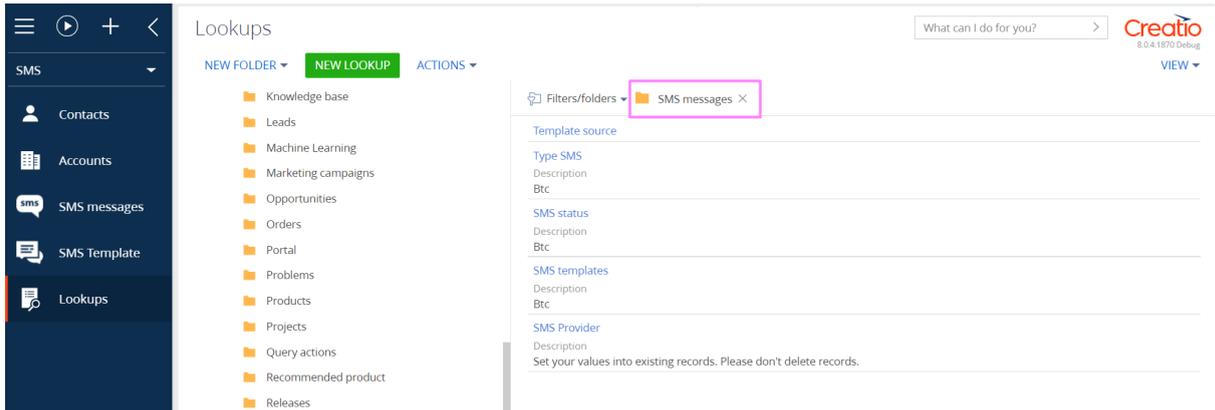


## Content

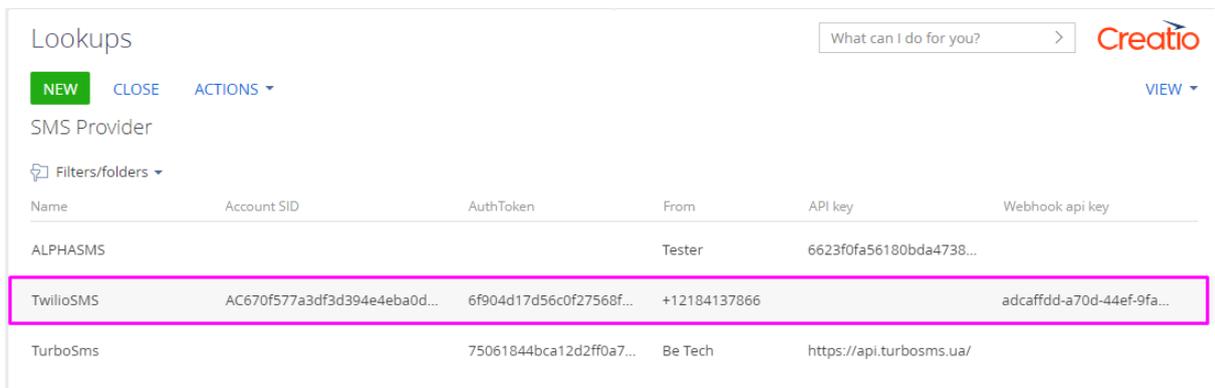
1. Installing packages.....	1
2. Sending an SMS from the Account section.....	5
3. Sending an SMS from the Contact section.....	9
4. Sending an SMS from the SMS message section to an unknown user.....	10
5. Sending an SMS from the card of any section (manually).....	12
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6.1. Setting up SMS templates. Executed in the "SMS Templates" section.....	16
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7. Sending a single SMS from the SMS section to the Contact/Account.....	19
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10. Sending an SMS after a certain time. Delayed message.....	31

## 1. Installing packages

1. Register in your personal account **TWILIO**  
<https://www.twilio.com/login>
2. Create an Active number from which you will send SMS
3. Install packages from <https://marketplace.creatio.com/>
4. Open Lookups

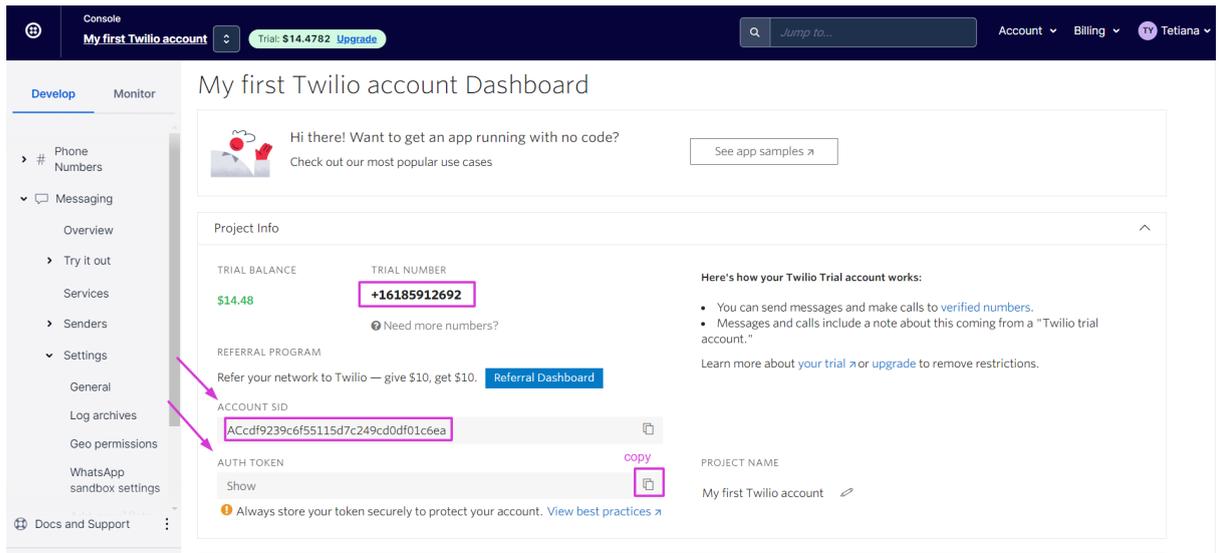


5. In the SMS Provider lookup, do not delete the data and fill in the line with the name TwilioSMS

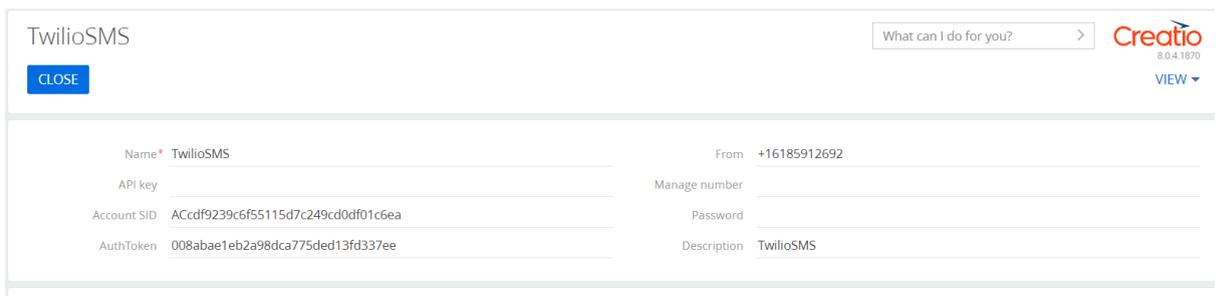


6. In the SMS Provider lookup, add an entry and fill it in as follows:

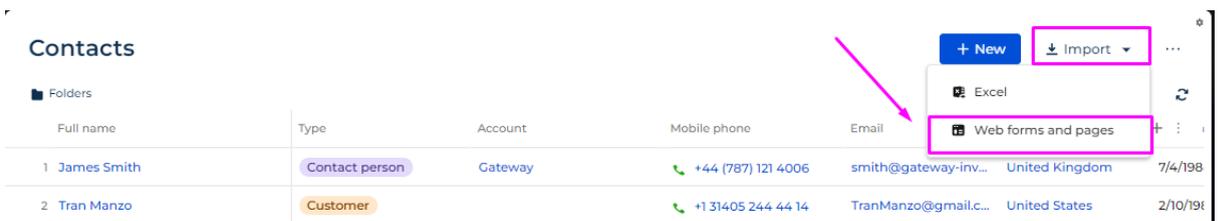
- Name - TwilioSMS
- Account SID - a unique immutable user ID, located in the personal office.
- AuthToken – Current authorization token, located in the personal office



- From – The number from which you will send SMS
- Description - TwilioSMS

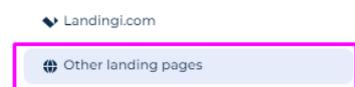


- To receive SMS from clients, you need to set a webhook URL in Twilio. To get a webhook, go to the Creatio system with Freedom UA version. Go to the Contacts section. Click the Import button and select Web Forms and Pages



Select Other Landing Pages

← Web forms and pages



Other landing pages

Import landing page data to Creatio

Click below to copy the Webhook

← Web forms and pages

▼ Landings.com

Other landing pages

## Other landing pages

Import landing page data to Creatio

Use the guide below to connect your web form to Creatio:

- 1 Create a new or use an existing landing page with a web form on your website.
- 2 Map the web form fields to the Creatio object fields. [Learn more.](#)
- 3 Get the Webhook URL and use it to send submitted form data to Creatio. [Learn more.](#)

Click to get your Webhook URL

Webhook URL

<https://webhooks.creatio.com/webhooks/5cc84910-54e3-44df-94d0-7c5...>

Paste the copied Webhook in the Twilio account and in the Creatio

In the Twilio office there is a section with your active number. Click on the number to which customers will send a reply.

