



# TWILIO SMS --- DYNAMICS 365 MARKETING

*User Manual*



# TABLE OF CONTENTS

---

Introduction..... 3

1. import solution..... 4

2. configuration solution ..... 5

1. send sms from the customer journey ..... 6

1. SEND direct messages ..... 8

# INTRODUCTION

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Twilio SMS for Dynamics 365 Marketing is a solution that allows you to send text messages quickly and easily allowing you to maintain communication with our customers on a constant basis.

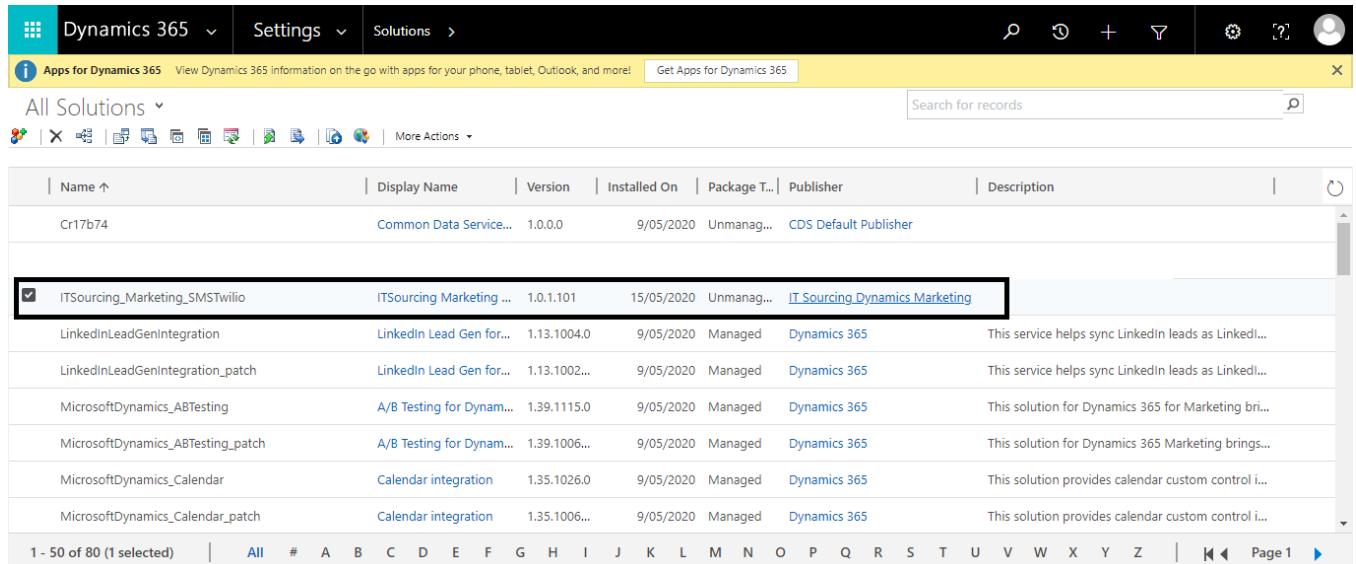
This solution allows you to send SMS messages from a Customer Journey or directly to the customer.

# 1. IMPORT SOLUTION

Before installing, it is important that you have the version of Dynamics 365 Marketing that allows you to perform Marketing Campaign Automation processes.

Once we have the managed solution

(**ITSourcing\_Marketing\_SMSTwilio\_1\_0\_1\_101\_managed.zip**) de Twilio SMS for Dynamics 365 marketing, we will proceed to import it into our Tenant.



