Getting Started with Microsoft Dynamics and TxtSync

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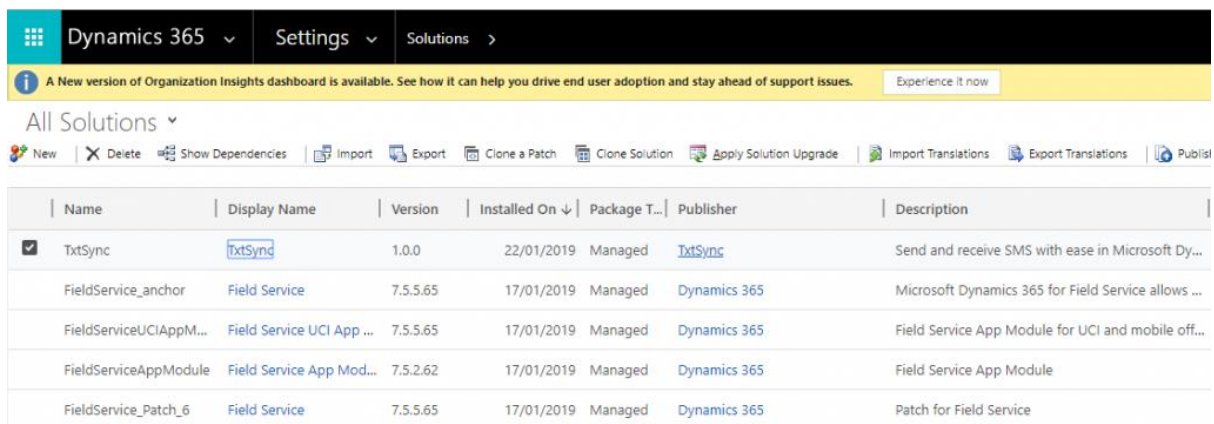
To signup for **free** to TxtSync go to https://app.txtsync.com/authentication/signup

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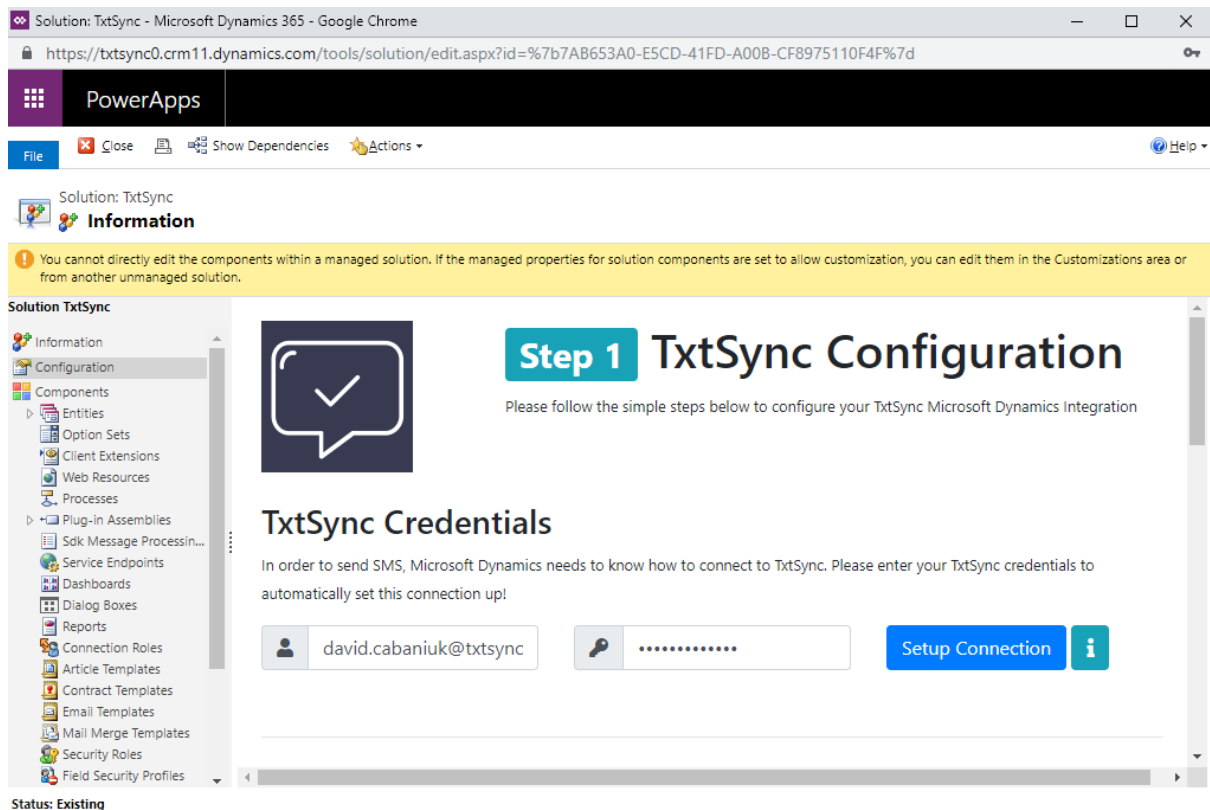
- From within Dynamics navigate back to the Solutions area and open up TxtSync.