Number	Friendly Name	Capabilities				Active Configuration
		Voice	SMS	MMS	Fax	
+1 218 413 7866 ▲	(218) 413-7866					Voice Webhook to POST: <a href="https://demo.twilio.com/welcome/voice/">https://demo.twilio.com/welcome/voice/</a> Messaging Webhook to POST: <a href="https://webhooks.creatio.com/webhooks/">https://webhooks.creatio.com/webhooks/</a>

Paste the Webhook URL below in the Messaging Configuration. And save the changes

Messaging Service: Select a Messaging Service

Configure with: Webhook, TwiML Bin, Function, Studio Flow, Proxy Service

A message comes in: Webhook

URL: <https://webhooks.creatio.com/webhooks/5cc84910-54e3-44df-94d0>

HTTP: HTTP POST

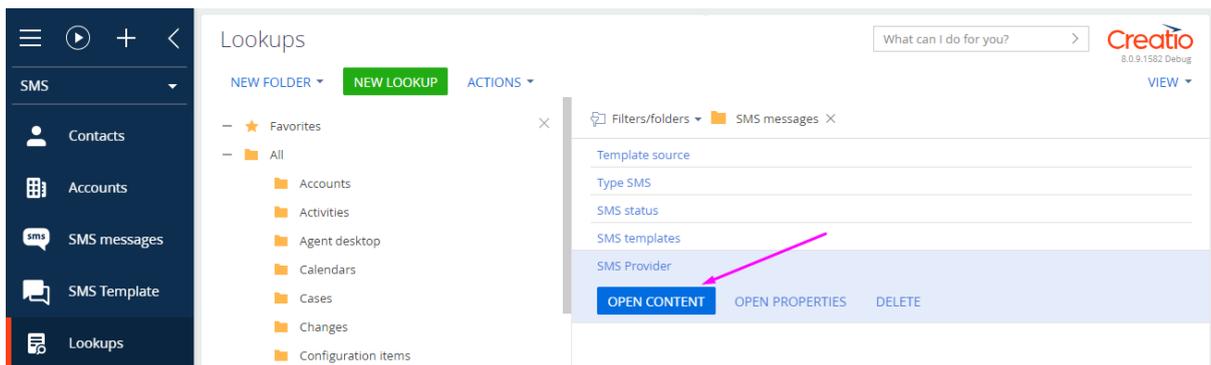
Primary handler fails: Webhook

URL:

HTTP: HTTP POST

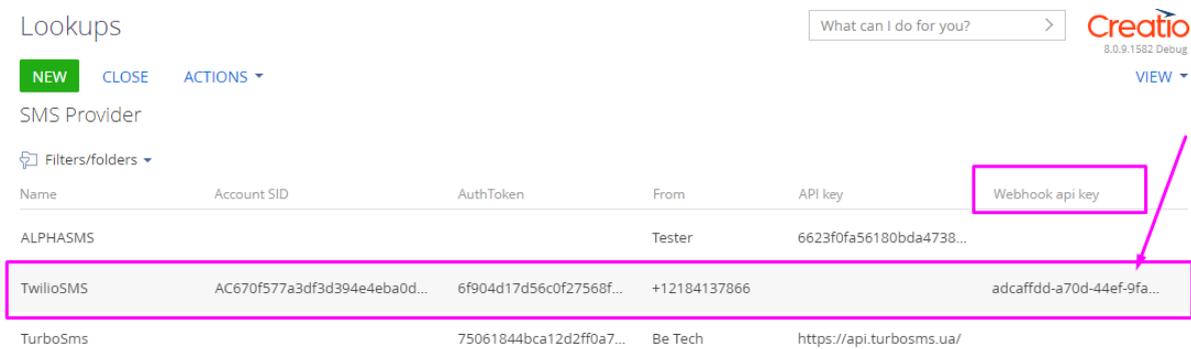
Save configuration | Return to Active Numbers

In Creatio, go to the Lookups section. Select a lookup SMS Provider



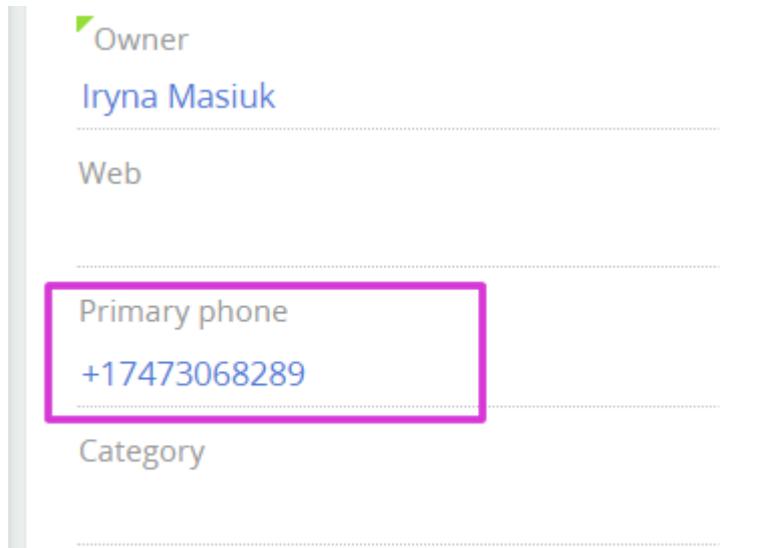
Enter the numbers starting with the word "webhook"

<https://webhooks.creatio.com/webhooks/5cc84910-54e3-44df-94d0-7c5b8cb34a9e>



## 2. Sending an SMS from the Account section

1. Go to the Accounts section and select the right counterparty
2. The Account must have a Primary phone number, to which a message is sent



3. Click the Send a MESSAGE button



Here we can see an empty SMS form

- 1- This is the text of the message, its completion is mandatory. You can fill in manually or from a template(6)
2. The phone number is mandatory and is filled in from the contact card
3. It is not filled in if we send the SMS from the counterparty's card
4. The name of the counterparty is taken from the card of the counterparty
5. Name of SMS
6. Template sample, select the template that is suitable for the Account section
7. The SMS type is set automatically
8. The date the SMS object was sent
9. SMS status
10. It is set automatically when mass SMS is sent
11. Name of the section from which SMS messages are sent

Outgoing message to BE TECH. What can I do for you? > **Creatio** 8.0.4.1870 Debug VIEW ▾

**SAVE** CANCEL ACTIONS ▾ **RUN PROCESS ▾** SEND SMS

1 Message Text\*

2 Phone number\* 17473068289 Enter a value

3 Contact

4 Account BE TECH

5 Title\* Outgoing message to BE TECH.

6 Sample

7 Message type Twilio SMS

8 Sending date

9 Status New

10 Mass mailing

11 Source Account

4. On the Main Information tab, the Account Name and Account Number are filled in at the beginning

< MAIN INFORMATION TOTALS FEED >

List of SMS recipients + :

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
	BE TECH	17473068289				

Fill in the required fields of Message Text  
 The status changes from NEW to Saved  
 and Message text is added

Outgoing message to BE TECH. What can I do for you? > **Creatio** 8.0.4.1870 Debug VIEW ▾

**CLOSE** ACTIONS ▾ **RUN PROCESS ▾** **SEND SMS**

SMS from Accounts

Message Text\*

Phone number\* 17473068289

Contact

Account BE TECH

Title\* Outgoing message to BE TECH.

Sample

Message type Twilio SMS

Source Account

Sending date

Status **Saved**

Mass mailing

< MAIN INFORMATION TOTALS FEED >

List of SMS recipients + :

Contact	Account	Phone of recipient	Delivery sta...	Delivery date	Message text	Error message
	1 BE TECH	2 17473068289			3 SMS from Accounts	

5. Click on Send SMS

Fields have been added:

Sending date - the date when the SMS was sent from the system

Status - changed to Sent

The Main information detail displays information directly related to the SMS

Delivery status - queued, because the recipient has not yet received the SMS.

Outgoing message to BE TECH.

What can I do for you? » **Creatio** 8.0.4.1870 Debug VIEW

**CLOSE** ACTIONS » » **RUN PROCESS** » **SEND SMS**

SMS from Accounts

Message Text\*

Phone number\* 17473068289

Contact

Account BE TECH

Title\* Outgoing message to BE TECH.

Sample

Message type Twilio SMS

Sending date 10/19/2022 11:36 AM

Status Sent

Source Account

Mass mailing

< MAIN INFORMATION TOTALS FEED >

List of SMS recipients + :

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
	BE TECH	17473068289	queued		SMS from Accounts	

6. To get the current SMS status, you can run the Business process "Refresh SMS status manually"

Outgoing message to BE TECH.

**CLOSE** ACTIONS » » **RUN PROCESS** » **SEND SMS**

RUN PROCESS BY RECORD

Refresh SMS status manually

SMS from Accounts

A window will appear with results

Statuses updated

**OK**

**Delivery status** will show the current SMS status and **delivery date** - the time when the client received the message

< MAIN INFORMATION TOTALS FEED >

List of SMS recipients + :

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
	BE TECH	17473068289	delivered	10/19/2022 11:36 AM	SMS from Accounts	

This process automatically refreshes the status.

