



DYNAMIC SMS CONFIGURATION GUIDE





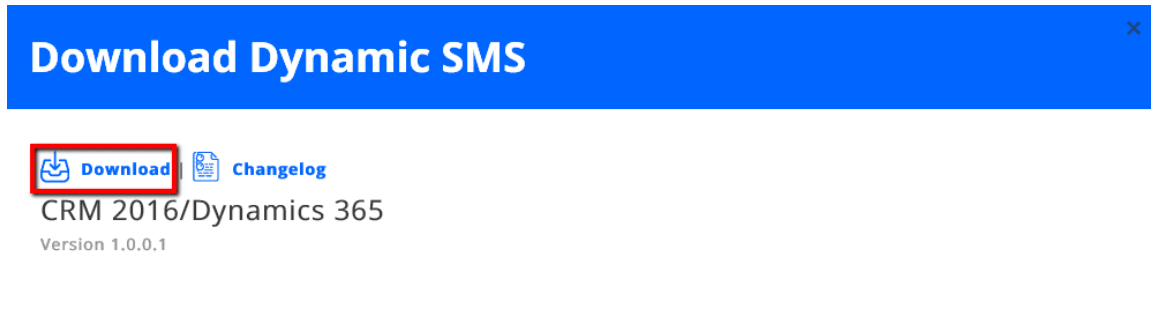
Contents

Solution Import	2
Solution Registration	6
Solution Configuration.....	8
Solution Subscription.....	9

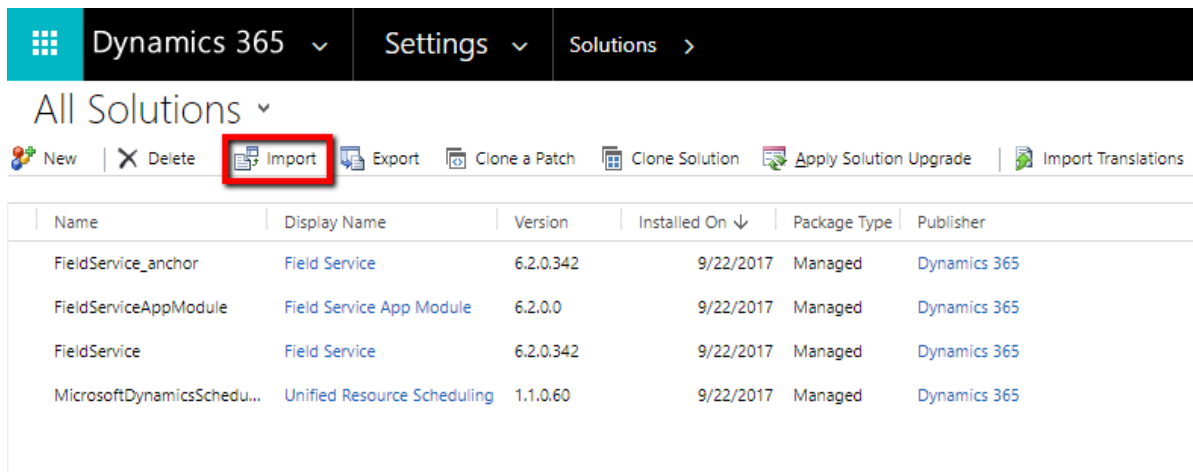
Solution Import

Please follow the below steps in order to start the import process:

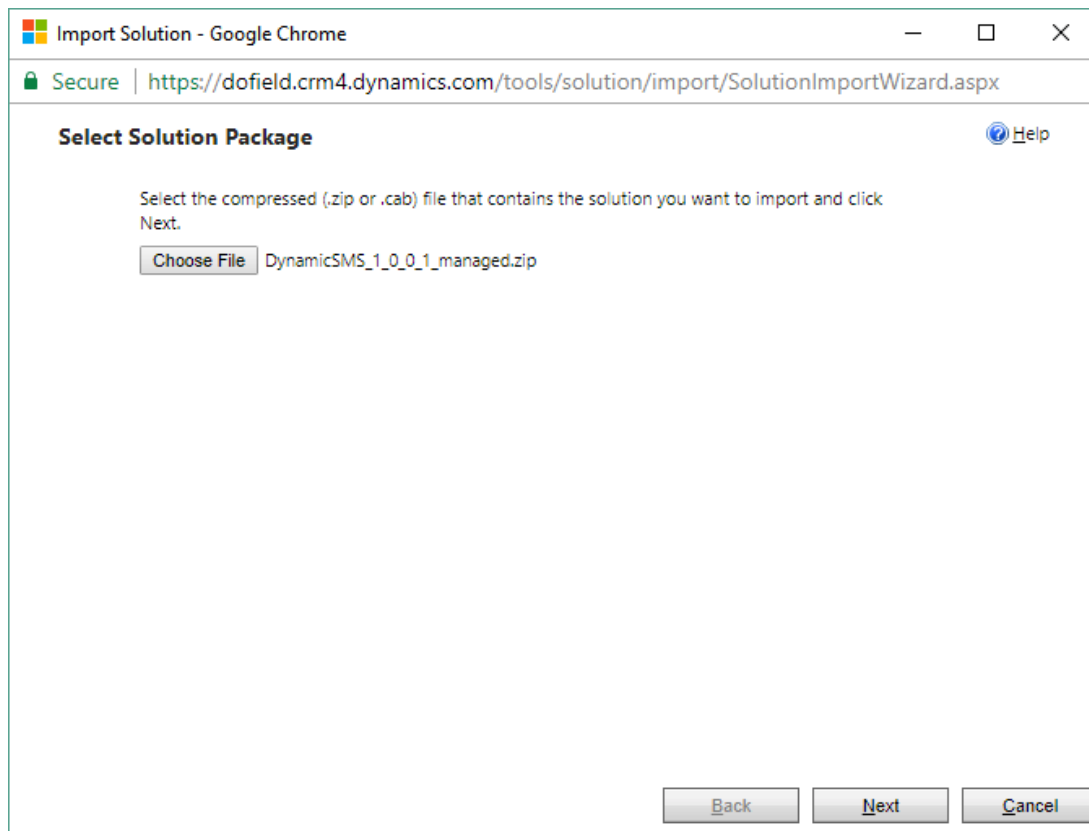
1. Go to the “download” button on the solution page and download the latest managed solution zip file.



