TeleSign SMS for Dynamics 365 for Marketing

User Manual

Applies to Dynamics 365 (online), version 9.x

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Overview

Easily add SMS text messaging to Microsoft Dynamics 365 for Marketing to reach, engage and directly communicate with your customers using TeleSign's Messaging API extension. Communicate more effectively and provide critical touchpoints throughout the customer lifecycle using SMS, user's preferred communication channel. Ninety-eight percent of text messages sent are read and help businesses attain response rates of 45% or more, compared to email with an average of 6%. Send SMS-based marketing campaigns including alerts, reminders and notifications directly from your Dynamics 365 for Marketing implementation to increase engagement, usage and brand awareness.

Features

- Extend Customer Journey with SMS text messaging capabilities
- SMS text message deduplication
- Reuse SMS text message templates
- Auto-reply on inbound SMS text message
- Manage subscription lists
- Define custom keywords
- Handle opt-in and opt-out requests
    - Per short/long code
    - Two-step opt-in
    - Automatic opt-out after specified amount of time
- Cleanse phone numbers

Language support

The solution is supported for following languages:

Language	Language Code	LCID	Name
English	en-US	1033	English
Chinese - Traditional	zh-TW	1028	中文(台灣)
Chinese – China	zh-CN	2052	中文(中国)
Chinese - Hong Kong SAR	zh-HK	3076	中文(香港特別行政區)
Russian - Russia	ru-RU	1049	Русский
Spanish (Traditional Sort) - Spain	es-ES	3082	Español

Sending the SMS text messages to recipients to the following countries is blocked by default:

- Russia
- China
- Japan
- India
- Vietnam

Solution configuration

Once TeleSign SMS solution is installed from the AppSource, open the TeleSign SMS settings page by navigating to Marketing Settings > TeleSign SMS > TeleSign SMS Configuration.

The registration form will appear, allowing you to register the application and create a TeleSign Portal trial account. If you already have an existing TeleSign Portal account, make sure to enter the valid email address associated with that existing account. This will link your existing Portal account to the TeleSign SMS solution.

Once the trial period has ended, the customer should upgrade to the full self-service account in order to continue using the solution.

After the registration form has been submitted the popup will appear requesting the required privileges. You will need Office 365 tenant administrator privileges to complete this step.

After the consent process has been successfully completed, you will receive a verification email.

Clicking the "Verify Email Address" link in the received email message will require you to complete the verification process on the TeleSign Portal.

⚠️ IMPORTNANT

For each Dynamics 365 for Marketing environment, that you want to use the TeleSign SMS solution with, you have to use a dedicated TeleSign Portal account. The scenario of multiple Dynamics 365 for Marketing environments with the same TeleSign Portal account is not supported.

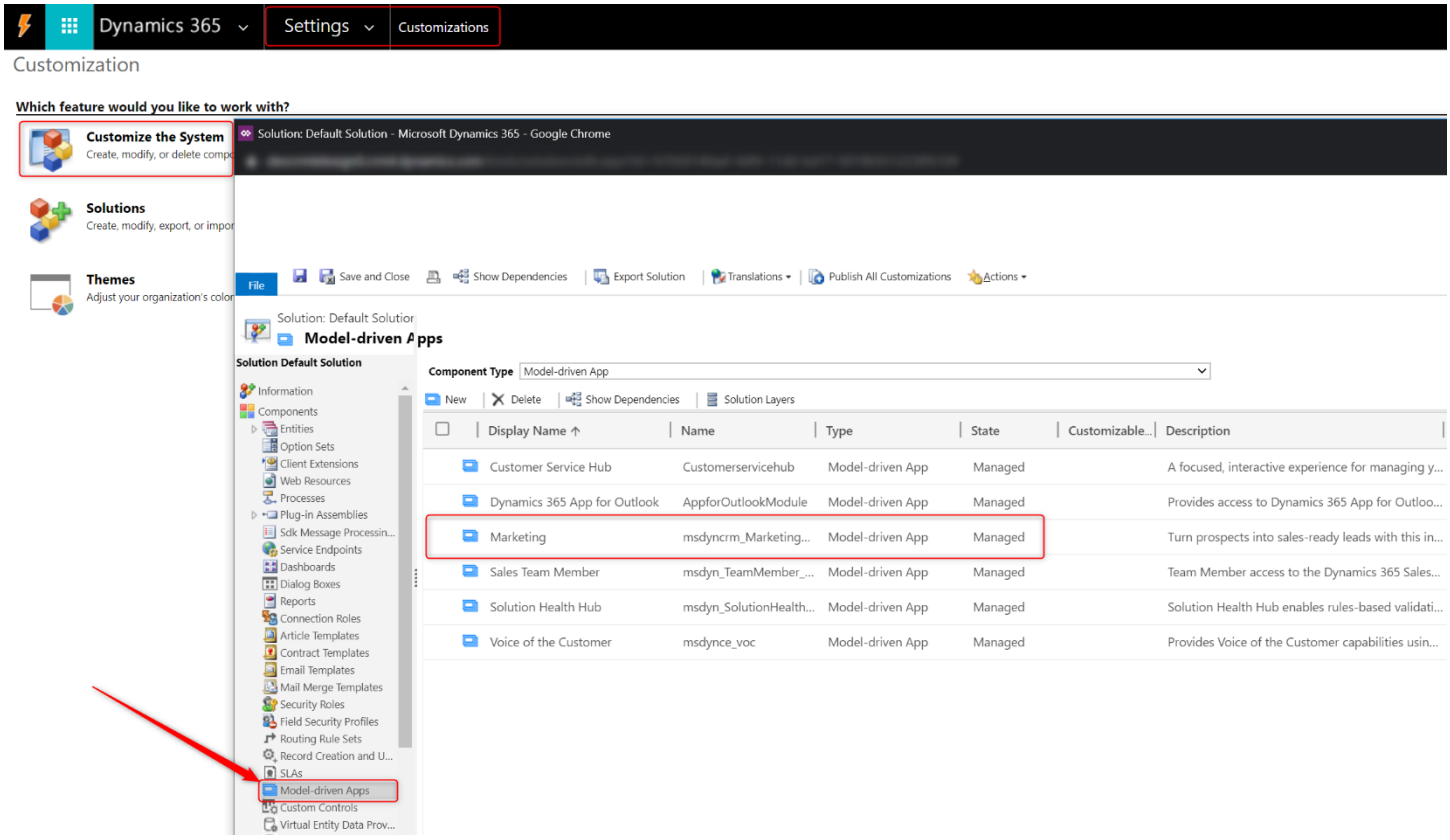
Post-installation steps

To keep your existing CRM customizations intact, TeleSign SMS solution does not include out of the box CRM forms for entities that are being used by the app (i.e. Contact, Marketing List…). Because of this, you need to manually

- Enable already prepared forms within Marketing app **OR**
- Add TeleSign custom fields to your existing forms

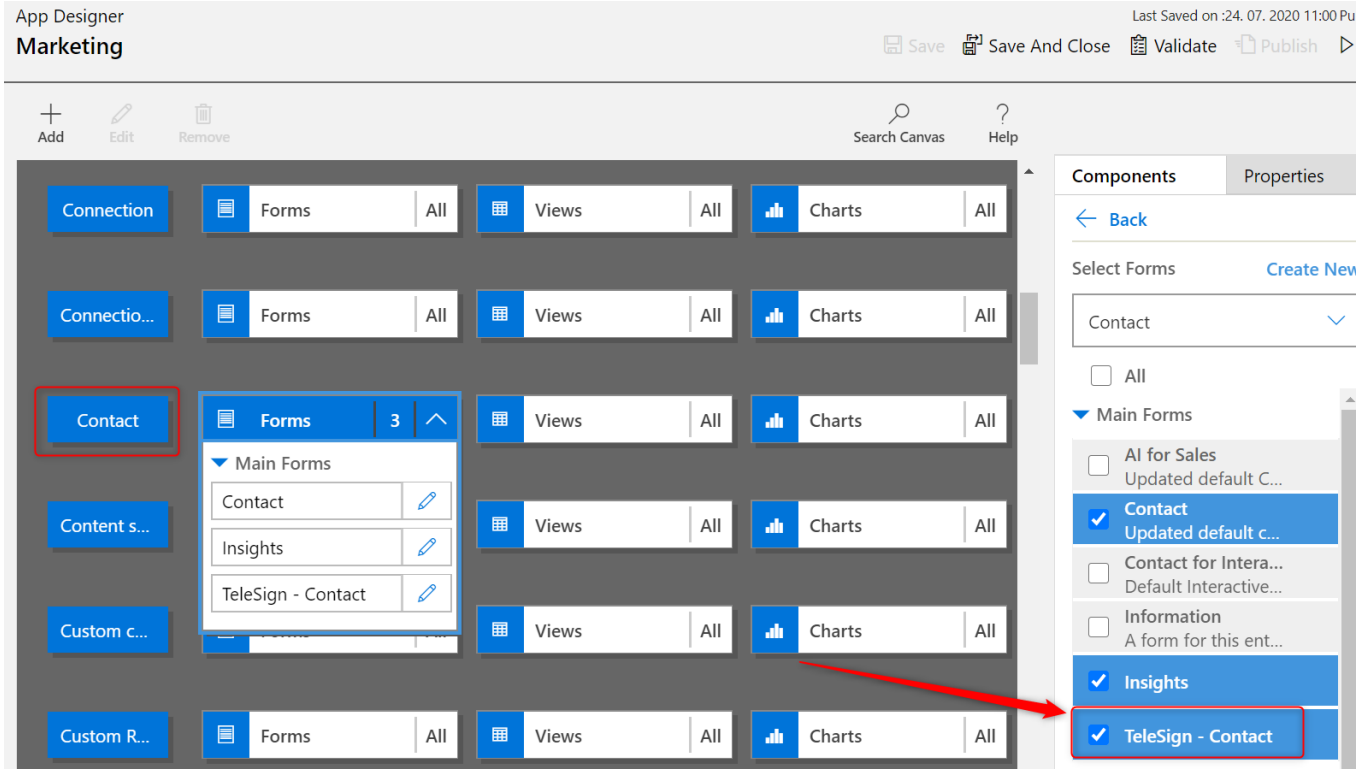
Enable already prepared forms within Marketing app

- With user that has "System Customizer" or "System Administrator" security role, open "Advanced Settings" and navigate to "Customizations" -> "Customize the system".

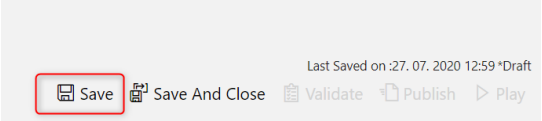


- On the left side under "Components" click on "Model-driven Apps".
- Double click on "Marketing" app.
- App designer opens. Under "Entity view" search for the following entities
  - Contact
  - Marketing List
  - User

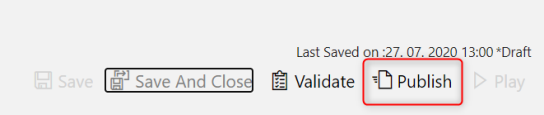
  and enable "*TeleSign - <EntityName>*" forms (i.e. "TeleSign – Contact").



