

Octopush

MS Dynamics CRM extension

User guide

INSTALLATION	3
Importing the Dynamics CRM solution.....	3
Configuration	3
Connection.....	4
Preferences.....	4
Single SMS.....	4
SMS campaigns.....	4
Remaining credit.....	4
SMS templates	4
Marketing lists	6
Creating a marketing list.....	6
Add members to a marketing list.....	7
USING THE EXTENSION	10
Sending a single SMS	10
SMS campaigns.....	13
Creating a campaign	13
Choosing the recipients	14
Delayed sending	17
Composing the SMS.....	18
Campaign status	19
Campaign simulation.....	19
Transmitting the campaign	21
Executing the campaign	21
Canceling the campaign.....	22
History of SMS sent via a campaign	22
Sending an SMS on a hook	22
Pre-registered hooks	22
Order validation.....	23
Canceled order.....	24
New incident acknowledgement	25
Incident resolution.....	25
New quote.....	26
Paid invoice	27
Member registering	28
Inactive contact follow-up.....	29
Create a new hook.....	30

Installation

Importing the Dynamics CRM solution

To import the « Octopush » Dynamics CRM solution :

- Download the « Octopush Dynamics CRM 1.0.zip » file, from the Octopush website (<http://xxxxxx>)
- Within the Settings section of your Dynamics CRM instance, go to Customization > Solutions.
- Click on Import
- Browse to the location of the zip file containing the managed solution
- Select « Activate any processes and enable any SDK message processing steps included in the solution » and click Next until the import starts.
- After installation, click on « Publish all customizations »

Configuration

Go to the « Settings > Configuration » section :

The screenshot shows the Microsoft Dynamics CRM Settings > Configuration page. At the top, there are navigation links: NEW ACTIVITY, NEW RECORD, IMPORT DATA, and ADVANCED FIND. Below these, the 'Connection' section contains fields for 'Proxy' and 'API key'. The 'API key' field contains the value 'KgyfwtOryoW9q4AnBk6gQjNmcLAnzwCm'. A link 'Create an account to get your API key' is also present. To the right, a 'Remaining credit' table shows values for FR (189.00) and XXX (241.92). Buttons 'Show remaining credit' and 'Get additional credit' are available. The 'Preferences' section includes settings for 'Single SMS' and 'SMS campaigns', each with options for 'SMS type choice' (Show/Hide), 'SMS type' (Marketing/Transactional), 'Personalized sender choice' (Show/Hide), and a 'Personalized sender' input field. A 'Save parameters' button is located at the bottom left.

Country	Remaining credit
FR	189.00
XXX	241.92

Connection

- Proxy : Proxy server used by your Dynamics CRM server to access Internet. Your Dynamics CRM server must be able to access Internet, in order to communicate with Octopush servers. The server name must be specified in the format « SERVER_NAME:PORT » (for example : « proxy.domain.com:8080 »).
- API key : Your Octopush identification key. If you don't have an API key, get one by clicking on « Create an account ».

Preferences

Single SMS

- SMS type choice : Indicates if the users should be able to choose between a « marketing » SMS and a « transactional » SMS.
- SMS type : The default SMS type, « marketing » or « transactional ».
- Personalized sender choice : Indicate if the users should be able to choose a personalized sender
- Personalized sender : the default personalized sender (optional)

SMS campaigns

- SMS type choice : Indicate if the users should be able to choose between a « marketing » SMS and a « transactional » SMS.
- SMS type : The default SMS type, « marketing » or « transactional ».
- Personalized sender choice : Indicates if users can choose a personalized sender
- Personalized sender : the default personalized sender (optional)

Remaining credit

Click on « Show remaining credit » to show the number of SMS remaining on your account.

SMS templates

To create SMS templates, which can include dynamics fields, go in the « Settings > SMS templates » section.

Screenshot of the 'SMS templates' section in a software application.

Header: SETTINGS | SMS templates | + Prénom Nom Test

Toolbar: NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | IMPORT DATA | ...

Section Title: Active SMS templates

Search Bar: Search for records

Table Headers: ✓ | Nom du modèle ↑ | Crée le

Data Rows:

Nom du modèle	Crée le
Order validation (account)	17/04/2015 10:58
Order validation (contact)	17/04/2015 10:57

Page Navigation: 1 - 2 of 2 (0 selected) | Page 1 | J K L M N O P Q R S T U V W X Y Z

URL: http://localhost/Test/_root/homepage.aspx?etc=10006&pagemode=iframe&...

Click on « New » to create a new template.

Screenshot of the 'New SMS template' creation screen.

Header: SETTINGS | SMS templates | New SMS template | + Prénom Nom Test

Toolbar: SAVE | SAVE & CLOSE | NEW | Up | Down | Print

Section: SMS TEMPLATE : INFORMATIONS

New SMS template

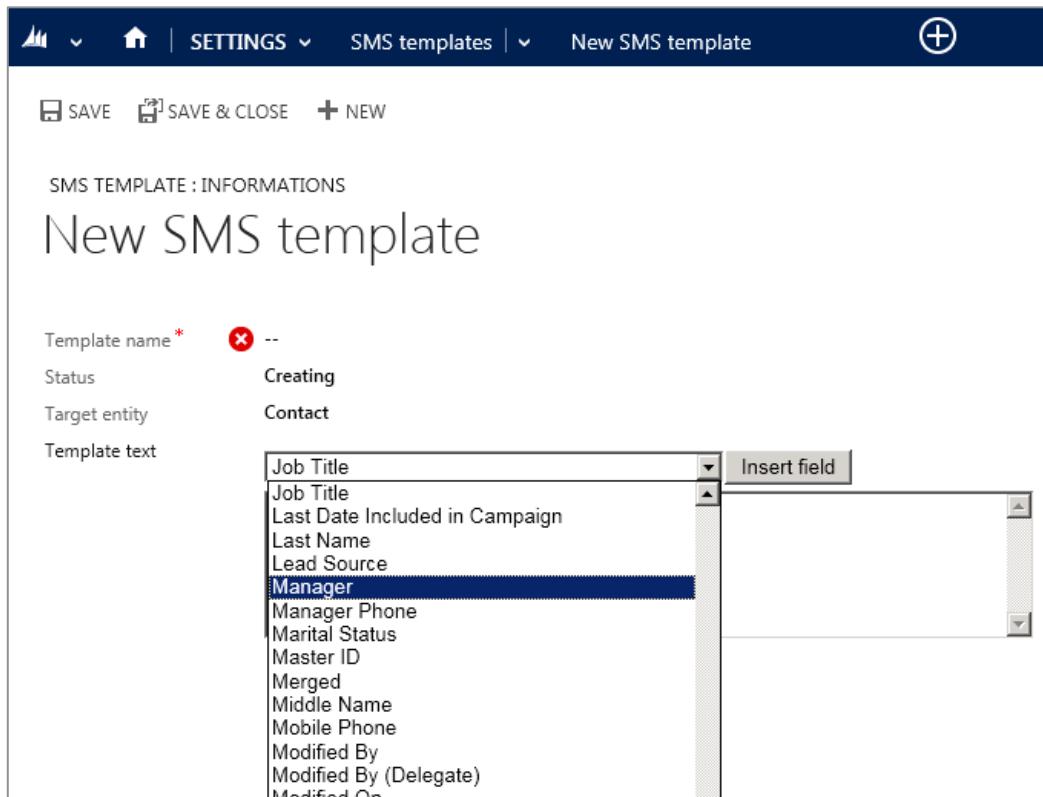
Form Fields:

- Template name * --
- Status Creating
- Target entity --
- Template text

The 'Template text' field contains a rich text editor interface with a toolbar and a scrollable area. A button labeled 'Insert field' is located at the top right of the text area.

- Template name : this field is mandatory.
- Status : « Creating » or « Published ». Templates in « Creating » status are not visible to users

- Target entity : SMS can be sent to leads, contacts or accounts. Choose the record type for which you want to create a template.
- Template text : The template can contains dynamic fields. To add a dynamics field, select it in the dropdown list and click on « Insert » :



NB : the dropdown list contains all the fields of the chosen record type (lead, contact or account). If you have added custom fields to one of these record types, those fields will automatically be available in the dropdown list.