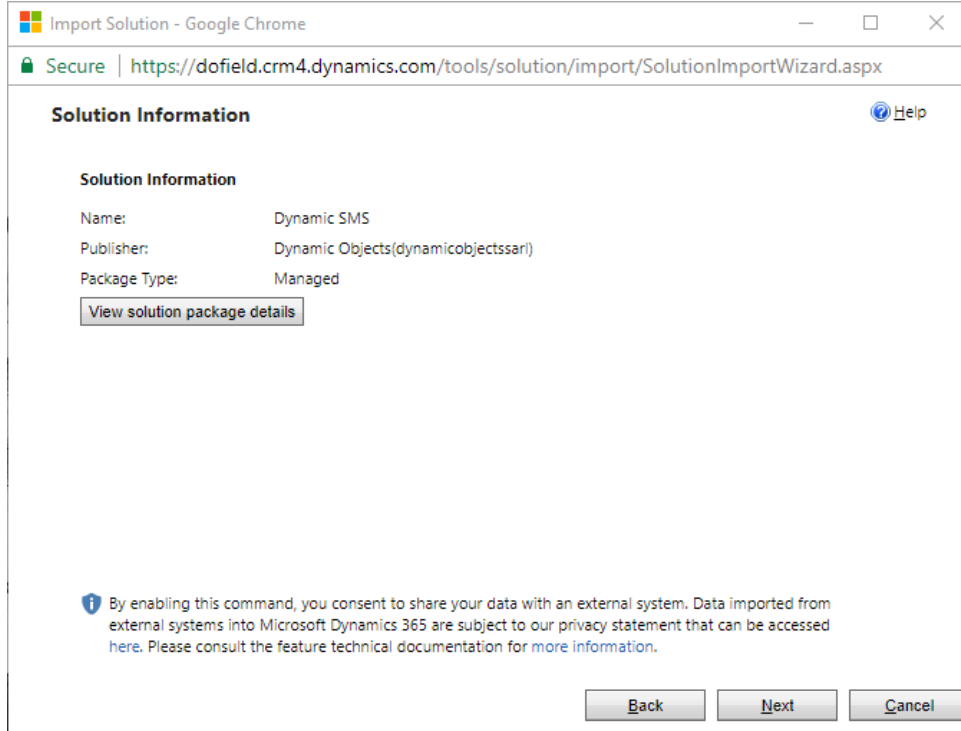
2. Login to your Microsoft Dynamics CRM/365 organization and head to Settings -> Solutions and click on the “Import” button.



3. Select the solution file that you downloaded in Step 1 and Press Next.



4. Verify that you imported the correct Solution by checking the solution information and package details and press “Next”.



Import Solution - Google Chrome

Secure | <https://dofield.crm4.dynamics.com/tools/solution/import/SolutionImportWizard.aspx>

Solution Information

[Help](#)

Solution Information

Name: Dynamic SMS

Publisher: Dynamic Objects(dynamicobjectssari)

