



January 22, 2019

Reading Time: 5 minutes

This guide is designed to take you through the full setup of the TxtSync integration into Microsoft Dynamics. The guide will explain what the integration does and how it works. The setup process has been documented in Dynamics 365 but it also applies to Dynamics 2016 on premise.

Setting up the integration

This section of the guide will take you through the process of getting everything up and running. If this is your first time using TxtSync you will be able to set everything up without any cost so you can trial the system. This includes a 14 day trial with Synchronisation.

Creating a TxtSync Account

If you haven't got a TxtSync account you will need to create one. TxtSync in its basic form is an SMS gateway that allows you to globally send and receive SMS against a managed list of contacts. The TxtSync web application allows you to do so much more but its off topic for this guide!

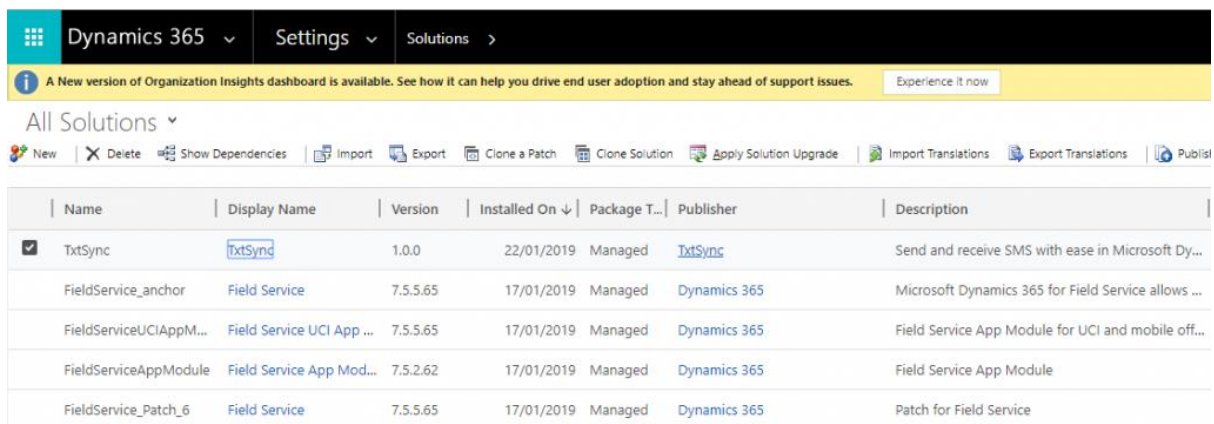
To signup for **free** to TxtSync go to <https://app.txtsync.com/authentication/signup>

You will need to fill out a few basic questions and agree to our terms. Once you submit your signup keep an eye out for your confirmation email. You will need to verify your email!

Configuring TxtSync and Synchronisation

Now you will need to configure Dynamics so that it knows how to connect to TxtSync. Sounds scary but don't worry its super simple.