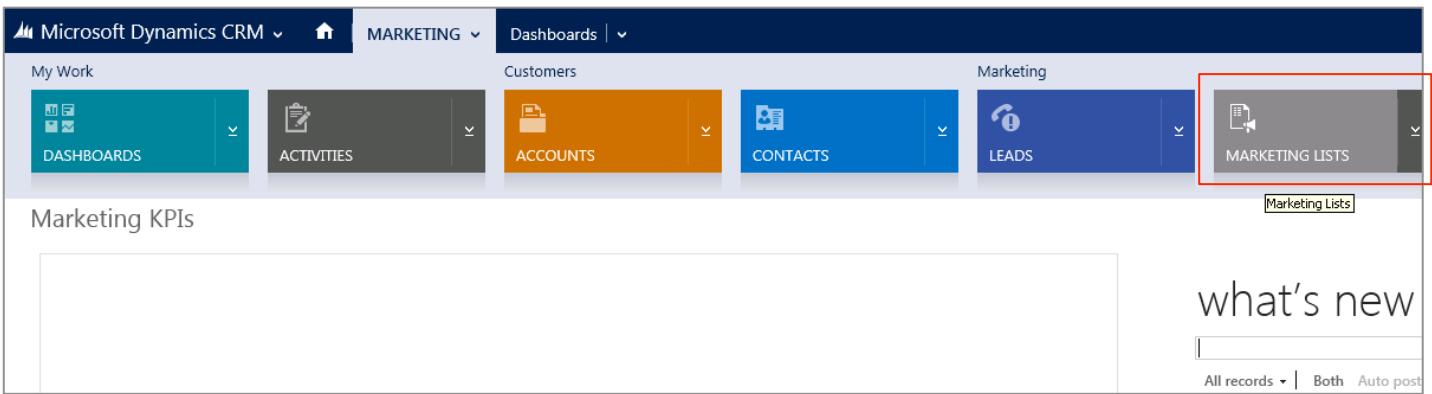
Once you're done, give the users access to the template, by changing its status to « Published ». Then click on « Save » or « Save and close ».

Marketing lists

Marketing lists are the targets of SMS campaigns. They can address leads, contact and accounts.

Creating a marketing list

To create a marketing list, go to the « Marketing > Marketing lists » section.



Click on « New » to create a new marketing list.

Information		Members	Campaigns
Name *	<input type="text" value="X"/>		Name ↑ To enable this content, create the record.
List Type *	Static		Quick Campaigns
Purpose	--		Subject To enable this content, create the record.
Targeted At *	--		
Source	--		
Currency	euro		
Modified On	<input type="button" value="--"/>		
Cost	--		
Last Used On	<input type="button" value="--"/>		
Locked	No		
Owner *	<input type="text" value="Prénom Nom"/>		
Description	--		

- Name : This field is mandatory.
- List type : « Static » or « Dynamic » :
 - o In a static list, members can be added manually or according to search criterias. The members list doesn't evolve by itself.
 - o In a dynamic list, members are added according to search criterias. The list is automatically populated with records matching those criterias. When new records are created, they are then automatically added to the marketing list, if they match the list criterias.
- Target : Lead, contact or account. A marketing list can only contains records from the same type. If you want to send SMS to multiple records types, multiple marketing lists should be created.

Add members to a marketing list

After the marketing list has been saved, click on the « + » icon in the « Members » zone :

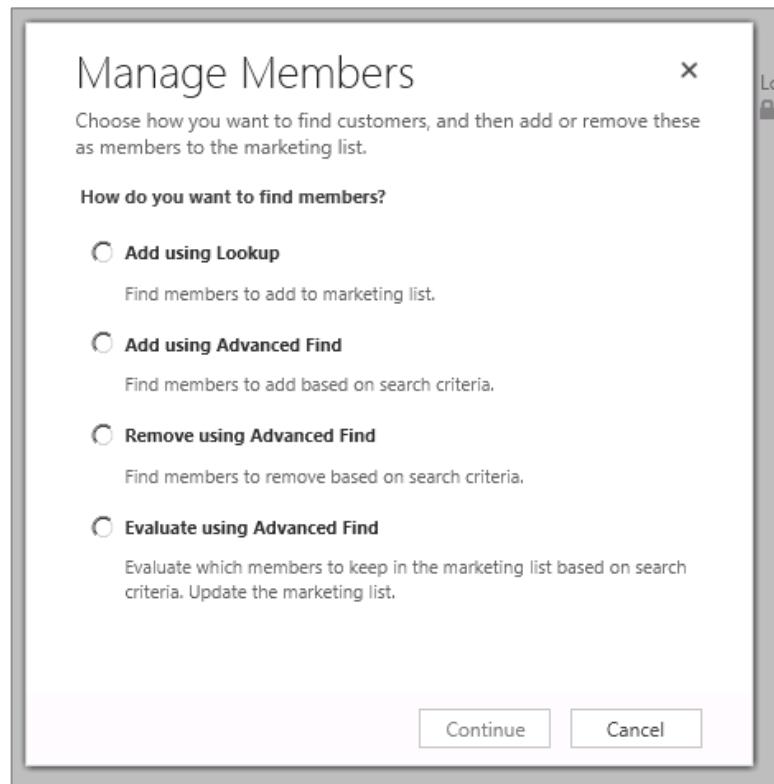
+ NEW DEACTIVATE DELETE MANAGE MEMBERS COPY TO STATIC ASSIGN SHARE ...

MARKETING LIST ▾

Customers from Paris

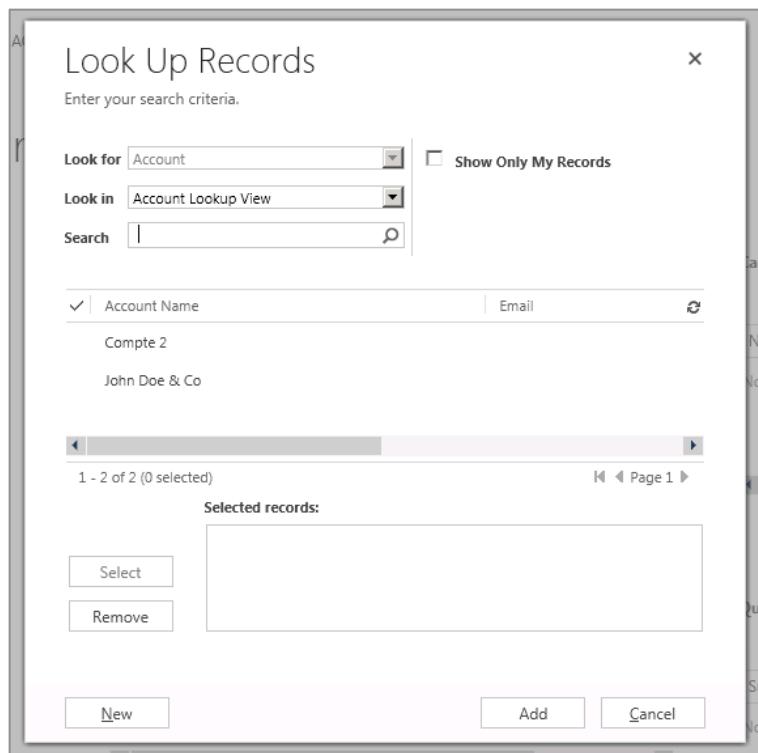
Summary

Information		Members
Name *	Customers from Paris	[+] [grid]
List Type *	Dynamic	Full Name ↑ Business Phone
Purpose	--	No Contact records found.
Targeted At *	Contact	
Source	--	
Currency	euro	
Modified On	05/05/2015 23:37	
Cost	--	
Last Used On	--	



The members list can be managed in various ways :

- Add using Lookup : Allow to search and add members from a simple search (for example a search by the name of the members)



- Add using Advanced Find : Search and add members from an advanced multi-criterias search.