This SMS can be viewed in two places

The first is the Account History tab, the List of SMS detail

[ACCOUNT INFO](#)
[CONTACTS AND STRUCTURE](#)
[CONNECTED TO](#)
[TIMELINE](#)
[HISTORY](#)
[ATTACHMENTS AND NOTES](#)
[FEED >](#)

- Cases
- Activities
- List of SMS recipients + :

SMS	Status	Message text	Created on
<a href="#">Outgoing message to BE TECH.</a>	delivered	SMS from Accounts	10/19/2022 9:29 AM
<a href="#">Outgoing message to BE TECH.</a>	delivered	Test	10/19/2022 8:40 AM

The second place where you can find messages is the SMS message section

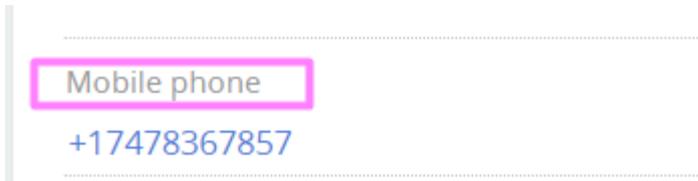
SMS messages NEW ACTIONS RUN PROCESS

Filters/folders Tag

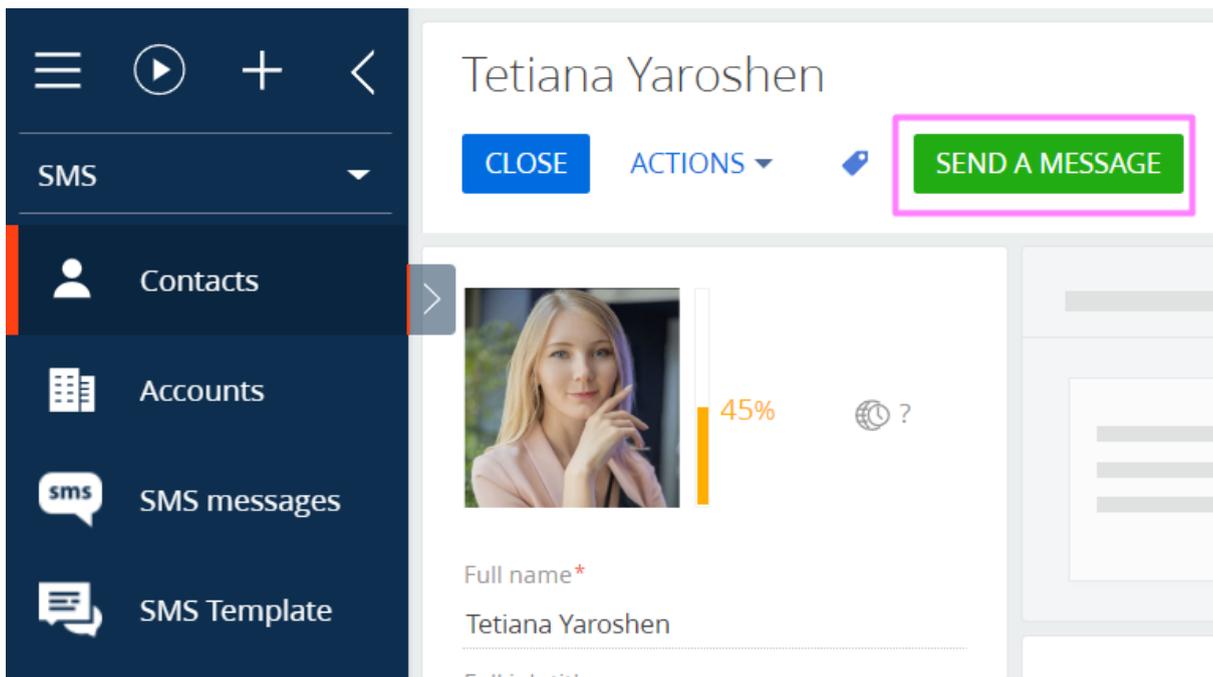
Title	Phone number	Message Text	Sending date	Status
<a href="#">Outgoing message to BE TECH.</a>	17473068289	SMS from Accounts	10/19/2022 11:36 AM	Sent
	Account BE TECH	Mass mailing: No Number of recipients: 1 Successfully delivered: 1 Created by:  Iryna Masiuk	10/19/2022 9:29 AM	
<a href="#">Incoming message</a>	+17473068289	17473068289	10/19/2022	Received

### 3. Sending an SMS from the Contact section

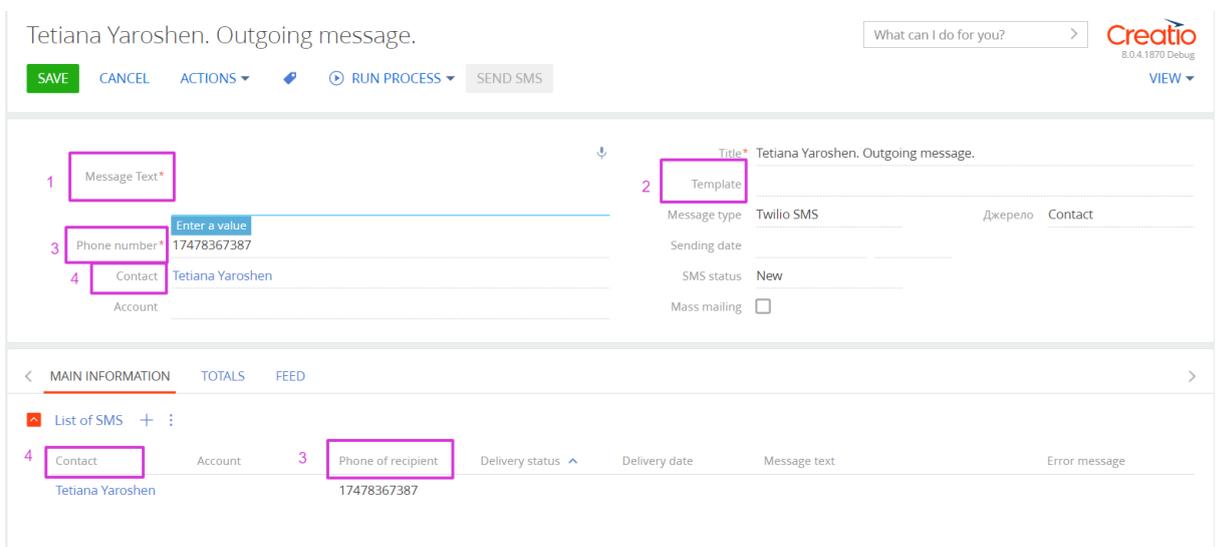
1. Open the Contact card
2. The phone number to which we send the SMS is displayed in the Mobile phone field



3. Click the "Send a Message" button.



4. In the new message card, add text (1) or select a template (2). Contact(4) and the main phone (3) will be added automatically



5. Press the "Send SMS" button

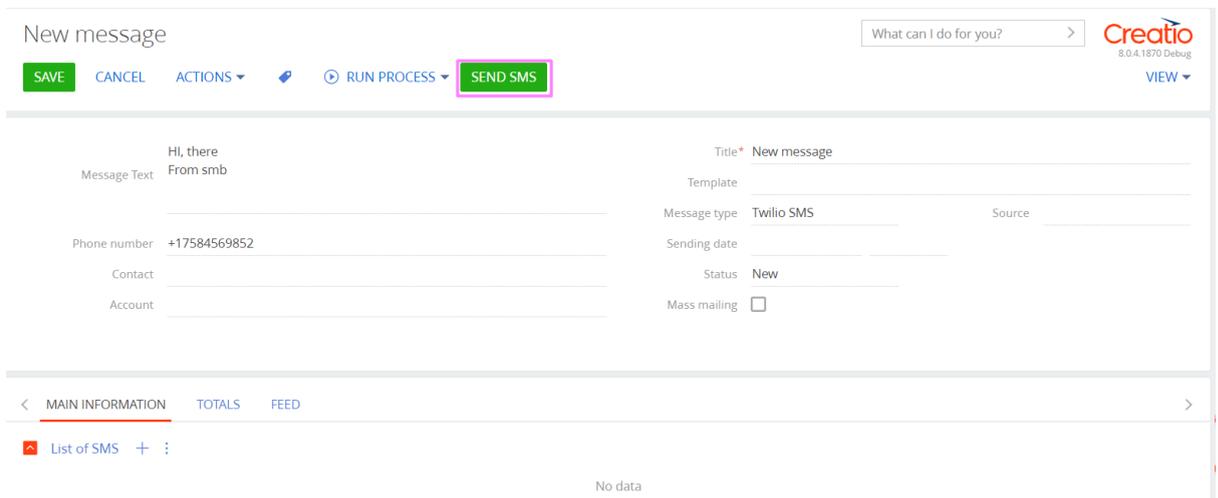


## 4. Sending an SMS from the SMS message section to an unknown user

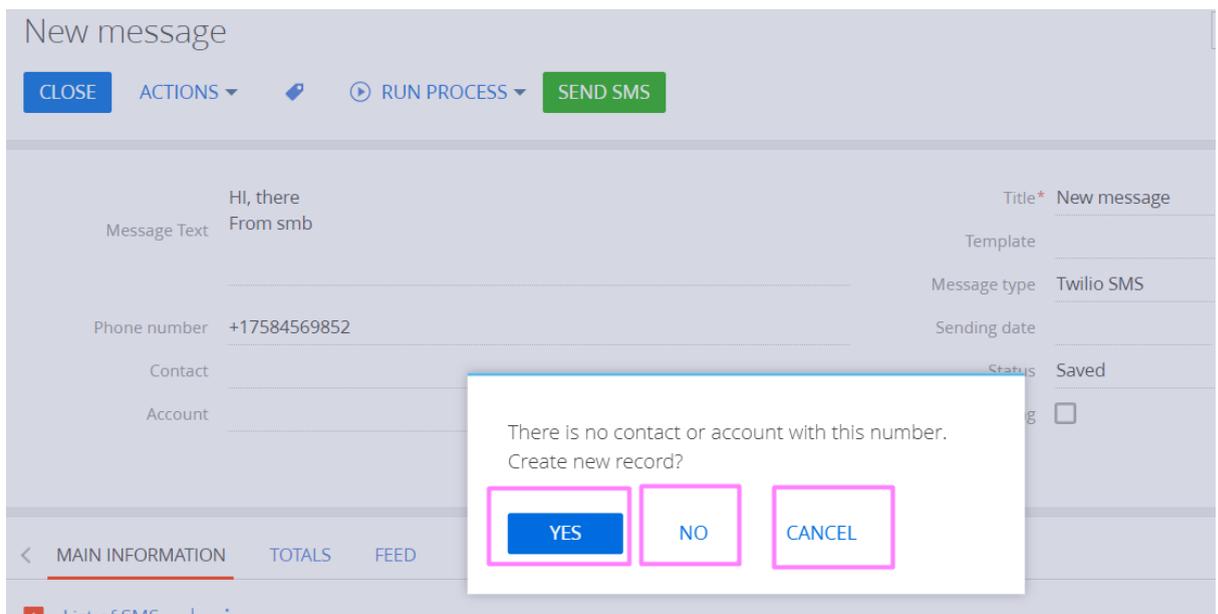
1. Go to the SMS message section and click the NEW button
2. Enter the text in the Message Text field and enter the number in the Phone number field. The number consists of 11 digits.