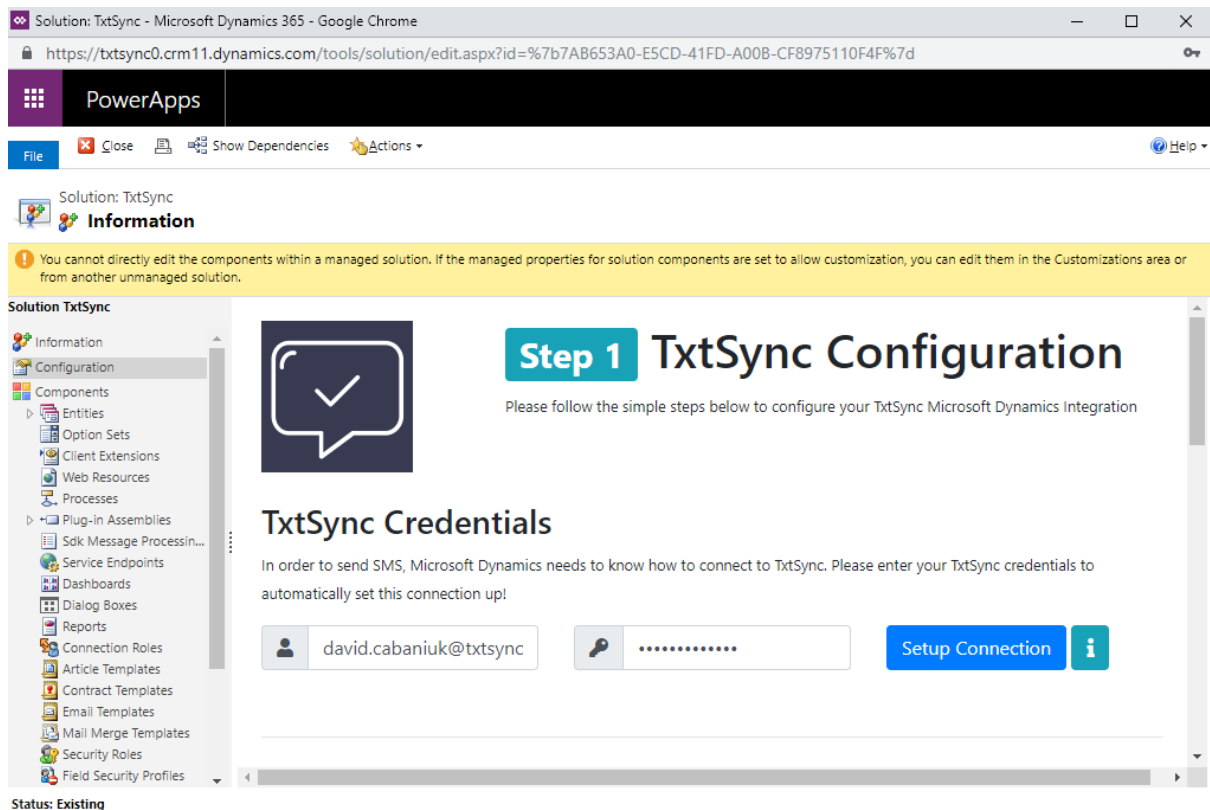
- From within Dynamics navigate back to the Solutions area and open up TxtSync.



The screenshot shows the Microsoft Dynamics 365 interface. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a yellow banner with a message about the Organization Insights dashboard. The main area is titled 'All Solutions' and contains a table of installed solutions. The first row is highlighted, showing the 'TxtSync' solution.

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
<input checked="" type="checkbox"/> TxtSync	TxtSync	1.0.0	22/01/2019	Managed	TxtSync	Send and receive SMS with ease in Microsoft Dy...
FieldService_anchor	Field Service	7.5.5.65	17/01/2019	Managed	Dynamics 365	Microsoft Dynamics 365 for Field Service allows ...
FieldServiceUCIAppM...	Field Service UCI App ...	7.5.5.65	17/01/2019	Managed	Dynamics 365	Field Service App Module for UCI and mobile off...
FieldServiceAppModule	Field Service App Mod...	7.5.2.62	17/01/2019	Managed	Dynamics 365	Field Service App Module
FieldService_Patch_6	Field Service	7.5.5.65	17/01/2019	Managed	Dynamics 365	Patch for Field Service

- The configuration page will open.
- In Step 1 enter your TxtSync username and password and click **Setup Connection**.



What has this done?

On entering your TxtSync credentials we create a Dynamics Application inside TxtSync. This application contains a client Key and Secret that are returned back and saved inside Dynamics. It is these credentials that are used by Dynamics in order to tell TxtSync to send text messages.

TxtSync will also assign the TxtSync security role to all the Dynamics users in the system. This role gives basic read rights on our TxtSync configuration custom entity. It also allows read and write privileges to the TxtSync SMS activity records.

The next stage (step 2), is to setup Synchronisation, this service powers the CRM integration and requires a monthly subscription. The pricing for Microsoft Dynamics Synchronisation can be found <https://txtsync.com/pricing/>

Note: Your first Synchronisation profile is free for 14 days.