Manage Members -- dialogue de page Web

Add Members

Use search criteria to find members to add to the marketing list.

Find

Edit Columns

Look for: Account **Use Saved View:** [new]

Details | **Clear** | **Group AND** | **Group OR**

Address 1: City	Equals	Paris
Annual Revenue	Is Greater Than	100000

Select

Find

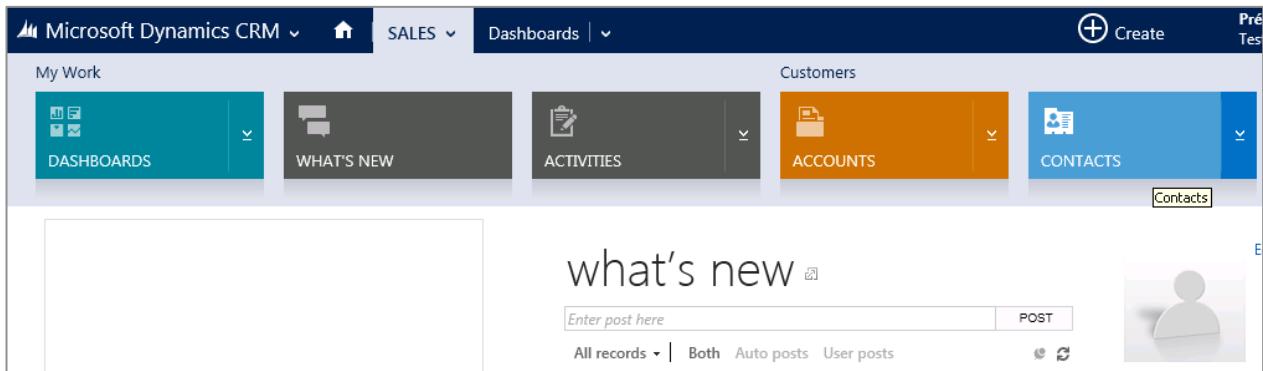
http://localhost/Test/MA/Lists/ListQualificationDlg/dlg_query | Intranet local | Mode protégé : désactivé

- Remove using Advanced Find : Remove the members who match the results of an advanced search.
- Evaluate using Advanced Find : Only keep members who match the results of an advanced search.

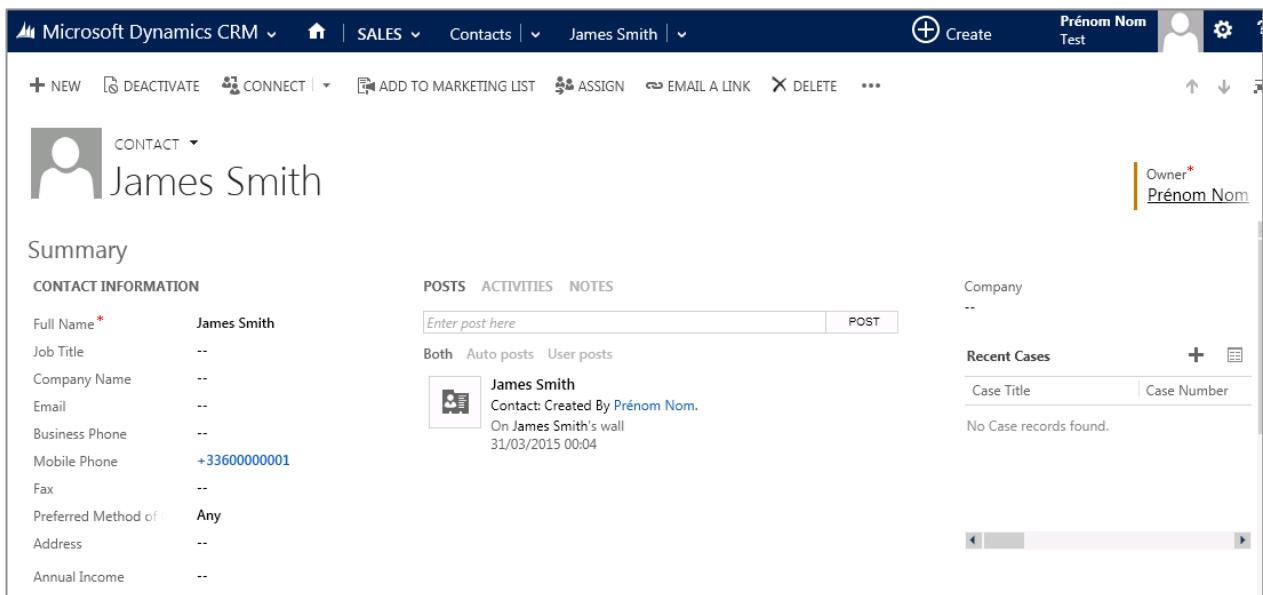
Using the extension

Sending a single SMS

Open the lead, contact or account to which you want to send a SMS.



The screenshot shows the Microsoft Dynamics CRM homepage. At the top, there are navigation links for 'SALES', 'Dashboards', 'Create', and 'Prénom Nom Test'. Below the navigation is a 'My Work' section with cards for 'DASHBOARDS', 'WHAT'S NEW', 'ACTIVITIES', 'ACCOUNTS', and 'CONTACTS'. The 'WHAT'S NEW' card is currently selected. In the center, there is a 'what's new' feed with a placeholder 'Enter post here' and a 'POST' button. Below the feed are filters for 'All records', 'Both', 'Auto posts', and 'User posts'. On the right side, there is a user profile picture for 'Prénom Nom Test'.



The screenshot shows a contact record for 'James Smith'. The top navigation bar includes 'SALES', 'Contacts', 'James Smith', 'Create', and 'Prénom Nom Test'. Below the navigation are standard CRM actions: NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, ASSIGN, EMAIL A LINK, DELETE, and more. The main area shows the contact's summary information, including a photo, name, and contact details like phone numbers and email. To the right, there are sections for 'POSTS', 'ACTIVITIES', and 'NOTES'. The 'POSTS' section shows a recent post from 'James Smith' on his wall. The 'ACTIVITIES' section shows 'Recent Cases' with no results found. The 'NOTES' section is currently empty.

In the Activities zone, choose « add SMS » :

Microsoft Dynamics CRM | SALES | Contacts | James Smith | + Create | Prénom Nom Test |  | 

+ NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | EMAIL A LINK | X DELETE | ...

 CONTACT James Smith

Owner*: Prénom Nom

Summary

CONTACT INFORMATION

Full Name*	James Smith
Job Title	--
Company Name	--
Email	--
Business Phone	--
Mobile Phone	+33600000001
Fax	--
Preferred Method of	Any
Address	--
Annual Income	--

POSTS ACTIVITIES NOTES

Enter post here

Both Auto posts User posts

 James Smith
Contact: Created By Prénom Nom.
On James Smith's wall
31/03/2015 00:04

Company --

Recent Cases + 

Case Title	Case Number
No Case records found.	

POSTS ACTIVITIES NOTES

All | Add Phone Call Add Task

 Bonjour Mr Smith, vo...

Completed by You Just now

... 

- Email
- Appointment
- SMS

Add SMS

The new SMS form opens :

Microsoft Dynamics CRM | SALES | Contacts | New SMS

SAVE MARK COMPLETE SAVE & CLOSE

SMS : INFORMATIONS

New SMS

Recipient	<input type="text" value="James Smith"/>	SMS type	Marketing
Number	+33600000001	Sender	SM
Sending date	--		
Text	<input type="text"/> <input type="button" value="Apply template"/> <div style="border: 1px solid #ccc; height: 100px; width: 100%; margin-top: 5px;"></div> <p>0 characters</p>		

- Recipient : link to the SMS recipient. This field is automatically filled.
- Number : mobile number of the recipient. This field is automatically filled and can be modified before sending the SMS.
NB : For leads and accounts, the number retrieved is the « mobile number » of the lead/account. For accounts, the mobile number retrieved is the « mobile number » of the account principal contact.
- SMS type : marketing or transactional. NB : this field is visible only if the SMS type choice has been allowed if the preferences (see [Preferences](#)).
- Sender : A personalized sender, optional. NB : this field is only visible if the sender choice has been allowed in the preferences.
- Date d'échéance : Choose the date and time at which you want the SMS to be sent. Leave this field empty if you want your SMS to be sent immediately.