The system will search for a number. If there is no such number, neither Contact nor Account was found. You can still send SMS

3. Click Send SMS



4. The system offers to create a new Contact



There are 3 options:

1. Yes - You create a new Contact and send him an SMS
2. No - You do not create a new Contact and send SMS to the client
3. Cancel - You do not create or send an SMS

4.1. You have clicked Yes and the Contact field is populated with a new contact. After that, press SEND SMS again and the message is sent in the standard way.

New message

What can I do for you? >

CREATIO 8.0.4.1870 Debug VIEW

CLOSE ACTIONS RUN PROCESS SEND SMS

Message Text: HI, there From smb

Phone number: +17584569852

Contact: +17584569852

Account:

Title\*: New message

Template:

Message type: Twilio SMS Source:

Sending date:

Status: Saved

Mass mailing:

< MAIN INFORMATION TOTALS FEED >

List of SMS + :

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
+17584569852		+17584569852			HI, there From smb	

4.2. You have clicked NO and the message was successfully sent without filling in the Contact field

New message

What can I do for you? >

CREATIO 8.0.4.1870 Debug VIEW

CLOSE ACTIONS RUN PROCESS SEND SMS

Message Text: Test 15

Phone number: +17473068

Contact: (highlighted with pink box)

Account:

Title\*: New message

Template:

Message type: Twilio SMS Source:

Sending date: 10/26/2022 10:09 PM

Status: Sent

Mass mailing:

< MAIN INFORMATION TOTALS FEED >

List of SMS + :

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
(highlighted with pink box)		+17473068	delivered	10/26/2022 10:09 PM	Test 15	

## 5. Sending an SMS from the card of any section (manually)

To send an SMS from any card, you need to set up a business process, using the preconfigured subprocess "**Create SMS from a card**"

*Consider the example of Opportunities*

### **User actions:**

1. Create a business process
2. Add elements necessary for the business process, which must be completed before sending the SMS message.
3. To send a message, add the subprocess "Create SMS with cards"
4. Specify the parameters of the [Send SMS] element:

[*Template source*] – the object from which macro substitutions will be used;

[*Contact*] – consignee received from Opportunity;

[*Accounts*] – consignee received from Opportunity;

[*Created SMS*] – optional parameter; intended for sending an SMS previously created in the business process;

[*Record Id*] – unique identifier of the record to which the SMS is attached.

5. Set up a business process from a card

### ***Example***

In the example below, the contact, account, and sales identifier are taken from the sale. The data is transferred to the input of the subprocess "**Create SMS with cards**":

- the template source is the Opportunities object
- we transfer the values taken from the sale to the Contact/Accounts parameters
- We link the SMS to the sales card

# Sending sales SMS

SAVE RUN CANCEL ACTIONS



Sub-process (Call activity) ⋮ ⓘ ✕

**Create SMS with cards 1**

---

**Which process to run?**

Create SMS with cards 🔗

---

**Process parameters**

🔍 Account  
 ↔ [#Read sales.First item of resulting collection.Account#]

---

🔍 Contact  
 ↔ [#Read sales.First item of resulting collection.Contact#]

---

🔍 Created SMS  
 ↔ Select value

---

🔍 RecordId  
 ↔ [#Read sales.First item of resulting collection.Id#]

---

🔍 Template source  
 ↔ [#Lookup.SMS Templates.Sale.7a073372-dc3a-4b70-899e-1d2ade103a87#]

---

Run current and the following elements in the background

It is necessary to display the finished business process on the page of the section.

On the sections page, select Section Wizard

Opportunities What can I do for you? > Creatio 8.0.4.1870 Debug VIEW

**NEW OPPORTUNITY** ACTIONS RUN PROCESS

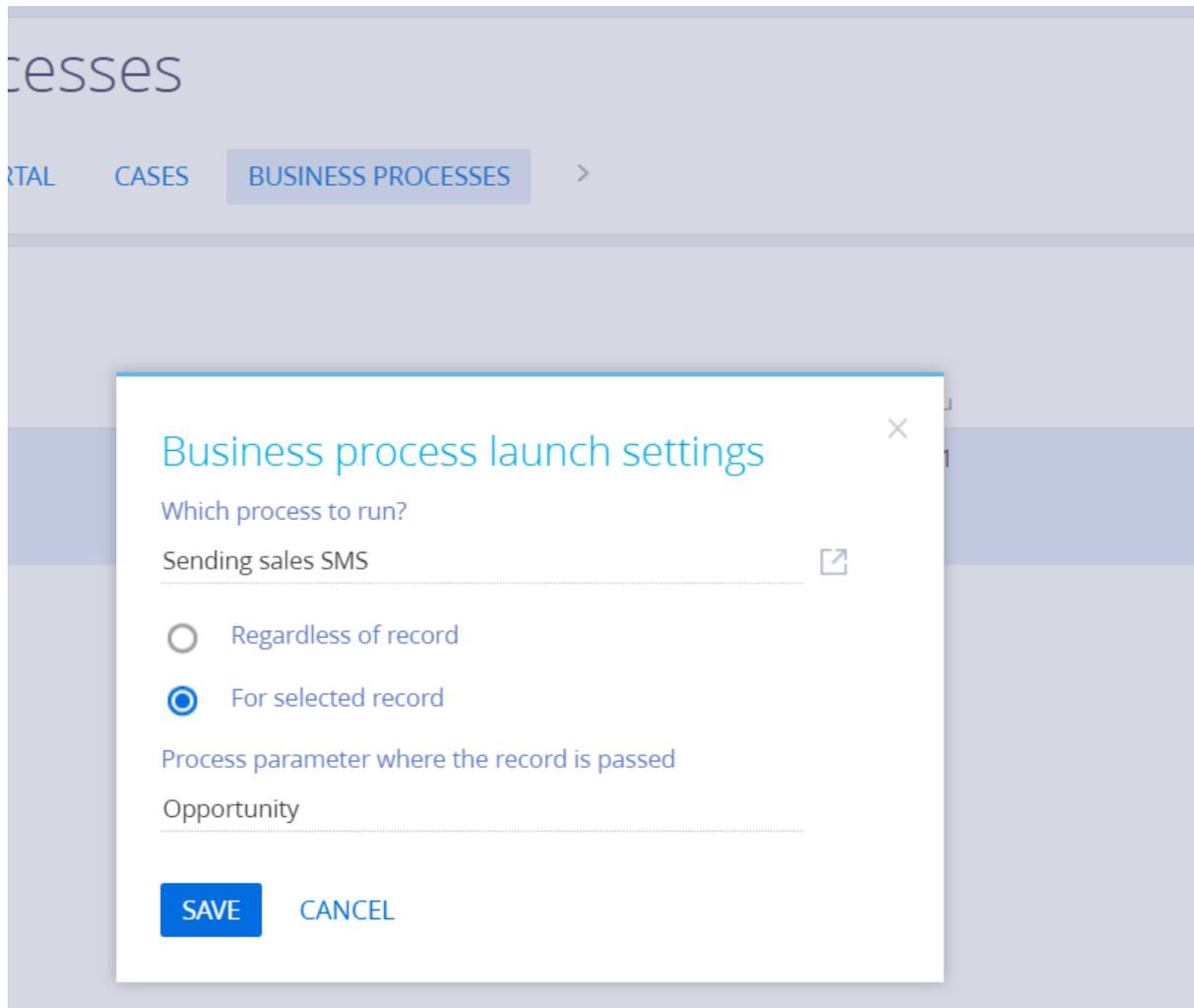
📅 📅 <Start date> till <Due date> × 👤 Caleb Jones × 🗑️ Filters/folders 🏷️ Tag

553 / Fast Works / Sale of Services		🟢 Mood Euphoric
Account Fast Works	Stage Proposal	Opportunity amo 875.00
	Owner Caleb Jones	
515 / Elite Systems / Sale of Services		🟢 Mood Hopeful
Account Elite Systems	Stage Presentation	Opportunity amo 1,500.00
	Owner Caleb Jones	

🗑️ Sort by  
 📄 Set up summaries  
 🗑️ Select fields to display  
🔗 Open section wizard  
 🗑️ Set up section cases  
 🗑️ Open dashboards

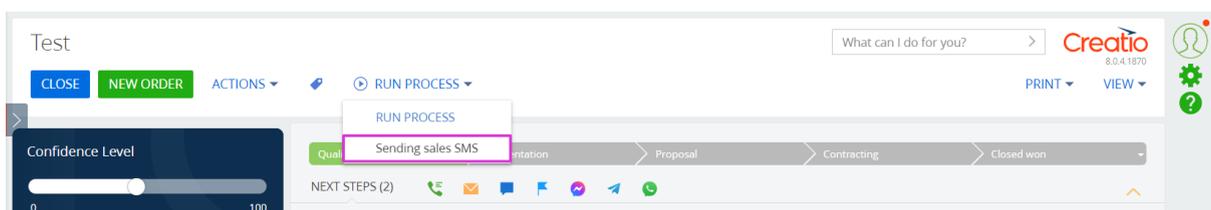
Go to the Business processes tab and select the business process we created.

