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1. Installing packages

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

≡ ⊙ +	< Lookups	What can I do for you? > Creation
SMS		VIEW -
Contacts	 Knowledge base Leads 	Eliters/folders ► SMS messages ×
Accounts	Machine Learning	Type SMS Description Descripti
SMS messages	s Opportunities	Btc SMS status Description
SMS Template	Portal Problems	Btc SMS templates
Lookups	Products	Description Btc
	Projects Query actions Recommended product Releases	SMS Provider Description Set your values into existing records. Please don't delete records.

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

Lookups				What can I do for you?	> Creatio
NEW CLOSE	ACTIONS -				VIEW -
SMS Provider					
🖓 Filters/folders 🕶					
Name	Account SID	AuthToken	From	API key	Webhook api key
ALPHASMS			Tester	6623f0fa56180bda4738	
TwilioSMS	AC670f577a3df3d394e4eba0d	6f904d17d56c0f27568f	+12184137866		adcaffdd-a70d-44ef-9fa
TurboSms		75061844bca12d2ff0a7	Be Tech	https://api.turbosms.ua/	

- 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

۲	Console <u>My first Twilio acc</u>	ount C Trial: \$14.4782 Upgrade	Q Jump to Account v Billing v Total
Deve	op Monitor	My first Twilio account Dashboard	
> # ^P N	hone lumbers	Hi there! Want to get an app running with no cod Check out our most popular use cases	e? See app samples 7
۱۱ لـې ♥	Overview	Project Info	^
>	Try it out Services Senders	TRIAL BALANCE TRIAL NUMBER \$14.48 +16185912692 © Need more numbers?	Here's how your Twilio Trial account works: You can send messages and make calls to verified numbers. Messages and calls include a note about this coming from a "Twilio trial account "
v	Settings General Log archives	REFERRAL PROGRAM Refer your network to Twilio — give \$10, get \$10. Referral Dashboard ACCOUNT SID ACCdf9239c6f55115d7c249cd0df01c6ea	Learn more about your trial x or upgrade to remove restrictions.
	WhatsApp sandbox settings	AUTH TOKEN Show	COPY PROJECT NAME My first Twilio account @
Docs	and Support	 Always store your token securely to protect your account. View best protect your account. 	ractices a

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

TwilioSMS close			What can I do for yo	u? > Crectio 8.0.4.1870 VIEW ▼
Name* API key Account SID AuthToken	TwilioSMS ACcdf9239c6f55115d7c249cd0df01c6ea 008abae1eb2a98dca775ded13fd337ee	From Manage number Password Description	+16185912692 	

 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

F						\$
Contacts				\mathbf{N}	+ New 👱 Import 👻	
Folders				$\langle \rangle$	醒 Excel	а
Full name	Туре	Account	Mobile phone	Email	Web forms and pages	+ :)
1 James Smith	Contact person	Gateway	👟 +44 (787) 121 4006	smith@gate	way-inv United Kingdom	7/4/198
2 Tran Manzo	Customer		+1 31405 244 44 14	TranManzo@	gmail.c United States	2/10/198

Select Other Landing Pages

← Web forms and pages

♦ Landingi.com	Other landing pages
Other landing pages	Other landing pages
	Import landing page data to Creatio

Click below to copy the Webhook

← Web forms and pages	;
♦ Landingi.com	Other landing pages
Other landing pages	 Import landing page data to Creatio Use the guide below to connect your web form to Creatio: Create a new or use an existing landing page with a web form on your website. Map the web form fields to the Creatio object fields. Learn more. Get the Webhook URL and use it to send submitted form data to Creatio. Learn more.
Webhook URL https://webhooks.creat	Click to get your Webhook URL io.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.

