



# BSG connector for Creatio

User manual

# 1 CONTENTS

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2 Configuration .....	3
3 Usage .....	6
3.1 Single SMS Delivery .....	6
3.2 Mass SMS Delivery .....	7
3.3 Check balance .....	9
3.4 SMS Message Templates .....	10
3.5 Template tags .....	14
3.6 Override Sender name .....	14
3.7 Usage in Creatio process .....	15
3.8 Using connector from Creatio scripts .....	17
4 Troubleshooting .....	20

## 2 CONFIGURATION

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You need to configure BSG Connector before usage: specify API key and default sender name.

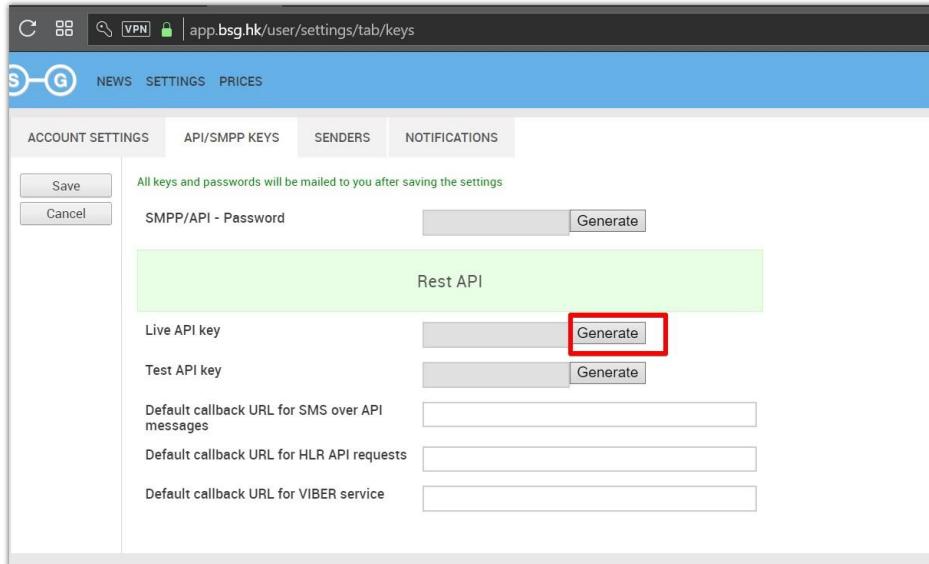
To reach configuration page for BSG Connector please go to "System Designer":  
Then in 'Import and integration' section click on 'BSG Connector Settings' link:



The modal dialog with BSG Connector settings:

The image shows a modal dialog box titled 'BSG Connector Settings'. Inside the dialog, there are two input fields. The first field is labeled 'API Key' with a red asterisk indicating it is required; the value 'xxx' is entered. The second field is labeled 'Default Sender name' with a red asterisk; the value 'Santa' is entered. At the bottom left of the dialog is a blue link labeled 'Get BSG Key'. At the bottom right are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button.

If you don't have API key for BSG service – please click on link 'Get BSG Key' and authenticate in BSG panel:



Press 'Generate' button and copy received API key:

live\_1omLRXzXXXXXXXXXXXX – for production

or

test\_1omLRXzXXXXXXXXXXXX – for testing

Put received key into 'API Key' input field:

BSG Connector Settings

API Key: live\_XXXXXXXXXXXXXX

Default Sender name: Santa

Get BSG Key

SAVE CANCEL

and press 'Save' button.

On success you'll see the confirmation window.

There is also the direct link to connector's configuration page right from main form, but only if current user is administrator:

Contact\* Andrew Baker (sample) (+1 617 221 5187)

Tags Not filled in Encode to latin

Compose SMS text message.

70 characters left (1 SMS).

Templates [Link BSG Account](#)

**SEND SMS**



If connector was configured before – there will be a link to disconnect it from BSG Service instead:

Contact\* Andrew Baker (sample) (+1 617 221 5187)

Tags Not filled in Encode to latin

Compose SMS text message.

70 characters left (1 SMS).

Templates Balance [Unlink BSG account](#)

**SEND SMS**



## 3 USAGE

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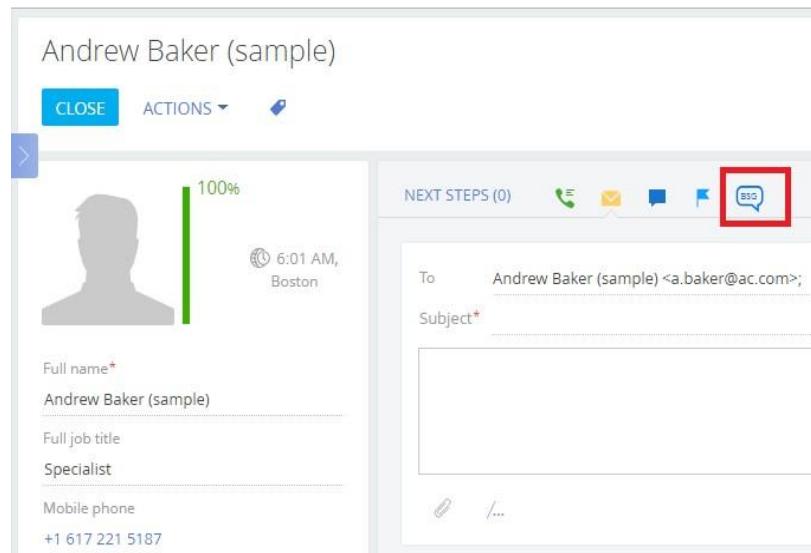
Our BSG Connector is designed for common use cases and has key features:

- single SMS delivery,
- mass delivery,
- message templates,
- template tags
- balance check
- count SMS messages

If your business require more specific features or you need advanced customization – feel free to contact our support team [support@bsg.world](mailto:support@bsg.world)

### 3.1 SINGLE SMS DELIVERY

Main form for SMS sending is on 'BSG' tab, top section of selected contact page:



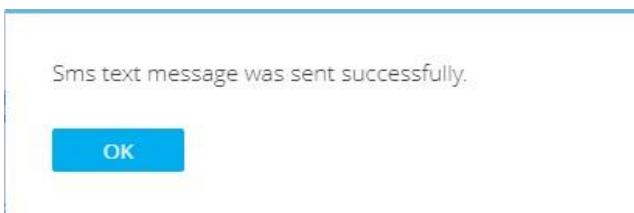
Main form in details:

The screenshot shows a web-based SMS composition interface. At the top, there's a contact selector with 'Contact\*' set to 'Andrew Baker (sample) (+1 617 221 5187)' and a red number '1.' next to it. Below it is a dropdown for 'Tags' with 'Not filled in' selected, a red number '2.', and an 'Encode to latin' checkbox with a red number '10.' next to it. A large text area for 'Compose SMS text message' is labeled with a red number '3.'. Below this area, there's a placeholder 'Enter a value' with a red number '4.' and a character count '70 characters left (1 SMS)' with a red number '5.'. At the bottom, there are links for 'Templates' (red number '6.'), 'Balance' (red number '7.'), and 'Unlink BSG account' (red number '8.'). On the right side, there's a blue 'SEND SMS' button with a red number '9.' and a small circular icon containing numbers 6, 8, and 9.

Control elements:

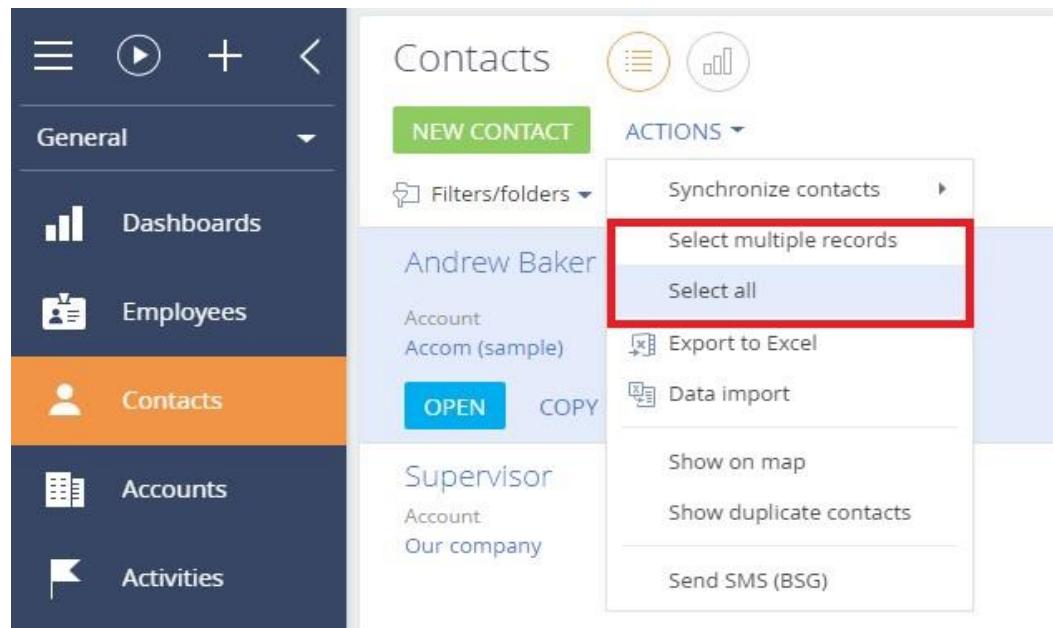
1. Selected contact and the phone that SMS message will be send to
2. Dropdown with allowed tags
3. Message text
4. Validation messages
5. Symbol counter with split for actual SMS messages
6. Select pre-defined message template
7. Check balance in BSG Service (if connected)
8. Link/Unlink BSG Account from connector
9. Send SMS action button
10. Encode message into translit

On successful delivery you will see notification window:

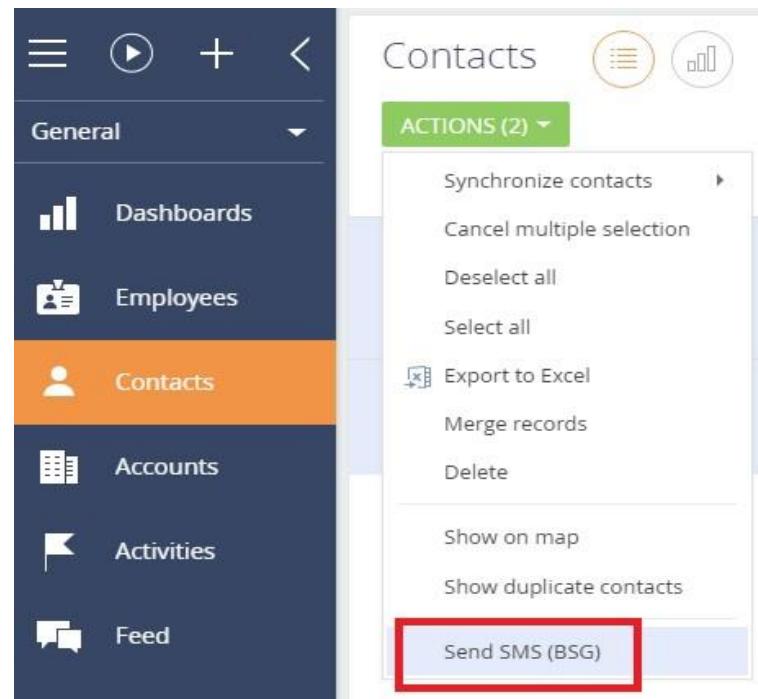


### 3.2 MASS SMS DELIVERY

Our BSG connector allows mass delivery of SMS messages to multiple selected contacts (or to all). To do that, you need to go to 'Contacts' section and in 'Actions' menu selects 'Select multiple records' or 'Select all':



Next, after finish selecting of required contacts, you'll need to select 'Send SMS (BSG)' option:



There will be a modal dialog with details for mass SMS delivery:

---

Send SMS to 6 contacts 1.

Encode to latin  
 6.

Tags  
7.

Message  
\*

2.

Templates 3.  
70 characters left (1 SMS). 4.

5. **SEND** CANCEL

---

Control elements:

1. Number of selected contacts
2. SMS message text, supports tags input
3. Selection of pre-defined message template
4. Symbol counter with split for actual SMS messages
5. Action button to start mass delivery
6. Encode message to latin
7. Select tags for SMS message substitutions (see below)

### 3.3 CHECK BALANCE

This option will be available only after successful linking with BSG Account. To see your balance in BSG, click on 'Balance' link in main connector form:

## Andrew Baker (sample)

CLOSE ACTIONS ▾

100%  
6:41 AM, Boston

Full name\*  
Andrew Baker (sample)

Full job title  
Specialist

Mobile phone  
+1 617 221 5187

Business phone  
+1 617 440 2031

Email

NEXT STEPS (0)

Contact\* Andrew Baker (sample) (+1 617 221 5187)

Tags Not filled in

Encode to latin

Compose SMS text message.

70 characters left (1 SMS).

Templates **Balance** Unlink BSG account

There will be modal window with balance details:



### 3.4 SMS MESSAGE TEMPLATES

Our connector allows to create, use and manage SMS message templates. To use this feature please click on 'Template' link from main connector form (or from mass delivery form):

Andrew Baker (sample)

CLOSE ACTIONS ▾

Full name\*  
Andrew Baker (sample)

Full job title  
Specialist

Mobile phone  
+1 617 221 5187

Business phone  
+1 617 440 2031

NEXT STEPS (0)

Contact\* Andrew Baker (sample) (+1 617 221 5187)

Tags Not filled in Encode to latin

Compose SMS text message.

70 characters left (1 SMS).

**Templates** Balance Unlink BSG account

Send SMS to 6 contacts

Encode to latin

Message   
  
\*

**Templates**

70 characters left (1 SMS).

SEND CANCEL

Main screen for SMS message templates:

Select: SMS templates

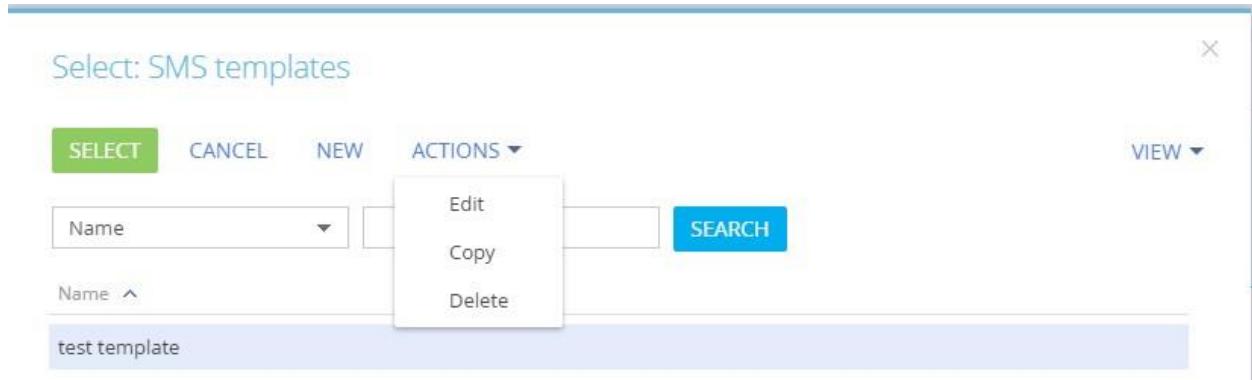
**SELECT** 1. **CANCEL** **NEW** 2. **ACTIONS** ▾ **VIEW** ▾

Name	SEARCH	3.
Name ^		
test template		

Control elements:

1. Select current template from list and back to delivery form
2. Add new template
3. Template search

On template select, there are common dictionary actions allowed:



And default control of current view:

The screenshot shows a modal window titled "Select: SMS templates". At the top, there are buttons for "SELECT", "CANCEL", "NEW", and "ACTIONS ▾". Below these are search fields for "Name" and a "SEARCH" button. To the right, a "VIEW ▾" dropdown menu is open, showing options like "Sort by" (with "Name (ascending order)" selected) and "Select fields to display".

Filter options for template search:

The screenshot shows a modal window titled "Select: SMS templates". At the top, there are buttons for "SELECT", "CANCEL", "NEW", and "ACTIONS ▾". Below these is a "VIEW ▾" dropdown menu. On the left, a sidebar lists filter options: "Name" (selected), "Created by", "Description", "Modified by", and "Text".

To create the new template, press 'New' button, there will be modal window:

The screenshot shows a modal window titled "Shiny new template". At the top, there are buttons for "SAVE" (highlighted in green) and "CANCEL". A red number "1." is placed above the buttons. Below the buttons is a text input field containing "Name\* Shiny new template" with a red number "2." next to it. A navigation bar at the bottom shows "TEMPLATE" (highlighted in orange) and "Template". A red number "3." is placed next to the "Template" link. The main area contains the template content: "Happy New Year , #name# !".

Control elements:

1. Action button to Save template

2. Template name
3. SMS message text

SMS message also allows tags input.

### 3.5 TEMPLATE TAGS

Our connector supports tags in SMS messages. To use them you need to put special keyword into message text and it will be automatically replaced to actual contact details.

Below is the list of supported tags:

Tag	Description
#name#	Full name of a contact
#GivenName#	First name
#MiddleName#	Middle name
#Surname#	Surname
#JobTitle#	Job Title
#BirthDate#	Date of birth
#MobilePhone#	Mobile phone
#Phone#	Work phone
#HomePhone#	Home phone
#Skype#	Skype
#Email#	Email
#Address#	Address
#Zip#	Zip

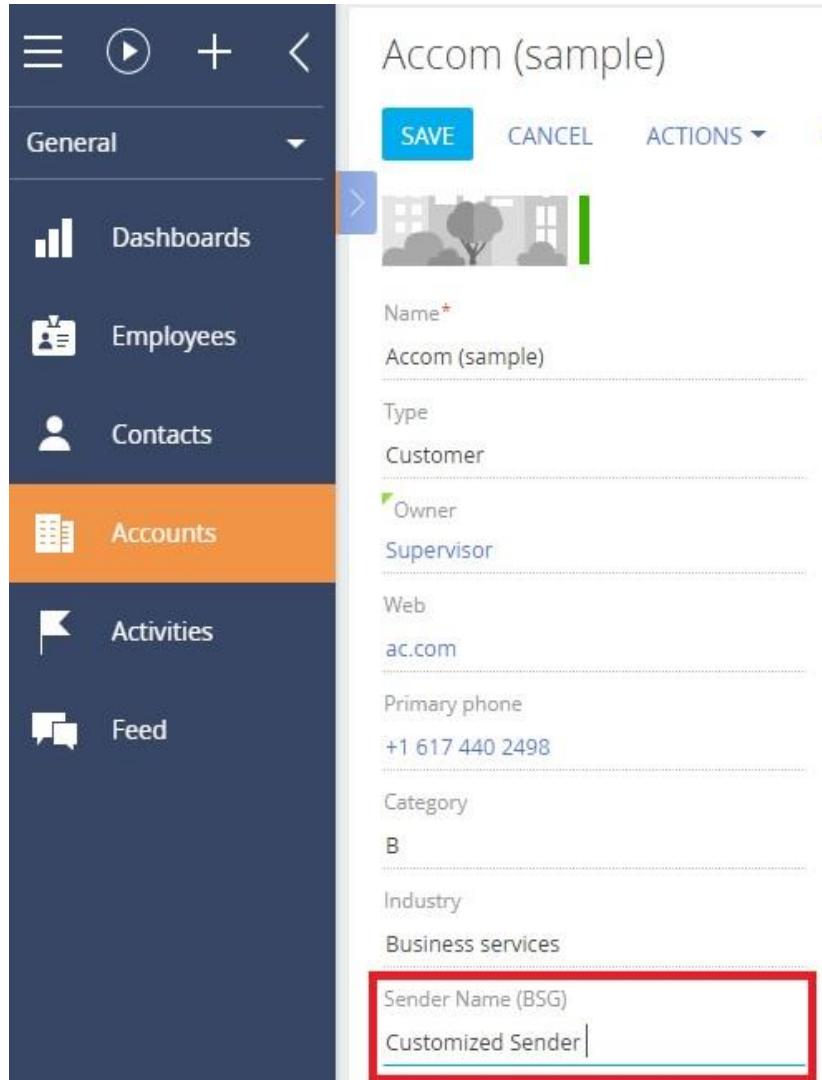
All tags are case insensitive, so all of them will work: #name# , #NAME# , #Name#

### 3.6 OVERRIDE SENDER NAME

Our connector allows to override default sender name for a value specified in associated Account.

There is specific field 'Sender name (BSG)' that our connector adds on install to Account entity, if this field is filled – the value will be used for all contacts associated with this Account entity.

To use this feature, go to Account page:



And fill 'Sender Name (BSG)' field, then press 'Save' button.

### 3.7 USAGE IN Creatio PROCESS

Our connector allows to use BSG service delivery as step in Creatio process. Below is step-by-step sample of how to add such step into new Creatio process.

Go to 'Process library'.

Press 'New process' button:

From the list on left (titled 'User actions') select 'Send SMS' option and drag it to Creatio diagram:

The line from start of process should be connected to our step, same as line from our step to 'end of process' point.

Now you'll need to fill the step parameters from (on right).

These parameters are typically filled from previous steps of Creatio process, so delivery step will take them from environment of current process.

To check that we created process correctly, press 'Run' button:

## Business process 1

SAVE **RUN** CANCEL ACTIONS ▾



### 3.8 USING CONNECTOR FROM Creatio SCRIPTS

Our connector allows to be used from so-called 'Script Task' – the special step in Creatio process flow with custom script inside.

Below is step-by-step sample of how to use that for mass SMS delivery.

1. Navigate to 'Process library' section and create new Creatio process, add 'Read data' and 'Script Task' steps, as on screen below:

The screenshot shows the 'Process library' interface. On the left, there's a sidebar with categories like 'Process elements', 'Start events', and specific icons for 'Script task', 'Connect process to object', 'User task', and various signal types. The main area is titled 'Test mass SMS delivery' and contains a process flow: a green start event leads to a 'Read data 1' step (blue square with a magnifying glass icon), which then leads to a 'Script task 1' step (blue square with a script icon), and finally ends at a red end event. The right side of the screen shows the process details: 'Process' name is 'Test mass SMS delivery', and the 'SETTINGS' tab is selected. The 'PARAMETERS' tab shows a note: 'Element has no parameters'. The 'METHODS' tab is also visible.

2. Click on 'Read data' step and configure parameters like on screen below:



Which data read mode to use?

Read collection of records

Which object to read data from?

Contact

How to filter records?

Actions ▾

AND

+ Add condition

Read first 50 records

How to sort records?

+ Add

What record data should the process read?

Read data from selected columns only

Id

+ Add column

Connector expects the collection of Ids from 'Contact' entity only, so all other fetched fields will not be used.

3. Click on 'Script Task' step and paste the code below:

```
var log = global::Common.Logging.LogManager.GetLogger("BSGConnector");

var userConnection = this.Get<UserConnection>("UserConnection");

log.Info("test process has been started ");

try {
```

```

var colSource = Get<ICompositeObjectList<ICompositeObject>>("ReadDataTask1.ResultCompositeObjectList");
var listIds = new List<Guid>();

foreach (var parameter in colSource)
{
    Guid value;
    parameter.TryGetValue("Id", out value);
    listIds.Add(value);
    log.Info(string.Format("parameter {0}", value));
}

log.Info(string.Format("total number of records: {0}", listIds.Count));

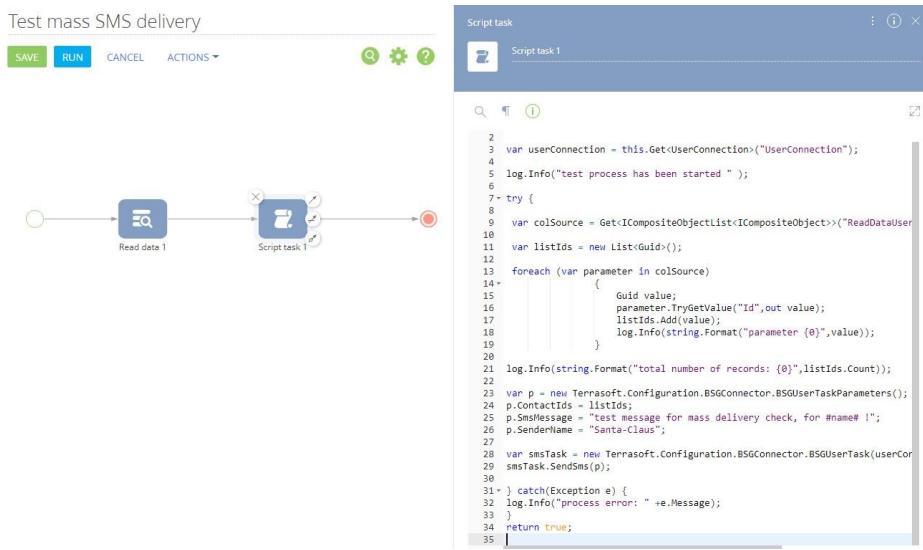
var p = new Terrasoft.Configuration.BSGConnector.BSGUserTaskParameters(); p.ContactIds
= listIds;
p.SmsMessage = "test message for mass delivery check, for #name# !";
p.SenderName = "Santa-Claus";

var smsTask = new Terrasoft.Configuration.BSGConnector.BSGUserTask(userConnection);
smsTask.SendSms(p);

} catch(Exception e) { log.Info("process error: "
+e.Message);
}
return true;

```

Should look like on screen below:



This test process will write log records to default log file (Common.log), also these records could be viewed in runtime with 'Telemetry extension' (see below):

Real-time logging

Logger\* BSGConnector

Level ALL

JS query:

```

BSGConnector 8:41:20 PM.190 checking Name
BSGConnector 8:41:20 PM.190 got value = on index 4
BSGConnector 8:41:20 PM.190 checking= MiddleName
BSGConnector 8:41:20 PM.190 got value =Andrew on index 3
BSGConnector 8:41:20 PM.174 checking= GivenName
BSGConnector 8:41:20 PM.174 got value =Baker on index 2
BSGConnector 8:41:20 PM.174 checking= Surname
BSGConnector 8:41:20 PM.174 replaceInMessage origMsg тестовое сообщение массовой отправки для #name# !
BSGConnector 8:41:20 PM.158 contact query created
BSGConnector 8:41:20 PM.158 getinfo contactId c4ed336c-3e9b-40fe-8b82-5632476472b4
BSGConnector 8:41:20 PM.158 called getParseInfo()
BSGConnector 8:41:20 PM.143 total size 6
BSGConnector 8:41:20 PM.143 created BSG client2 with API key: live_lomLRXzFcbFmQNj2fUq7 and sender: DefaultSender
BSGConnector 8:41:20 PM.96 количество записей 6
BSGConnector 8:41:20 PM.96 параметр cbfd2864-9bde-46c5-a602-f93b20593ad8
BSGConnector 8:41:20 PM.96 параметр 5266908c-f3d1-4c5c-9097-f0dfbdbf900b
BSGConnector 8:41:20 PM.80 параметр 410006e1-cafe-4502-a9ec-e54d922d2c00
BSGConnector 8:41:20 PM.80 параметр 714bd9a7-d81a-4d03-b890-b14750c24ab
BSGConnector 8:41:20 PM.80 параметр 946c38ac-f623-4e37-b41f-9c12a1691cc0
BSGConnector 8:41:20 PM.65 параметр c4ed336c-3e9b-40fe-8b82-5632476472b4
BSGConnector 8:41:20 PM.33 процесс массовой отправки запущен

```

## 4 TROUBLESHOOTING

Our connector supports multiple levels of logging, so to investigate source of problem you can adjust connector's log level to see more details of its internal work.