Then save all the settings.



**Result:**

1. We start the process from the Opportunities card



2. A new message card opens:
  - Write the text or choose a prepared template (1)
  - Number of the Contact/Account (2) that will receive the SMS
  - Contact/Accounts is automatically refreshed (3)

New message

What can I do for you? » **Creatio** 8.0.4.1870 Debug TASK PROPERTIES VIEW

**SAVE** **CLOSE** ACTIONS » ▶ RUN PROCESS ▶ **SEND SMS** 4

---

Edit Page

Message Text  1

Phone number  2

Contact  3

Account

Title\* New message

Template  1

Message type Twilio SMS Source Opportunity

Sending date

SMS status New

Mass mailing

---

< MAIN INFORMATION DELAYED MESSAGE TOTALS FEED >

+ List of SMS + :

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
<input type="text" value="Dmytro Havrylov"/> 3		<input type="text" value="15811155888"/> 2				

3. Press the "Send SMS" button (4)

## 6. Setting an SMS templates and macros

### 6.1 Setting up SMS templates. Executed in the "SMS Templates" section.

1.1. Create a new template by clicking the "New" button

SMS Template

What can I do for you? » **Creatio** 8.0.4.1870 De VIEW

**NEW** ACTIONS ▶

Filters/folders ▼

Name	Templates	SMS type	Source of template	Created on
Orders	[#Contact Name#] Your package [#Number#] has been shipped.	Twilio SMS	Order	9/24/2022 10:01 AM
Event Invitation	We invite you to the event	Twilio SMS	Contact	9/24/2022 10:01 AM
WARNING	[#Name#], Smile, you are beautiful. Happy birthday. You are [#Age#] years old	Twilio SMS	Contact	9/29/2022 1:52 PM
The Creatio event in Chicago	The Creatio event in Chicago is tomorrow and expected to be very hot! We look forward to meeting you at the Grand Chicago at 8:00 a.m.	Twilio SMS	Contact	9/24/2022 10:01 AM
Sale	Thank you for your purchase, we look forward to seeing you again	Twilio SMS	Opportunity	9/24/2022 10:01 AM
Items reserved	Your items are reserved for you. We'll call you as soon as possible	Twilio SMS	Account	9/24/2022 10:01 AM
Custom test pattern	Contact name:	Twilio SMS	Order	9/24/2022 10:01 AM

1.2. Fill in the columns:

New record What can I do for you? > Creatio  
8.0.4.1870 Debug  
VIEW ▾

SAVE CANCEL

---

Name\*

Source of template  SMS type

---

< TEMPLATE >

Templates

---

A list of the fields of the "SMS Template" object that are used.

Field name	Data type	Notes
Name	Text	Mandatory field. You need to save the template in the system, it is not sent to SMS.
Source of template	Template source	Specify the object from which macro substitutions will be pulled
SMS type	Types of SMS	TwilioSMS
Templates	Text, multiline field	Description

1.3. Form the text of the message as needed with macro wildcards

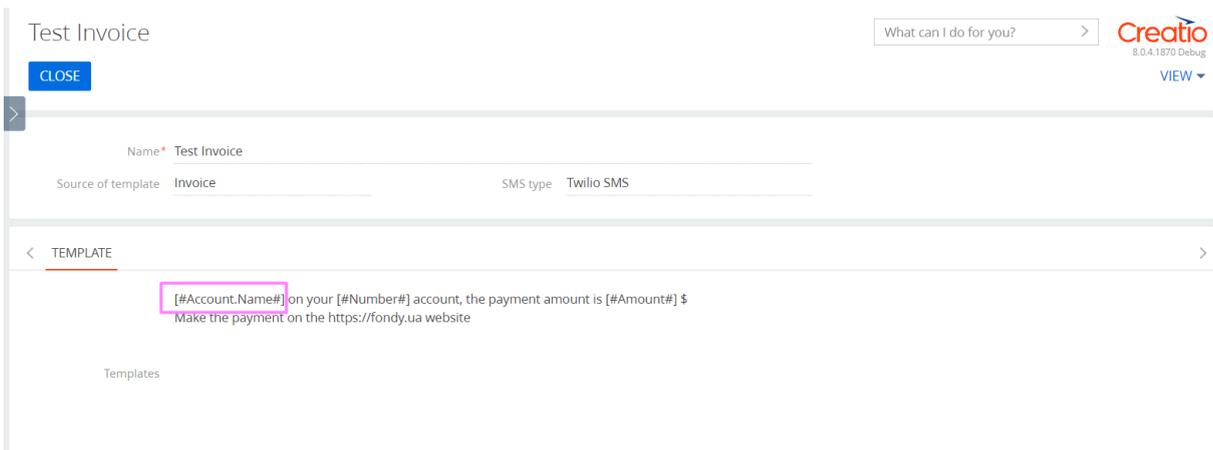
## 6.2 Configuring macro substitutions in the SMS template.

To use macro substitutions, you need to specify the object from which the fields will be displayed in the template source



If you are referring to a field whose type is reference, then you need to enter the name of the field with a dot.

Example in the photo

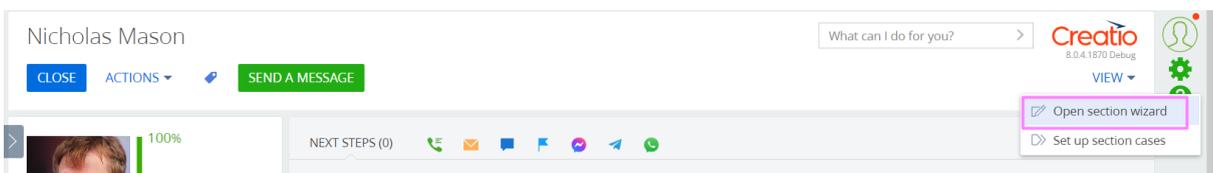


A macro substitution has the form

“[#Code (in English)#]”,

where *Code (in English)* is the name of the column in the database. You can find it out in the section wizard.

For example, the Contact's Age can be specified using the [#Age#] macro substitution by opening the master page and looking at the column code



## Column

**SAVE** CANCEL

 General 

Title \*

Age 

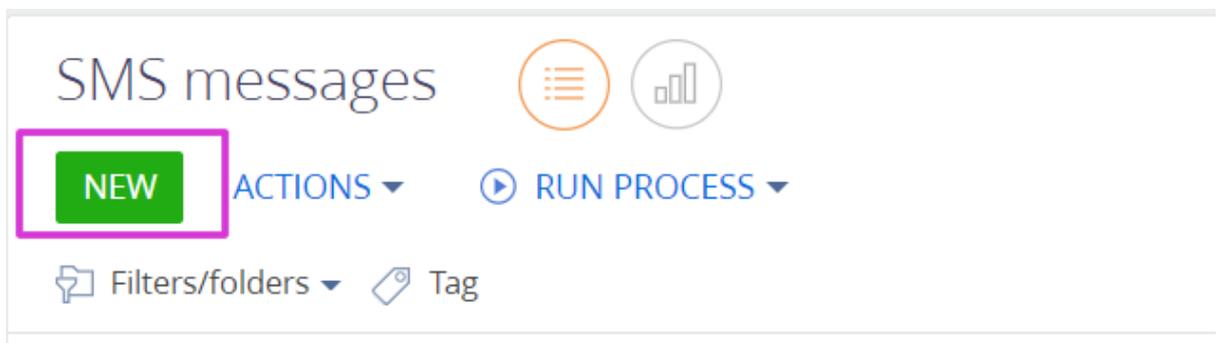
Code

Age

Decision

## 7. Sending a single SMS from the SMS section to the Contact/Account

1. Go to the SMS message section
2. Click the New button



3. A new message opens where we can fill in the Contact field

Contact



#### 4. Phone number, Contact, Account are filled in automatically (if specified)

New message

What can I do for you? >

SAVE CANCEL ACTIONS RUN PROCESS SEND SMS

VIEW

Message Text

Phone number +1 617 221 5187

Contact Andrew Baker (sample)

Account Accom (sample)

Title\* New message

Template

Message type Twilio SMS Source

Sending date

SMS status New

Mass mailing

< MAIN INFORMATION DELAYED MESSAGE TOTALS FEED >

List of SMS + : No data

#### 5. We write the text in Message Text and can press Send SMS

#### 6. Next, the standard procedure for checking the delivery status takes place.

## 8. Mass sending of SMS messages

### 8.1 Sending mass SMS from the SMS message section to a group of contacts

1. Go to the SMS message section
2. Press NEW
3. Click Mass mailing

New message

What can I do for you? >

SAVE CANCEL ACTIONS RUN PROCESS SEND SMS

VIEW

Message Text

Phone number

Contact

Account

Title\* New message

Template

Message type Twilio SMS Source

Sending date

SMS status New

Mass mailing

< MAIN INFORMATION DELAYED MESSAGE TOTALS FEED >

#### 4. The fields for a single SMS (Phone number, Contact, Account) disappear

SAVE CANCEL ACTIONS RUN PROCESS SEND SMS

Message Text

Title \* New message

Template

Message type Twilio SMS

Source

Sending date

SMS status New

Mass mailing

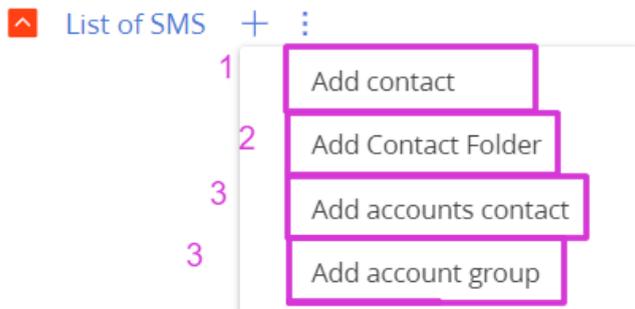
*We can not click this button, it will disappear automatically when there is more than one contact in the List of SMS details*