Name	Display Name	Version	Installed On	Package T...	Publisher	Description
Cr17b74	Common Data Service...	1.0.0.0	9/05/2020	Unmanag...	CDS Default Publisher	
<input checked="" type="checkbox"/> ITSourcing_Marketing_SMSTwilio	ITSourcing Marketing ...	1.0.1.101	15/05/2020	Unmanag...	IT Sourcing Dynamics Marketing	
LinkedInLeadGenIntegration	LinkedIn Lead Gen for...	1.13.1004.0	9/05/2020	Managed	Dynamics 365	This service helps sync LinkedIn leads as Linkedl...
LinkedInLeadGenIntegration_patch	LinkedIn Lead Gen for...	1.13.1002...	9/05/2020	Managed	Dynamics 365	This service helps sync LinkedIn leads as Linkedl...
MicrosoftDynamics_ABTesting	A/B Testing for Dynam...	1.39.1115.0	9/05/2020	Managed	Dynamics 365	This solution for Dynamics 365 for Marketing bri...
MicrosoftDynamics_ABTesting_patch	A/B Testing for Dynam...	1.39.1006...	9/05/2020	Managed	Dynamics 365	This solution for Dynamics 365 Marketing brings...
MicrosoftDynamics_Calendar	Calendar integration	1.35.1026.0	9/05/2020	Managed	Dynamics 365	This solution provides calendar custom control i...
MicrosoftDynamics_Calendar_patch	Calendar integration	1.35.1006...	9/05/2020	Managed	Dynamics 365	This solution provides calendar custom control i...

## 2. CONFIGURATION SOLUTION

Once the previous point is checked. An email should be sent to [support@itsourcing.tech](mailto:support@itsourcing.tech)

With the following information to request the Token:

**Asunto: [Empresa] – Twilio SMS for Dynamics 365 Marketing - Token**

**Body:**

**Company Name:**

**Nit:**

**GUID Tenant Dtnamics:**

**Contact Name:**

**Contact Email:**

**Contact Phone:**

Once we have the token response, we must enter Marketing >> Settings >> Configuration Providers >

Save
Save & Close
New
Deactivate
Delete
Validate API Key
Refresh
Assign
Share
Email a Link
Flow
Word Templates
Run Report

**Provider Twilio**  
Configuration Provider

General
Related

Name	* Provider Twilio
Provider SMS	* Twilio
Field Lead Name	* mobilephone
Field Contact Name	* mobilephone
ITS Token	* 00cbdddb-39bf-4b31-9992-f49a6aaca11c
Status	* Active
Status Reason	Active

Twilio

Phone Number	+12183535728
Twilio Account SID	AC447b4ad2a505e07b12845b7c17196423
Twilio Auth Token	4d558c646b92e76b9f3b643c9b76e083
Twilio Api Uri	<a href="https://api.twilio.com/2010-04-01/Accounts">https://api.twilio.com/2010-04-01/Accounts</a>

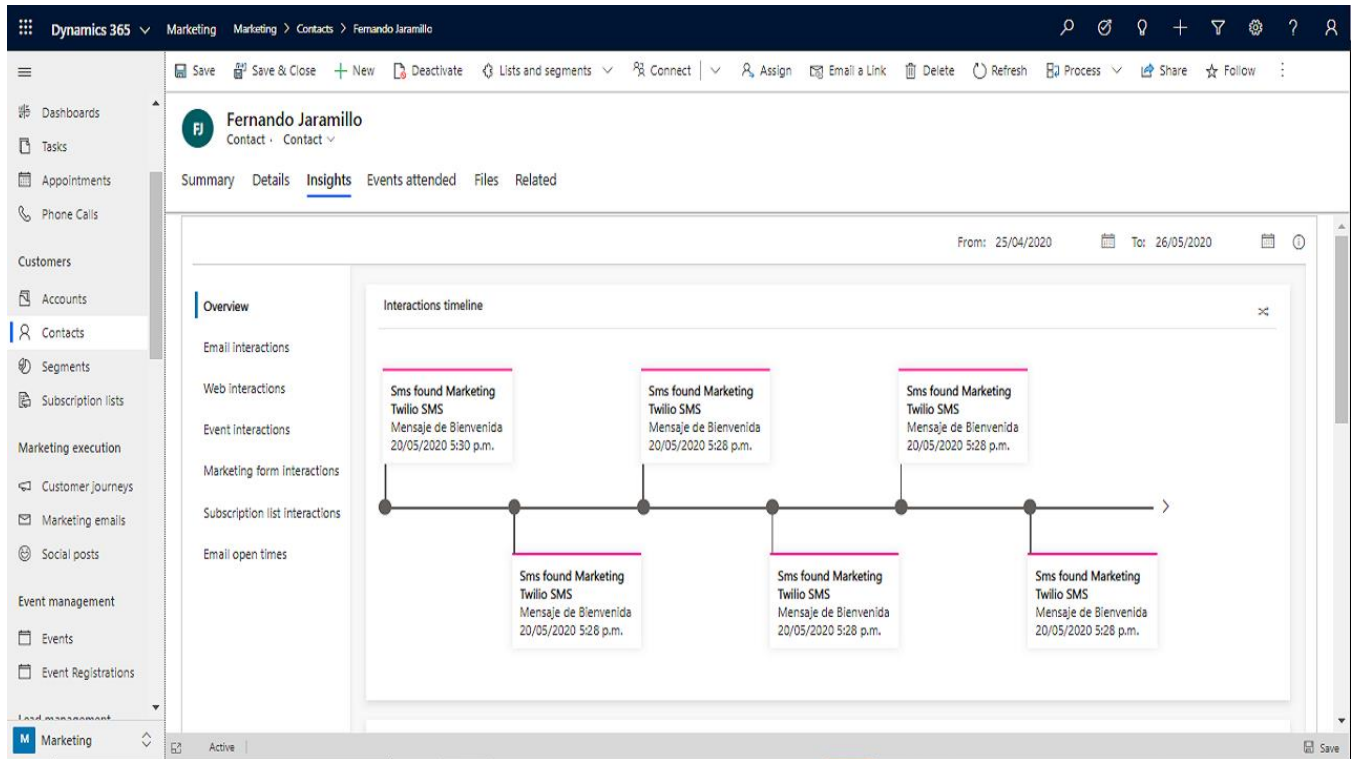
Once figured out at the top there is a button called **"Validate API Key"** with which they verify that the configuration is correct.