Develop Monitor	Number	Friendly		Capabilities			Active Configuration
> 冨 Studio	$\mathbf{\Lambda}$	Wallie	Voice	SMS	MMS	Fax	
 <i>F</i> Functions and Assets <i>#</i> Phone 	+1 218 413 7866 ▲ Babbitt,	(218) 413- 7866	S	Ę	ą	(îii	Voice Webhook to POST: https://demo.twilio.com/welcome/voice/ Messaging Webhook to POST: https://webhooks.creatio.com/webhooks/
Manage Active numbers						← Prev	ious Next →

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 Fl	ow, Proxy S	ervice		~
A message comes in		URL	нттр	
Webhook		https://webhooks.creatio.com/webhooks/5cc84910-54e3-44df-94d0	HTTP POST	~
Primary handler fails		URL	НТТР	
Webhook	*		HTTP POST	~
ave configuration Return to Active Nur	mbers			

≡	• + <	Lookups	What can I do for you? > Crectio
SMS	-	NEW FOLDER - NEW LOOKUP ACTIONS -	VIEW 👻
•	Contacts	- ★ Favorites 🛛 🕹	한 Filters/folders 🕶 📙 SMS messages 🗙
	contacts	— 🖿 All	Template source
⊞ı	Accounts	Accounts	Type SMS
		Activities	SMS status
sms	SMS messages	Agent desktop	SMS templates
		Calendars	SMS Provider
	SMS Template	Cases	OPEN CONTENT OPEN PROPERTIES DELETE
		Changes	
70 LOO	Lookups	Configuration items	

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

Lookups				What can I do for you?	> Creatio
NEW CLOSE	ACTIONS -				VIEW -
SMS Provider					
🖓 Filters/folders 🕶					/
Name	Account SID	AuthToken	From	API key	Webhook api key
ALPHASMS			Tester	6623f0fa56180bda4738	
TwilioSMS	AC670f577a3df3d394e4eba0d	6f904d17d56c0f27568f	+12184137866		adcaffdd-a70d-44ef-9fa
TurboSms		75061844bca12d2ff0a7	Be Tech	https://api.turbosms.ua/	

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

Owner	
Iryna Masiuk	
Web	
Deiesenselsense	
	-
Primary phone	

3. Click the Send a MESSAGE button

BE TEC	ΞH				What can I do for you?	>	Creatio
CLOSE	ACTIONS -	ø	● RUN PROCESS ▼	SEND A MESSAGE			VIEW -

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? > Crectio 8.0.4.1570 Debug VIEW
1 Message Text* 2 Phone number* 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 10 Mass mailing

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 me	ssage to BE TECH. ▼		What can I do for you? CREATED B.8.0.4.1870 Debug
Message Text*	SMS from Accounts	Title [*] Outgoing messag Sample	e to BE TECH.
Phone number* Contact	17473068289	Message type Twilio SMS Sending date Status Saved	Source Account
Account	BE TECH	Mass mailing	>
 List of SMS recipie Contact 	Account Phone of recipient Delivery sta Delivery date	Message text	Error message
	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 mes	ssage to BE 1 ▼ ● ■ RL	FECH. JN PROCESS ▼ SEND SM	ЛS		What can I do	o for you? >> Creatio 8.0.4.1970 Debug VIEW -
Message Text*	SMS from Accounts			Title ¹ Sample	Outgoing message to BE TECH.	Source Account
Phone number* Contact	17473068289			Sending date Status	10/19/2022 11:36 AM	Jource Account
Account	BE TECH			Mass mailing		
< MAIN INFORMATION	TOTALS FEE	D				>
List of SMS recipier	nts + :					
Contact	Account BE TECH	Phone of recipient	Delivery status 🔺 queued	Delivery date	Message text SMS from Accounts	Error message

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

Outgoing message to	BE TECH.	
CLOSE ACTIONS -	SEND SMS	
	RUN PROCESS BY RECORD	
SMS from Ac	Refresh SMS status manually	Ų
A window will appear with results	3	
Statuses updated		
ОК		

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	+ :						9
	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		1

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 AN	ID STRUCTURE	CONNECTED TO	TIMELINE	HISTORY	ATTACHMENTS	S AND NOTES	FEED >
~	Cases								
~	Activities								
^	List of SMS recip	oients + :							
	SMS	Status	Message text					Created on	
	Outgoing message to BE TECH.	delivered	SMS from Acco	unts				10/19/2022 9:2	9 AM
	Outgoing message to BE TECH.	delivered	Test					10/19/2022 8:4	0 AM