Type in your message in the « Text » field. Your message can be based upon a SMS template, by selecting one in the dropdown list and clicking on « Apply template ».

Click on « Save », then « Send », to send the SMS.

SMS : INFORMATIONS

New SMS

Recipient	James Smith	SMS type	Transactional
Number	+33649819006	Sender	SMS
Sending date	--		
Text	<input style="width: 100%; height: 100px;" type="text" value=""/> Apply template		
0 characters			

An « SMS » activity is automatically added to the recipient history.

CONTACT ▾

James Smith

Summary

CONTACT INFORMATION

Full Name *	James Smith
Job Title	--
Company Name	--
Email	--
Business Phone	--
Mobile Phone	+33600000001
Fax	--

ACTIVITIES

All | Add Phone Call Add Task ...

Bonjour Mr Smith, vo...
Completed by Prénom Nom Yesterday

Bonjour Mr Smith, vo...
Completed by Prénom Nom Yesterday

SMS campaigns

Creating a campaign

To create a new campaign, go to the « Marketing > Campaigns » section.

Microsoft Dynamics CRM MARKETING Campaigns					
+ NEW NEW TEMPLATE DELETE COPY A LINK EMAIL A LINK RUN REPORT EXPORT TO EXCEL ...					
◀ My Campaigns ▼					
✓ Name ↑	Template	Status Reason	Created On		
Campagne SMS Contacts	No	Proposed	02/04/2015 21:56		
Test	No	Proposed	13/04/2015 00:52		
test	No	Proposed	16/04/2015 14:58		
test 2	No	Proposed	13/04/2015 14:44		
Test 3	No	Proposed	13/04/2015 15:17		
Test4	No	Proposed	13/04/2015 16:05		

Click on « New » to create a new campaign.

Microsoft Dynamics CRM | MARKETING | Campaigns | New Campaign

SAVE SAVE & CLOSE + NEW

CAMPAIGN : INFORMATION ▾

New Campaign

General

Name *	<input type="text"/>	Status Reason	Proposed
Campaign Code	--	Campaign Type	Advertisement
Currency *	euro		
Expected Response	--	Price List	--
Offer	--		

Schedule

Proposed Start	--	Actual Start	--
Proposed End	--	Actual End	--

Description

Description	--
-------------	----

SMS

SMS campaign parameters	
Recipients type	<input type="button" value=""/>

Fill in the campaign name and click on « Save ».

Choosing the recipients

After saving the campaign, click on the « down arrow » icon next to the campaign name, in the ribbon located on top of the window :

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes links for Home, MARKETING, Campaigns, My campaign, and other options. Below the navigation is a toolbar with buttons for NEW, DEACTIVATE, DELETE, COPY AS CAMPAIGN, COPY AS TEMPLATE, ASSIGN, and SHARE. A dropdown menu labeled 'CAMPAIGN : INFORMATION' is open, showing the title 'My campaign' and a 'General' section. The 'My campaign' link in the ribbon is highlighted with a red box.

In the opening ribbon, click on « Target marketing lists ».

The screenshot shows the Microsoft Dynamics CRM interface with the 'Marketing' ribbon selected. Under the 'Marketing' tab, there are several buttons: TARGET PRODUCTS, SALES LITERATURE, TARGET MARKETING LISTS (which is highlighted with a red box), and RELATED CAMPAIGNS. A tooltip 'Target Marketing Lists' appears over the highlighted button. Below the ribbon, the 'General' section of the campaign record is visible, showing fields like Name, Campaign Code, Currency, and Status Reason.

The screenshot shows the 'Marketing List Associated View' page for the 'My campaign' record. The top navigation bar and ribbon are identical to the previous screenshot. The main content area displays the title 'My campaign' and the heading 'Marketing List Associated View'. Below this are buttons for ADD EXISTING MARKETING LIST, CHART PANE, RUN REPORT, and EXPORT MARKETING LISTS. A table header row is shown with columns for Name, Type, Marketing List..., Last Used On, Purpose, and a search/filter icon. A message at the bottom states 'No Marketing List records found.'

Click on « Add a marketing list » :

CAMPAIGN : INFORMATION ▾

My campaign

Marketing List Associated Vie

ADD EXISTING MARKETING LIST CHART PANE NEW

Name ↑	Type	Purpose	Marketing List
No Marketing List records found.			

Select the marketing lists you want to target, click on "select" and on « Add ».

Look Up Records

Enter your search criteria.

Look for: Marketing List Show Only My Records

Look in: Marketing List Lookup View

Search: Search for records

✓	Name	Type	Purpose	Marketing List
	Liste dynamique...	Dynamic		Contact
	Customers from...	Static		Account
	Liste contacts	Static		Contact

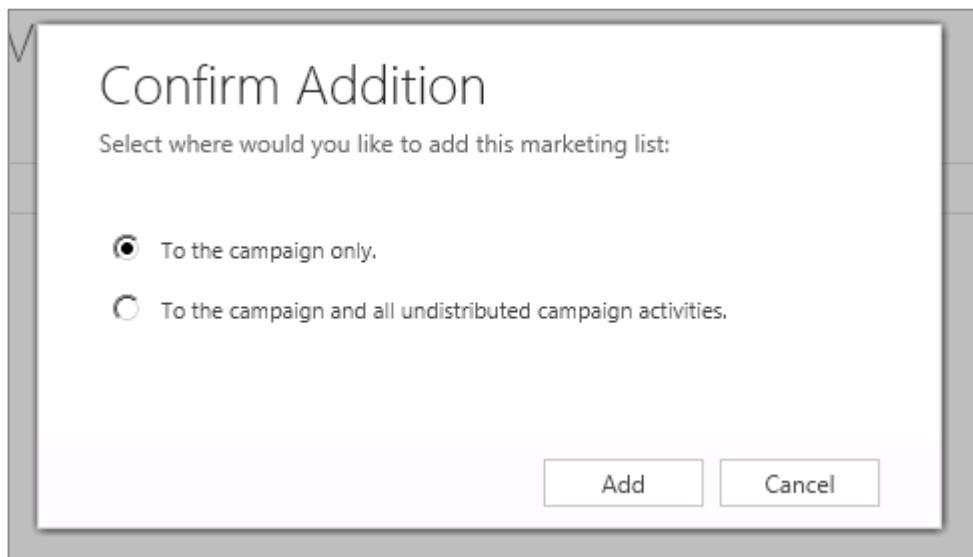
1 - 3 of 3 (0 selected) Page 1

Selected records:

Customers from Paris

Select Remove

New Add Cancel



Choose « To the campaign only » and then click on « Add ».

NB : You can associate multiple marketing lists to the same campaign. Each list can be static or dynamics. However, these lists must target the same record type (lead, contact or account).

Click on this button to go back to the campaign :

A screenshot of the Microsoft Dynamics CRM interface showing the 'My campaign' view. The top navigation bar includes 'Microsoft Dynamics CRM', 'Home', 'MARKETING', 'Campaigns', and 'My campaign'. A red box highlights the 'My campaign' link. The main area shows 'CAMPAIN : INFORMATION' and the title 'My campaign'. Below is a section titled 'Marketing List Associated View' with buttons for 'ADD EXISTING MARKETING LISTS', 'CHART PANE', 'RUN REPORT', and 'EXPORT MARKETING LISTS'. A table header with columns 'Name ↑', 'Type', 'Marketing List...', 'Last Used On', and 'Purpose' is shown, followed by the message 'No Marketing List records found.'

Delayed sending

In the « actual start » field, indicate the date and time at which the campaign to be executed. Let this fill empty if you want the SMSes to be sent immediately.