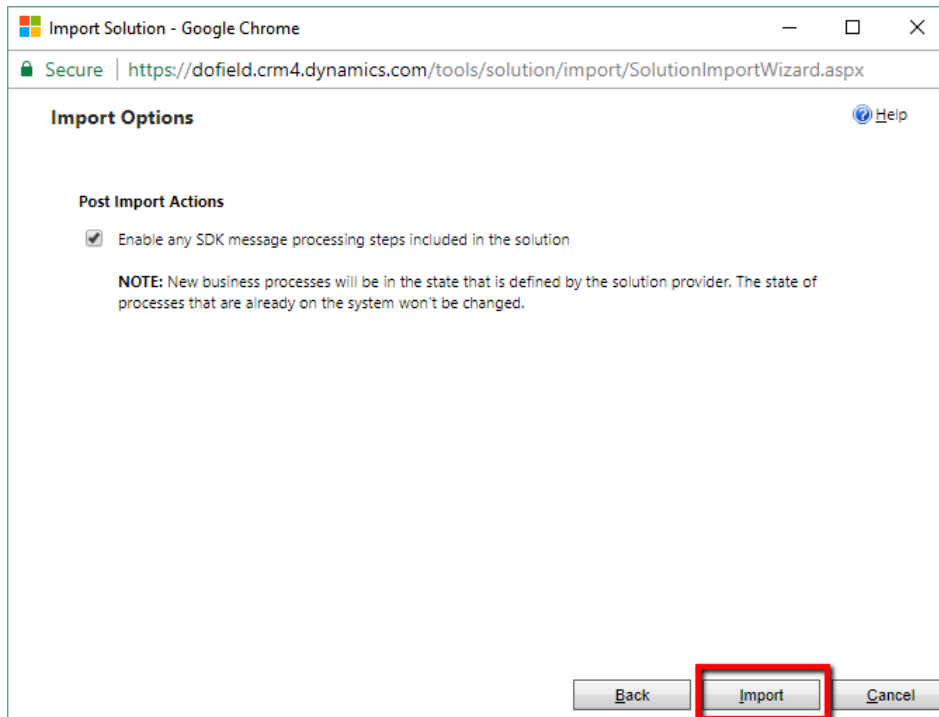
Package Type: Managed

[View solution package details](#)

By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).

[Back](#) [Next](#) [Cancel](#)

5. Please make sure that the **“Enable any SDK message processing steps included in the solution” option is selected** and select **“Import”**.



Import Solution - Google Chrome

Secure | <https://dofield.crm4.dynamics.com/tools/solution/import/SolutionImportWizard.aspx>

Import Options

[Help](#)

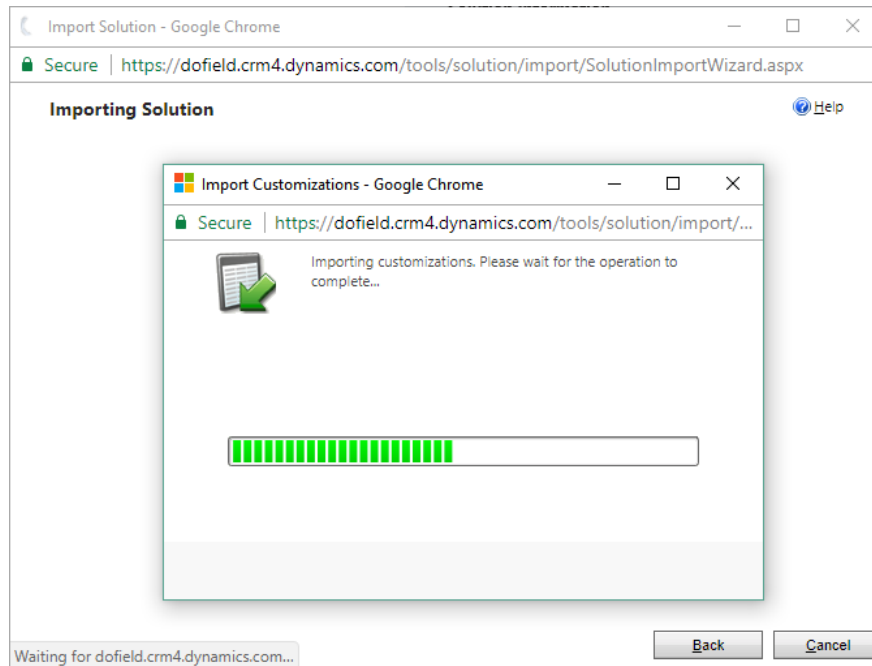
Post Import Actions

☒ Enable any SDK message processing steps included in the solution

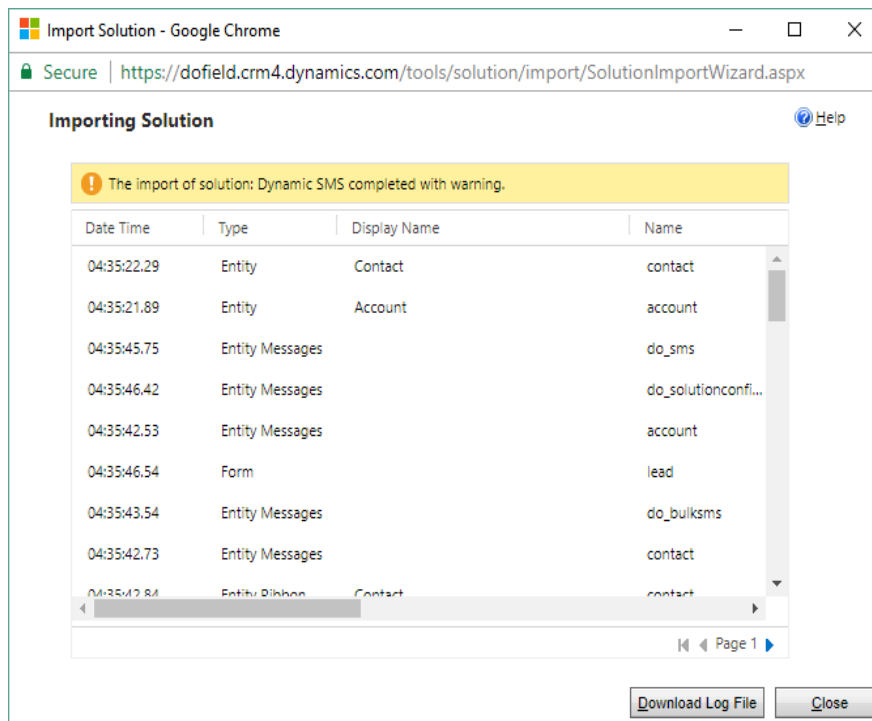
NOTE: New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.