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

≡	• + <	SMS messages 🔲 💷						What can I do for you?	>	Creatio 8.0.4.1870 Debug
SMS	-	NEW ACTIONS -	• RUN PROCESS							VIEW -
•	Contacts	🔁 Filters/folders 👻 🖉	7 Tag							
	Accounts	Title Outgoing message to BE TECH.	Phone number 17473068289	Message Text SMS from Acco	punts			Sending date 10/19/2022 11:36 AM	Statu: Sent	5
	CMC		Account BE TECH	Mass mailing No	Number of recipients 1	Successfully delivered 1	Created by Iryna Masiuk	Created on 10/19/2022 9:	29 AM	
~	SMS messages	Title Incoming message	Phone number +17473068289	Message Text 17473068289				Sending date 10/19/2022	Statu: Recei	ved

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

Tetiana Yaroshen. Outgoing message.	What can I do for you? > Crectio
1 Message Text* 3 Phone number* 4 Contact Account	 ↓ Title* 2 Template Message type Sending date SMS status Mass mailing ↓ Tetiana Yaroshen. Outgoing message. Twilio SMS ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓
 MAIN INFORMATION TOTALS FEED List of SMS + : Contact Account 3 Phone of recipient Delivery status A Tetiana Yaroshen 17478367387 	> Delivery date Message text Error message

5. Press the "Send SMS" button

Tetiana Yaroshe	n. O	utgoing messag	ge.	What can I do for you?	>	Creati 8.0.4.1870 Det
CLOSE ACTIONS ▼	ø		SEND SMS			VIEW

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

New message	e Actions • 4	⑦ RUN PROCESS ▼	SEND SMS			What can I do for you?	>	Creatio 8.0.4.1870 Debug VIEW -
Message Text Phone number Contact Account	HI, there From smb +17584569852			Title [®] Template Message type Sending date Status Mass mailing	New message Twilio SMS New	Source		
< MAIN INFORMATION List of SMS +	N TOTALS FEE	Ð						>
			N	o data				

4. The system offers to create a new Contact

New message	2		
CLOSE ACTIONS	👻 🖉 🕟 RUN PRO	CESS ▼ SEND SMS	
	HI, there	Title*	New message
Message Text	From smb	Template	
		Message type	Twilio SMS
Phone number	+17584569852	Sending date	
Contact		Ctatus	Saved
Account		g There is no contact or account with this number. Create new record?	
< MAIN INFORMATION	N TOTALS FEED	YES NO CANCEL	
► List of SMS +	:		

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	2		_			What can I do for you?	Creatio 8.0.4.1870 Debug
CLOSE ACTIONS	V 🥐 🕑 RUN	PROCESS ▼ SEND SM	5				VIEW 🗸
	HI, there			Title*	New message		
Message Text	From smb			Template			
				Message type	Twilio SMS	Source	
Phone number	+17584569852			Sending date			
Contact	+17584569852			Status	Saved		
Account				Mass mailing			
< MAIN INFORMATION	N 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

Ne c	ew message Lose Actions	÷ • (RUN PRO	CESS - SEND SM	ИЗ			What can I do f	for you?	 Creatio 8.0.4.1870 Debug VIEW -
	Message Text Phone number Contact Account	Test 15 +17473068				Title* Template Message type Sending date Status Mass mailing	New message Twilio SMS 10/26/2022 Sent	10:09 PM	Source	
<	MAIN INFORMATION	TOTALS	FEED	Phone of recipient	Delivery status 🔦	Delivery date	Message text		Error messag	>
				+17473068	delivered	10/26/2022 10:09	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



Sub-process (Call activity)	
Create SMS with cards 1	
Which process to run?	
Create SMS with cards	[2
Process parameters	
Q Account	
[#Read sales.First item of resulting collection.Account#]	
Q Contact	
[#Read sales.First item of resulting collection.Contact#]	
Q Created SMS	
Select value	
Id RecordId	
← [#Read sales.First item of resulting collection.Id#]	
Q 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
NEW OPPORTUNITY ACTIONS ▼				VIEW 🕶
$\begin{array}{c c} \hline \\ \hline $	🔁 Filters/folders 👻 ⊘ Tag			↓≡ [†] Sort by
553 / Fast Works / Sale of Services			Hood Events	∑ Set up summaries
Account	Stage	Owner	Opportunity amo	≣≣ Select fields to display
Fast Works	Proposal	Caleb Jones	875.00	📝 Open section wizard
515 / Elite Systems / Sale of Services			Hopeful	Set up section cases
Account Elite Systems	Stage Presentation	Owner Caleb Jones	Opportunity amo 1,500.00	Den 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

