in the CRM SMS record subject field when workflow inserted dynamic values. These hidden characters are now stripped prior to sending to the SMS provider.
4. 6.0.0.7 Added a common configuration setting to specify the SMS message characters limit in the 'Send SMS' interface. The SMS message characters' limit are by default 160 characters for all SMS gateway types. User can send big messages which maximum limit are for TextAnywhere 918 characters, for Red Oxygen 765 and for Esendex 612 characters. Note. The big messages can charge more money as they divide the message into chunks of around 160 characters.
5. 6.0.0.6 Added four new fields to track the delivery details of SMS. Also the SMS in intermediate delivery can have Pending Send status unless the Resend Wait time and Resend Attempts of delivery limit not finishes. Introduce New EsendEx SMS API.
6. 6.0.0.5 Added UTF-8 encoding to enable Scandanavian characters.
    NOTE: user of characters such as these may reduce the number of characters allowed in a single SMS message and may result in 2 messages/credits being used by the service provider.
7. 6.0.0.4 Fixed a re-send issue regarding undeliverable messages.
8. 6.0.0.3 Upgraded for the release of CRM2013.
9. 5.2.0.4 Fixed the auto generation of interfaces and interface parameters so inbound records are now generated on 'Publish All' after installing the solution.
10. 5.2.0.3 - Fixed the issue which replace '00' at runtime to '+' symbol to avoid format error of TextAnywhere.
11. 5.2.0.1 – Added inbound SMS capability (requires supplementary executable)

Section 2 - FAQ

2.1 What is the best way to Bulk Send SMS from CRM I.e. send the same SMS to multiple contacts from CRM?

This can be carried out via Workflow. Create a Workflow to send the SMS message that is desired and then select the leads, contacts accounts or users you wish to send messages to (select individually, create a Marketing List or use an Advanced Find) and apply the workflow to the selected records.

TIP: Use our free 'Bulk Workflow Executor' tool to trigger more than 250 workflows at once https://incrementalgroup.co.uk/services/dynamics-customer-engagement-crm/essentials-range/

2.2 What does the solution cost?

Auto SMS is £199. This is a flat fee per live organisation irrespective of user numbers or the number of development / test organisations which support the live organisation. The text service will require purchasing separately from either Red Oxygen, Esendex or Text Anywhere and is not included in the above price.

Please contact us for information on obtaining a licence for your Microsoft Dynamics CRM organisation.

2.3 Trial Mode

By default, this solution runs in trial mode. Whilst running in Trial mode, approximately 1 in every 10 SMS requests will generate just random text. Trial mode can be removed by applying a license key for your CRM Organisation.

Section 3 - Installation

3.1   Prerequisites

3.1.1   On-Premise or Partner Hosted

You must have the following prerequisites installed before installing the SMS for Microsoft Dynamics CRM On-Premise or Partner Hosted:

12. A fully working installation of Microsoft Dynamics CRM
13. You must have the Microsoft Dynamics CRM Sandbox server role installed
14. A System Administrator security role for your Organisation
15. A TextAnywhere, Esendex or RedOxygen subscription

3.1.2   CRM Online

You must have the following prerequisites installed before installing the SMS for Microsoft Dynamics CRM Online:

16. An active Microsoft Dynamics CRM Online subscription
17. A System Administrator security role for your Organisation
18. A TextAnywhere, Esendex or RedOxygen subscription

3.2   Solution Installation Steps

Please use these steps to install the Auto SMS.

1. Navigate to Settings > Solutions, and import the Auto SMS solution Note: During import ensure you select the Activate Processes tick box
2. Once imported, click on Publish All Customizations. Press F5 to Refresh your browser.

3.3   Console Application Installation

3.3.1   Steps

Please use these steps to install the Auto SMS Console Application. (NOTE: The application setup is only required if inbound text messages are a requirement and isnt available for RedOxygen)

1. Extract the contents of the Incremental Group Auto SMS .zip file to a suitable location on the server where the console application will run.
2. Run the setup.exe file as an administrator.
   NOTE: If a previous version has been installed, you will be prompted with the option to Repair or Remove the Installation. Before you chose the relevant option first ensure you have a copy of the

current stored Interface Parameters. Follow instructions in 4.2 to save parameters. Select Remove and once you have confirmation that the installation has been removed, run the setup.exe again.

3. As part of the installation parameters, you will need to decide whether the application will be accessible for all users or just the user installing the application.
4. Enter URL and the login details of the CRM user that you wish to run the application.
5. You will be given the option at the end of the installation to Open Task Scheduler. Selecting this option will allow you to skip Step 7 below.
6. Complete the Installation.
7. Open the Task Scheduler (Control Panel > Administrative Tools > Task Scheduler).