[Back](#) [Import](#) [Cancel](#)

6. The Solution import process will start. Please wait around 5 minutes for the solution import process to complete.

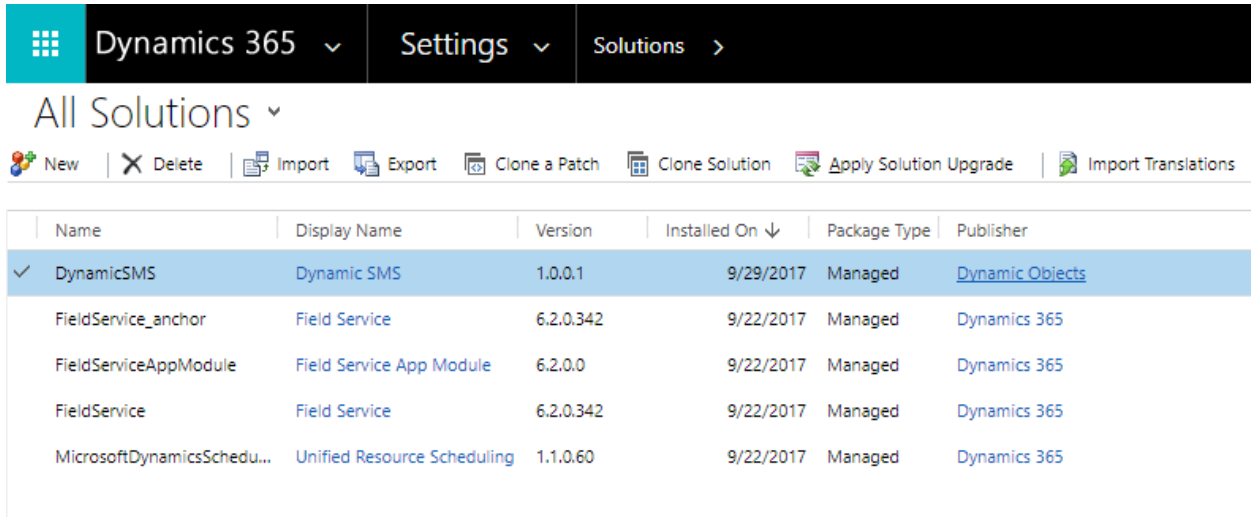


7. Once the import is complete, you will see a screen with an overview of the import and components. Please select close and proceed to Solution Registration.



Solution Registration

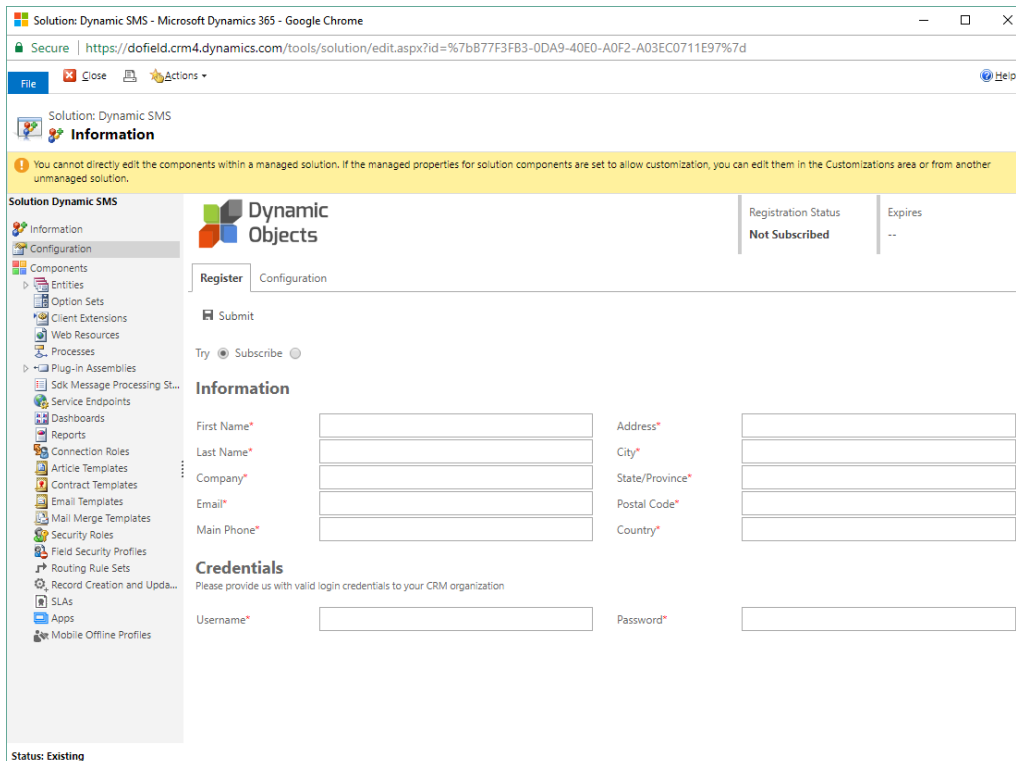
1. When the import process is complete, please double click on the solution imported to start the registration process.