- Repeat the steps for all above mentioned entities (Contact, Marketing List, User).
- When done, on the top right screen, click on “Save”.

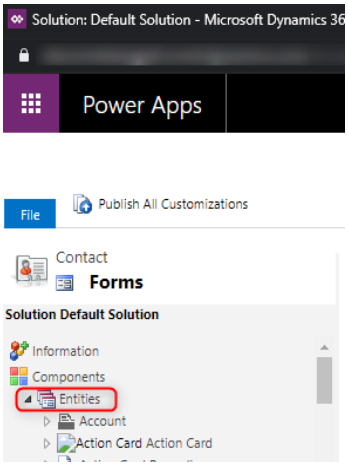


- After that, click on “Publish”.

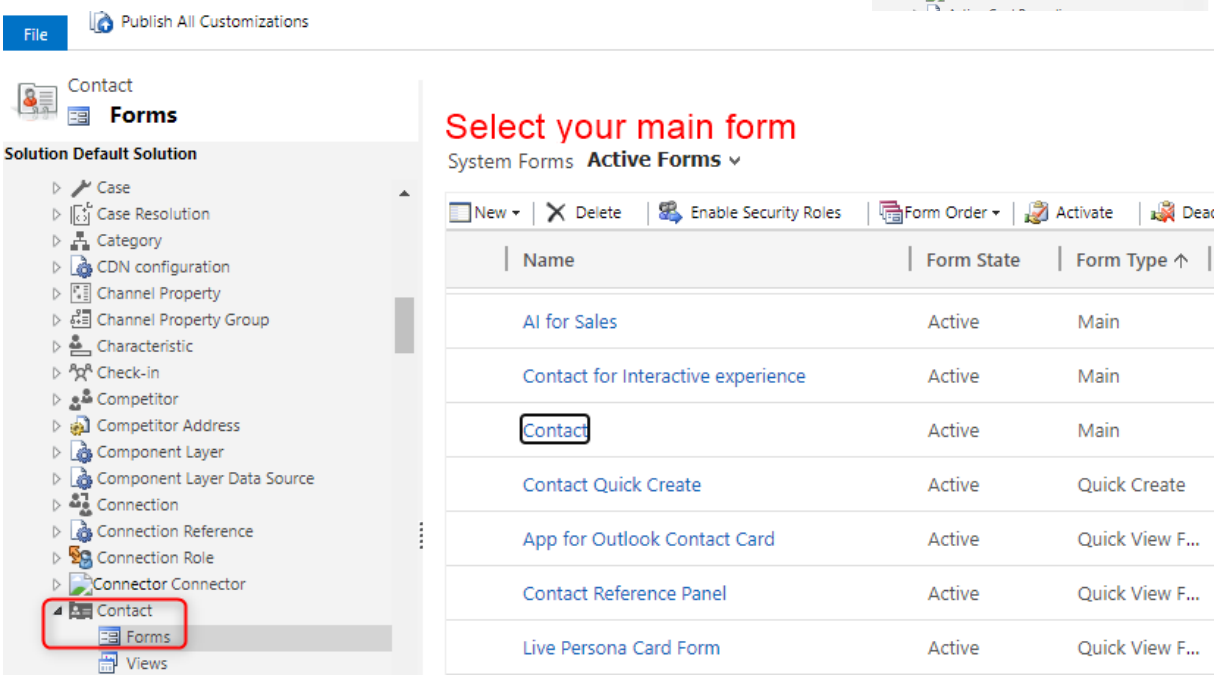


- When you now navigate to one of those entities, you will find new forms that were purposely built by TeleSign and already contain all fields that were created during solution installation and are used by the TeleSign SMS app.

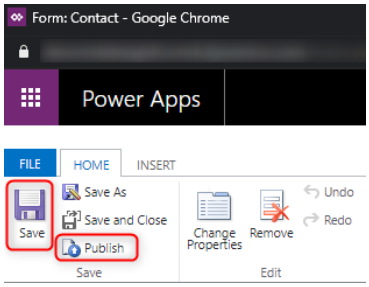
Add TeleSign custom fields to your existing forms



- With user that has “System Customizer” or “System Administrator” security role, open “Advanced Settings” and navigate to “Customizations” -> “Customize the system”.
- On the left side under “Components” click on “Entities”.
- Under “Entities” search for the following entities
    - Contact
    - Marketing List
    - User
- For each one, click on “Forms” and from the right side of the screen, click on your main entity form.



- Drag and drop TeleSign fields, as specified in the table onto the corresponding form.
- Click on “Save” and then on “Publish”.
- Repeat the steps for all above mentioned entities.



Entity name	Field display name	Field logical name
Contact	Do not allow SMS	ts_donotsms
Marketing List	Use As Telesign SMS List	ts_issmslist
Marketing List	Opt-In Keyword	ts_optinkeywordid
Marketing List	Opt-Out Keyword	ts_optoutkeywordid
Marketing List	Short/Long Code	ts_shortlongcodeid
User	Default Short/Long Code	ts_defaultshortlongcodeid

Table containing custom TeleSign fields

Using TeleSign SMS solution

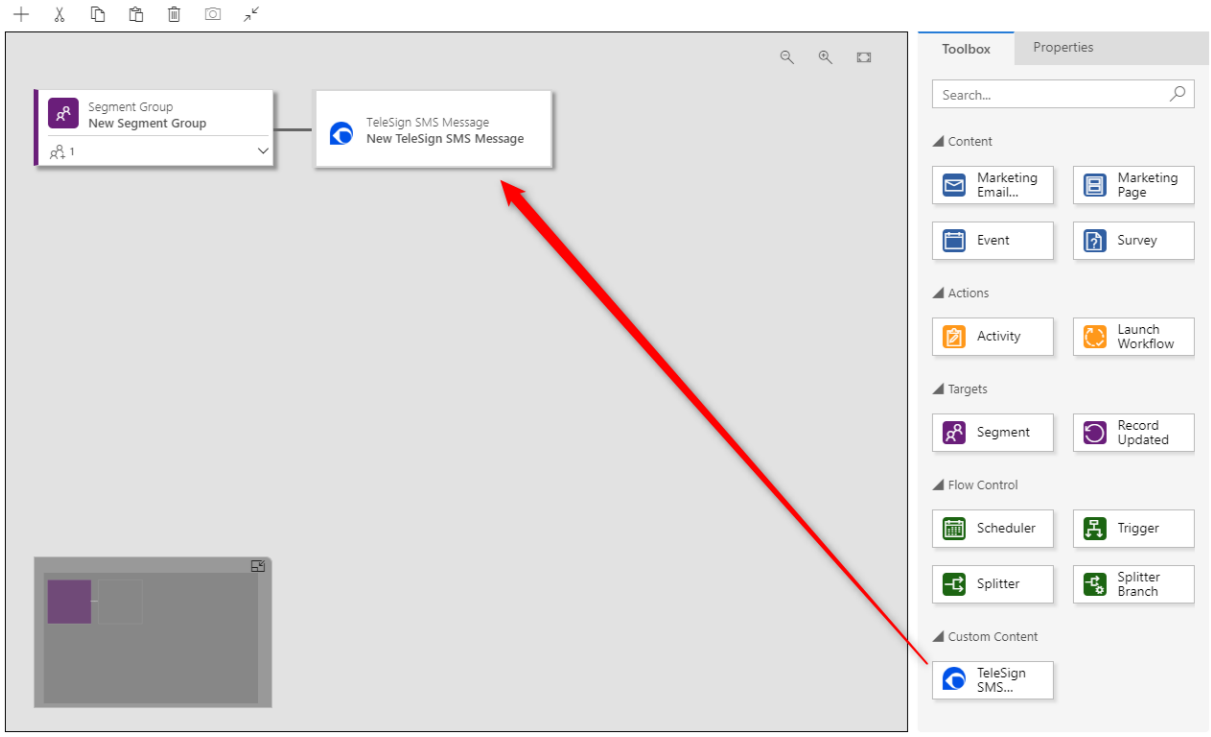
Sending SMS text messages

Extending the Customer Journey

TeleSign SMS solution introduces a new Customer Journey component (tile) called "TeleSign SMS Message" that you can use to extend the existing Dynamics 365 for Marketing functionality to create an even more interactive customer journeys.

More about Customer Journeys can be found here:

- Generate activities from a Customer Journey
- Create a simple Customer Journey with email messaging



See Create a Customer Journey using TeleSign SMS tile example.

Phone number deduplication

If segment contains duplicate contacts or multiple contacts with the same phone number, the solution will send only one SMS text message to the phone number in a single Customer Journey iteration. After the first message is successfully sent to the specific phone number, all others will be completed with state "Not Delivered", with descriptive message visible on the SMS text message record stating "Customer Journey duplicate contact identified".

Using the Trigger tile

Trigger tiles add interactivity to the journey by splitting the pipeline and establishing logical criteria for deciding which path each contact will take.

Find more about triggers at Create an interactive Customer Journey with triggers and signup.

TeleSign SMS solution introduces three (3) trigger interactions:

- Triger_Condition_Sent - message has been successfully sent off to the customer, but has not yet been delivered to the handset.
- Triger_Condition_Delivered - the message has successfully been delivered to the handset.
- Triger_Condition_Keyword - the customer replied to the sent SMS message using a specific keyword.

TELESIGN OUTBOUND MESSAGE DETAILS

Code	0
Description	Customer Journey duplicate contact identified
Updated On	23/05/2018

⚠ **IMPORTANT**

When validating the trigger conditions based on keyword responses and proceeding through the customer journey, we need to keep in mind that we always assume that the customer is replying to the latest **Delivered** SMS message within a specific customer journey. Additionally the received SMS responses **must** come from the same short/long code that used to send the customer journey message. Please refer to the Customer Journey interaction chapter of this guide.

Sending a single SMS text message

The solution supports sending of a single SMS text message to the selected recipient. To send a single SMS text message navigate to Marketing > TeleSign SMS Marketing > TeleSign SMS Messages and click on the “NEW” button in the command bar.

Choose a recipient in the “To” attribute. If selecting the Contact record the solution automatically copies the contacts phone number in the “Phone Number” attribute. The phone number is copied from the contacts “Mobile Phone” attribute by default (this is configurable in the TeleSign SMS solution settings. For details please refer to the Solution administration section of this guide.).

A short/Long code can be entered, but it is not necessary. If a short/long code is not entered, the SMS text message will be sent using one of the default TeleSign’s long/short codes for the recipients country.

When the message is saved and ready to be sent, you should click the “SEND” button in the command bar.

Delivery reports

The TeleSign SMS solution enables you to receive individual message delivery reports, providing you with further information of not only if the SMS text message was sent, but if it was actually delivered to the recipient.

Information about the status of each individual SMS text message is stored on the “TeleSign SMS Message” entity record.

For more information about “TeleSign SMS Message” entity statuses refer to the Understanding entity status section of this guide.

Replying to SMS text message

If customer replied to your SMS message, you have a convenient way to reply back with just a single click. On received SMS messages you can find a "Reply" button, which creates new SMS text message and pre-fills contact and short/long code information (if this was filled on the receiving SMS). If there is no short/long code on the received SMS, logic will check "Default Short/Long Code" on system user and pre-fill this value (if not empty).