- The 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**.
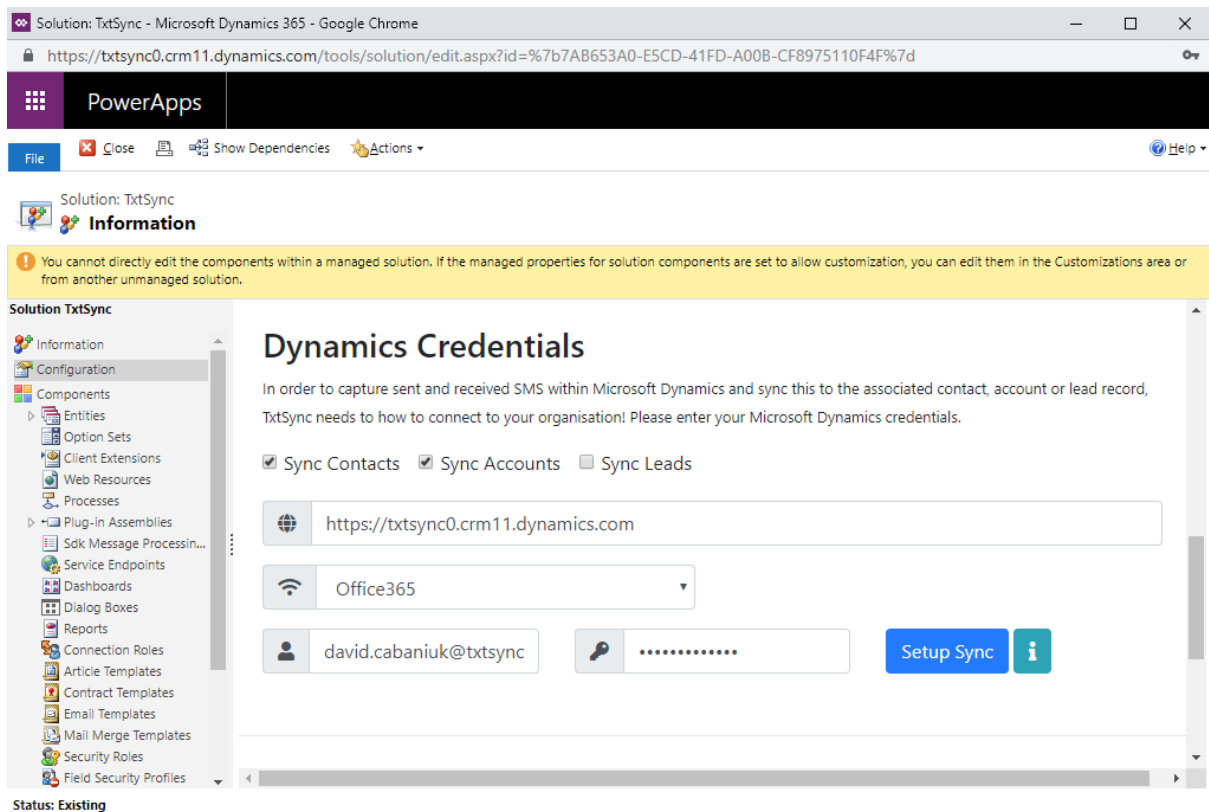
Synchronisation Details

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/niaaajnfnhfnjbojpdkhghhocgfifnod