The screenshot shows the Dynamics 365 interface with the 'Solutions' menu selected. Below the navigation bar, there is a toolbar with icons for New, Delete, Import, Export, Clone a Patch, Clone Solution, Apply Solution Upgrade, and Import Translations. The main area displays a table of solutions.

Name	Display Name	Version	Installed On	Package Type	Publisher
DynamicSMS	Dynamic SMS	1.0.0.1	9/29/2017	Managed	Dynamic Objects
FieldService_anchor	Field Service	6.2.0.342	9/22/2017	Managed	Dynamics 365
FieldServiceAppModule	Field Service App Module	6.2.0.0	9/22/2017	Managed	Dynamics 365
FieldService	Field Service	6.2.0.342	9/22/2017	Managed	Dynamics 365
MicrosoftDynamicsSchedu...	Unified Resource Scheduling	1.1.0.60	9/22/2017	Managed	Dynamics 365

2. Please fill-in your details in the “Information” section and make sure to enter the correct email details in order to receive important updates about the solution.



The screenshot shows the 'Solution: Dynamic SMS' registration page in a web browser. The page has a left sidebar with a navigation menu and a main content area. The 'Information' section is active, showing a registration form. The form includes fields for personal and company information, as well as login credentials. A 'Register' button is visible at the top of the form.

Dynamic Objects

Registration Status: Not Subscribed | Expires: --

Information

First Name* | Last Name* | Company* | Email* | Main Phone* | Address* | City* | State/Province* | Postal Code* | Country*

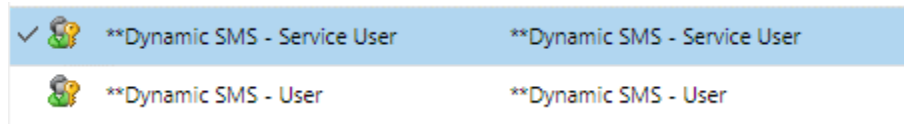
Credentials

Please provide us with valid login credentials to your CRM organization

Username* | Password*

Status: Existing

In the “Credentials” section, please type in the appropriate user with the required security role which will be used to renew your subscription. This user needs to be allocated the “Dynamic SMS – Service User” role.



Once all the information is entered, please click “Submit” and you are subscribed for the 30-day trial.

Solution: Dynamic SMS - Microsoft Dynamics 365 - Google Chrome

Secure | <https://dofield.crm4.dynamics.com/tools/solution/edit.aspx?id=%7bB77F3FB3-0DA9-40E0-A0F2-A03EC0711E97%7d>

File Close Actions Help

Solution: Dynamic SMS

Information

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution Dynamic SMS

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-In Assemblies
 - Sdk Message Processing St...
 - Service Endpoints
 - Dashboards
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles
 - Routing Rule Sets
 - Record Creation and Upda...
 - SLAs
 - Apps
 - Mobile Offline Profiles

Dynamic Objects

Registration Status: Trial Expires: 9/30/2017

Register Configuration

Submit Test CRM Credentials

Try ☒ Subscribe ☐

Information

First Name*	John	Address*	Samoria One Building
Last Name*	Piller	City*	Batroun
Company*	Dynamic Objects	State/Province*	NL
Email*	jp@dynamicobjects.net	Postal Code*	1400
Main Phone*	009616741343	Country*	Lebanon