Receiving SMS text messages

The solution supports inbound SMS text messages sent to configured short/long codes. Such messages are stored in the system with a "Received" message status.

If the message is received from phone number, which is associated to several contacts, the "TeleSign SMS Message" record will be linked to all the contacts having this phone number.

If the message is received from phone number, which is not associated with any contacts, the "TeleSign SMS Message" record will be created, but not linked to any contact at all (the originating phone number is visible).

Upon receiving the SMS text message into the system, there are several business processes that take place:

Contact identification

When the SMS text message is received, the system will search for all the contacts in the system based on the sender's phone number and associate all found contacts to the inbound "TeleSign SMS Message" record.

Subscription list management

The short/long code and keyword from the received SMS text message are used to either subscribe or unsubscribe the sender to or from the configured "Subscription List". For details regarding the "Subscription List" setup, please refer to the Subscription List (Marketing List) section of this guide.

Keyword processing

First word in the SMS text message is compared against the keyword code list that is defined in the solution. If a word is identified as a valid keyword in the system, the processing takes place based on the type of keyword identified (e.g. opt-in request).

Auto-reply messages

If a published "TeleSign SMS Auto-Reply Message" record is found based on the received SMS text messages' short/long code and identified keyword, the system automatically sends out the SMS text message to the sender's phone number.

If multiple contacts were identified based on the received SMS text messages' phone number, the system only sends out a single SMS text message.

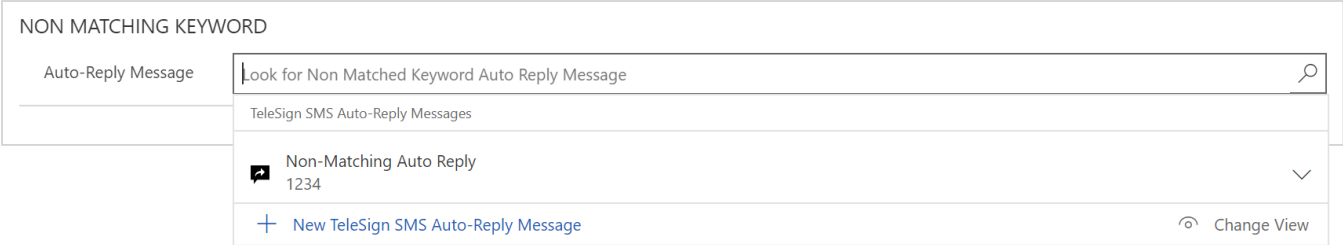
The auto-reply functionality will not be executed in case the short/long code of the received SMS text message is configured for two-step opt-in functionality.

See Create an auto-reply message example.

Non-Matching Auto-reply messages

If an end user sends a message that does not match a keyword associated with the Short/long code, you can send back a "Non-Matching" auto reply message. This auto reply message must be set on each short / long code you wish to use this functionality (section “Non Matching Keyword”).

Non-Matching auto reply will only be sent if received keyword was NOT associated with short/long code.



See Create a Non-Matching auto-reply message example.

Customer Journey interaction

TeleSign SMS solution enables you to leverage existing Dynamics 365 for Marketing functionality for creating interactive customer journeys with the use of triggers. One of the options is the Customer Journey interaction based on received SMS text messages’ keyword.

The received SMS text message can turn out to be a reply to the specific Customer Journey currently in progress. In order to determine if a Customer Journey interaction is required, there are a couple of preconditions that need to be met before the interaction is invoked:

1. The contact, identified by the phone number, was indeed included in the Customer Journey.
2. The identified keyword in the received SMS text message must match one of the keywords defined on the Customer Journey.
3. The short/long code of the received SMS text message must match the one that was used for outbound SMS text message.

TeleSign SMS Bulk Messages

There are times when you need to send a small number of SMS text messages to a subset of your customers. Creation of segment, customer journey can be time consuming, so for distribution of small number of SMS messages, you can use TeleSign SMS Bulk Message.

This feature enables you to manually select up to 150 contacts and distribute SMS text messages without the need for complex customer journey creation.

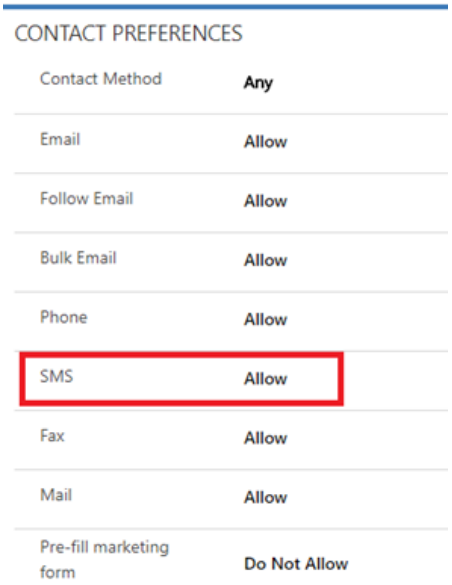
See Create and distribute TeleSign SMS Bulk Message example.

Compliance

Compliance attributes

In order to ensure the compliance requirements, the TeleSign SMS solution introduces a new attribute on the Contact entity called "Do Not SMS" (only "SMS" label is displayed on the form, in the section called "CONTACT PREFERENCES") that enables to you regulate sending of SMS text messages. By default, the value is set to "Do not allow", blocking all outbound SMS communication towards the contact.

The attribute "Do Not SMS" is compliance attribute by default, but this is configurable in the TeleSign SMS solution settings. For details please refer to the Solution administration section of this guide.



CONTACT PREFERENCES

Contact Method	Any
Email	Allow
Follow Email	Allow
Bulk Email	Allow
Phone	Allow
SMS	Allow
Fax	Allow
Mail	Allow
Pre-fill marketing form	Do Not Allow

Additionally, the solution is also taking into consideration the global compliance attribute called "Marketing Materials" that also must be set to "Allow" in order for SMS text messages to be sent to the contact.

Upon every explicit opt-in request (regardless of the short/long code) from the customer both compliance attributes are automatically switched to the value "Allow".

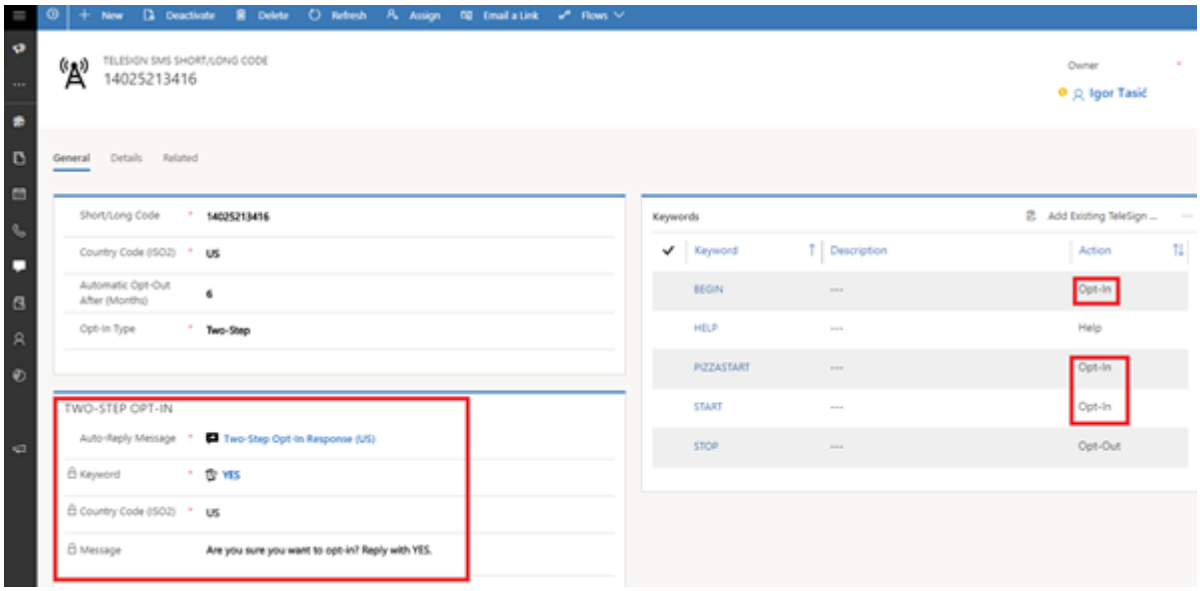
Handling opt-in and opt-out requests

All opt-in and opt-out requests are handled on the short/long code level and are initiated by the received SMS text message. This means that the customer specifically gives you the permission to communicate with him/her via a specific short/long code.

Each individual short/long code has an "Opt-In Type" attribute specifying how the opt-in requests and the sending of SMS text messages are handled:

- None – if "Honor Opt-In / Opt-Out For None Opt-In" has been enabled in settings, then SMS text messages will be sent only if customer didn't opt-out. If this setting is disabled, SMS text messages will be sent to the customer, regardless if they have explicitly opted-in or not.
- Single (default) – SMS text messages will be sent to the customer, using this short/long code, only if the customer explicitly opted-in by sending a SMS text message with an opt-in keyword defined on the short/long code itself. If the customer has opted-out for whatever reason (manually or automatically), the opt-in process must be repeated in order for the customer to receive SMS text messages again via this short/long code.

- Two step – similarly as the process for single opt-in, but with a key difference of requiring explicit opt-in confirmation. Upon the receival of the first opt-in request, a confirmation SMS text message is automatically sent to the customer. Only when the confirmation keyword is received, is the opt-in process completed. A confirmation timeframe is one (1) day – if the opt-in confirmation is not received within this timeframe, the two-step opt-in process will need to be initiated again. In order to configure a short/long code for two-step opt-in process, you must specify the "Auto-Reply Message" attribute value (published auto-reply message template). The keyword, defined on the auto-reply message record, is used as a confirmation keyword in the two-step opt-in process.



See Configure the short/long code to use two-step opt-in example.

Subscription logs

Each opt-in and opt-out request is logged in the "TeleSign SMS Subscription" log entity record. Subscription log records are created in the following scenarios:

- In case the short/long code "Opt-In Type" is set to "Single", the subscription log is created when the opt-in keyword from the received SMS text message matches the opt-in keyword defined on the short/long code.
- In case the short/long code "Opt-In Type" is set to "Two-Step", the subscription log is created when the confirmation keyword is received in the SMS text message.
- In case the short/long code opt-out keyword is received in the SMS text message.
- In case the contact is automatically opted out based on the opt-out interval specified on each individual short/long code.

Subscription logs for each individual Contact record are accessible from the Contact form by navigating to the Related > TeleSign SMS Subscription Logs.

Examples

Create a new keyword

1. Navigate to Marketing > TeleSign SMS Marketing > Keywords
2. Create a new record by clicking “+ New” button in the command bar
3. Set the “Keyword” attribute value to “PIZZASTART”
4. Set the “Action” attribute value to “Opt-In”
5. Click “Save & Close”

The keyword is ready to be used in all scenarios leveraging keyword functionality.

