January 31, 2019
Reading Time: 3 minutes

When it comes to sending manual SMS within Microsoft Dynamics we would strongly recommend using our Synchronisation service and Chrome extension. The reason for this is that it allows you to have a natural and quick SMS conversation with your contacts. Exactly how you would do on a mobile phone. If the use of this service isn't an option to your organisation then you can still send SMS manually through the CRM interface.

This guide will take you through setting up the components required for sending SMS directly through Dynamics.

Please note in this guide we have assumed you have gone through the Getting Started Guide to get TxtSync installed and configured

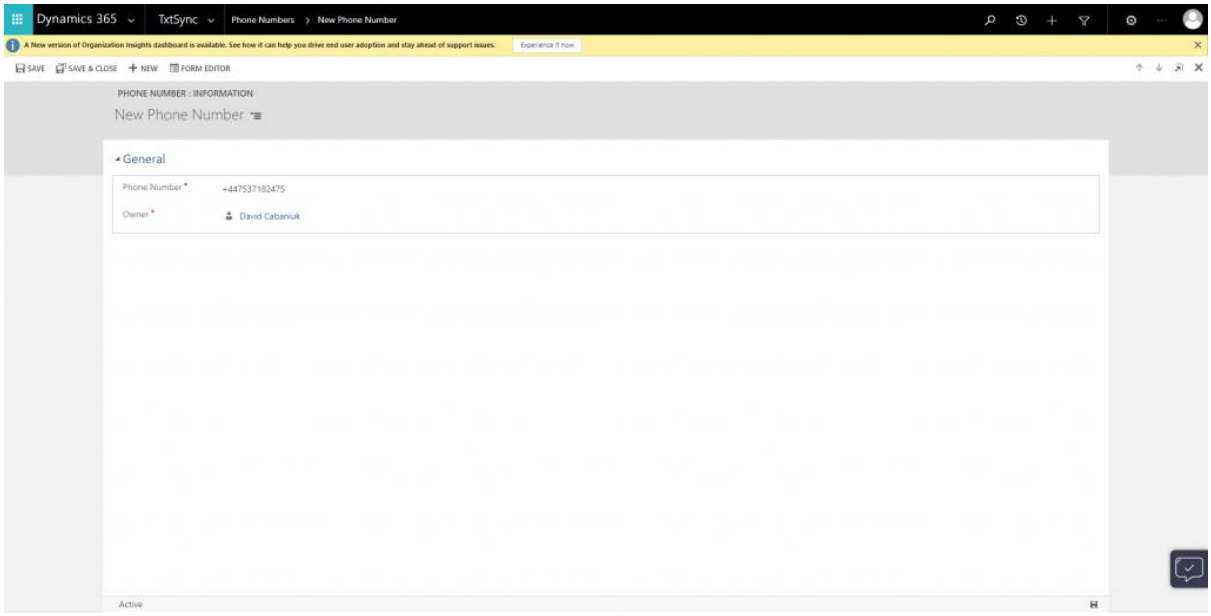
Phone Number Permissions

When sending SMS manually through the CRM you need to specify the number to send from. For security and integrity reasons we only allow you to send from numbers that you have access to in TxtSync. By default you will have access to the TxtSync shared numbers, but you can also apply for free branded Sender IDs or purchase your own dedicated numbers.

To grant access to your owned numbers in CRM you must create them as Phone Number records. Once created, you can use the standard Dynamics security roles and share permissions to determine which users can use which numbers.

To create the Phone Number records follow the steps below:

- Navigate to **Settings** > **TxtSync** > **Phone Numbers**
- Click **New**
- In **Phone Number** Enter the number or Sender ID you wish to grant access to. Please note that this number must directly match the number in TxtSync.
- Set the Owner according to the permissions that interest you.



