



TWILIO SMS --- DYNAMICS 365 MARKETING

User Manual

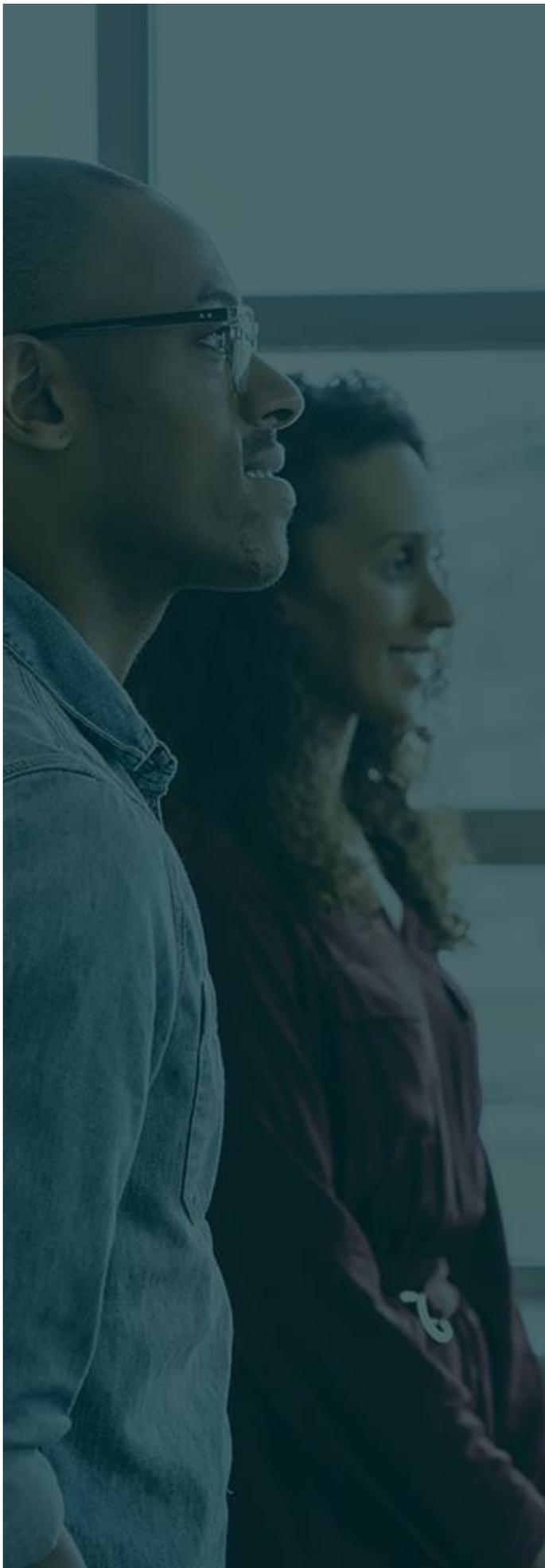


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INTRODUCTION

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

With the following information to request the Token:

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

Body:

Company Name:

Nit:

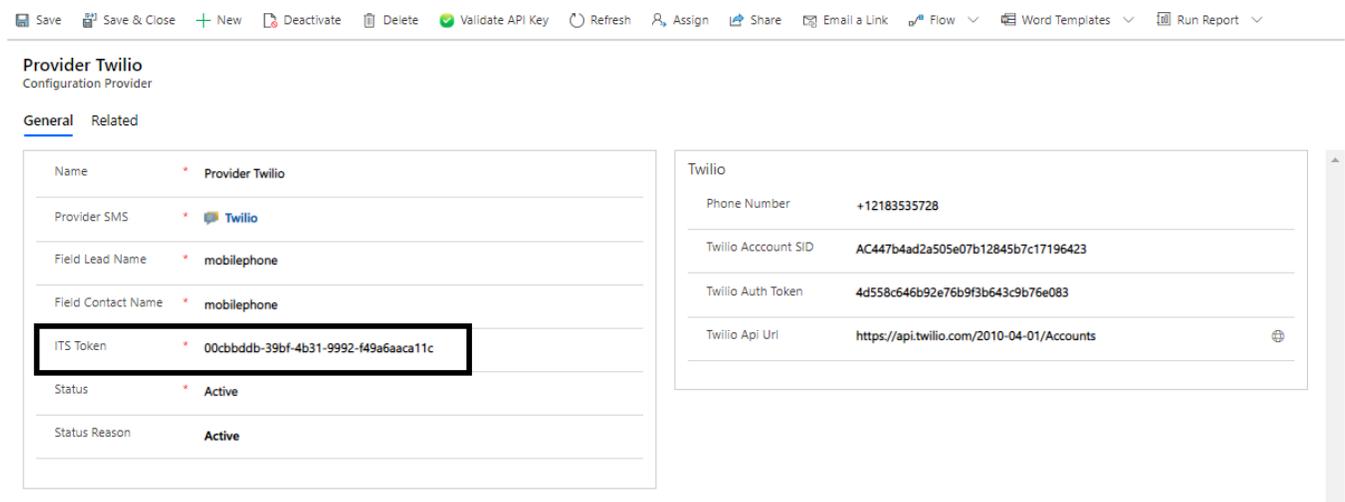
GUID Tenant Dtnamics:

Contact Name:

Contact Email:

Contact Phone:

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



The screenshot shows the Dynamics 365 configuration interface for a Twilio provider. At the top, there is a navigation bar with various actions like Save, Deactivate, Delete, Validate API Key, Refresh, Assign, Share, Email a Link, Flow, Word Templates, and Run Report. Below this, the 'Provider Twilio' configuration is shown with two tabs: 'General' and 'Related'. The 'General' tab is active and displays a list of fields:

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

To the right of the 'General' tab, there is a 'Twilio' section with the following details:

Phone Number	+12183535728
Twilio Account SID	AC447b4ad2a505e07b12845b7c17196423
Twilio Auth Token	4d558c646b92e76b9f3b643c9b76e083
Twilio Api Url	https://api.twilio.com/2010-04-01/Accounts

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 main canvas shows a flow starting with a 'Segment group my customers' box, followed by a 'Scheduler Mensaje de Bienvenida' box, and then a 'Marketing Twilio SMS Mensaje de Bienvenida' box. The 'Marketing Twilio SMS' box is highlighted with a black border. On the right, the 'Properties' panel for 'Marketing Twilio SMS' is open, showing fields for 'Title name' (Mensaje de Bienvenida), 'Marketing Twilio SMS' (Mensaje de Bienvenida), and 'Details'. 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 top right shows the journey name 'Journey ppp (Monthly Newsletter)', status 'Draft', start date '26/05/2020 4:53 p.m.', and recurrence 'Yes'.

The screenshot displays the Dynamics 365 Marketing interface for a contact named Fernando Jaramillo. The main content area shows an "Interactions timeline" with the following data points:

Interaction Type	Message Content	Date and Time
Sms found Marketing Twilio SMS	Mensaje de Bienvenida	20/05/2020 5:30 p.m.
Sms found Marketing Twilio SMS	Mensaje de Bienvenida	20/05/2020 5:28 p.m.
Sms found Marketing Twilio SMS	Mensaje de Bienvenida	20/05/2020 5:28 p.m.

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