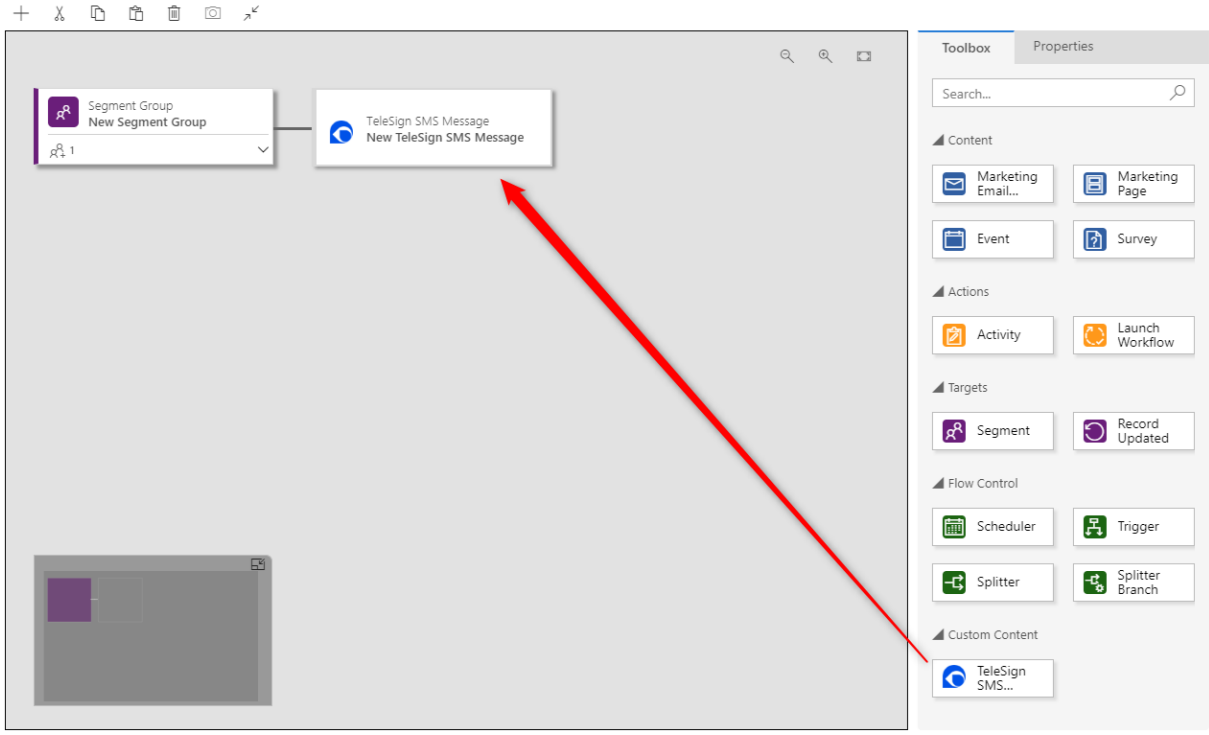
Create a new personalized SMS text message template

1. Navigate to Marketing > Templates > TeleSign SMS Message Templates
2. Create a new record by clicking “+ New” button in the command bar
3. Set the “Name” attribute value to “Welcome message”
4. Set the “Short/Long Code” attribute value if available
5. Set the “Message” attribute value to “{{fullname}}, welcome to TeleSign SMS for Dynamics 365 for Marketing.”
6. Click the “Save” button in the command bar
7. Click the “Go Live” button in the command bar and confirm the dialog box by clicking “OK”

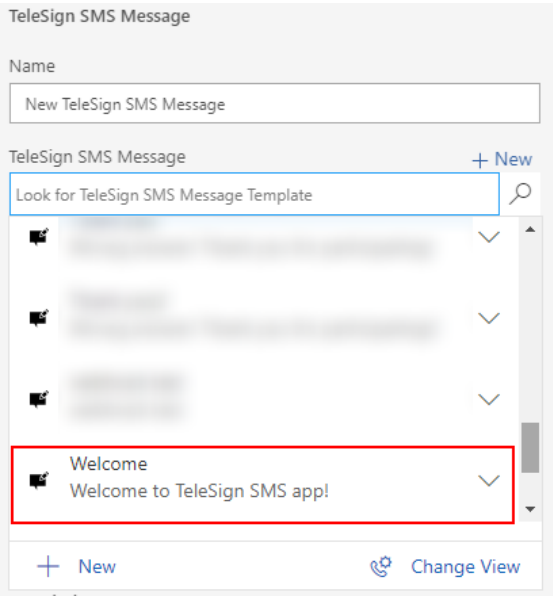
The SMS text message template is ready to be used in the Customer Journey.

Create a Customer Journey using TeleSign SMS tile

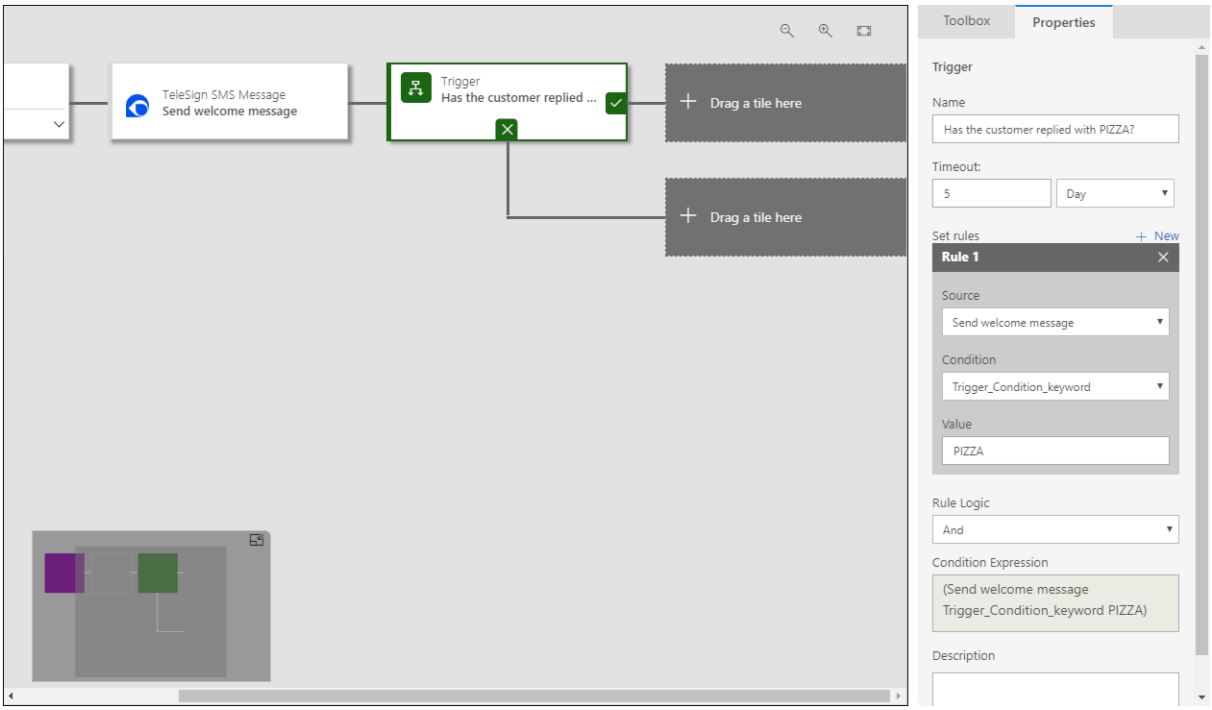
1. Navigate to Marketing > Marketing Execution > Customer Journeys
2. Create a new record by clicking “+ New” button in the command bar
3. Select a “Blank Template” from the popup window titled “Select a customer journey template” and click the “Select” button
4. Drag and drop a Segment group tile on the canvas and select a segment from the “Properties” tab
5. Add “TeleSign SMS Message” tile on the right of the segment group tile



6. On the “Properties” tab, set the “Name” to “Send welcome message” and select an existing “TeleSign SMS Message” record called “Welcome message”.



7. Drag and drop a Trigger tile to the right of the TeleSign SMS tile.



8. On the “Properties” tab, click “+ New” next to the “Set rules” section
9. Set the “Source” attribute value to “Send welcome message”
10. Set the “Condition” attribute value to “Trigger_Condition_delivered”
11. Drag and drop “Marketing Email Message” tile to each of the trigger branches, specifying different email templates in the “Properties” tab in regards to whether the SMS text message was successfully delivered or not.
12. Click the “Save” button in the command bar
13. Click the “Go Live” button in the command bar

The Customer Journey will send a SMS text message to every contact in the specified segment (considering compliance prerequisites). Depending on the successfully delivery of the SMS text message, the appropriate email will be sent to the customer’s email address.

Configure the short/long code to use two-step opt-in

A bought short/long code is a prerequisite for using this functionality. See TeleSign SMS Short/Long Code.

1. Create a new keyword called “CONFIRM”. See Create a new keyword example.
2. Create a new auto-reply message named “Two-step confirmation message”, informing the customer to send the “CONFIRM” keyword in order to confirm the opt-in request. See Create an auto-reply message example.
3. Navigate to Marketing > TeleSign SMS Marketing > Short/Long Codes
4. Select and open an existing short/long code record form
5. Set the “Opt-In Type” attribute value to “Two-Step”
6. Click the “Save” button in the command bar or the bottom lower
7. Set the “Auto-Reply Message” attribute value to the previously created “Two-step confirmation message”.
8. Click the “Save” button in the command bar or lover right corner of the form.

User must now opt-in to the specified short/long code by initially sending a SMS text message containing one of the specified opt-in keywords (e.g. “START”) and then confirming the opt-in request by sending the second SMS text message containing the “CONFIRM” keyword.

⚠️ **IMPORTANT**

Make sure that the confirmation keyword, specified on the auto-reply message, is not on the list of opt-in keywords for the short/long code itself (sub-grid on the right side of the form).

Create an auto-reply message

1. Navigate to Marketing > TeleSign SMS Marketing > Auto-Reply Messages
2. Create a new record by clicking “+ New” button in the command bar
3. Set the “Name” attribute value to “Help message”
4. Set the “Keyword” attribute value to “HELP”
5. Set the “Short/Long Code” attribute value if available
6. Set the “Message” attribute value to “Visit https://support.telesign.com to find answers and advice for getting the most out of TeleSign.”
7. Click the “Save” button in the command bar
8. Click the “Go Live” button in the command bar and confirm the dialog box by clicking “OK”

The auto-reply rule is now live and will ready to react on SMS text messages containing the “HELP” keyword.

Using a subscription list

A bought short/long code is a prerequisite for using this functionality. See TeleSign SMS Short/Long Code.

1. Using the “standard” Dynamics 365 user interface, open the main menu and navigate to Marketing > Marketing Lists
2. Create a new record by clicking “NEW” button in the command bar
3. Set the “Name” attribute value to “Pizza subscription list”
4. Set the “Subscription” attribute value to “True”
5. Set the “Use As TeleSign SMS Subscription List” to “Yes”
6. Set the “Short/Long Code” attribute value to the desired short/long code
7. Set the “Opt-In Keyword” attribute value to “PIZZASTART”
8. Set the “Opt-Out Keyword” attribute value to “STOP”

The subscription list is ready to gather contact expressing explicit interest by sending SMS text messages to the specified short/long code using the “PIZZASTART” keyword.