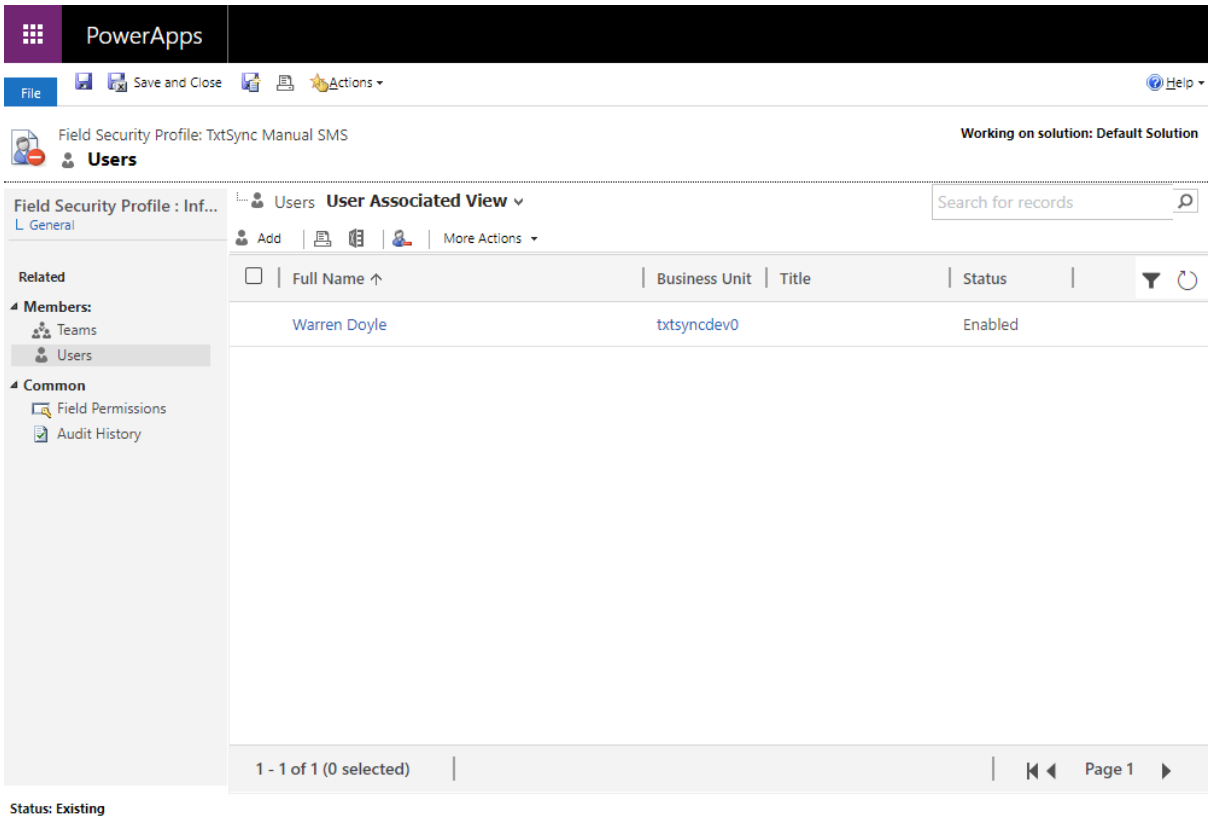
Sending Permissions

Included with the TxtSync solution is a **Field Security Profile** that grants access to the send SMS trigger field. In order to send an SMS this field must be set to true when creating the SMS record. The TxtSync Manual SMS field security profile is used to determine which users can an can't send manual SMS.

To apply the field security profile to your users follow the steps below:

- Navigate to **Settings** > **Field Security Profiles**
- Open **TxtSync Manual SMS**

- Then select rather **Teams** or **Users** and associate the relevant people to the profile.