3. On the List of SMS details, you can select the list of contacts we need

By pressing +

- Add contact\account (1) is an opportunity to select a contact or Account one by one
- Add contact Folder (2) is the selection of a folder with a certain dynamic group of Contacts
- Add accounts contact (3) - this is a selection of Contacts that are assigned to the Account
- Add account group (4) is a dynamic group selection in the Accounts section

< MAIN INFORMATION TOTALS FEED



5. Select Add Contact Folder, a list will open where you can select any dynamic group or several groups

## Select: Contact folder



SELECT

CANCEL

ACTIONS ▾

Records selected: 1 VIEW ▾

Name ▾

SEARCH

Name ▲

- Atlanta
- Austin
- BE TECH
- Bounced
- Bounce reason
- By regions
- Campaign filters
- Cases history
- Clicked link in emails

### 6. List of SMS will be filled

< MAIN INFORMATION TOTALS FEED >

List of SMS + ⋮

Contact	Account	Phone of recipient ▾	Delivery status	Delivery date	Message text	Error message
Christine Nelson		447882471010				
James Smith		447871214006				
Lynn A. Collins		447724512078				
Christopher Brown		447522547058				
Andrew Baker (sample)		16172215187				
Scarlett Chapa		1345685582571				
Romelia Brummitt		1343809051836				

### 7. We write the text that we want to send to this group of Contacts and press the Save button

WARNING. Mass mailing

What can I do for you? > **Creatio** 8.0.4.1870 Debug VIEW ▾

SAVE CANCEL ACTIONS ▾ RUN PROCESS ▾ SEND SMS

Message Text:

Title\* WARNING. Mass mailing

Template: WARNING

Message type: Twilio SMS Source: Contact

Sending date:

SMS status: Saved

Mass mailing:

### 8. In the List of SMS details, the Message Text field will be filled in according to the text or template

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
Zulma Mara		1315694619385			Zulma Mara, Smile, you are beautiful. Happy birthday. You are 36 years old	
Zandra Haller		1327595732229			Zandra Haller, Smile, you are beautiful. Happy birthday. You are 32 years old	
Zachariah Kershner		1252908934979			Zachariah Kershner, Smile, you are beautiful. Happy birthday. You are 53 years old	
Yung Moncrief		1331555294045			Yung Moncrief, Smile, you are beautiful. Happy birthday. You are 31 years old	
Yvette Heisey		1334603267371			Yvette Heisey, Smile, you are beautiful. Happy birthday. You are 30 years old	
Youlanda Mcwhorter		1335537726819			Youlanda Mcwhorter, Smile, you are beautiful. Happy birthday. You are 30 years old	
Yong Derosé		1256013043842			Yong Derosé, Smile, you are beautiful. Happy birthday. You are 52 years old	

9. Press SEND SMS  
and Sending date is inserted  
and SMS Status changes from Saved to Sent

Title\* WARNING. Mass mailing

Template WARNING

Message type Twilio SMS Source Contact

Sending date 10/19/2022 8:23 PM

SMS status Sent

Mass mailing

10. To check for each delivered SMS, run the Business process “Refresh SMS status manually”, or it will automatically update the Delivery status field after 15 and 60 minutes

WARNING. Mass mailing

CLOSE ACTIONS RUN PROCESS SEND SMS

RUN PROCESS BY RECORD

Refresh SMS status manually

Message Text [#Name#], S Happy birthday. You are [#Age#] years old

You can view the current status and delivery date of the SMS in the List of SMS details

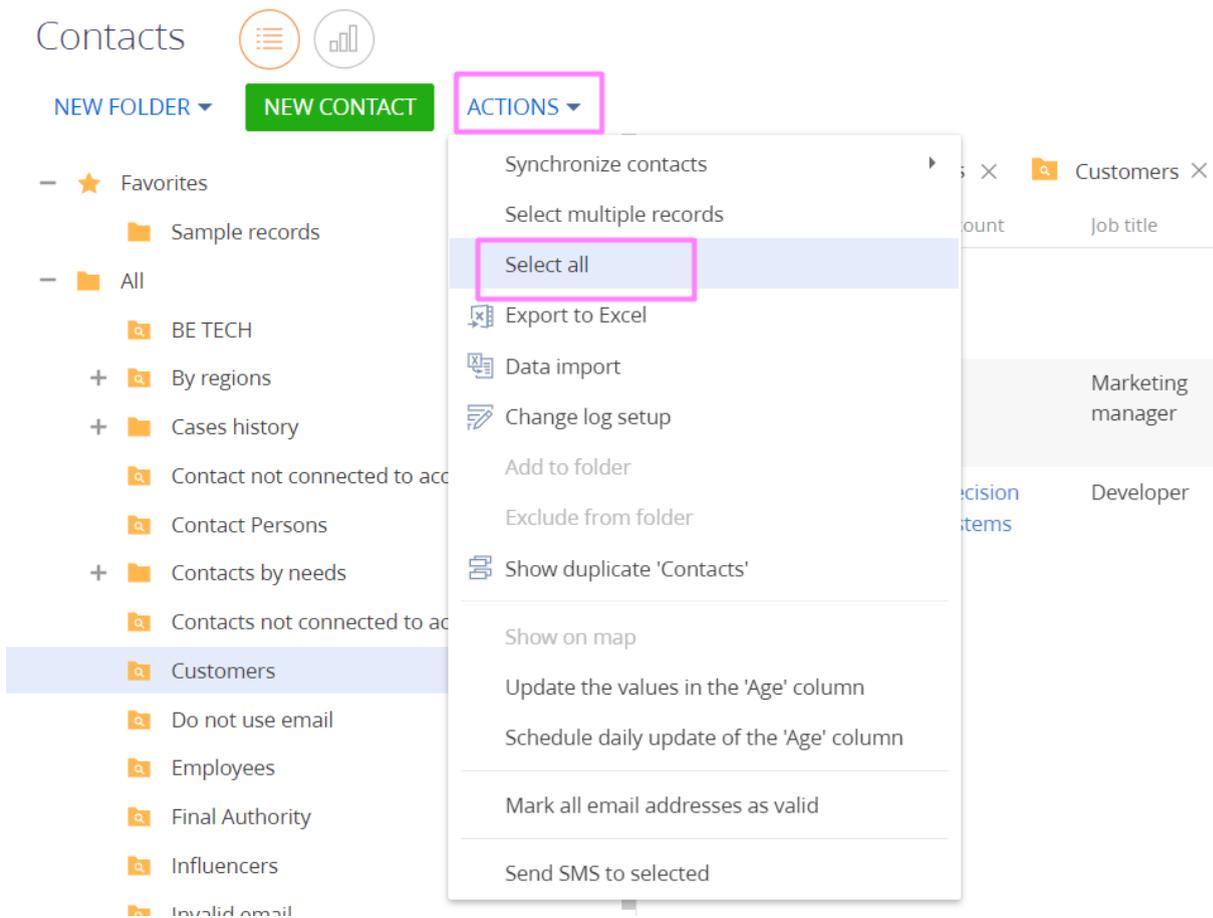
Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
Dima Gavrilov		1747306	delivered	10/19/2022 8:23 PM	Dima Gavrilov, Smile, you are beautiful. Happy birthday. You are 20 years old Your manager	
Tetiana Yaroshen		1747836	delivered	10/19/2022 8:23 PM	Tetiana Yaroshen, Smile, you are beautiful. Happy birthday. You are 22 years old Your manager	