Microsoft Dynamics CRM | MARKETING | Campaigns | My campaign | Create

General

Name *	My campaign	Status Reason	Proposed
Campaign Code	CMP-01009-W1X3R0	Campaign Type	Advertisement
Currency *	euro	Price List	--
Expected Response(%)	--		
Offer	--		

Schedule

Proposed Start	--	Actual Start	15/05/2015 15:00
Proposed End	--	Actual End	--

Description

Description	--
-------------	----

Composing the SMS

Type in your message text in the « Text » field :

SMS

SMS campaign parameters

Recipients type	Contact
Text	<input type="text"/> Apply template
0 characters	
SMS type	Marketing
Sender	fsfs

- **Text** : The message text cannot exceed 489 characters. This indication is only valid if the message doesn't contain dynamic fields. If dynamic fields exists, the message length can eventually exceeds the indicated characters count. Should this happen, you will receive a warning when simulating the campaign.

To use a SMS template, select it in the dropdown list and click on « Apply template ».

- **SMS type** : marketing or transactional. NB : this field is visible if the SMS type choice is allowed in the preferences (cf. [Preferences](#)).

- Sender : Type in a personalized sender, if necessary. NB : this field is visible if the personalized sender choice is allowed in the preferences.

Campaign status

Campaign simulation and execution		
Octopush status	Campaign not found	
	Test campaign	
	Prepare campaign	

The status give you informations about the campaign state on Octopush servers.

- Campaign not found : the campaign has not been yet transmitted to Octopush. A new campaign is by default in this status.
- Campaign compiling : the campaign has been transmitted to Octopush and is compilating. You will be able to execute the campaign as soon as the compilation is over.
- Campaign sent : the campaign has been executed. The SMSes will be sent soon after.

Campaign simulation

Before transmitting your campaign, you can simulate to check for potential errors. To do so, click on « Test campaign ».

The simulation checks that :

- The SMS message is not empty
- The message length doesn't exceed 489 characters for each recipient
- A mobile phone number exists for each recipient
- The mobile phone numbers are in international format (+XXXXXX or 00XXXX)
- The text « STOP au XXXXX » exists for messages sent to french recipients (mobile numbers who starts with « +33 » or « 0033 »)

The simulation results are displayed next to the « Test campaign » link :

Campaign simulation and execution		
Octopush status	Campaign not found	
	Test campaign 3 recipients, 3 errors.	
	Prepare campaign	

Errors details can be visualized in the Notes of the campaign :

Simulation et lancement de la campagne

Statut Octopush Campagne non trouvée 
[Tester la campagne](#) 3 destinataires, 3 erreurs.
[Préparer la campagne](#)

Finances

Finances

Coût total des activités  **0,00€**
Coûts divers  **0,00€**
Coût total de la campagne  **0,00€**

Administration

Propriétaire *  **Prénom Nom**
Modifié par  **Prénom Nom**

Notes

NOTES

 Entrer une note

Résumé de la simulation (16/04/2015 15:15:17)

Test

 resume.csv

Prénom Nom - Invalid Date Invalid Date

Click on the file « resume.csv » to download the complete result of the simulation :

```
1 STATUS;DETAIL;NUMBER;MESSAGE
2 ERROR;The text 'STOP au XXXXX' is missing.;+33627588010;test
3 ERROR;The text 'STOP au XXXXX' is missing.;+33600000001;test
4 ERROR;The text 'STOP au XXXXX' is missing.;+33649819006;test
5
```

The simulation result lists all the SMS, showing :

- The SMS status : ERROR or SUCCESS. Error occurs if the simulation didn't pass one of the tests mentioned above.
- The error detail, if applicable
- The recipient number
- The message that will be sent to the recipient

When all potential errors have been corrected, you can transmit the campaign.

Transmitting the campaign

To transmit the campaign, click on « Prepare campaign ».

Once the campaign has been transmitted, its status change to « Campaign compiling ». This means that the campaign has been received by Octopush and that it soon will be ready to be executed.

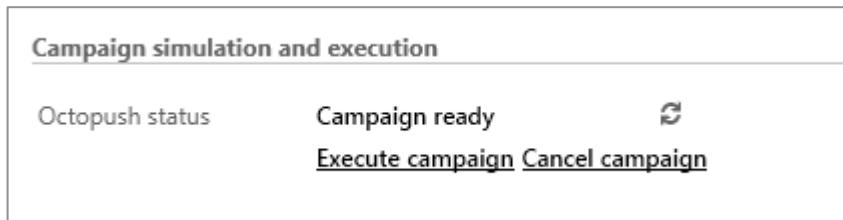


In the « Financials » section, you can check for the estimated cost of your campaign :

A screenshot of a user interface titled 'Financials'. Under the 'Financials' section, it displays the 'Total Cost of Campaign' as 0,00€, 'Miscellaneous Costs' as 0,30€, and the 'Total Cost of Campaign' again as 0,30€, which is highlighted with a red border.

After you have transmitted the campaign, you can visualize a complete report, in the « Notes » section.

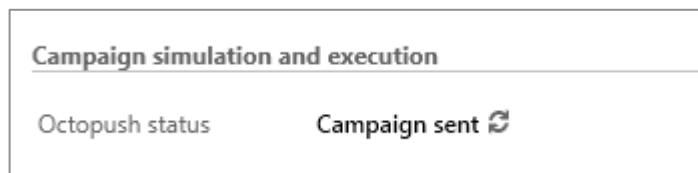
Refresh the status to check if the campaign is ready to be executed. When the campaign is ready to be executed, its status changes to « Campaign ready »:



You can now either execute the campaign to send the SMS, or cancel it.

Executing the campaign

Click on « Execute campaign ». The campaign status then changes to « Campaign sent ».



Canceling the campaign

Click on « Cancel the campaign ». The campaign status then change to « Campaign not found » and you can then simulate it or transmit it again.

History of SMS sent via a campaign

Once the campaign has been transmitted and executed, an « SMS » activity is automatically created in the history of each recipient:

The screenshot shows the Microsoft Dynamics CRM interface for a contact named James Smith. At the top, there are several action buttons: NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, ASSIGN, EMAIL A LINK, DELETE, and more. Below the buttons, the contact's name 'James Smith' is displayed with a placeholder icon. Under the 'CONTACT' section, there is a 'Summary' area. On the left, under 'CONTACT INFORMATION', there are fields for Full Name (James Smith), Job Title (--), Company Name (--), Email (--), and Business Phone (--). On the right, there is a section titled 'ACTIVITIES' which is highlighted with a red box. This section includes tabs for POSTS, ACTIVITIES (which is selected), and NOTES. It shows a list of activities: 'All' (with a dropdown arrow), Add Phone Call, Add Task, and more. One activity is listed: 'Bonjour Mr Smith, vo...' with a mobile phone icon, completed by 'Prénom Nom' yesterday.

Sending an SMS on a hook

SMS can be sent automatically when some events occur (order validation, creation of a contact, bill payment...)

Pre-registered hooks

Some hooks are ready to use out-of-the-box. You can find them in the « Settings > Processes » section :

The screenshot shows the Microsoft Dynamics CRM Process Center page. At the top, there is a navigation bar with the Microsoft Dynamics CRM logo, a home icon, SETTINGS, and Business Management. Below the navigation, there are three main sections: 'PROCESSES' (grey background), 'Octopush' (green background with a mobile phone icon), and 'CONFIGURATION' (grey background). The 'Octopush' section is currently active. In the 'PROCESSES' section, there is a tooltip for 'Processes' stating 'tracking sales goals'. Below these sections, there are four cards representing different hooks: 'Business Closures' (icon of a calendar and a briefcase), 'Queues' (icon of a document with a checkmark), 'Facilities/Equipment' (icon of a wrench and a building), and 'Resource Groups' (icon of a person with a speech bubble). Each card has a brief description below it.

Order validation

Sends a SMS when an order has been validated, and its status changes to "Fulfilled".

General Administration Notes

Hide Process Properties

Process Name * Envoi de SMS - Commande validée Entity Order

Activate As Process Category Workflow

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope Organization Start when: After

Record is created

Record status changes

Record is assigned

Record fields change Select

Record is deleted

Before

Execute as:

The owner of the workflow

The user who made changes to the record

Add Step | Insert | Delete this step.