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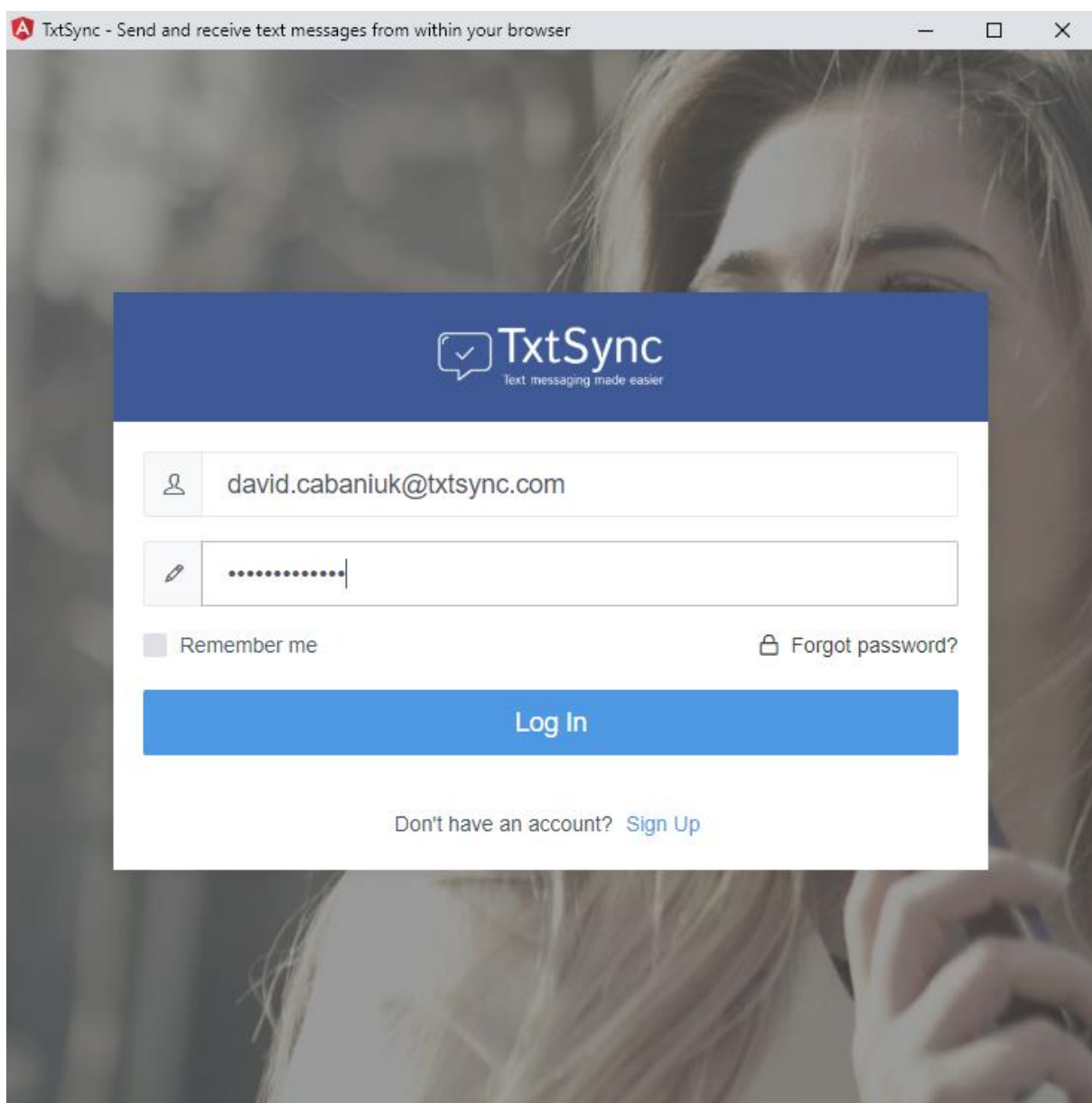
- The extension can be access from the top right of your browser.

You are now setup and ready to rock 'n' roll!

TxtSync elements inside Dynamics

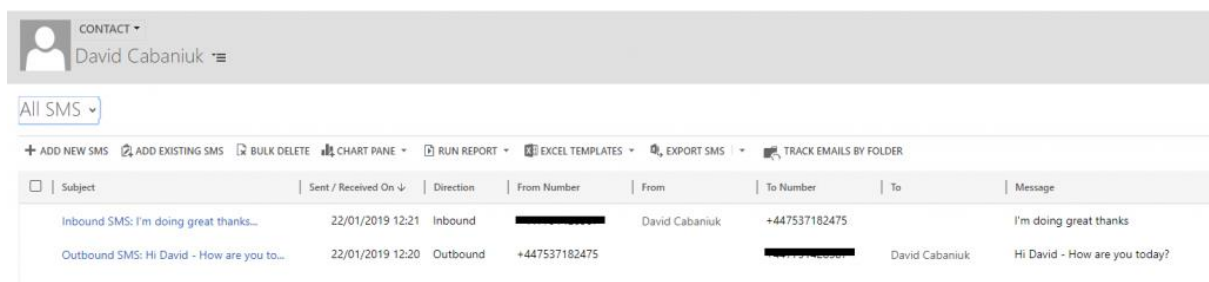Let's take a look at the elements that have been installed into your CRM

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.