Credentials

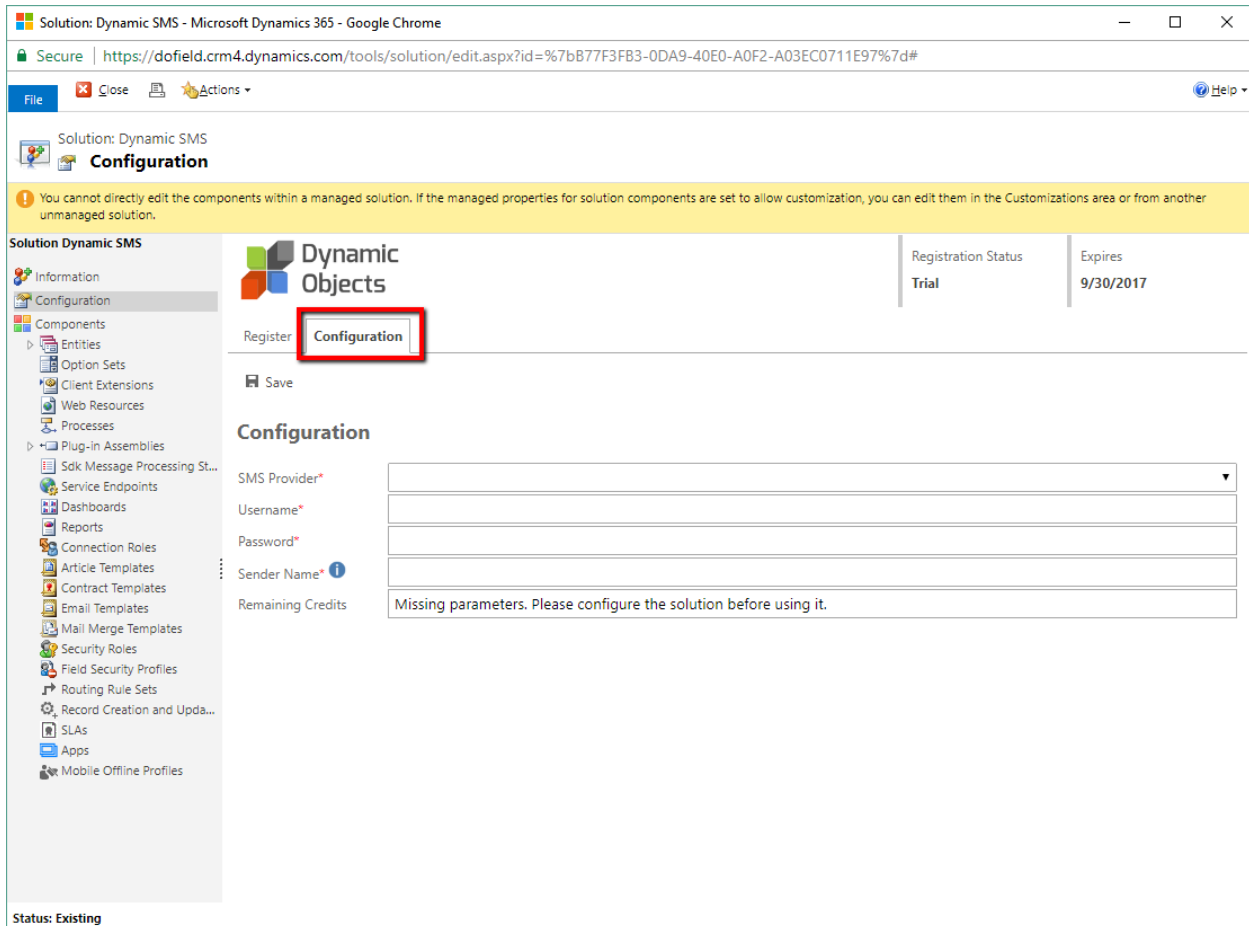
Please provide us with valid login credentials to your CRM organization

Username*	michael_tabchi@dynamicobjects.net	Password*	*****
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Status: Existing

Solution Configuration

Now that you successfully registered your solution, you need to click on the “Configuration” tab to configure the third-party SMS Provider.



Solution: Dynamic SMS - Microsoft Dynamics 365 - Google Chrome

Secure | <https://dofield.crm4.dynamics.com/tools/solution/edit.aspx?id=%7bB77F3FB3-0DA9-40E0-A0F2-A03EC0711E97%7d#>

File Close Actions Help

Solution: Dynamic SMS

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Solution Dynamic SMS

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Security Roles
Field Security Profiles
Routing Rule Sets
Record Creation and Upda...
SLAs
Apps
Mobile Offline Profiles

Dynamic Objects

Register Configuration

Save

Configuration

SMS Provider*

Username*

Password*

Sender Name* ⓘ

Remaining Credits

Missing parameters. Please configure the solution before using it.

Registration Status: Trial

Expires: 9/30/2017

Status: Existing

Please select the corresponding SMS Provider and enter the related Username and Password.

Note that you should set up an account and purchase SMS messages with any of the providers listed in order to be able to send SMS messages.

Choose the corresponding “Sender Name” based on the details allocated and agreed with the provider, and press “Save”. If the you entered the correct information the remaining Credits field will reflect the remaining credits in your account and you are ready to send SMS from your CRM/D365 organization, please refer to the user guide for more details.

Register
Configuration

 Save

Configuration

SMS Provider*	ElBarid - www.elbarid.com ▼
Username*	Dynamic.Objects
Password*	*****
Sender Name* 	DO
Remaining Credits	6

Solution Subscription

The trial solution will expire after 30 days; thus, you need to subscribe in order to continue using the solution features. The steps are as follows:

1. In the “Billing Address” Section, Enter the billing address. You can use the “Copy Address Above” button to automatically copy the address details entered above or enter a different billing address.