## 8.2 Sending Mass SMS from the Contacts or Accounts section

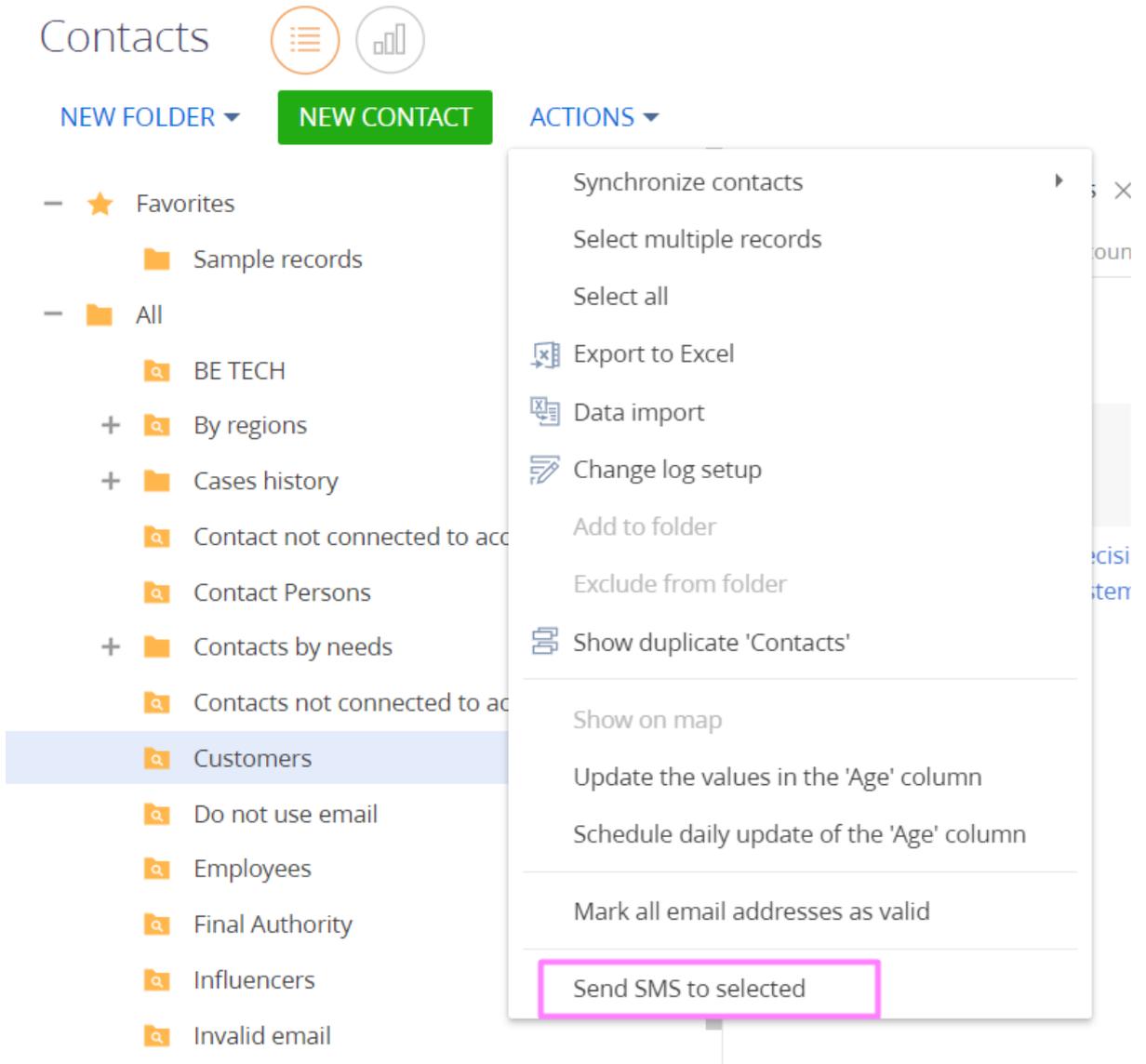
Mass SMS can be sent to only one object (for example, a group of accounts). To send an SMS to another object (leads, contacts), you need to create a new SMS

### User actions to create a mass mailing:

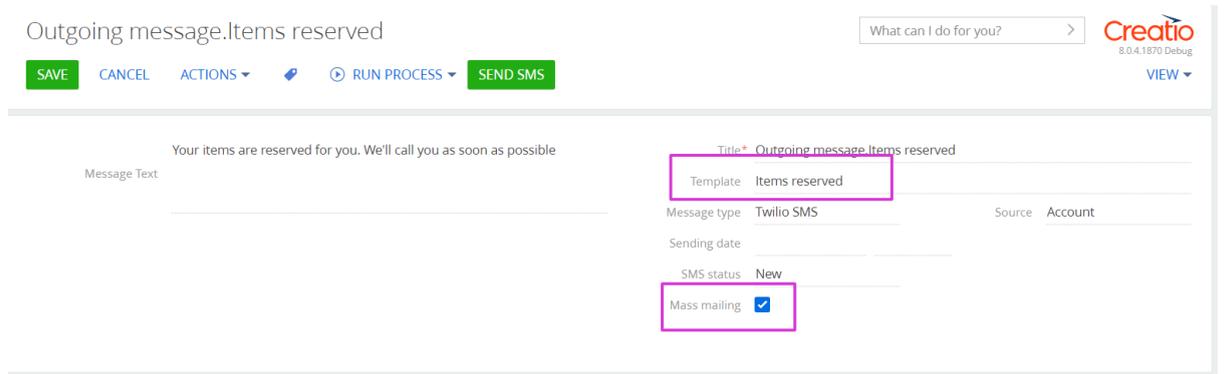
1. Create the required dynamic group in the **Contacts** or **Accounts** section
2. Select all or desired entries



3. Select "Send SMS to selected" in the Actions button



4 Fill in the fields of the SMS card. You can specify a message template



The selected Contacts/Accounts will be automatically added to the item  
Click Save so that the text is drawn for each Contact

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
	Apex Solutions	441514282834			Your items are reserved for you. We'll call you as soon as possible	
	Console Solutions	12122185471			Your items are reserved for you. We'll call you as soon as possible	
	Clearsoft	14045712302			Your items are reserved for you. We'll call you as soon as possible	
	Axiom	14045323976			Your items are reserved for you. We'll call you as soon as possible	

The dispatch is identical to the other sections mentioned before

## 9. Receiving an SMS from the Contact

- You sent an SMS to the client, he can write back to you.
- It is possible to receive SMS in the Creatio system, provided that messages are sent to the number from which your company sends SMS.
- In the Twilio system, this number is listed in the Active numbers section

**Active Numbers**

Number	Friendly Name	Capabilities				Active Configuration
		Voice	SMS	MMS	Fax	
+1 618	(618)					<b>Voice</b> Webhook to POST: https://demo.twilio.com/welcome/voice/https://125090-crm-bundle.creatio.com/0/Service... <b>Messaging</b> Webhook to POST: https://125090-crm-bundle.creatio.com/0/ServiceModel/BtcTwilioSmsController.svc/Get...

- You specify this number in Lookups - SMS Provider

**Lookups**

Filters/folders: SMS messages

Type	Description
SMS	Btc
SMS status	Btc
SMS templates	Btc
SMS Provider	Set your values into existing records. Please don't delete records.

- in the From item

Lookups

What can I do for you? Creatio 8.0.4.1870 Debug VIEW

NEW CLOSE ACTIONS

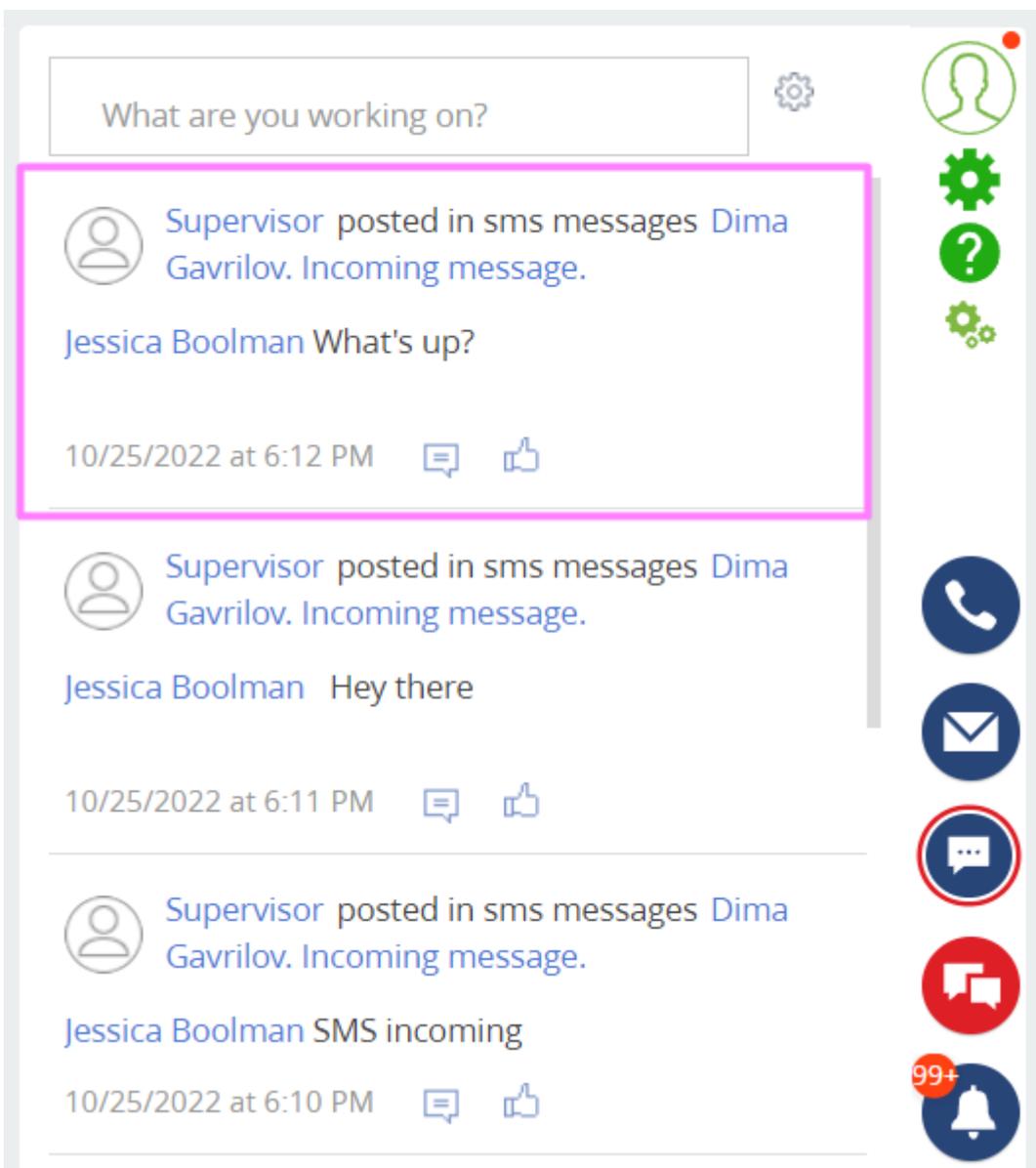
SMS Provider

Filters/folders

Name	Account SID	AuthToken	From	API key	Id
ALPHASMS			Tester	6623f0fa56180bda4738145...	22e65203-8e5e-47f0-8e88-a...
TwilioSMS	115d7c249c...	998dca775de...	+1618	-----	4bd7-a2c5-5...
TurboSms	-----	75061844bca12d2ff0a74a8...	Be Tech	https://api.turbosms.ua/	930ef58c-645b-455f-bbea-1...