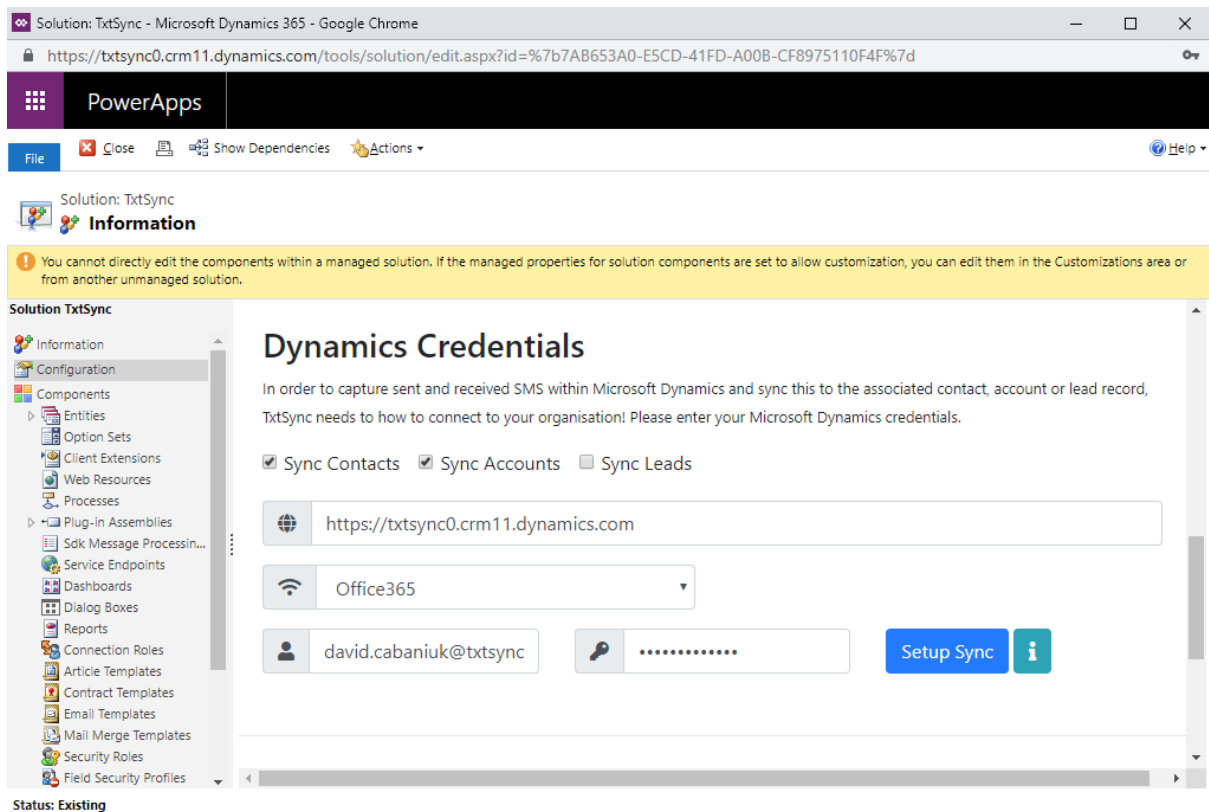
What is Synchronisation?

TxtSync's Synchronisation allows for a seamless user experience between Dynamics and TxtSync. When Synchronisation is turned on it allows TxtSync to match, and store sent and received text messages against the relevant contact, account or lead.

Combining Synchronisation with the TxtSync browser extension gives the ability to screen pop with contact info when you receive an inbound message. What's more, with the browser extension activated you can be outside of Dynamics and still send text messages and have them synced into the CRM!

To set up Synchronisation follow the steps below:

- Choose the entities that you wish to sync on. By default Contact and Account sync is turned on.
- The URL to access Dynamics with will be populated by default. Make sure that it is correct.
- Choose your connection method. For Dynamics 365 you will need to select **Office 365**.
- Enter the credentials of the user you wish to sync as.
- Finally click **Setup Sync**.
- Within the Create Sync Profile popup click **Create**.