# I. SEND SMS FROM THE CUSTOMER JOURNEY

To send SMS from Customer Journey functionality, you must do the following:

1. Create a Customer Journey
2. Select the Customer Journey Template
3. In the Journey designer add a Custom content called "**Marketing Twilio SMS**".
4. In the properties of the **Twilio SMS** box you must enter the name of the message, Select the message template.

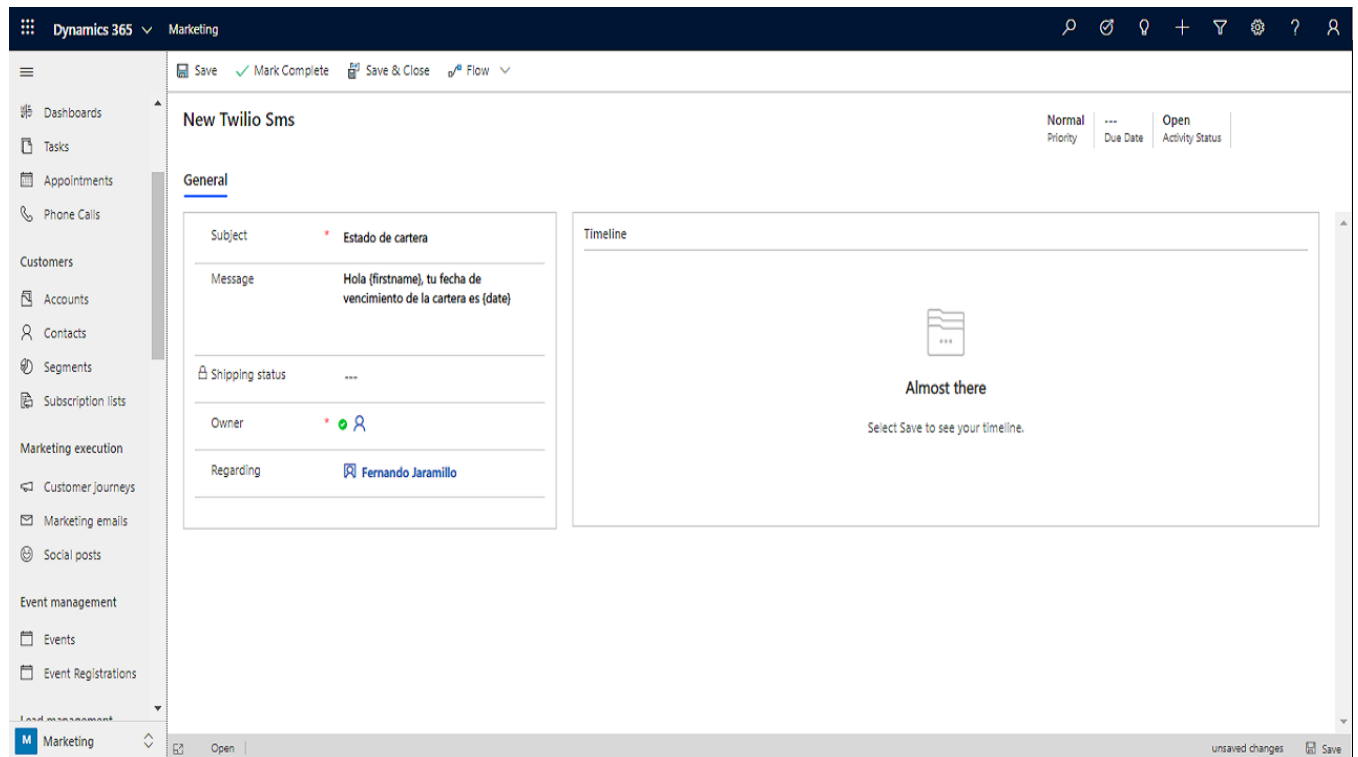
The screenshot displays the Dynamics 365 Marketing Customer Journey Designer interface. The top navigation bar includes options like Save, Check for errors, Go live, Deactivate, Delete, Save as template, Refresh, Assign, Share, and Email a Link. The main header shows the journey name 'Journey ppp (Monthly Newsletter)' and its status as a 'Draft'. The 'Designer' tab is active, showing a visual flowchart with steps: 'Segment group my customers', 'Scheduler Mensaje de Bienvenida', and 'Marketing Twilio SMS Mensaje de Bienvenida'. The 'Marketing Twilio SMS' step is highlighted with a red box. On the right, the 'Properties' panel for this step is open, showing fields for 'Title name' (Mensaje de Bienvenida), 'Marketing Twilio SMS' (with a '+ New' button), and 'Mensaje de Bienvenida'. The bottom status bar indicates 'Active' and 'unsaved changes'.



The screenshot shows the Dynamics 365 Marketing interface for a contact named Fernando Jaramillo. The 'Insights' tab is selected, displaying an 'Interactions timeline' from 25/04/2020 to 26/05/2020. The timeline shows a sequence of SMS messages from Twilio Marketing, all labeled 