Test	W	hat can I do for you? > Creatio
CLOSE NEW ORDER ACTIONS -		PRINT 👻 VIEW 👻 🥵
\rangle	RUN PROCESS	
Confidence Level	Qual Sending sales SMS Intation Proposal Contra	icting Closed won 🚽
0 100	NEXT STEPS (2) 🐧 📕 🖡 🖉 🖪 🚱	~

- 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 save close	e Actions 🗸 🏼 🥏		SEND SMS			What can I do for you? > Crection 8.04.1870 Debug TASK PROPERTIES VIEW -
Edit Page						
Message Text			1	Title* Template	New message	1
Phone number	15811155888	2		Message type Sending date SMS status	Twilio SMS	Source Opportunity
Account				Mass mailing		
< MAIN INFORMATIO	N DELAYED MESS	AGE TOTALS FEED				\$
▲ List of SMS +	÷					
Contact Dmytro Havrylov	Account 3	Phone of recipient 2 15811155888	Delivery status 🔺	Delivery date	Message text	Error message

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 y	
SMS	-	NEW ACTIONS -				VIEW
		🔁 Filters/folders 🗸				
\sim	SMS messages	Name	Templates	SMS type	Source of template	Created on
	Lookups	Orders	[#Contact Name#] Your package [#Number#] has been shipped.	Twilio SMS	Order	9/24/2022 10:01 AM
ц,	Lookups	Event Invitation	We invite you to the event	Twilio SMS	Contact	9/24/2022 10:01 AM
	Accounts	WARNING	[#Name#], Smile, you are beautiful. Happy birthday. You are [#Age#] years old	Twilio SMS	Contact	9/29/2022 1:52 PM
•	Contacts	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
8	SMS Template	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? > Creation 8.0.4.1870 Debug VIEW ~
Name*	SMS type Twilio SMS	
< 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

WARNING			
CLOSE			
>			
Name	WARNING		
Source of template	Contact	SMS type	Twilio SMS
< TEMPLATE			
	[#Name#], Smile, you are beautiful.		
	Happy birthday. You are [#Age#] years old		
Templates			

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

Test Invoice close		What can I do for you? > Crection 8.0.4.1870 Debug VIEW
Name*	Test Invoice SMS type Twilio SMS	
C TEMPLATE	[#Account.Name#] on your [#Number#] account, the payment amount is [#Amount#] \$ Make the payment on the https://fondy.ua website	>

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

Nicholas Mason		What can I do for you?	Creatio ()
CLOSE ACTIONS - 🖌 SENT	D A MESSAGE		VIEW -
			Open section wizard
2	NEXT STEPS (0) 🐛 🔟 📕 🎽 🥥 🖪 🔕		Set up section cases

SAVE CANCEL	
E General	
Title *	
Age	
Code	
Age	

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

SMS m	nessages 🔳 💷
NEW	ACTIONS ▼ () RUN PROCESS ▼
🔁 Filters/1	folders 👻 🧷 Tag

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



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

Message Text	Template
	Message type Twilio SMS Source
Phone number +1 617 221 5187	Sending date
Contact Andrew Baker (sample)	SMS status New
Account Accom (sample)	Mass mailing

- 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 save cancel	ACTIONS -	ø	⑦ RUN PROCESS ▼	SEND SMS				What can I do for you?	>	Creatio 8.0.4.1870 Debug VIEW -
Message Text					∎)-	Title* Template Message type	New message Twilio SMS	Source		
Phone number						Sending date				
Contact						SMS status	New			
Account						Mass mailing				

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

New mes	SSAge NCEL	ACTIONS -	ø	SEND SMS			What can I do for you?	>	Creatio 8.0.4.1870 Debug VIEW -
Messa	ige Text				 Title* Template Message type Gending date SMS status Mass mailing	New message Twilio SMS New	Source		

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



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

Select: Contact folder

	SE	LECT CANCEL ACTIONS -	Records selected: 1 VI	EW 🕶
	Na	me		
	Nam	ne 🔨		
		Atlanta		
		Austin		
		BETECH		
		Bounced		
		Bounce reason		
		By regions		
		Campaign filters		
		Cases history		
		Clicked link in emails		
6.	List	t 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