Si la commande est validée

If OrderStatus equals [Fulfilled], then:

Si le client est un "compte" -> SMS vers compte, sinon si le client est un "contact" -> SMS vers contact

If Customer (Account):Account contains data, then:

Envoi du SMS au compte
Octopush (1.0.0.31):OctopushWF.SendSMS Set Properties

Otherwise, if Customer (Contact):Contact contains data, then:

Envoi du SMS au contact
Octopush (1.0.0.31):OctopushWF.SendSMS Set Properties

To modify the default text :

- Go to the « Settings → Processes » section
- Open the process « Envoi de SMS - Commande validée »
- Deactivate the process
- Click on each of the « Set properties » buttons :



- Modify the text in the « Texte à utiliser » field

Processus : Commande validée

Définir les propriétés d'entrée de la phase persona...

Nom de propriété	Type de données	Valeur
Contact destinataire	Recherche	[]
Prospect destinataire	Recherche	[]
Compte destinataire	Recherche	{Compte(Client (Compte))}
Modèle de SMS à utiliser	Recherche	[]
Texte à utiliser	Une seule ligne de texte	Votre commande n° {Référence de com...}

Canceled order

Send an SMS when an order status changes to "Canceled"

General Administration Notes

▼ Hide Process Properties

Process Name * Envoi de SMS - Commande annulée Entity Order

Activate As Process Category Workflow

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope Organization

Start when:

- After Record is created
- After Record status changes
- Before Record is assigned
- Before Record fields change
- Before Record is deleted

Execute as:

- The owner of the workflow
- The user who made changes to the record

Add Step | Insert | Delete this step.

▼ Si la commande est annulée

If OrderStatus equals [Canceled], then:

Si le client est un compte -> SMS vers compte, sinon si le client est un contact -> SMS vers contact

If Customer (Account):Account contains data, then:

- Envoi du SMS au compte

Octopush (1.0.0.31):OctopushWF.SendSMS

Otherwise, if Customer (Contact):Contact contains data, then:

- Envoi du SMS au contact

Octopush (1.0.0.31):OctopushWF.SendSMS

New incident acknowledgement

Sends a SMS when a new incident is created.

The screenshot shows the 'General' tab of a workflow configuration. The process name is 'Envoi de SMS - Accusé de réception nou'. It is activated as a 'Process'. The 'Available to Run' section includes options for running in the background (recommended), as an on-demand process, or as a child process. Under 'Options for Automatic Processes', the scope is set to 'Organization', and the start when condition is 'After' (selected). Other options include 'Record is created' (checked), 'Record status changes', 'Record is assigned', 'Record fields change', and 'Record is deleted'. The execution context is set to 'The user who made changes to the record'. The step list shows a single step: 'Si le client est un compte -> SMS vers compte, sinon si le client est un contact -> SMS vers contact'. This step uses the 'Octopush (1.0.0.31):OctopushWF.SendSMS' action.

Process Name *	Envoi de SMS - Accusé de réception nou	Entity	Case
Activate As	Process	Category	Workflow

Available to Run

Run this workflow in the background (recommended)
 As an on-demand process
 As a child process

Options for Automatic Processes

Scope: Organization
Start when:
After Record is created
After Record status changes
Before Record is assigned
Before Record fields change Select
Before Record is deleted

Execute as:
 The owner of the workflow
 The user who made changes to the record

Step List

Add Step | Insert | Delete this step.

Si le client est un compte -> SMS vers compte, sinon si le client est un contact -> SMS vers contact

If Customer (Account):Account contains data, then:

- Envoi du SMS au compte
Octopush (1.0.0.31):OctopushWF.SendSMS

Otherwise, if Customer (Contact):Contact contains data, then:

- Envoi du SMS au contact
Octopush (1.0.0.31):OctopushWF.SendSMS

Incident resolution

Sends a SMS when an incident status changes to "Resolved"

General Administration Notes

Hide Process Properties

Process Name *	Envoi de SMS - Incident résolu	Entity	Case
Activate As	Process	Category	Workflow

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope	Organization	<input type="checkbox"/> Record is created
Start when:	After	<input checked="" type="checkbox"/> Record status changes
	After	<input type="checkbox"/> Record is assigned
		<input type="checkbox"/> Record fields change <input type="button" value="Select"/>
	Before	<input type="checkbox"/> Record is deleted

Execute as:

The owner of the workflow

The user who made changes to the record

Workflow Steps

Add Step | Insert | Delete this step.

- ▼ Si le statut de l'incident est "Résolu"
 - If Case>Status equals [Resolved], then:
 - ▼ Si le client est un compte > SMS vers compte, sinon si le client est un contact > SMS vers contact
 - If Customer (Account):Account contains data, then:
 - Envoi du SMS au compte
 - Octopush (1.0.0.31):OctopushWF.SendSMS
 - Otherwise, if Customer (Contact):Contact contains data, then:
 - Envoi du SMS au contact
 - Octopush (1.0.0.31):OctopushWF.SendSMS

New quote

Sends a SMS when a quote status switch from « draft » to « active ».

General	Administration	Notes
<p>▼ Hide Process Properties</p> <p>Process Name * <input type="text" value="Envoi de SMS - Devis établi"/></p> <p>Activate As <input type="button" value="Process"/></p> <p>Available to Run</p> <p><input checked="" type="checkbox"/> Run this workflow in the background (recommended)</p> <p><input type="checkbox"/> As an on-demand process</p> <p><input type="checkbox"/> As a child process</p> <p>Options for Automatic Processes</p> <p>Scope <input type="button" value="Organization"/></p> <p>Start when:</p> <ul style="list-style-type: none"> <input type="button" value="After"/> <input type="checkbox"/> Record is created <input type="button" value="After"/> <input checked="" type="checkbox"/> Record status changes <input type="button" value="Before"/> <input type="checkbox"/> Record is assigned <input type="button" value="Before"/> <input type="checkbox"/> Record fields change <input type="button" value="Select"/> <input type="button" value="Before"/> <input type="checkbox"/> Record is deleted <p>Execute as:</p> <ul style="list-style-type: none"> <input type="radio"/> The owner of the workflow <input checked="" type="radio"/> The user who made changes to the record <p>Add Step Insert Delete this step.</p> <p>▼ Si le statut du devis est "Actif"</p> <p>If Quote>Status equals [Active], then:</p> <ul style="list-style-type: none"> ▼ Si le client est un compte > SMS vers compte, sinon si le client est un contact > SMS vers contact <p>If Potential Customer (Account):Account contains data, then:</p> <ul style="list-style-type: none"> ● Envoi du SMS au compte Octopush (1.0.0.31):OctopushWF.SendSMS <input type="button" value="Set Properties"/> <p>Otherwise, if Potential Customer (Contact):Contact contains data, then:</p> <ul style="list-style-type: none"> ● Envoi du SMS au contact Octopush (1.0.0.31):OctopushWF.SendSMS <input type="button" value="Set Properties"/> 		

Paid invoice

Sends a SMS when an invoice status changes to « Paid ».

General	Administration	Notes
<p>▼ Hide Process Properties</p> <p>Process Name * <input type="text" value="Envoi de SMS - Facture réglée"/></p> <p>Activate As <input type="button" value="Process"/></p> <p>Available to Run</p> <p><input checked="" type="checkbox"/> Run this workflow in the background (recommended)</p> <p><input type="checkbox"/> As an on-demand process</p> <p><input type="checkbox"/> As a child process</p> <p>Options for Automatic Processes</p> <p>Scope <input type="button" value="Organization"/></p> <p>Start when:</p> <ul style="list-style-type: none"> <input type="button" value="After"/> <input type="checkbox"/> Record is created <input type="button" value="After"/> <input checked="" type="checkbox"/> Record status changes <input type="button" value="Before"/> <input type="checkbox"/> Record is assigned <input type="button" value="Before"/> <input type="checkbox"/> Record fields change <input type="button" value="Select"/> <input type="checkbox"/> Record is deleted <p>Execute as:</p> <ul style="list-style-type: none"> <input type="radio"/> The owner of the workflow <input checked="" type="radio"/> The user who made changes to the record 		
<p>Add Step Insert Delete this step.</p> <p>▼ Si le statut est "Réglée"</p> <p>If Invoice>Status equals [Paid], then:</p> <ul style="list-style-type: none"> ▼ Si le client est un compte > SMS vers compte, sinon si le client est un contact > SMS vers contact If Customer (Account):Account contains data, then: <ul style="list-style-type: none"> ● Envoi du SMS au compte Octopush (1.0.0.31):OctopushWF.SendSMS <input type="button" value="Set Properties"/> Otherwise, if Customer (Contact):Contact contains data, then: <ul style="list-style-type: none"> ● Envoi du SMS au contact Octopush (1.0.0.31):OctopushWF.SendSMS <input type="button" value="Set Properties"/> 		

Member registering

Sends a SMS when a new contact is created.