3.4 Requesting a Licence Key

To request a licence key for your SMS solution please follow these steps:

1. Navigate to the customisations area of CRM. Click on Customisations.
2. Click on Developer Resources.
3. Copy and paste the Organisation Unique Name send a licence key request to support@incrementalgroup.co.uk .

3.5 Installing a Licence Key

To install a licence key for your SMS solution please follow these steps:

1. Navigate to Settings > Interfaces
2. Open the SMS Generation interface
3. Double click to open the Licence Key interface parameter record
4. Copy and paste your licence key into the value field to replace the "Trial Version" value
5. Save and close the Interface Parameter. SMS will now operate in licenced mode.

3.6 Uninstallation Steps

To remove Auto SMS please perform the following two steps.

NOTE: The steps apply to all current releases of Auto SMS.

1. Navigate to the SMS Definition area in Settings. Click on each SMS Definition and press the delete key to remove this record.
2. Navigate to the Solution area in Settings. Click on Auto SMS, click delete and follow the instructions.

3.7　Configuration

3.7.1　Information

The Incremental Group SMS Solution is designed to work with the Lead, Contact, Account and User entities in Microsoft Dynamics CRM. The package enables SMS messages to be sent to single and multiple records simultaneously. SMS messages are created as an activity record on an entity. This means that SMS messages can be sent by workflow process in response to system events or user actions and appear in the social pane of the associated records.

The solution is designed to work with a specified SMS service provider (currently TextAnywhere, Esendex or RedOxygen (outbound only)) and each organisation will need to register for an account with the appropriate provider.

3.7.2　Interface Records

The following Interface records should be generated automatically via the solution import when pressing 'Publish All'. If not, the missing Interface records must be manually created:

· SMS Send Message

· SMS Validation

· Auto SMS Receive Message

3.7.3　Interface Parameters

The following is a guide to configuring the key Interface Parameters required for SMS to run effectively SMS Send Message Interface Parameters

Common Parameters:

1. SMS Gateway Type

   Suggested Values: TextAnywhere, Esendex or RedOxygen
   Description - The SMS gateway type using which SMS and can be receive/send etc.

2. SMS Licence Key

   Default Values: Trial Version
   Description - Used to store the Incremental Group License Key for SMS. Enter any value to activate

trial mode. Please note on trial mode. The SMS message will be replaced with random texts approximately 1 out of every 10 messages.

3. SMS Country Code

   Example Value: +44

   Description - Use to store the default country code for SMS. This parameter will be used if the destination or receiver mobile number doesn't have a country code as part of the stored mobile number.

4. SMS Characters Limit

   Example Value: 630

   Description - Use to validate the length of the SMS. You can store from:

   » 160 to 918 characters if the Gateway Type is TextAnyWhere.
   » 160 to 612 characters if the Gateway Type is Esendex.
   » 160 to 765 characters if the Gateway Type is Red Oxygen etc.
   » Any other values can be considered as 160 characters.

Red Oxygen Parameters:

To be completed if Red Oxygen service is being used.

1. RedOxygen Account Id
   Description: Use to store unique Account Id for SMS RedOxygen.
2. RedOxygen Email
   Description: Use to store unique Email for SMS RedOxygen.
3. RedOxygen Password
   Description: Use to store Password for SMS RedOxygen.
4. RedOxygen URL Suggested Value: http://www.redoxygen.net/sms.dll?Action=SendSMS
   Description: Use to store webservice URL for SMS RedOxygen.

TextAnyWhere Parameters:

To be completed if Text Anywhere service is being used.

1. 1. TextAnywhere Gateway Client Id
   Description: This parameter sets your unique text messaging account identifier. This is required to confirm which account is interfacing with the SMS Gateway. Your unique account identifier is assigned to users account when your account is first opened and cannot be amended. The user should use the

Client_Id value as your externalLogin setting. The Client_Id value can be found by logging in to your online account, and clicking on the ADMIN PANEL button.

2. TextAnywhere Gateway Password
   Description: This parameter sets your text messaging account password, required to authenticate which account is interfacing with the SMS Gateway.

3. TextAnywhere Gateway Originator Type
   Description: This parameter sets the type of Originator that is being sent as detailed in 4 and 5 below. The options are 0 to send a reply number and 1 to send a reply name.

4. TextAnywhere Outbound Reply Name
   Description: This parameter sets the name that alphanumeric string you wish the SMS to appear to be from.

5. TextAnywhereGatewayReplyNumber
   Description: This parameter sets the number of the inbound service that you are requesting new inbound messages for, from the SMS Gateway.