Synchronisation Details

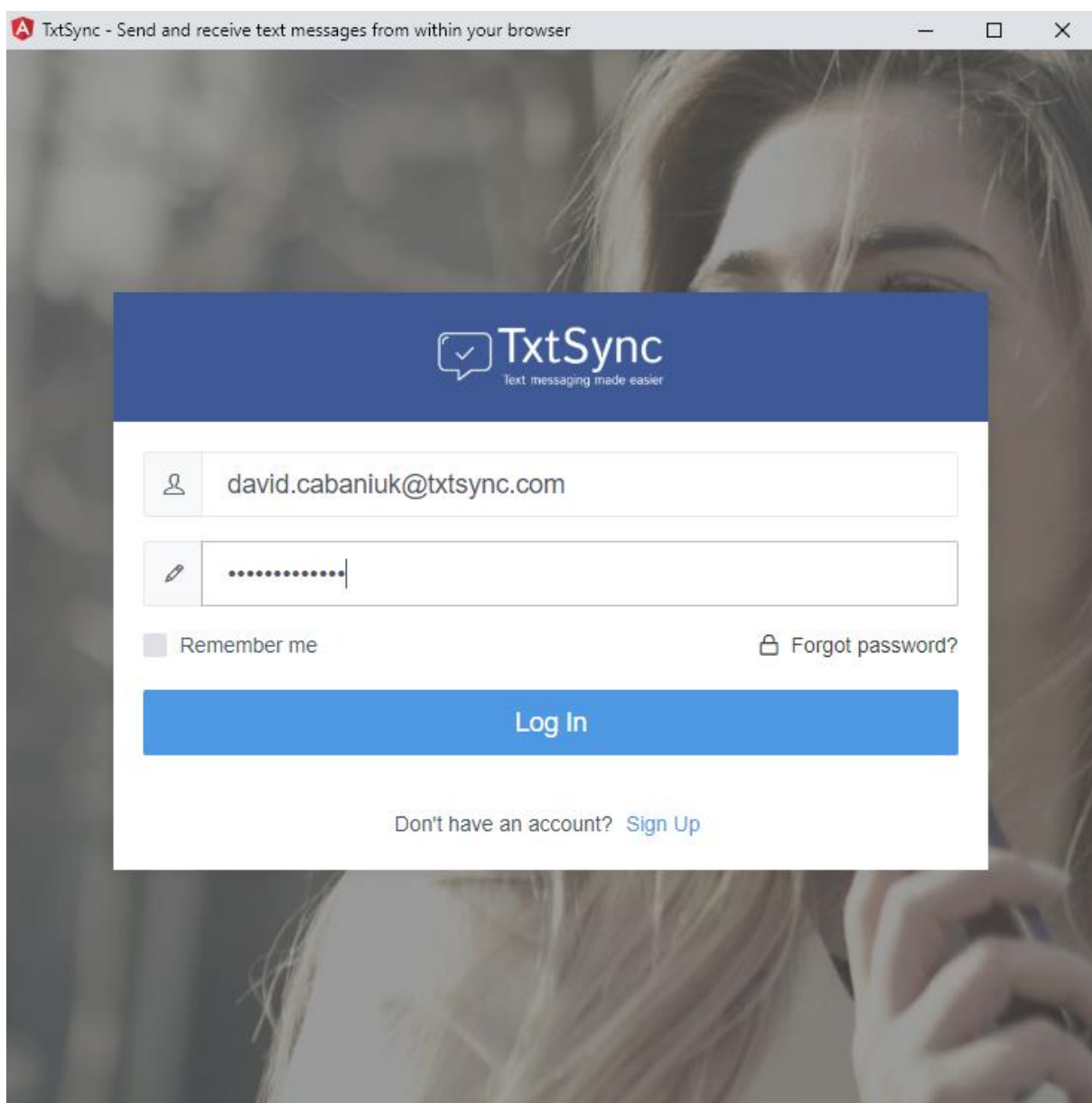
1. The synchronisation order for Dynamics is Leads, Account and Contacts. This means Contacts is the highest priority.
2. Phone numbers uniquely identify a person. If a given phone number exists as a Lead and Contact, the Contact record will be synced as its the highest priority.
3. Sync occurs onthe following fields: mobilephone, telephone1, & telephon2 for Contacts, telephone1, telephone2 & telephone3 for Accounts and mobilephone, telephone1 & telephone2 for leads.
4. "Contact" Synchronisation occurs in realtime.
5. SMS synchronisation occurs instantly.
6. TxtSync will never create or delete contacts in Dynamics.
7. Deleting "Contacts" in Dynamics will not remove them from TxtSync.
8. Only **Active** "Contacts" that have their **Contact Preference** set from SMS to **Allow** are synced.
9. SMS Statistics are automatically updated through sync.
10. You don't have to synchronise your account, contacts and leads records. If you don't, SMS will still be pushed into your CRM, but the SMS records won't be linked to any contact, account or lead.

Installing the browser extension

The TxtSync browser extension allows you to send and receive SMS directly from your browser. To download the extension go to

<https://chrome.google.com/webstore/detail/txtsync-send-and-receive/niaaaainfnhfnjbojpdkhghhocgfifnod>

- When in the Chrome webstore for TxtSync click **Add to Chrome**.
- Click **Add Extension** on the popup.
- Once installed the TxtSync browser extension will ask for TxtSync Credentials. Enter the details of the user to run as.



- The extension can be access from the top right of your browser.

You are now setup and ready to rock ‘n’ roll!

TxtSync elements inside Dynamics

Let’s take a look at the elements that have been installed into your CRM

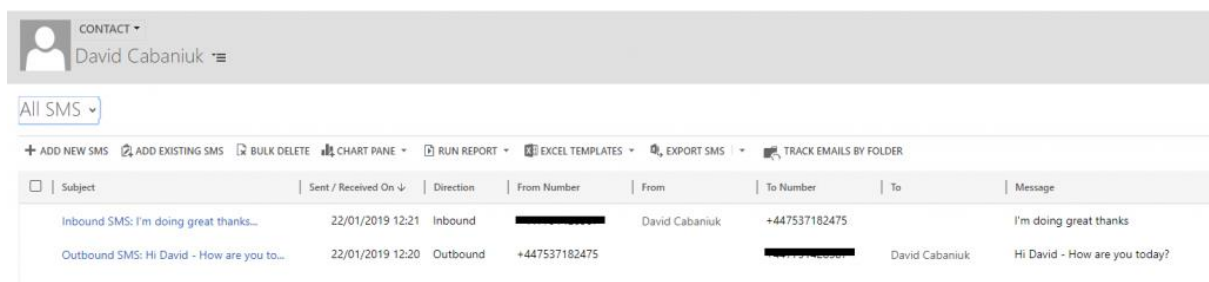
Sitemap Alterations

A TxtSync group is added to the Sitemap so that you can quickly access SMS records.



SMS Records

Keep track of sent and received SMS against the relevant contacts.



SMS : INFORMATION

Inbound SMS: I'm doing great thanks...

Activity Status ^{*}
Completed

Owner ^{*}
 David Cabaniuk

General

Subject ^{*}

Inbound SMS: I'm doing great thanks...

Direction ^{*}

Inbound

Sent / Received On ^{*}

22/01/2019 12:21

From ^{*}

David Cabaniuk

From Number ^{*}

██████████

To Number ^{*}

+447537182475

Regarding

Message

I'm doing great thanks

Owner ^{*}

David Cabaniuk

NOTES

Enter a note

There aren't any notes to show. To get started, enter a note.

Details

Menu Controls

From the entity menu you can access TxtSync features.

NEW

DEACTIVATE

CONNECT

ADD TO MARKETING LIST

ASSIGN

EMAIL A LINK

DELETE

FORM

PROCESS

...