INING. Mass maining			What can I d	o for you? > Creatio
CANCEL ACTIONS 🗸 🏈 🕑 RUN PROCESS 🛪 SEN	ID SMS			VIEW -
[#Name#], Smile, you are beautiful.	Ŷ	Title*	WARNING. Mass mailing	
Message Text Happy birthday. You are [#Age#] years old		Template	WARNING	
		Message type	Twilio SMS	Source Contact
		Sending date		
		SMS status	Saved	
		Mass mailing	2	

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

 \times

<	MAIN INFORMATION	TOTALS FEED					2
^	List of SMS + :						
	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	
	Yuette Heisey		1334603267371			Yuette 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 Derose		1256013043842			Yong Derose, Smile, you are beautiful. Happy	

9. Press SEND SMS

and Sending date is inserted and SMS Status changes from Saved to Sent

Title*	WARNING. N	lass mailing			
Template	WARNING				
Message type	Twilio SMS		Source	Contact	
Sending date	10/19/2022	8:23 PM			
SMS status	Sent				
Mass mailing	 Image: A second s				

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 BY RECORD					
>			[#Name#],	Refresh SMS status manually					
		Message Text	Happy birth	day. You are [#Age#] years old					

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

<	MAIN INFORMATION	TOTALS FEED						>
^	List of SMS + :							
	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

Contacts 🔳 💷			
NEW FOLDER NEW CONTACT	ACTIONS -		
— 🛨 Favorites	Synchronize contacts	; × 🗖	Customers $ imes$
Sample records	Select multiple records	ount	Job title
— 🖿 All	Select all		
a BE TECH	🛒 Export to Excel		
+ a By regions	🔄 Data import		Marketing
+ 📔 Cases history	📅 Change log setup		manager
Contact not connected to account of the second s	Add to folder	rision	Developer
Contact Persons	Exclude from folder	items	Developer
+ 📄 Contacts by needs	🗟 Show duplicate 'Contacts'		
Contacts not connected to ad	Show on map		
Customers	Update the values in the 'Age' column		
Do not use email	Schedule daily undate of the 'Age' column		
Employees			
Final Authority	Mark all email addresses as valid		
a Influencers	Send SMS to selected		
Invalid amail		-	

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

Outgoing me	ssage.ltems reserved	What can I d	do for you? > Creatio
SAVE CANCEL	ACTIONS ▼		VIEW 🕶
	Your items are reserved for you. We'll call you as soon as possible	Title* Outgoing message.Items reserv	ved
Message Text		Template Items reserved	
		Message type Twilio SMS	Source Account
		Sending date	
		SMS status New	
		Mass mailing 🔽	

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

MAIN INFORMATION	TOTALS FEED					
List of SMS + :						
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	
	A	4747000000			V	

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

Develop Monitor	Active	Numbe	ers				Buy a number →			
 # Phone Numbers Manage 	Inventory Filters	s •			Voice U	ation Filters	Filter Reset filters			
Active numbers	Number Friendly Name			Capabilities			Active Configuration			
Released			Voice	SMS	MMS	Fax				
Buy a number Verified Caller IDs TwiML apps > Port & Host	+1618 Eldorado, IL, US	(618)	S	Ę	Ø	ß	Voice Webhook to POST: https://demo.twilio.com/welcome/voice/https://125090-crm-bundle.creatio.com/0/Servic Messaging Webhook to POST: https://125090-crm-bundle.creatio.com/0/ServiceModel/BtcTwilioSmsController.svc/Get			

- You specify this number in Lookups - SMS Provider

≡	• + <	Lookups	What can I do for you? >> Crectio
SMS	-	NEW FOLDER ▼ NEW LOOKUP ACTIONS ▼	VIEW 🕶
•	Contacts	Knowledge base	🚰 Filters/folders 🛩 📜 SMS messages X
	Accounts	 Leads Machine Learning 	Type SMS Description Brc
sms	SMS messages	Marketing campaignsOpportunities	SMS status Description
		Orders Portal	Btc SMS templates
	SMS lemplate	Problems	Description Btc
Â	Lookups	Products	SMS Provider Description
	Projects Query actions		Set your values into existing records. Please don't delete records.
		Recommended product	OPEN CONTENT OPEN PROPERTIES DELETE
		Releases	