Create a Non-Matching auto-reply message

1. Navigate to Marketing > Keywords
2. Create new keyword (name is not important, but do use something descriptive) and set action to “Non-Matching”
3. Navigate to Marketing > Auto-Reply Messages
4. Create new auto-reply message. Make sure to choose previously created keyword and desired short/long code. In “Message” write auto reply message that will be sent to end users
5. In the ribbon, click on “Go Live” button to activate auto-reply message
6. Navigate to Marketing > Short/Long Codes
7. Open short/long code for which you wish to send non-matching auto replies

8. Select previously created auto-reply message in “Non Matching Keyword” section (lookup field “Auto-Reply Message”.
9. Make sure you associated all keywords on short/long code. Non-Matching auto reply is sent only if keyword is not associated with short/long code.

Create and distribute TeleSign SMS Bulk Message

1. Navigate to Marketing -> TeleSign SMS Bulk Messages
2. In the top ribbon, click on “TeleSign SMS Bulk Message”
3. Fill in the following fields:
    a. *Subject* (subject of Bulk SMS Message - not seen by customers, only for your information)
    b. *To* (specify contacts to send SMS text messages)
    c. *Short/Long Code* (select your desired short/long code – not required)
    d. *Send On* (if desired, you can schedule date and time when you want the messages to be sent. By default, this is set to current date and time)
    e. *Message* (the text message that you wish to send out)
4. Save the record and click on “Send” in the top ribbon. Confirmation windows appears, where you need to confirm your decision
5. Record is then saved and scheduled for sending
6. When the distribution is completed, record will be deactivated and the status will be changed into “Distribution Completed”
7. See the statistic of your SMS messages in the “TeleSign SMS Message Statistics” tab or drill through all SMS messages via “TeleSign SMS Messages” tab (note: it may take a couple of minutes for statistics to refresh and show the latest data).

Solution administration

Phone number cleansing

The TeleSign SMS solution enables you to leverage TeleSign's internal phone number cleansing algorithms to help you clean up your contact phone numbers.

You can toggle on the phone number cleansing functionality by navigating to Marketing Settings > TeleSign SMS > TeleSign SMS Configuration > TeleSign SMS Settings.

In the "PHONE NUMBER CLEANSING" section of the form set the "Allow Phone Number Cleansing" attribute to "Yes" or "No", depending on your preference.

Change contact phone number and compliance attributes

The TeleSign SMS solution enables you change the phone number attribute and the compliance attribute of the Contact entity that will be used when sending SMS text messages. Custom attributes are supported.

You can change the phone number attribute and the compliance attribute by navigating to Marketing Settings > TeleSign SMS > TeleSign SMS Configuration > TeleSign SMS Settings.

Set the "Contact Mobile Number Field Schema Name", "Lead Mobile Number Field Schema Name" or "Compliance Field Schema Name" attributes to the desired values.

Security roles

TeleSign SMS solution introduces three new security roles that are needed to use administer the solution:

- TeleSign SMS: Administrator
  - manage settings for solution
  - has all organization privileges to autoreply messages
  - has all organization privileges to templates
  - has all organization privileges to short/long codes
  - has all organization privileges to keywords
- TeleSign SMS: Advanced User
  - can not administer TeleSign solution
  - has user level privileges for create/write/delete autoreply messages
  - has organization level privileges for read/append/append to and user level privileges for create/write/delete to short/long codes
  - has full organization privileges for templates
  - has all organization privileges to keywords
- TeleSign SMS: User
  - can not administer TeleSign solution
  - has user level privileges for create/write/delete autoreply messages
  - has user level privileges for short/long codes
  - has full privileges for templates
  - has all organization privileges to keywords

All three security roles are **NOT** self-sufficient and should be used (at least) in addition to the out-of-the-box „Marketing Professional – Business" security role.

Automatic Record Creation

The TeleSign SMS solution enables you to automatically create contacts or leads in your CRM system when end user replies with SMS message. New records are created only when this feature is enabled and when no contact and no lead is found in CRM system.

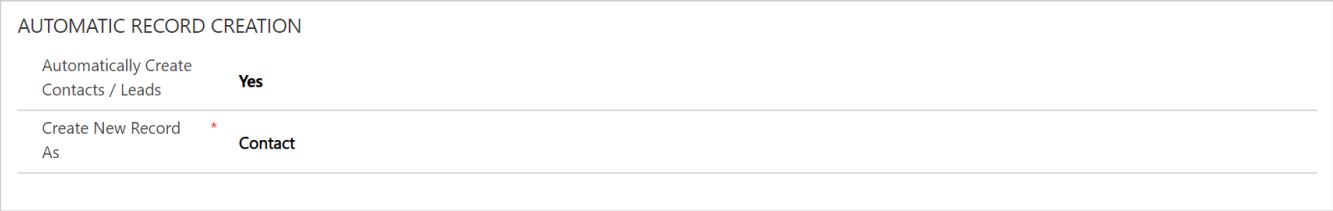
If contact with end user's phone number is found in CRM, search will NOT be performed on leads. Search on leads is only performed if contact isn't found in system (contacts have higher priority than leads).

This feature can be enabled / disabled on the TeleSign SMS Settings entity with setting field "Automatically Create Contacts / Leads" to "Yes" / "No". If selecting "Yes", you must also specify if you want your newly created records to be contacts or leads.

To keep created records as unique as possible, they are created in the following way:

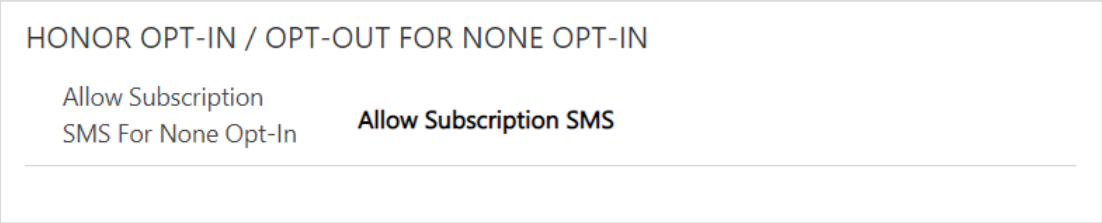
first name = end user's phone number

last name = TeleSign Record



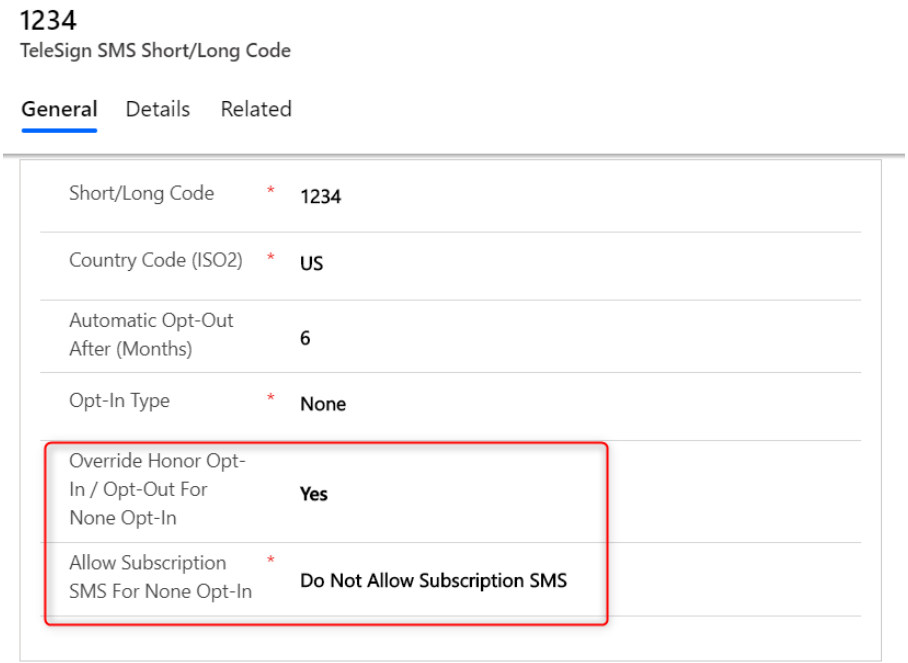
Honor Opt-In/Opt-Out Messages for Short/Long Codes with None Opt-In

If your process of collecting opt-in consents for SMS sending is mostly done via web or some other channel where users don't directly send "Opt-In" SMS and you want end-user to be able to unsubscribe from these kind of messages, you can enable feature "Honor Opt-In/Opt-Out for None Opt-In".



If enabled ("Allow Subscription SMS For None Opt-In" set to "Allow Subscription SMS"), system will process received Opt-in/Opt-out SMS messages, even if you have set "None" as an Opt-In type on short/long code. In simpler words, this feature provides end-user the ability to subscribe/unsubscribe from SMS messages, even if short/long code's "Opt-In" type is set to "None".

You can globally enable / disable this functionality on the TeleSign SMS Settings entity, but you can always override this option on every short/long code that has "None" set as "Opt-In Type". If override is specified on short/long code, this option always takes priority over the one set in global settings.



When sending SMS message, system checks TeleSign SMS Subscription Logs entity if user decided to opt-out from SMS messages. If yes, SMS will not be sent. If user for specified short/long code didn't unsubscribe, SMS will be sent.

Default Country Code

Solution comes with a list of SMS Country codes for the majority of countries. Records include name, ISO Code and prefix for the country. If your Short/Long codes are all located in one country, you can specify default country code, which will be automatically set during Short/Long code record creation.

You can find more information about TeleSign SMS Country codes below.

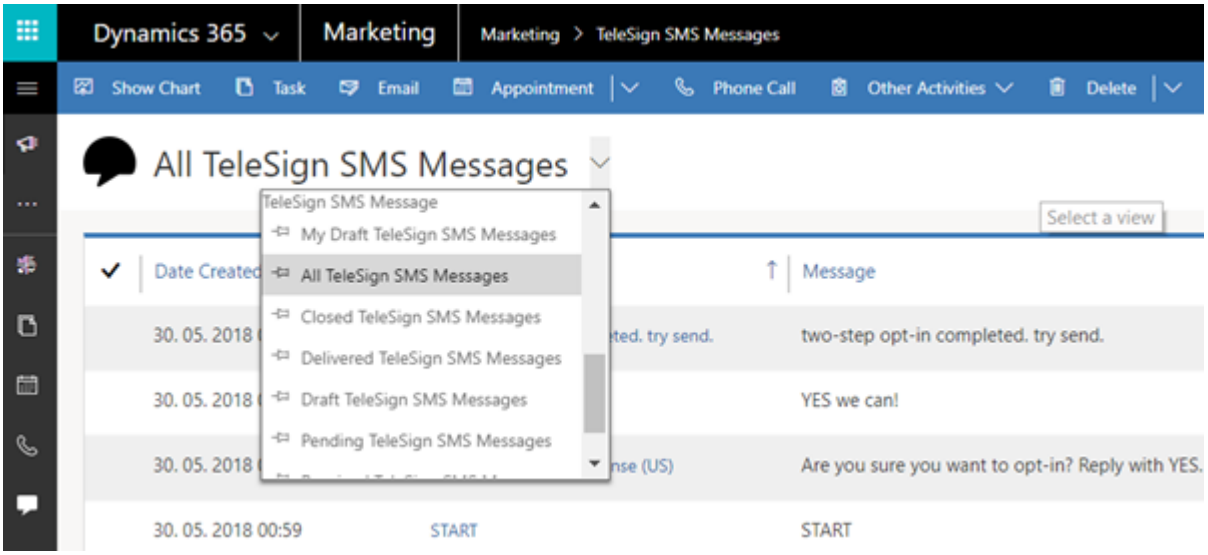
TeleSign SMS solution entities

TeleSign SMS Message

Each individual SMS text message in the system is represented as a single "TeleSign SMS Message" entity record. The "TeleSign SMS Message" is an activity entity and therefore shares the common functionalities of other activity entities.