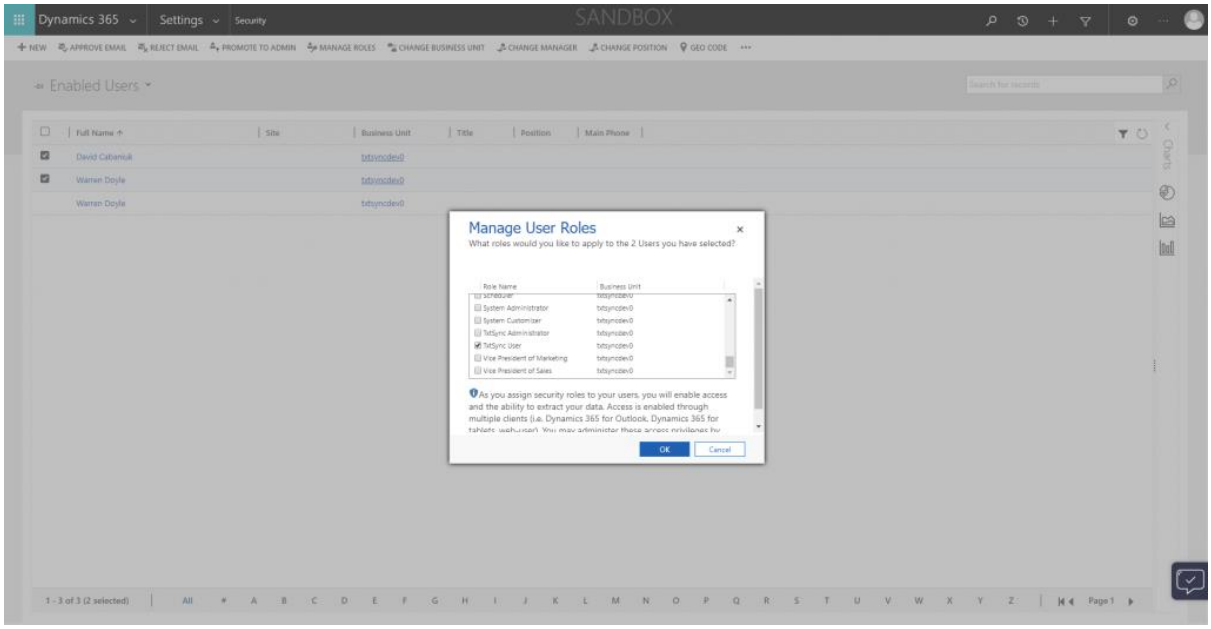


SMS Security Roles

Included in the TxtSync solution is a **Security Role** called **TxtSync User** that is used to grant access to reading SMS, TxtSync Configuration and Phone Numbers. You will need to make sure that this is assigned to the relevant users in your organisation. If not, your users will not be able to read the TxtSync credentials required to send out an SMS.

To add this role to your users follow the steps below:

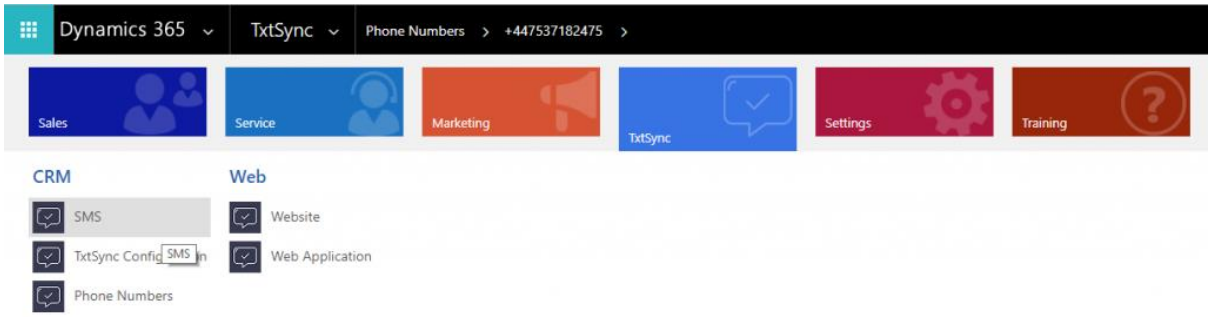
- Navigate to **Settings** > **Security** > **Users**
- Select your users
- Click **Manage Roles**
- Make sure **TxtSync User** is checked and click **OK**



Sending an SMS

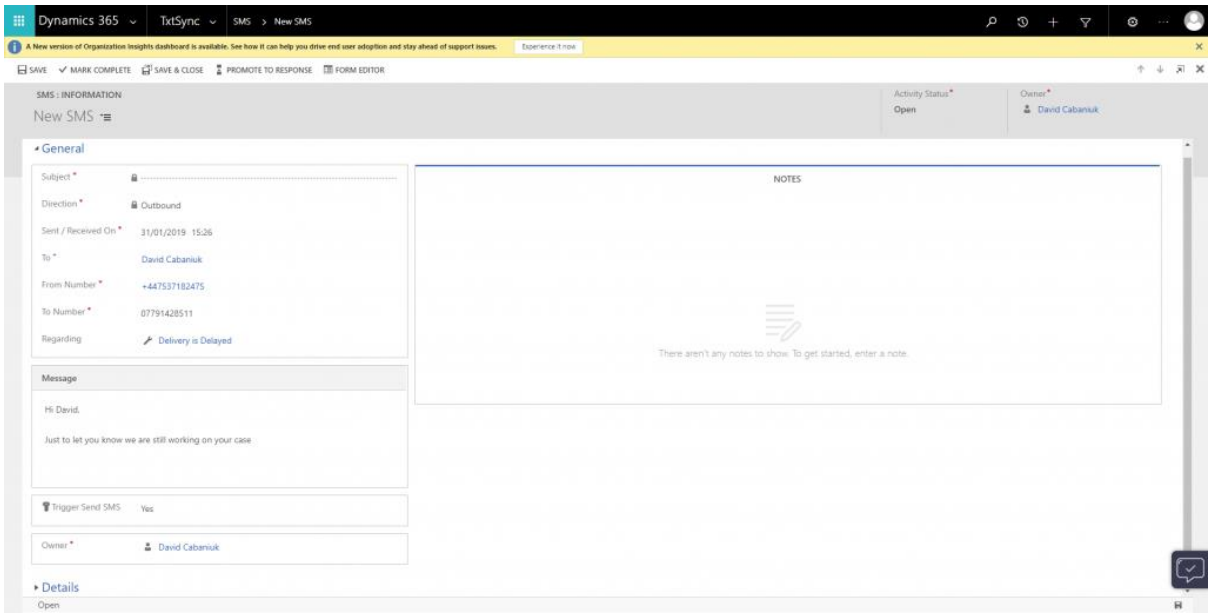
Now that you have configured your CRM for manual SMS you are ready to send out your first SMS.
Please follow the steps below:

- In Dynamics navigate to **TxtSync** > **SMS**



- From the menu click **Other Activities** > **SMS**
- Now you will need to fill out the SMS record.
- Within the recommended **To** field locate your Account, Contact or Lead record. TxtSync will automatically pull in a phone number from that record. TxtSync will also inform you at this point whether the “contact” has given you consent to contact them by SMS.
- Now select the **From Number** you wish to send your SMS from.

- In the **Message** section enter your message.
- Finally set the **Trigger Send SMS** to Yes. Please note if you fail to do this on create your SMS will not be sent out.

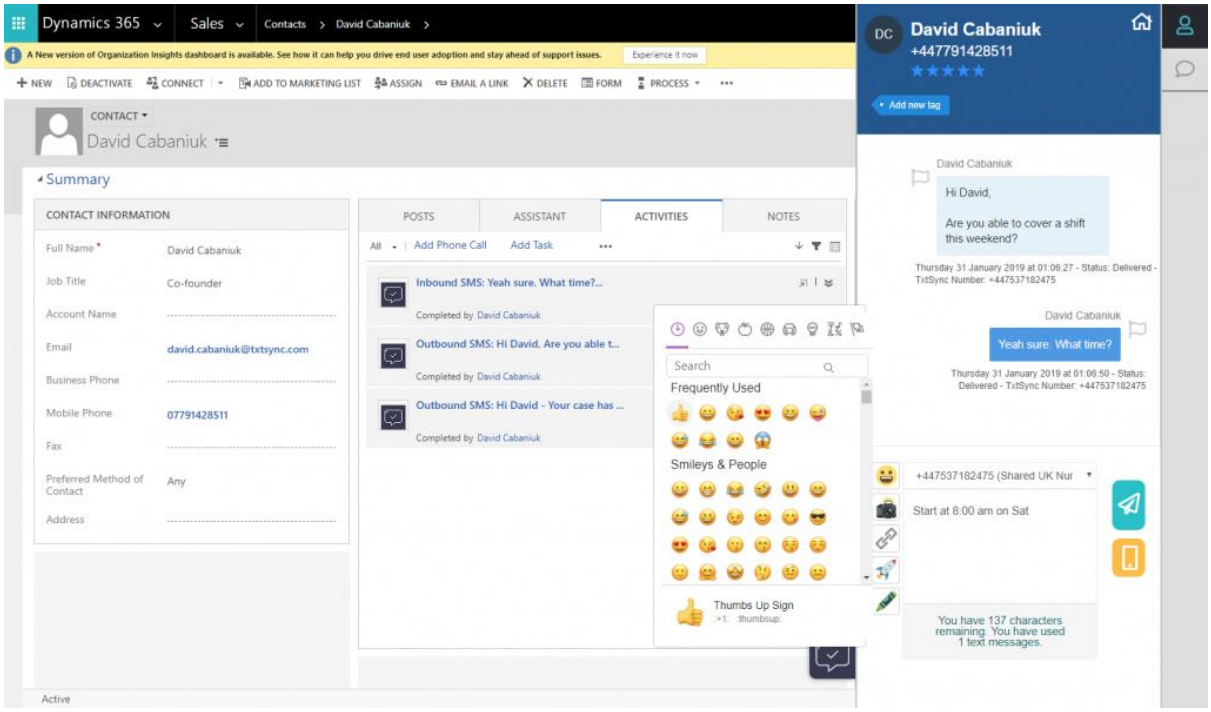


A workflow will now run which will send out your SMS!

Wait, There's More!

If you are looking for a quicker, and user friendly way of sending SMS that is more of a natural conversation. Then please check out the TxtSync Synchronisation service and Chrome extension.

It will empower your staff to easily and efficiently communicate with your customers! You'll be able to deliver impacting SMS that includes emojis, images and files. Making your messages personal and human is a great way to build relationships with your customers!


Dynamics 365
Sales
Contacts
David Cabaniuk
A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues.
Experience it now
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
Co-founder
Account Name
Email
david.cabaniuk@txtsync.com
Business Phone
Mobile Phone
07791428511
Fax
Preferred Method of Contact
Any
Address
POSTS
ASSISTANT
ACTIVITIES
NOTES
All
Add Phone Call
Add Task
Inbound SMS: Yeah sure. What time?...
Completed by David Cabaniuk
Outbound SMS: Hi David, Are you able t...
Completed by David Cabaniuk
Outbound SMS: Hi David - Your case has ...
Completed by David Cabaniuk
Search
Frequently Used
Smileys & People
Thumbs Up Sign
+1: thumbsup
Active
DC
David Cabaniuk
+447791428511
Add new tag
David Cabaniuk
Hi David,
Are you able to cover a shift this weekend?
Thursday 31 January 2019 at 01:06:27 - Status: Delivered - TxtSync Number: +447537182475
David Cabaniuk
Yeah sure. What time?
Thursday 31 January 2019 at 01:06:50 - Status: Delivered - TxtSync Number: +447537182475
+447537182475 (Shared UK Nur
Start at 8:00 am on Sat
You have 137 characters remaining. You have used 1 text messages.