CONTACT

David Cabaniuk

Summary

CONTACT INFORMATION

Full Name ^{*}

David Cabaniuk

Job Title

Account Name

Email

Business Phone

POSTS

ASSISTANT

Enter post here

All posts

Auto posts

User posts

David Cabaniuk

Geo Code

Share

Follow

Run Workflow

Start Dialog

Word Templates

Run Report

Other Activities

Relationship

TxtSync Dashboard

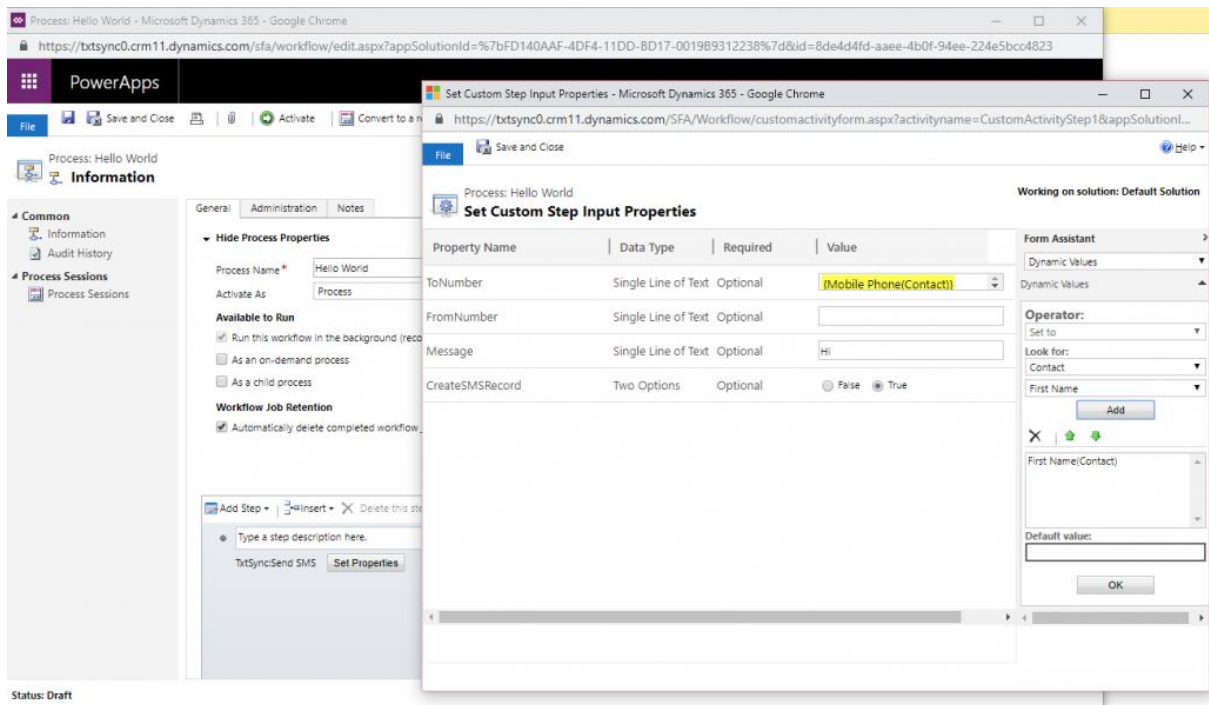
Send SMS

Contact Summary

Campaign Wizard

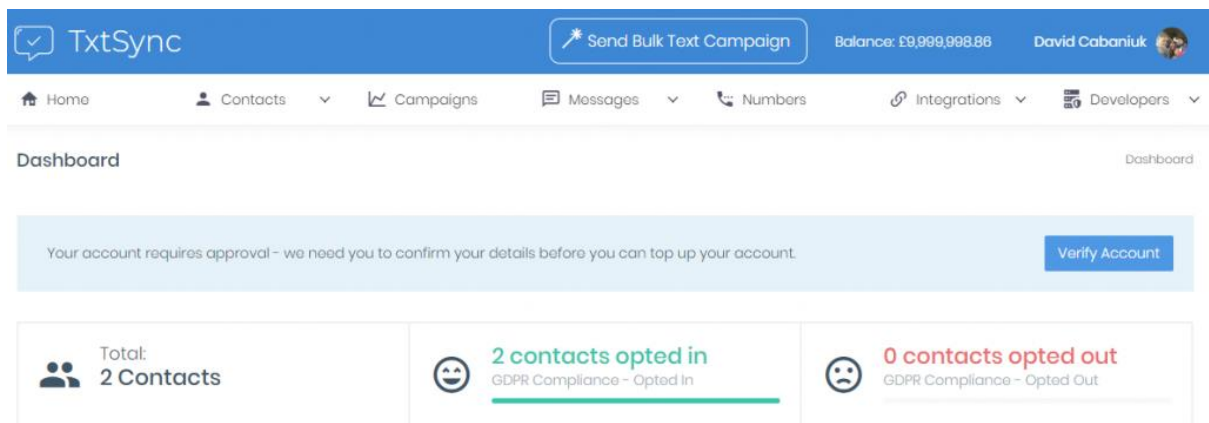
Workflow Assembly

Automate your text messages through workflow.



Activating your account and going live

If you are happy with our integration and wish to go live you will need your account verifying. To make the request click on **Verify Account** on the TxtSync Dashboard.



Once verified add a payment method to your account in TxtSync. You can rather use auto top, which is recommended when using SMS automation to ensure your service isn't disrupted or you can paid to account on demand manually.

When your payment method is activated you will be able to make purchases such as renting dedicated numbers to capture inbound SMS.

Why does my account need to be verified?

Well with great power comes great responsibility

SMS is powerful and people who wish to do harm know it, and will try to exploit it. We make sure that everyone using our SMS services are doing it for legal reasons.