General	Administration	Notes
<p>▼ Hide Process Properties</p> <p>Process Name * <input type="text" value="Envoi de SMS - Inscription d'un membre"/></p> <p>Activate As <input type="button" value="Process"/></p> <p>Available to Run</p> <p><input checked="" type="checkbox"/> Run this workflow in the background (recommended)</p> <p><input type="checkbox"/> As an on-demand process</p> <p><input type="checkbox"/> As a child process</p> <p>Options for Automatic Processes</p> <p>Scope <input type="button" value="Organization"/></p> <p>Start when:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> After <input type="checkbox"/> Record is created <input type="checkbox"/> After <input type="checkbox"/> Record status changes <input type="checkbox"/> Before <input type="checkbox"/> Record is assigned <input type="checkbox"/> Before <input type="checkbox"/> Record fields change <input type="button" value="Select"/> <input type="checkbox"/> Before <input type="checkbox"/> Record is deleted <p>Execute as:</p> <ul style="list-style-type: none"> <input type="radio"/> The owner of the workflow <input checked="" type="radio"/> The user who made changes to the record <p>Workflow Log Retention</p> <p><input checked="" type="checkbox"/> Keep logs for workflow jobs that encountered errors</p>		
<p>Add Step Insert Delete this step.</p> <p>▼ Si le numéro de mobile du contact est renseigné</p> <p>If ContactMobile Phone contains data, then:</p> <ul style="list-style-type: none"> ● Envoi du SMS au contact <p>Octopush (1.0.0.31);OctopushWF.SendSMS <input type="button" value="Set Properties"/></p>		

Inactive contact follow-up

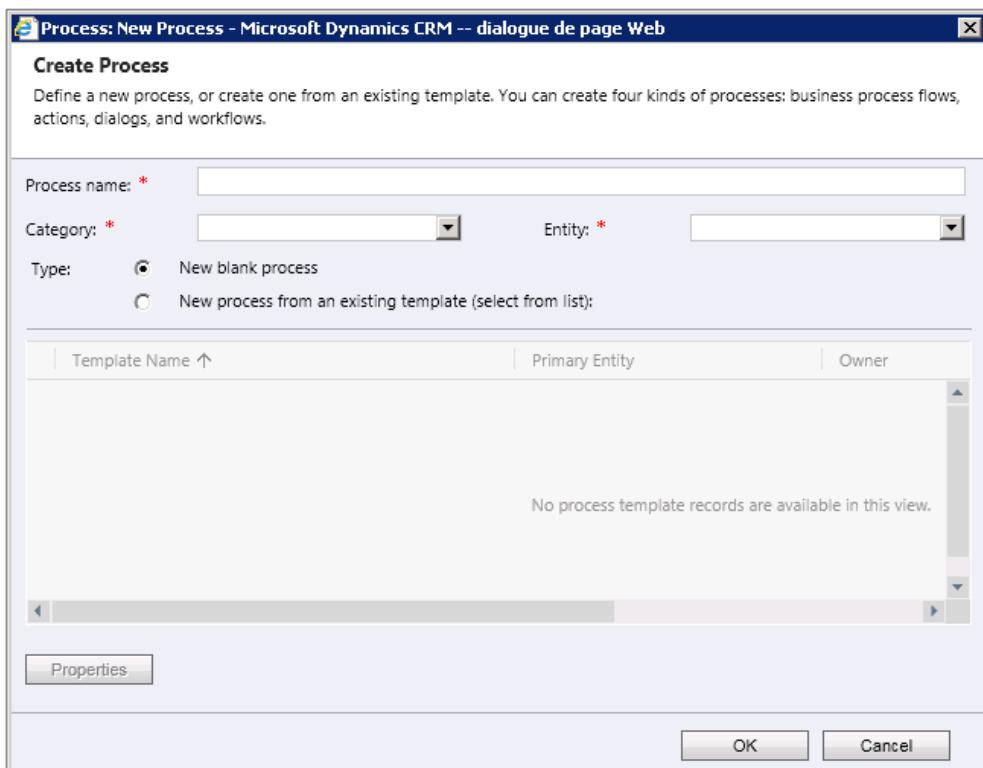
Sends a SMS to a contact which have no activities for the past 90 days.

General	Administration	Notes
<p>▼ Hide Process Properties</p> <p>Process Name * <input type="text" value="Envoi de SMS - Relance d'un contact inactif"/></p> <p>Activate As <input type="button" value="Process"/></p> <p>Available to Run</p> <p><input checked="" type="checkbox"/> Run this workflow in the background (recommended)</p> <p><input type="checkbox"/> As an on-demand process</p> <p><input type="checkbox"/> As a child process</p> <p>Workflow Job Retention</p> <p><input checked="" type="checkbox"/> Automatically delete completed workflow jobs (to save disk space)</p>		
<p>Entity <input type="text" value="Contact"/></p> <p>Category <input type="text" value="Workflow"/></p> <p>Options for Automatic Processes</p> <p>Scope <input type="button" value="Organization"/></p> <p>Start when:</p> <p><input checked="" type="checkbox"/> Record is created</p> <p><input type="checkbox"/> Record status changes</p> <p><input type="checkbox"/> Record is assigned</p> <p><input type="checkbox"/> Record fields change <input type="button" value="Select"/></p> <p><input type="checkbox"/> Record is deleted</p>		
<p>Add Step Insert Delete this step.</p> <p>▼ Attente 90 jours</p> <p>Wait until Process-Execution Time >= [3 Months After Contact:Created On], then:</p> <p>▼ Si le contact n'a pas été modifié</p> <p>If Contact:Modified On equals [Contact:Created On], then:</p> <p><input checked="" type="radio"/> Envoi du SMS au contact</p> <p>Octopush (1.0.0.31):OctopushWF.SendSMS <input type="button" value="Set Properties"/></p>		

Create a new hook

Hooks are created as Dynamics CRM workflows. Workflows let you determine the conditions of an event, and the action (sending a SMS) to be triggered when this event occurred.

To create a new workflow, go to the "Settings > Processes" section of Dynamics CRM and click on "New":



- Process name : choose a name for your workflow
- Category : choose « Workflow »
- Entity : The record type that will trigger the event. For example, for an order validation, choose the « Order » entity.

Click on « OK » to start configuring the workflow.