- in the From item

Lookups New Close	ACTIONS -			What can I do for ye	ou? > Creatio
SMS Provider				/	
Name	Account SID	AuthToken	From	API key	ld
ALPHASMS			Tester	6623f0fa56180bda4738145	22e65203-8e5e-47f0-8e88-a
TwilioSMS	115d7c249c	a98dca775de	+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

What are you working on?	\bigcirc
Supervisor posted in sms messages Dima Gavrilov. Incoming message. Jessica Boolman What's up?	* ? ?
10/25/2022 at 6:12 PM 📮 🖒	
Supervisor posted in sms messages Dima Gavrilov. Incoming message. Jessica Boolman Hey there	
10/25/2022 at 6:11 PM 📮 🖒	
Supervisor posted in sms messages Dima Gavrilov. Incoming message. Jessica Boolman SMS incoming 10/25/2022 at 6:10 PM 🗐 🖆	

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

SMS message NEW ACTIONS · 쥿 SMS status = Re	es i≣ d → RUN PROCES ceived × <7 Tag	5 🕶				What can I do for you?	> (VIEW -
Title BE TECH. Incoming message.	Phone number +17473068289	Message Text Test 10 Mass mailing No	Number of recipients	Successfully delivered 0	Created by Jessica Boolman	Sending date 10/28/2022 9:52 PM Created on 10/28/2022 9:1	Status Received	
Title +17473068289. Incoming message.	Phone number +17473068289	Message Text Test 4 Mass mailing No	Number of recipients 0	Successfully delivered 0	Created by Supervisor	Sending date 10/27/2022 5:01 PM Created on 10/27/2022 5:0	Status Received	

- 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	ATTAC	HMENTS AND NO	DTES	ENGAGEN >
\sim	Website events									
\checkmark	Activities									
^	List of SMS +									
	SMS	Phone De	elivery date	Delivery statu	Message t	ext		Created on	Modifie	d by
	Dima Gavrilov. Incoming message.	+174 0682		received	Test twilic	2 words. 3		10/19/2022 12:53 PM	Supervi	isor
	Dima Gavrilov. Incoming message.	+174 0682		received	Okay Biill			10/19/2022 6:09 PM	Superv	isor
	Dima Gavrilov. Incoming message.	+174 0682		received	Test twilic	2 words. 2		10/19/2022 12:32 PM	Supervi	isor
	Dima Gavrilov. Incoming message.	+174 0682		received	Test twilic	2 words		10/19/2022 11:26 AM	Supervi	isor
	Incoming moscogo	17/70		received	17/72060	200		10/10/2022	Cuponi	icor

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						
OPEN COPY DELETE							
Default user for new SMS notification	BtcDefaultUserForNewSMS						

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

Default user f	or new SMS notification			What can I do for you?	>	Creatio
CLOSE						5
Name*	Default user for new SMS notification	Code*	BtcDefaultUserFo	orNewSMS		
Туре*	Lookup	Cached	~			
Lookup*	Contact	Save value for current				
Default value	Supervisor	u				
Description						

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

Always create	e a contact on incoming SMS		What can I do for you?	> Cre 8.0.4.1	IS70 Debug
>	Always create a contact on incoming SMS	Code* BtcCreateCont	actOnIncomingSMS		
Type* Default value	Boolean	Cached Save value for current user			
Description					

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

Message Te		Test 3			Title* Template	+174730682			
					Message type	Twilio SMS		Source	
	Phone number	+174730682			Sending date	10/27/2022	4:56 PM		
	Contact	+174730682			Status	Received			
	Account				Mass mailing				
<	MAIN INFORMATION	TOTALS FEED							>
	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 save cancel	Actions ✓ ✓ O RUN PROCESS SEND SMS			What can I do for yo	u? >	Creatio 8.0.4.1870 Debug VIEW -
Message Text Phone number Contact Account	Test 4 +174730682	Title ⁴ Template Message type Sending date Status Mass mailing	+174730682 Twilio SMS 10/27/2022 Received	Incoming message.	Source	
< MAIN INFORMATION List of SMS +	TOTALS FEED	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.



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

New message				What can I do for you?	Creatio 8.0.4.1870 Debug
CLOSE ACTIONS	S ▼				VIEW 🕶
	Test	Title* N	New message		
Message text or templete		Template			
		Message type	wilio SMS	Source	
Phone number	+174730682	Sending date			
Contact	Dmytro Havrylov	Status S	aved		
Account	BE TECH	Mass mailing		-	