'Mensaje de Bienvenida' and dated 20/05/2020 5:30 p.m. or 5:28 p.m. The interface includes a left sidebar with navigation options like Dashboards, Tasks, Appointments, Phone Calls, Customers, Accounts, Contacts, Segments, Subscription lists, Marketing execution, Customer journeys, Marketing emails, Social posts, Event management, Events, and Event Registrations. The top bar shows the contact's name and various action buttons like Save, Save & Close, New, Deactivate, Lists and segments, Connect, Assign, Email a Link, Delete, Refresh, Process, Share, and Follow.

# I. SEND DIRECT MESSAGES

To send a message directly, we only need to be placed on the contact, and in the timeline add an activity of type Twilio SMS



The screenshot shows the Dynamics 365 Marketing interface. The left sidebar contains navigation options: Dashboards, Tasks, Appointments, Phone Calls, Customers, Accounts, Contacts, Segments, Subscription lists, Marketing execution, Customer journeys, Marketing emails, Social posts, Event management, Events, and Event Registrations. The main area is titled 'New Twilio Sms' and includes a 'General' tab. The form fields are as follows:

Field	Value
Subject	* Estado de cartera
Message	Hola (firstname), tu fecha de vencimiento de la cartera es (date)
Shipping status	---
Owner	* [User Icon]
Regarding	Fernando Jaramillo

The right side of the form shows a 'Timeline' section with a message: 'Almost there. Select Save to see your timeline.'

At the bottom of the form, there is a status bar indicating 'unsaved changes' and a 'Save' button.