General

Process Name *: Test

Activate As: Process

Entity: Order

Category: Workflow

Available to Run

- Run this workflow in the background (recommended)
- As an on-demand process
- As a child process

Workflow Job Retention

- Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

Scope: User

Start when:

- Record is created
- Record status changes
- Record is assigned
- Record fields change
- Record is deleted

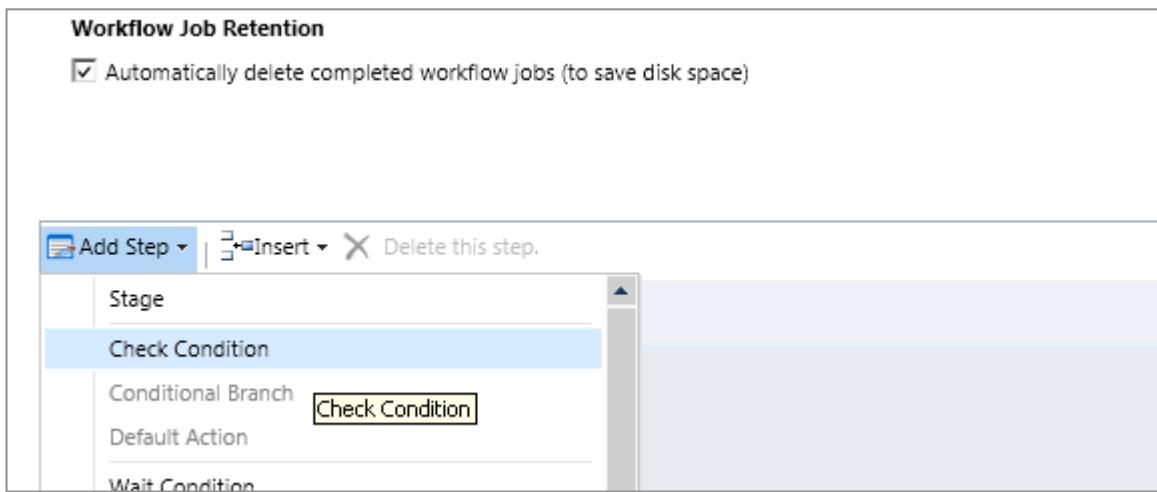
Add Step | **Insert** | **Delete this step.**

Select this row and click Add Step.

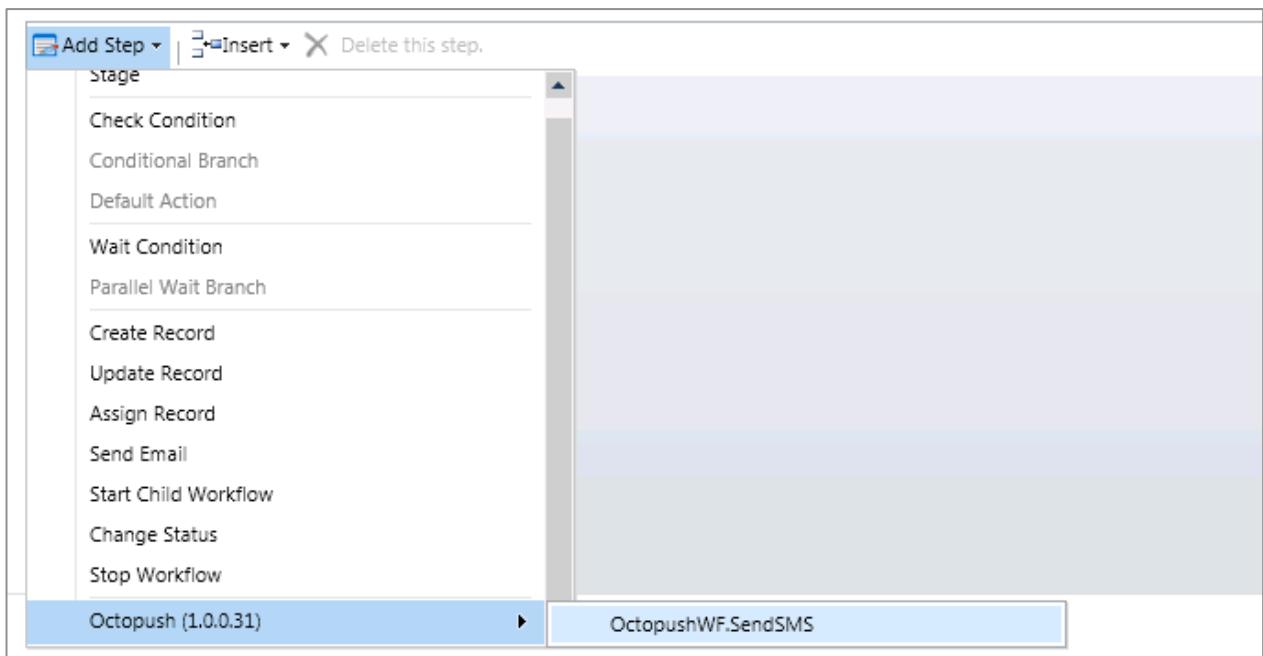
In the « Scope » dropdown list, choose “Organization”.

In the “Start when” section, choose the events that will trigger the workflow.

You can add tests that will check some conditions before sending the SMS. To add a test, click on “Add Step”, then click on “Check condition”:



To add the « send SMS » action to your workflow, click on « Add Step », then click on « Octopush (1.0.0.31) », then click on « OctopushWF.SendSMS » :



Type a description for your action, then click on « Set Properties » :

File Save and Close Help ▾

Process: Test Working on solution: Solution par défaut

Set Custom Step Input Properties

Property Name	Data Type	Value
Contact destinataire	Lookup	<input type="text"/>
Prospect destinataire	Lookup	<input type="text"/>
Compte destinataire	Lookup	<input type="text"/>
Modèle de SMS à utiliser	Lookup	<input type="text"/>
Texte à utiliser	Single Line of Text	-

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set to

Look for: Order

Customer

Add

X |

Default value:

OK

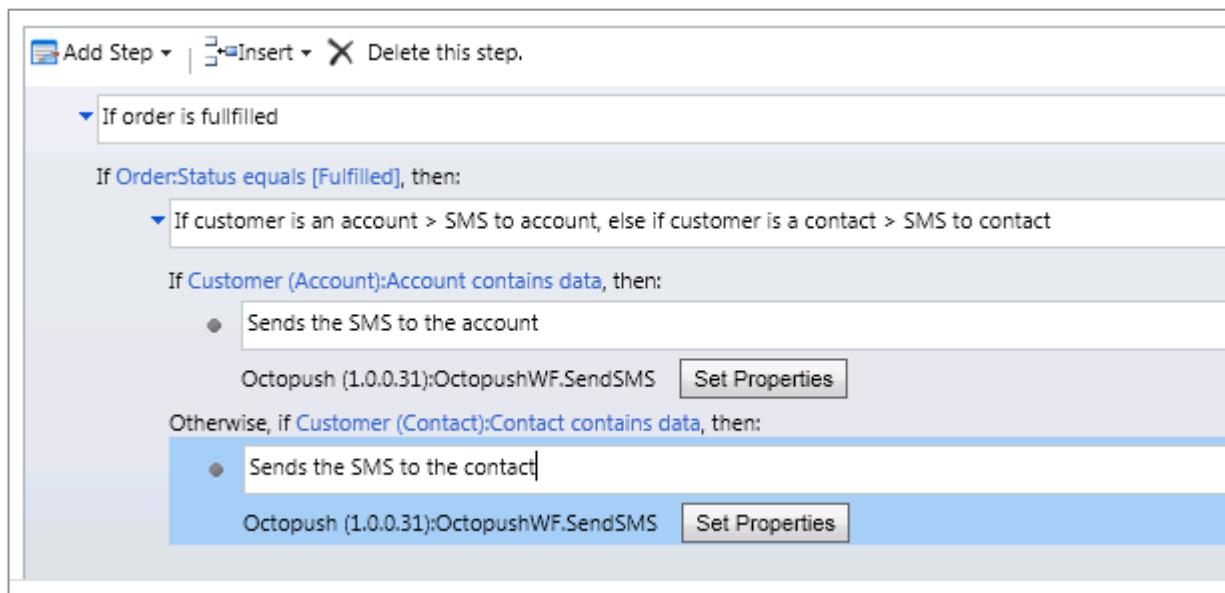
2 fields must be filled :

- The SMS recipient (which can be a lead, a contact or an account)
- The text to user for your SMS. The text can contain dynamic fields.

As the recipient can be a lead, contact or account, you can see 3 « recipients » fields : « Contact destinataire », « Prospect destinataire » and « Compte destinataire ». Only 1 of these fields should be filled. If the hook applies to various record types, you will need to create 1 action per record type. Each of these actions will target a specific record type.

For example, a hook regarding an order validation can target contacts or accounts (the customer of an order can be a contact or an account).

A test like the one below is then mandatory in your workflow :



Click on « Activate » when your workflow is finished:

