Dialpad SMS User Guide

Introduction

Dialpad SMS/MMS Connector for Creatio is an integration module that enables full two-way SMS and MMS communication directly inside Creatio.
The connector allows users to:

- Send and receive SMS/MMS messages through Dialpad.
- Use Creatio Omnichannel for routing and processing incoming messages.
- Automate communication via business processes and marketing campaigns.
- Track message delivery statuses directly within Creatio.

This guide explains how to configure the connector, including setting the Dialpad API key and defining chat channels for the Dialpad SMS channel.

1. Configure the Dialpad SMS API Key

1. Open **System settings** in Creatio.
2. Locate the system setting **SM Dialpad SMS/MMS**.
3. Open the setting record.
4. Enter the **Dialpad API Key** into the value field.
5. Click **Save**.

This API key allows Creatio to authenticate outbound SMS/MMS requests through Dialpad.

2. Configure Chat channel for DialpadSMS

1. Open **Chat settings** from the main menu.
2. Click **Add** and select **DialpadSMS** as the chat provider.
3. Fill in the configuration form:

Name

Provide a meaningful name for this channel (e.g., "Dialpad SMS Queue" or "Support SMS Line").

Source

Enter the Dialpad phone number in E.164 format (e.g., **+11234567890**).

Assign to

Select **All agents**, or choose a specific queue/group.

4. Click **Save**.

Once saved, Creatio will route incoming SMS/MMS messages from the specified number into the Omnichannel agent interface.

3. Using SMS Sending in Business Processes

To send SMS messages from business processes in Creatio, you must use the pre-built UserTask named **"Send Dialpad SMS"**. This UserTask is designed to integrate seamlessly with your business process workflows, enabling automated SMS communication via Dialpad.

Send Dialpad SMS

Disclaimer

The connector uses a **WebSocket-based mechanism** to receive real-time events from Dialpad, including:

- Incoming SMS/MMS messages
- Delivery status updates

This approach allows Creatio instances located **inside private networks** to maintain an active connection to Dialpad without exposing inbound ports.

However, this requires the Creatio application to maintain a **continuously active WebSocket connection**.
If the application server or web server is not configured for persistent long-running connections, **incoming messages and delivery status updates may be missed**.

Please ensure your web server and hosting environment support persistent connections for production use.