Solution: Dynamic SMS - Microsoft Dynamics 365 - Google Chrome

Secure | <https://dofield.crm4.dynamics.com/tools/solution/edit.aspx?id=%7b877f3fb3-0da9-40e0-a0f2-a03ec0711e97%7d>

File Close Actions

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Solution Dynamic SMS

Information Configuration

Register Configuration

Submit Test CRM Credentials

Try Subscribe

Information

First Name*	John	Address*	Samoria One Building
Last Name*	Piller	City*	Batroun
Company*	Dynamic Objects	State/Province*	NL
Email*	jp@dynamicobjects.net	Postal Code*	1400
Main Phone*	009616741343	Country*	Lebanon

Credentials

Please provide us with valid login credentials to your CRM organization

Username*	michael_tabchi@dynamicobjects.net	Password*	*****
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Billing Address

Copy Address Above

Address Line 1*		State/Province*	
Address Line 2		Postal Code*	
City*		Country*	

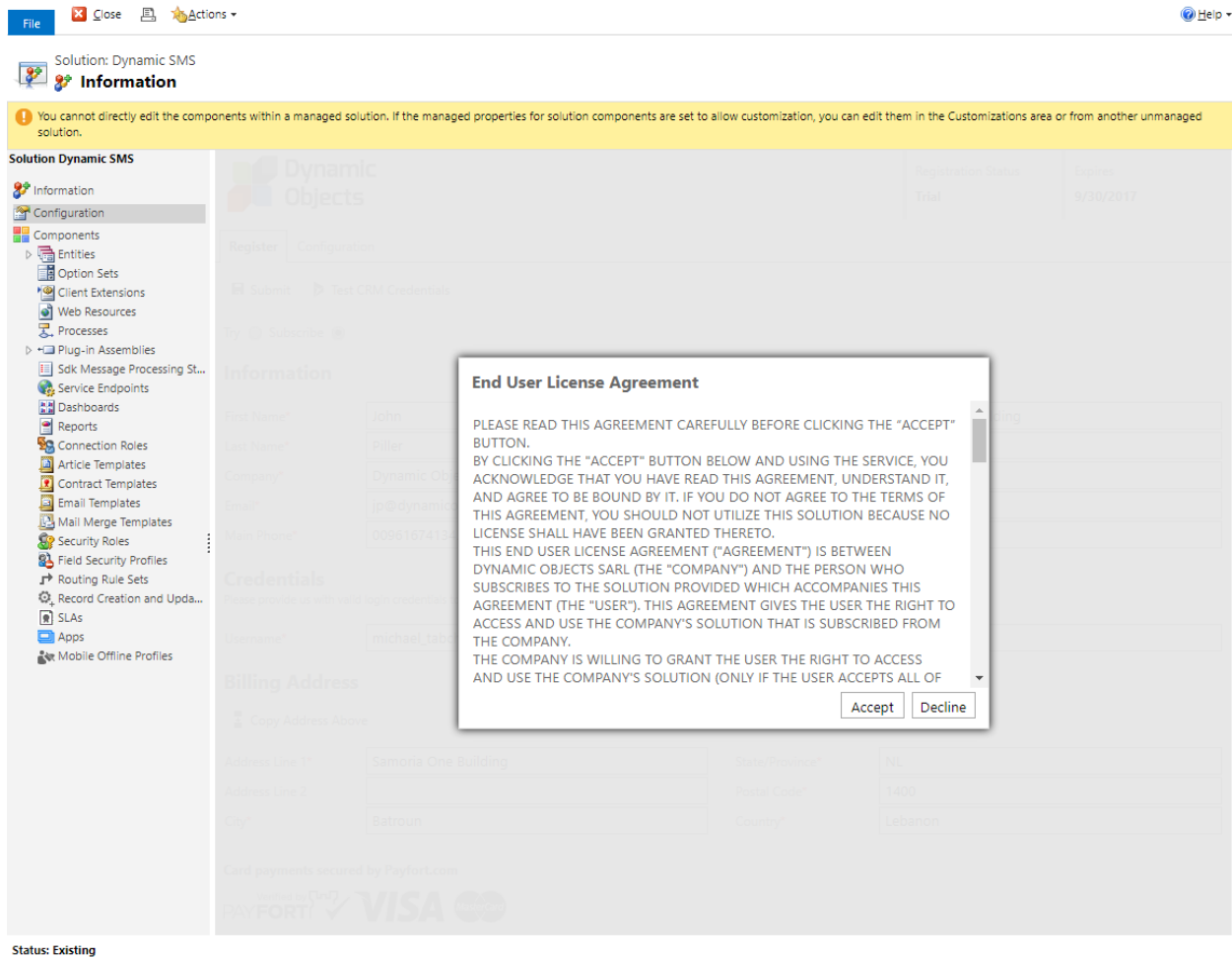
Card payments secured by Payfort.com

Verified by PAYFORT VISA MasterCard

Status: Existing

2. Once the billing fields are filled, press the "Submit" Button and you will be presented with the End User License agreement. Please read it carefully and press "Accept" to continue to the