You can access the SMS text messages by navigating to Marketing > My Work > TeleSign SMS Messages and using one of the predefined views to display the records:

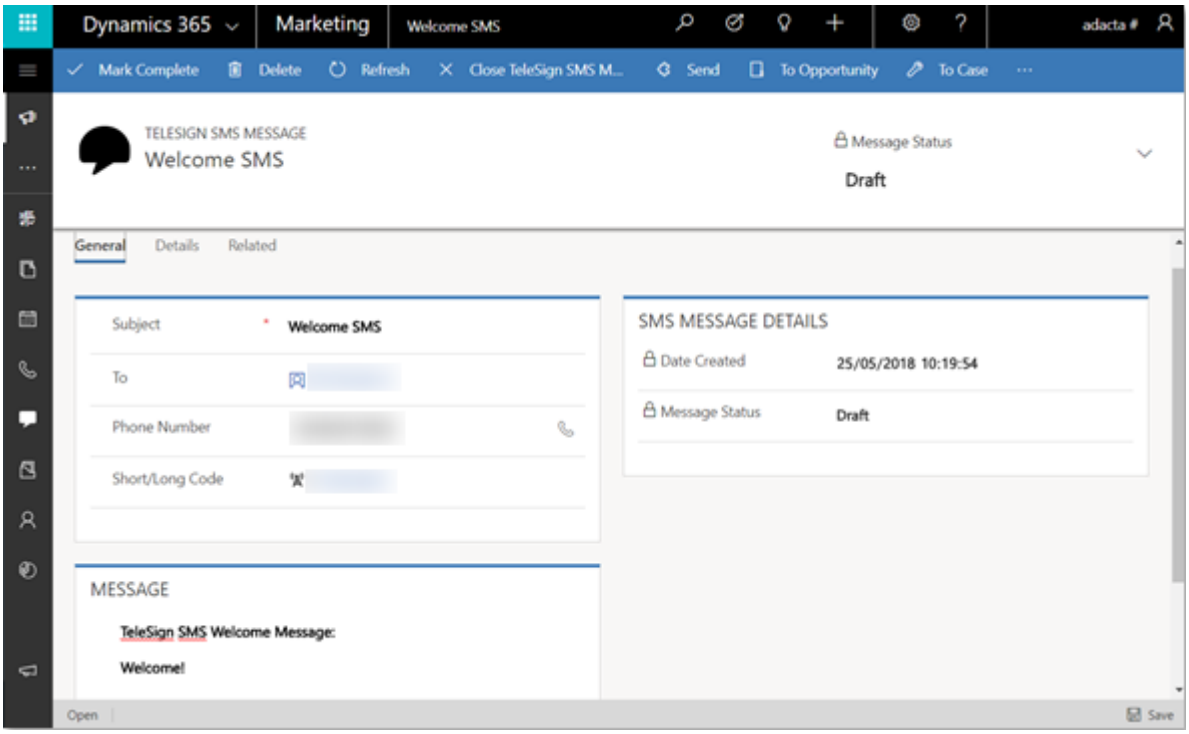
- All TeleSign SMS Messages
- Closed TeleSign SMS Messages
- Delivered TeleSign SMS Messages
- Draft TeleSign SMS Messages
- Pending TeleSign SMS Messages
- Received TeleSign SMS Messages
- Sent TeleSign SMS Messages



Opening a single entity record provides you with the insight of all the necessary information about the SMS text message:

- General tab
  - Subject
  - To
  - Contacts
  - Phone Number
  - Short/Long Code
  - Message
  - Date Created
  - Message Status
- Details tab
  - Reference ID – a TeleSign unique identifier of each individual SMS text message.
  - Error Message – a detailed error message in case an error occurred while processing the SMS text message.
  - Code – please refer to the TeleSign SMS API for details. Visible for sent message only.

- Description – please refer to the TeleSign SMS API for details. Visible for sent message only.
- Updated On – date and time of the last status update from the TeleSign platform. Visible for sent message only.
- Country Code (ISO2) – the country code of the originating SMS text message. Visible for received message only.
- Keyword – the identified keyword from the originating SMS text message. Visible for received message only.
- Timestamp – date and time of the received SMS text message. Visible for received message only.



Understanding entity status

"TeleSign SMS Message" entity supports standard Dynamics 365 activity entity status and status reason combinations:

- Open
  - Draft – this status reason is only available when manually creating the SMS text message record. When the message is in this status, you have the possibility to click the "SEND" button, manually sending the message to the recipient.
- Scheduled
  - Pending send – either as a manual send operation or as the SMS text messages generated directly by the Customer Journey, the message is scheduled to be sent off to the customer.
- Completed
  - Sent – the message has been sent to the customer but has not yet been delivered. The majority of validations were passed (e.g. compliance attribute, phone number format) and the message is on the way.

  - Not delivered – the message was not delivered. See the message details for the exact reason (e.g. duplicate phone number in a single Customer Journey, contact has not opted in).
  - Delivered – the message was successfully delivered.
  - Received – this is the only status for incoming or received SMS text messages.
- Canceled
  - Invalid phone number – the phone number is not valid. The message was not sent.

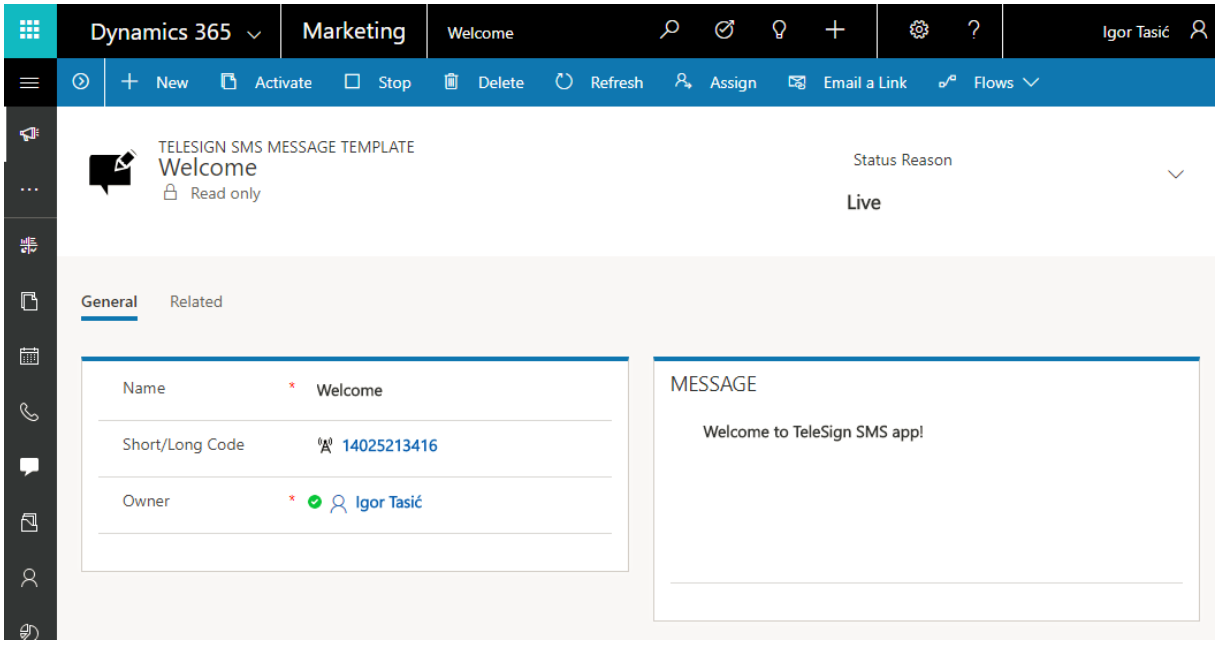
TeleSign SMS Message Template

Having a published (live) "TeleSign SMS Message Template" is a prerequisite for using the newly introduced Customer Journey tile for sending the SMS text messages.

To manage your templates navigate to Marketing > Templates > TeleSign SMS Message Templates.

When the template is ready to be used make sure you publish the template by clicking the "Go Live" button in the command bar!

Keep in mind that you can use dynamic content by pulling the contact information into the SMS text message body. Just make sure to include the attribute schema name between two curly brackets (e.g. {{firstname}}).



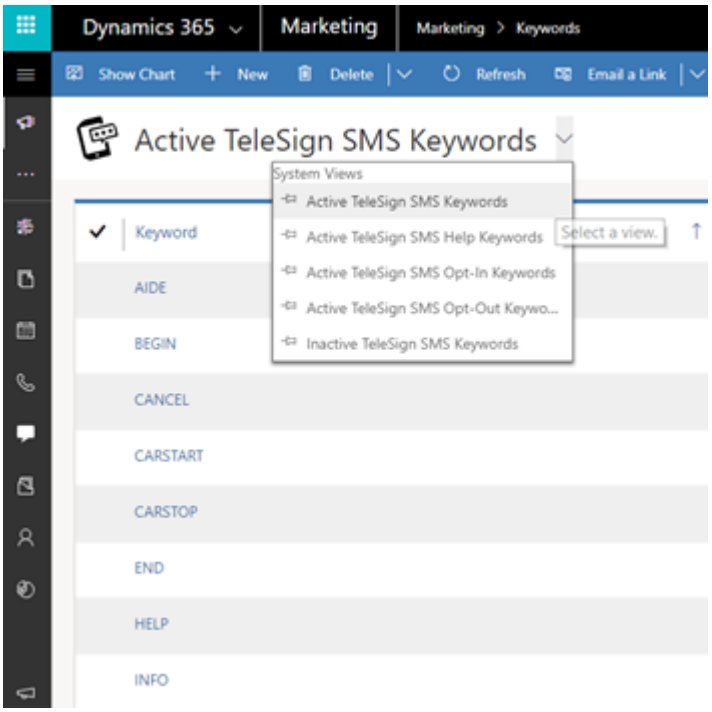
See Create a new personalized SMS text message template example.