Menu Controls

From the entity menu you can access TxtSync features.
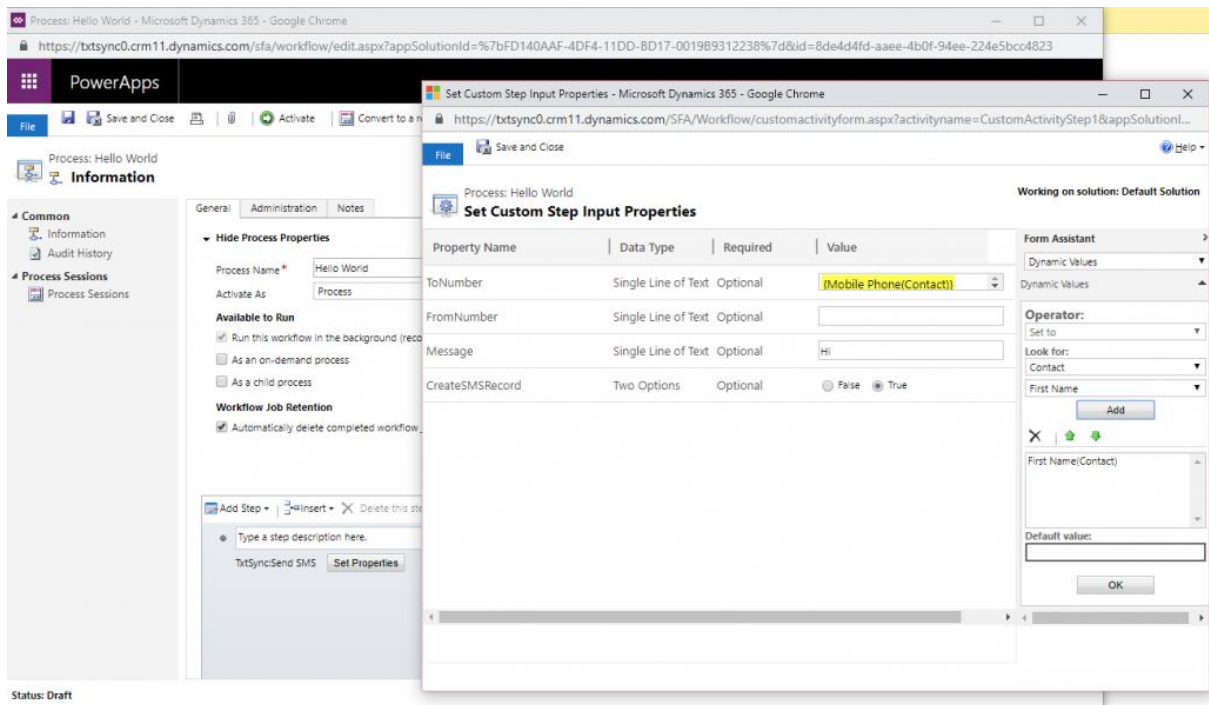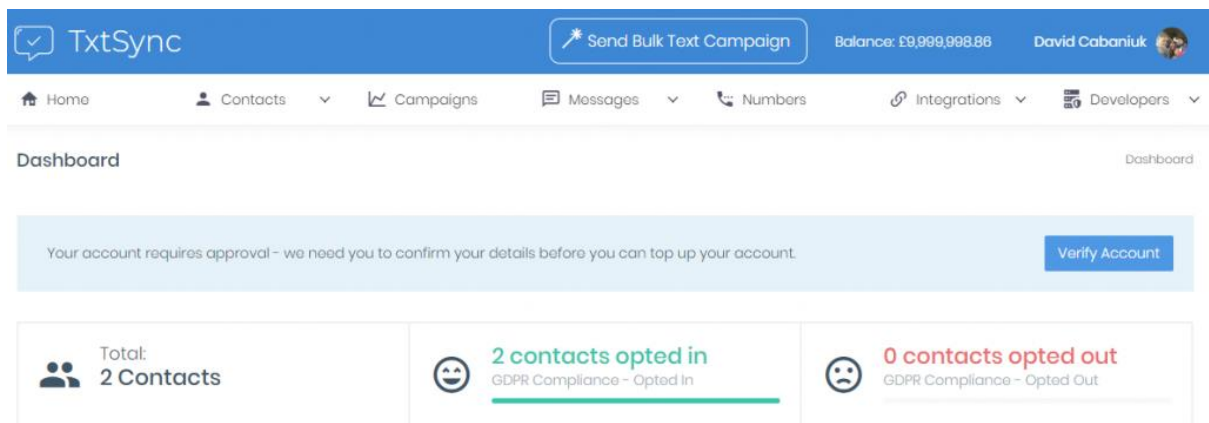

Workflow Assembly

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.