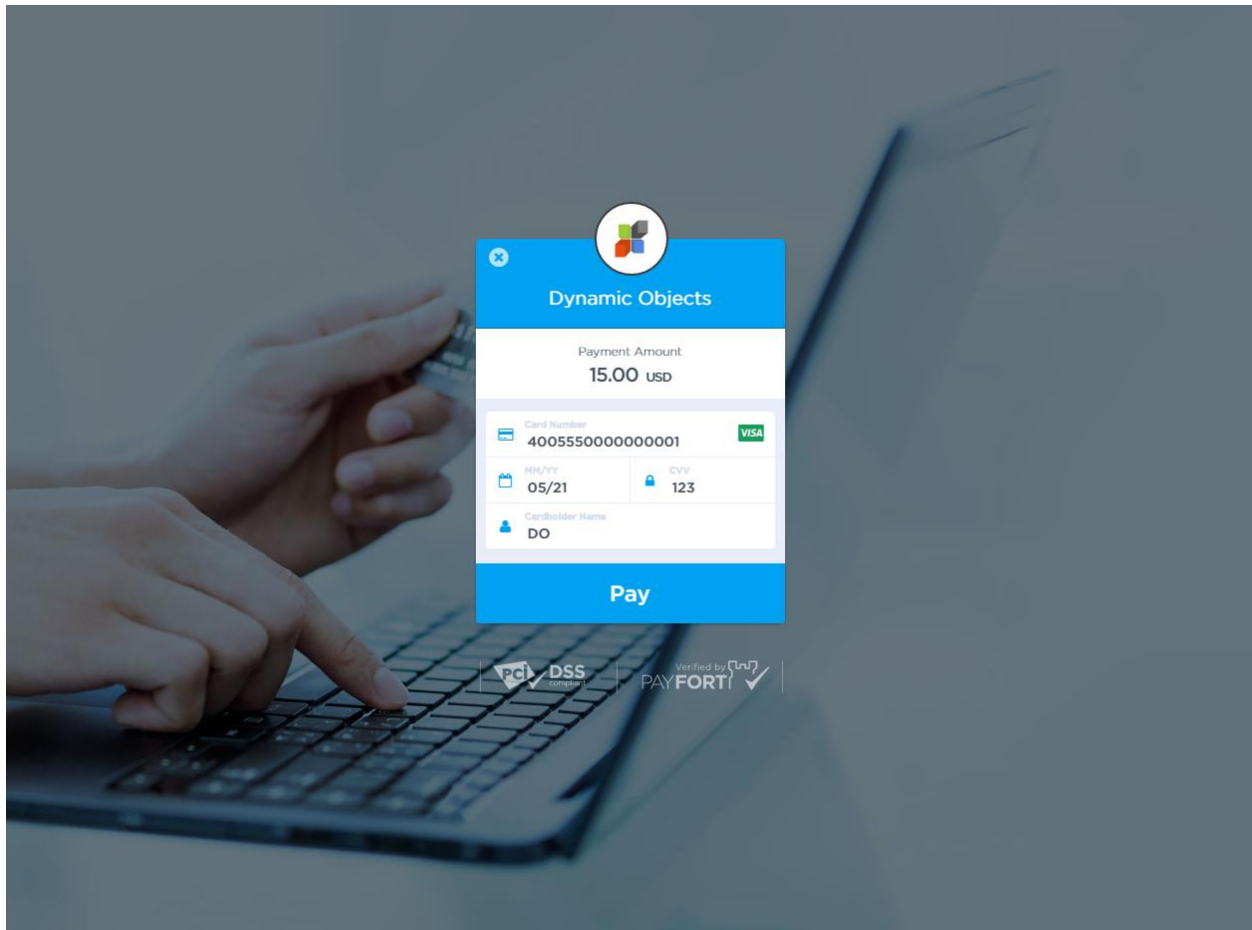
payment. page.



3. The payment page lists the amount that you will be billed on a monthly basis.

Enter your Card Number, Expiration Date, CVV and Cardholder Name and press the "Pay Button".

Note that we currently support only visa and Mastercard as payment methods.



If the payment is Successful, you will be routed to the "configuration" Page and the solution is extended for another month.

The "Payment Method" section lists the masked card details so you keep track of the payment details used.

Please note that the solution will automatically renew every month on the expiration date.

If you wish to stop using the solution, please click on the "Unsubscribe" button and confirm.

The solution will remain active until the expiry date.



FileCloseActions

Solution: Dynamic SMS

Help

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Solution Dynamic SMS

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Mail Merge Templates

Security Roles

Field Security Profiles

Routing Rule Sets

Record Creation and Upda...

SLAs

Apps

Mobile Offline Profiles

Register

Configuration

Submit

Unsubscribe

Test CRM Credentials

Update Payment Method

Information

First Name*John

Last Name*Piller

Company*Dynamic Objects

Email*jp@dynamicobjects.net

Main Phone*009616741343

Address*Samoria One Building

City*Batroun

State/Province*NL

Postal Code*1400

Country*Lebanon

Credentials

Please provide us with valid login credentials to your CRM organization

Username*michael_tabchi@dynamicobjects.net

Password*.....

Billing Address

Copy Address Above

Address Line 1*Samoria One Building

Address Line 2*

City*Batroun

State/Province*NL

Postal Code*1400

Country*Lebanon

Payment Method

Name on Card*DO

Credit Card Number*400555*****0001

Card Type*VISA

Expiration Month*5

Expiration Year*21

Card payments secured by Payfort.com

PAYFORT

VISA

MasterCard

Status: Existing