6. TextAnywhere Gateway Billing Ref
   Description: This parameter sets a value that is used to help billing.

7. TextAnywhere Gateway Connection
   Description: This parameter sets the solution to send messages either as Live or Test. The options are: 1 – Test, 2 – Live (low volume use), 4 – Live (high volume use)

8. TextAnywhere Gateway Originator Type
   Description: This parameter sets the type of Originator that is being sent

9. TextAnywhere Reply Type
   Description: The parameter sets the type of reply that will be sent in response to messages. The options are: 0 – No reply, 1 – Reply to Web Service/HTTP Connector, 2 – Reply to Email, 3 – Reply to URL

10. TextAnywhere Reply Data
    Description: This parameter requires setting if Reply Type has been set to 2 or 3. If Reply Type has been set to 2, then provide the email address for replies to be sent to here. If Reply Type has 6 been set to 3, then provide a web url. When a reply occurs, the SMS gateway will contact this URL as follows:

http://URL?originator=+447787654321&destination=+447712345678&date=5/1/2004&Time=10
:30&Body=Test&ClientRef=test
11. TextAnywhere SMS Gateway URL
Default Value: http://www.textapp.net/webservice/service.asmx Description: Use to store webservice
URL for SMS Text Anywhere service.

EsendEx Parameters:

1. Esendex Account Id
Description: The valid User Account Id for Authentication of ESendEx account.
2. Esendex Account Reference
Description: Unique Unique Identification number for the EsendEx Account.
3. Esendex Password
Description: Password for the Esendex Account.
NOTE: Above Esendex Parameter is only required when Gateway type is selected as EsendEx.

Section 4 - Auto SMS Receive Message Interface

4.1.1   Parameters

Common Parameters:

1. SMS Country Code
   Example Value: +44
   Description: Use to store the default country code for SMS. This parameter will be used if the destination or receiver mobile number doesn't have a country code as part of the mobile number.
2. SMS Gateway Type:
   Suggested Values: TextAnywhere or Esendex
   Description: The sms gateway type using which SMS and can be receive/send etc.
3. SMS Licence Key
   Default Values: Trial Version
   Description: Used to store the Incremental Group License Key for SMS. Enter any value to activate trial mode.

TextAnyWhere Parameters:

1. TextAnywhere Gateway Client ID
   Description: This parameter sets your unique text messaging account identifier, required to confirm which account is interfacing with the SMS Gateway. Your unique account identifier is assigned to users account when your account is first opened and cannot be amended. User should use the Client_Id value as your externalLogin setting. The Client_Id value can be found by logging in to your online account, and clicking on the ADMIN PANEL button.
2. TextAnywhere Gateway Password
   Description: This parameter sets your text messaging account password, required to authenticate which account is interfacing with the SMS Gateway.
3. TextAnywhere Inbound Reply Number
   Description: This parameter holds the phone number or Short Code used to retrieve inbound messages.
4. TextAnywhere SMS Gateway URL
   Default Value: http://www.textapp.net/webservice/service.asmx
   Description: Use to store webservice URL for SMS Text Anywhere service.
5. TextAnywhere Resend Attempts
   Suggested Default: 20
   Description: This parameter sets the number of attempts the SMS service will make to retrieve the SMS Message status.
6. TextAnywhere Resend Wait Time
   Suggested Default: 5

Description: This parameter sets the maximum wait time in minutes for the service to attempt to retrieve SMS Message status.

4.1.2 Configuring CRM records

In order to send SMS messages the phone number needs to be set for the relevant record unless the 'To Number' is populated (this acts as an override which can be populated manually or via workflow).

User: Mobile Phone (mobilephone)

Lead: Mobile Phone (mobilephone)

Contact: Mobile Phone (mobilephone)

Account: Phone (telephone1)

Section 5 - Operation

5.1.1   How to enable logging

SMS for Microsoft Dynamics CRM provides two levels of runtime logging - Event Logging and Trace Logging. Please note, for Live operation logging should always be disabled. If you require support, you could be asked to enable to enable logging for SMS which is based on the following steps:

1. Navigate to settings > Interfaces
2. Open the SMS Generation interface (or the interface required)
3. In the Interface Options & Parameters section click to enable the logging type required, save and close.
4. Run SMS by creating a new record which is configured with an SMS Definition record.
5. Open the interface record again. You should now see a new Interface Job record. Double click to open the Interface Job Record for detailing logging information.

5.1.2   Saving Interface Parameters

Should you need to uninstall the solution or the console application, it is advisable to save a copy of the Interface Parameters for future reference. Follow these steps to save the Parameters:

1. In CRM navigate to Advanced Find
2. Look for Interface Parameters
3. Edit Columns so that you have included Name, Interface and Value
4. Retrieve Results and then either Export results to Excel or print the results

5.1.3   Support/Upgrade

If you require support for our SMS for Microsoft Dynamics CRM product, please contact us at support@incrementalgroup.co.uk.

If you intend to upgrade CRM, a new Auto SMS license key must be purchased for each production instance.