TeleSign SMS Keyword

Keywords are a way for customers to interact with you using SMS text messages. The solution allows you to define as many keywords as you like, in any language that you prefer and use them for various scenarios. Carefully defined keywords are essential for the following functionalities:

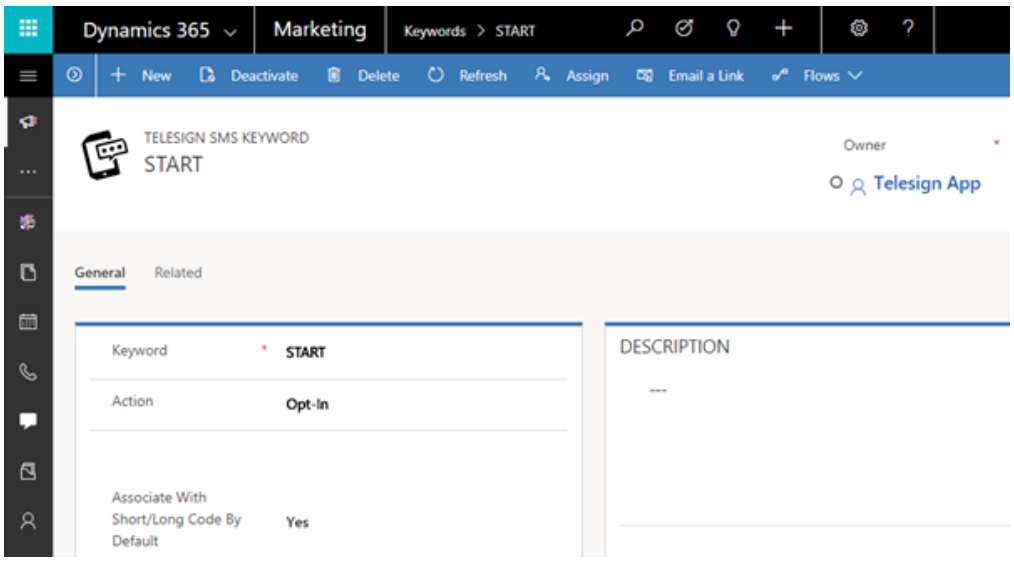
- Customers opting in or opting out
- Driving the Customer Journey
- Automatically replying to customers (e.g. HELP)
- Managing subscription list memberships

To manage your keyword navigate to Marketing > TeleSign SMS Marketing > Keywords.



When introducing a new keyword you have the option to define the following attributes:

- Keyword – an actual keyword you want to interact with
- Action – information about the behavior of this keyword
    - Opt-In – the keyword will be used to process opt-in requests
    - Opt-Out – the keyword will be used to process opt-out requests
    - Help – the keyword will be used to send automatic help messages
    - Non-Matching – the keyword will be used for non-matching auto replies
    - Undefined value – no specific action associated. The keyword can still be used for subscription list management, two-step opt-in confirmation and other auto-reply messages.
- Associate With Short/Long Code By Default – should this keyword be automatically associated with newly bought short/long codes.
- Description – general description that helps you distinguish between keywords. For informational purposes only.



The solution comes with the following predefined keywords:

- Opt-In
  - START
  - ARRET
- Opt-Out
  - STOP
  - END
  - QUIT
  - CANCEL
  - UNSUBSCRIBE
- Help
  - AIDE
  - HELP
  - INFO

The "START", "STOP" and "HELP" are default keyword for every short/long code and they cannot be removed.

⚠ **IMPORTANT**

Keyword phrases are not supported. Only single word keywords are supported.

TeleSign SMS Short/Long Code

Short codes are short digit sequences, significantly shorter than telephone numbers, used to address SMS messages. Purpose is to be universal and easy to remember.

Long codes enable businesses to have their own number, rather than short codes , which are generally shared across many brands.

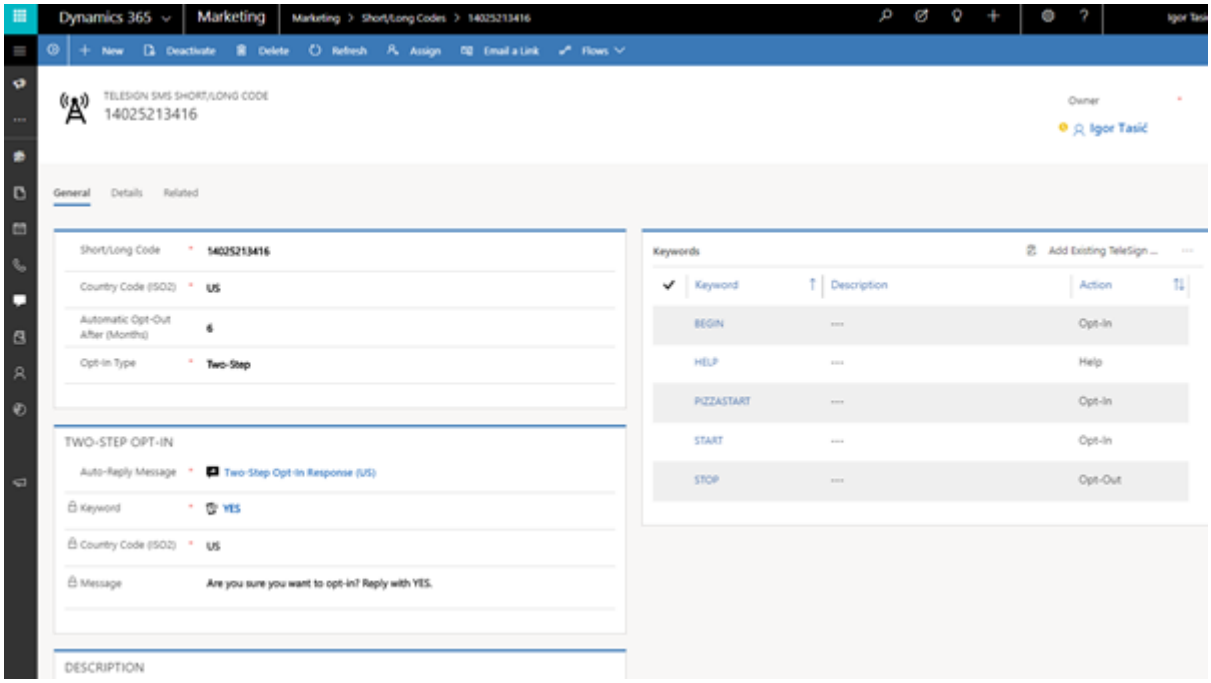
One way of obtaining a short/long code is purchasing it directly with TeleSign. Once the short/long code has been purchased it will be automatically transferred to your Dynamics 365 for Marketing environment.

To manage your short/long codes navigate to Marketing > TeleSign SMS Marketing > TeleSign SMS Short/Long Codes.

When managing a specific short/long code you have the possibility to view and/or modify the following data:

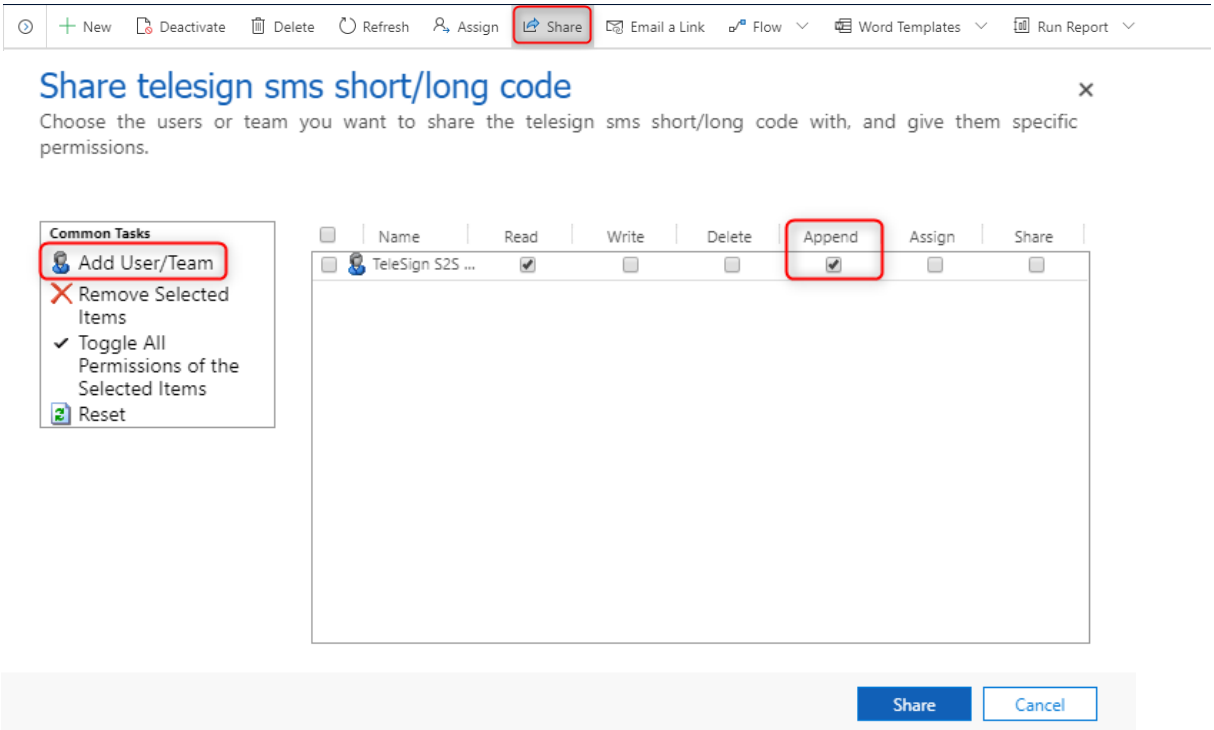
- Short/Long Code – purchased short/long code
- Country Code (ISO2) – country of purchased short/long code. Same short/long code can be used in multiple countries.
- Automatic Opt-Out After (Months) – duration period after which the customers are automatically opted out and new opt-in is required.
- Opt-In Type – for detailed explanation see chapter Handling opt-in and opt-out requests
- Auto-Reply Message – used for two-step opt-in process. For detailed explanation see chapters Handling opt-in and opt-out requests and Configure the short/long code to use two-step opt-in.
- Description - general description that helps you distinguish between short/long codes. For informational purposes only.

- Keywords – list of keywords that can be used by the customers to either opt-in or opt-out of this specific short/long code.



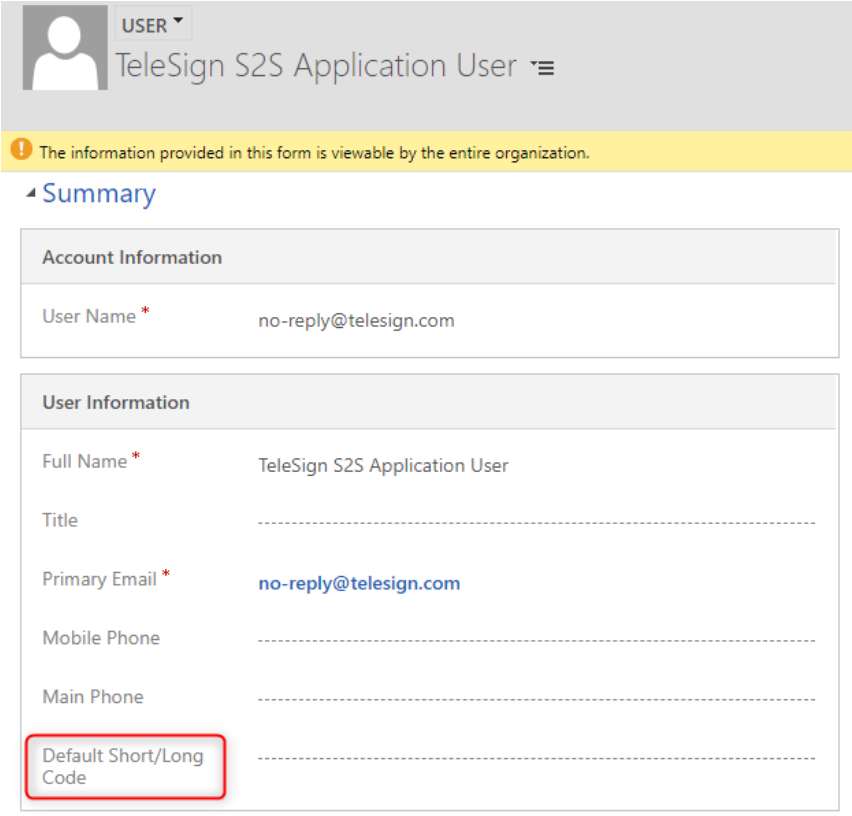
When a new short/long code is created (either manually or automatically upon purchase), all existing keywords, that have the attribute “Associate With Short/Long Code By Default” set to “Yes”, will be automatically added to the list.

If there is a requirement that you don’t want to give a user full permissions to short/long codes, you can use a standard CRM functionality of “sharing” the short/long code record. Open short/long code that you want to share and click on “Share”. A new window will open, where you can select user or team that you want to give access to. Desired user / team apart from read access, also needs “Append” privileges.



Default TeleSign SMS Short/Long code

Sometimes you may wish to always set a specific short/long code when sending manual SMS messages. This can be achieved by setting a “Default Short/Long Code” on a system user record in CRM.

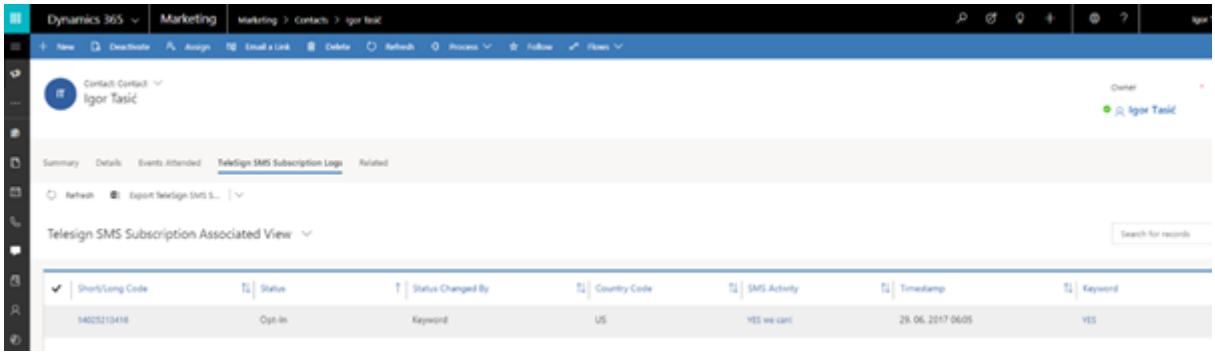


When this user creates new manual SMS message, short/long code will be set to a value set in default short/long code field for this user (if it’s specified).

TeleSign SMS Subscription Log

"TeleSign SMS Subscription Logs" are a way for you to keep track of all customer's opt-in and out-out requests. For details regarding creation of log records please refer to chapter Subscription logs.

Subscription logs for each individual Contact record are accessible from the Contact form by navigating to the Related > TeleSign SMS Subscription Logs.



Each "TeleSign SMS Subscription Log" contains the following information:

- Short/Long Code - the short/long code for which the subscription log was created.
- Country Code – the short/long code country for which the subscription log was created.
- Contact – the contact subjected to the opt-in change.
- Keyword – identified keyword from the received SMS text message that resulted in a log record creation.
- Timestamp – date and time of the opt-in/opt-out request.
- Status – request type (opt-in, opt-out).
- Status Changed By - the log record could be a result of a received SMS text message (explicit customer request) or a result of an automatic opt-out job after the short/long code interval has expired.
- SMS Activity – a link to the specific SMS text message that resulted in a log record.

TeleSign SMS Auto-Reply Message

The solution enables you to set up automatic replies based upon received SMS text messages. The automatic reply is triggered based on the received keyword, short/long code and country code combination. A predefined SMS text message is sent to the customer when a published (Live) "TeleSign SMS Auto-Reply Message" record exists in the system.

To manage your auto-reply messages navigate to Marketing > TeleSign SMS Marketing > TeleSign SMS Auto-Reply Messages.

When managing a specific auto-reply message you have the possibility to view and/or modify the following data:

- Name – short description to easily identify specific records when using then throughout the solution.
- Keyword – a specific keyword, based on which you would like to send an automatic SMS text message.
- Short/Long Code – a specific short/long code, based on which you would like to send an automatic SMS text message.
- Country Code (ISO2) – a specific country code, based on which you would like to send an automatic SMS text message.

- Message – SMS text message body that will be sent as an automatic reply.
- Description – general description that helps you distinguish between short/long codes. For informational purposes only.
- Status Reason – the status of the auto-reply message can be either “Draft” or “Live”.

Make sure you publish the desired “TeleSign SMS Auto-Reply Message” record by clicking the “Go Live” button in the command bar in order to enable it.

Subscription List (Marketing List)

You can define your various target groups by setting up segments and lists. Each list or segment represents a collection of contacts that you can use to target a customer journey. You will also use marketing lists in your subscription center to enable contacts to manually opt-in or opt-out of various types of newsletters and other marketing communications.

To learn more about Dynamics 365 for Marketing subscription lists see:

- Set up subscription lists and subscription centers
- Market segmentation, marketing lists, and subscription lists

TeleSign SMS solution extends the existing subscription list functionality by providing the possibility for you to capture customer interest via SMS communication channel. Keywords are defined for opting in to and opting out from a subscription list.

In addition to existing functionality of Dynamics 365 for Marketing, the following extensions are introduced to the Marketing List entity:

- Use As TeleSign SMS Subscription List – should be set to “Yes” in order to be considered as a SMS subscription list upon receival of the SMS text message.
- Short/Long Code – mandatory when talking about SMS subscription lists. Should be set to specific short/long code.
- Opt-In Keyword – mandatory when talking about SMS subscription lists. A specific keyword that will be used for opting in a contact to the subscription list.
- Opt-Out Keyword – mandatory when talking about SMS subscription lists. A specific keyword that will be used for opting out a contact from the subscription list.

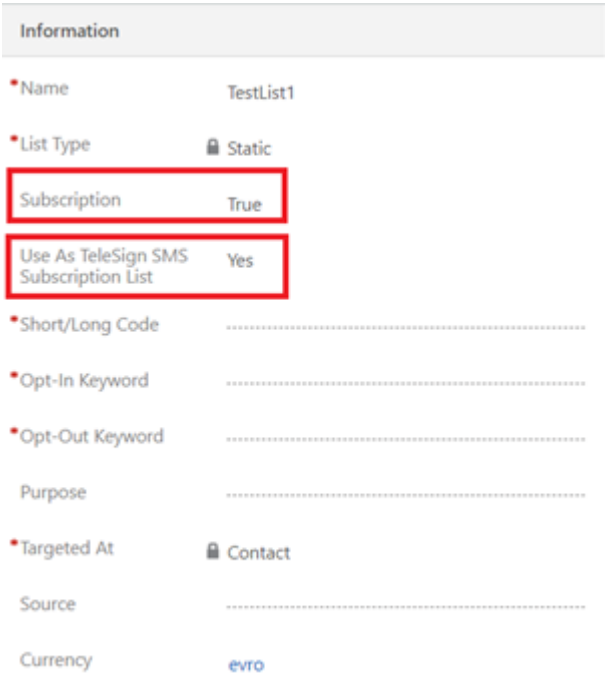
⚠ **IMPORTANT**

Make sure you target the subscription list to contacts - “Target At” attribute should be set to “Contact” - and that the “List Type” is set to “Static”.

When multiple contacts (duplicates) are identified based on the received SMS text message phone number, only one of the contacts is added to the subscription list.

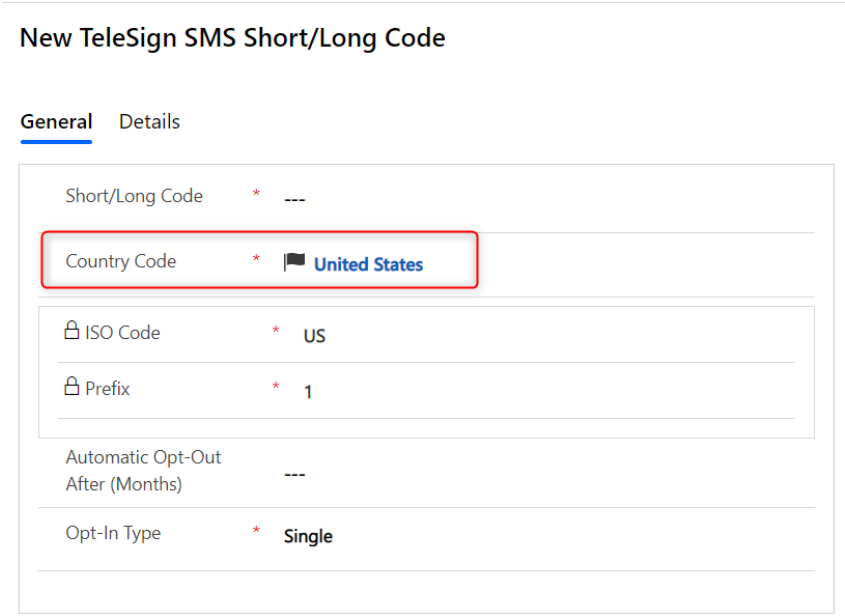
Keep in mind that if a contact has not explicitly opted in to a specific short/long code, he/she will not receive any SMS text messages regardless if the contact is part of one or many subscription lists.

Multiple subscription lists can have the same short/long code and keyword combinations.



TeleSign SMS Country Code

Solution comes with a list of SMS Country codes for the majority of countries. Records include name, ISO Code and prefix for the country. One of these records must be selected on every Short/Long code (field “Country Code”). Entity can be found in “Settings” -> “TeleSign SMS Country Codes” (under TeleSign SMS section).

Having all contacts phone numbers in international format and ready for sending can be hard, so TeleSign SMS logic uses country codes to automatically parse contacts phone number (if country is filled on contact). It uses the prefix, so you do not need to have all phone numbers with international formats in CRM.

If you specify “Default Country Code” in TeleSign SMS Settings, this value will be automatically pre-filled during Short/Long code record creation.