So, the client sends the text of the message to your phone number +1 618 \*\*\* \*\*

In the Creatio system, the user receives an SMS notification



- The received SMS will be displayed in the SMS message section with the status Received and green color

SMS messages

What can I do for you? Creatio 8.0.4.1870 Debug

NEW ACTIONS RUN PROCESS VIEW

SMS status = Received Tag

Title	Phone number	Message Text	Sending date	Status
BE TECH. Incoming message.	+17473068289	Test 10	10/28/2022 9:52 PM	Received
	Account: BE TECH	Mass mailing: No Number of recipients: 1 Successfully delivered: 0	Created by: Jessica Boolman	Created on: 10/28/2022 9:52 PM
+17473068289. Incoming message.	+17473068289	Test 4	10/27/2022 5:01 PM	Received
		Mass mailing: No Number of recipients: 0 Successfully delivered: 0	Created by: Supervisor	Created on: 10/27/2022 5:01 PM

- If this is a response to a client that is in the system, you can view the SMS in Contact, its History and List of SMS

CONTACT INFO CONNECTED TO CURRENT EMPLOYMENT HISTORY TIMELINE ATTACHMENTS AND NOTES ENGAGE

Website events

Activities

List of SMS + :

SMS	Phone	Delivery date	Delivery statu...	Message text	Created on	Modified by
Dima Gavrilov. Incoming message.	+174 0682		received	Test twilio 2 words. 3	10/19/2022 12:53 PM	Supervisor
Dima Gavrilov. Incoming message.	+174 0682		received	Okay Biill	10/19/2022 6:09 PM	Supervisor
Dima Gavrilov. Incoming message.	+174 0682		received	Test twilio 2 words. 2	10/19/2022 12:32 PM	Supervisor
Dima Gavrilov. Incoming message.	+174 0682		received	Test twilio 2 words	10/19/2022 11:26 AM	Supervisor
Dima Gavrilov. Incoming message.	+174 0682		received	Test twilio 2 words	10/19/2022 11:26 AM	Supervisor

### 9.1. Receiving an SMS from an unknown number

There are 2 system settings that are required for this process:

Filters/folders SMS message

Name	Code
Always create a contact on incoming SMS	BtcCreateContactOnIncomingSMS
Default user for new SMS notification	BtcDefaultUserForNewSMS

OPEN COPY DELETE

Default user for new SMS notification - in this setting, you specify the user who will receive SMS notifications

Default user for new SMS notification

What can I do for you? Creatio 8.0.4.1870 Debug

CLOSE

Name\* Default user for new SMS notification Code\* BtcDefaultUserForNewSMS

Type\* Lookup  Cached

Lookup\* Contact  Save value for current user

Default value Supervisor

Description

Always create a contact on incoming SMS- in this setting, check the Default value checkbox

Always create a contact on incoming SMS

What can I do for you? > **Creatio** 8.0.4.1870 Debug

**CLOSE**

Name\* Always create a contact on incoming SMS

Type\* Boolean

Default value

Description

Code\* BtcCreateContactOnIncomingSMS

Cache

Save value for current user

- 1 - Yes - when an SMS is received from an unknown number, a new contact is created
- 2 - No - when an SMS is received from an unknown SMS number, the contact is not created

### 1. Example

A new contact with Full Name and phone number has been created

Test 3

Message Text

Phone number +174730682

Contact +174730682

Account

Title\* +174730682 Incoming message.

Template

Message type Twilio SMS

Sending date 10/27/2022 4:56 PM

Status Received

Mass mailing

MAIN INFORMATION TOTALS FEED

List of SMS + :

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
+174730682		+174730682	received		Test 3	

### 1. Example

No contact is attached to the SMS

+174730682 Incoming message.

What can I do for you? > **Creatio** 8.0.4.1870 Debug

**SAVE** **CANCEL** ACTIONS **RUN PROCESS** **SEND SMS** **VIEW**

Test 4

Message Text

Phone number +174730682

Contact

Account

Title\* +174730682 Incoming message.

Template

Message type Twilio SMS

Sending date 10/27/2022 5:01 PM

Status Received

Mass mailing

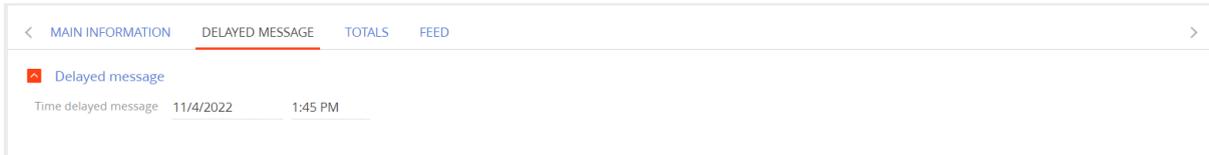
MAIN INFORMATION TOTALS FEED

List of SMS + :

No data

## 10. Sending an SMS after a certain time. Delayed message

On the Delayed message tab, set the required time at which the message will be sent.



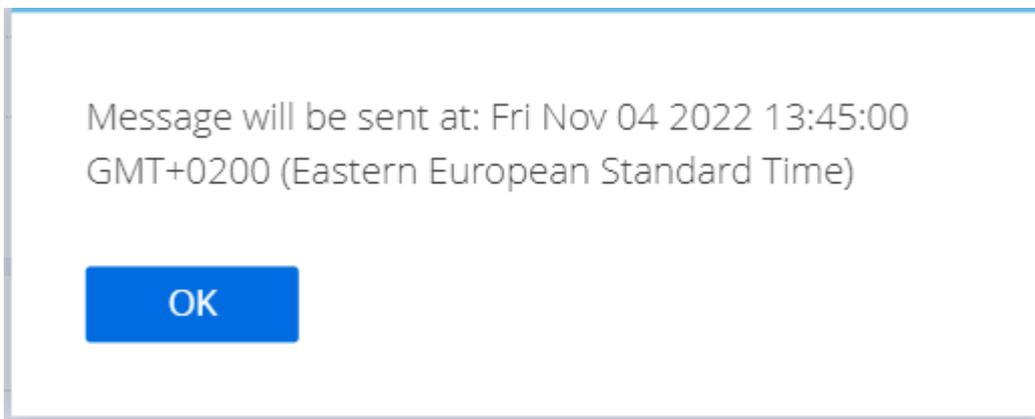
The screenshot shows a navigation bar with tabs: MAIN INFORMATION, DELAYED MESSAGE (selected), TOTALS, and FEED. Below the tabs, there is a red square icon with a white 'x' and the text 'Delayed message'. Underneath, it displays 'Time delayed message' with a date '11/4/2022' and a time '1:45 PM'.

Press **SEND SMS**

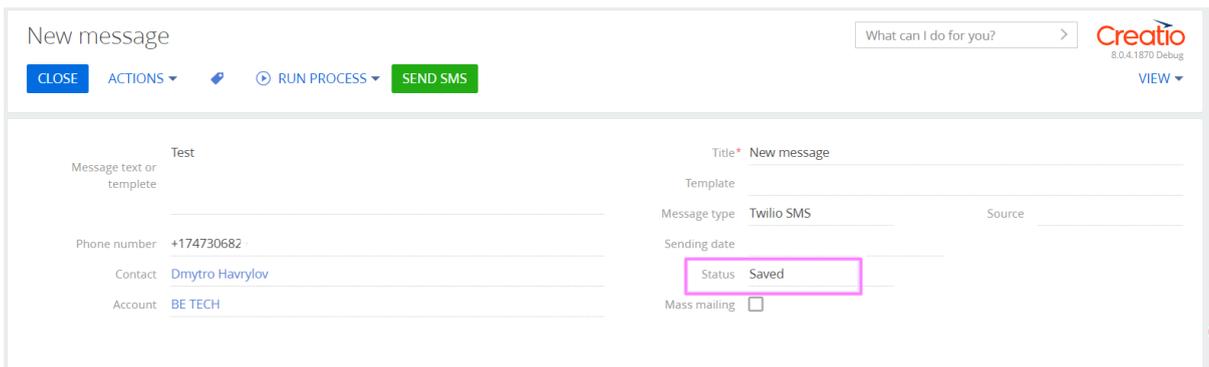


The screenshot shows the 'New message' form. At the top left, it says 'New message'. On the right, there is a search bar with the text 'What can I do for you?'. In the top right corner, the 'Creatio' logo is visible with the version '8.0.4.1870 Debug' and a 'VIEW' button. Below the search bar, there are several buttons: 'SAVE' (green), 'CANCEL', 'ACTIONS' (dropdown), a blue icon, 'RUN PROCESS' (dropdown), and 'SEND SMS' (green, highlighted).

You will receive a notification



Status will be saved before sending the SMS. After sending at the specified time, the Status will change to Sent.



The screenshot shows the 'New message' form with various fields. The 'Status' field is highlighted with a pink box and contains the text 'Saved'. The form includes fields for 'Message text or template' (containing 'Test'), 'Phone number' (+174730682), 'Contact' (Dmytro Havrylov), 'Account' (BE TECH), 'Title' (New message), 'Template', 'Message type' (Twilio SMS), 'Source', 'Sending date', and 'Mass mailing' (checkbox).