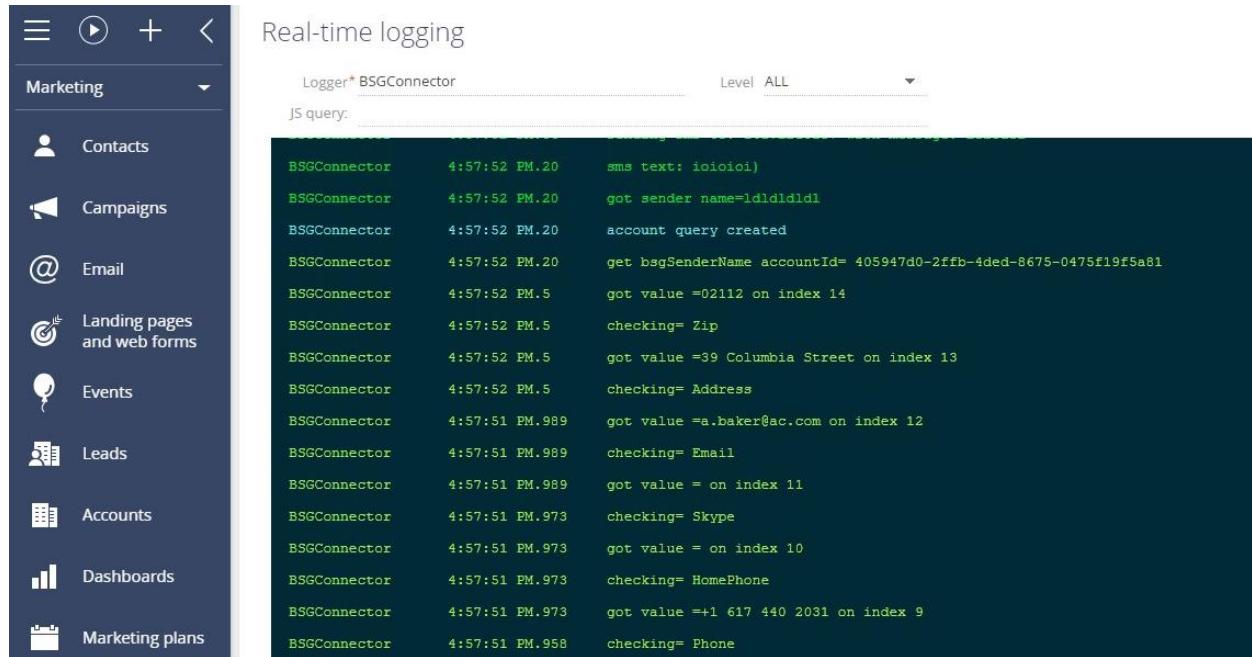
Logger name: BSGConnector

Detailed guide of how-to setup logging in Creatio offsite instance could be found in Creatio documentation.

For cloud instances, you can try this extension «Telemetry log for Creatio»:

<https://marketplace.creatio.com/app/telemetry-log-creatio> that will

allow to observe connector logs in real-time:



The screenshot shows a 'Real-time logging' interface. On the left is a sidebar with a navigation bar at the top containing three icons (three horizontal lines, play/pause, plus, back/forward) and a dropdown menu set to 'Marketing'. Below this are ten items: 'Contacts', 'Campaigns', 'Email', 'Landing pages and web forms', 'Events', 'Leads', 'Accounts', 'Dashboards', and 'Marketing plans', each with a corresponding icon. The main area is titled 'Real-time logging' and shows a list of log entries. At the top of this list is a header: 'Logger\* BSGConnector' and 'Level ALL'. Below the header is a 'JS query:' input field. The log entries themselves are in green text and show various connector operations:

```
BSGConnector 4:57:52 PM.20 sms text: ioioioioi
BSGConnector 4:57:52 PM.20 got sender name=ldldldldl
BSGConnector 4:57:52 PM.20 account query created
BSGConnector 4:57:52 PM.20 get bsgSenderId accountId= 405947d0-2ffb-4ded-8675-0475f19f5a81
BSGConnector 4:57:52 PM.5 got value =02112 on index 14
BSGConnector 4:57:52 PM.5 checking= Zip
BSGConnector 4:57:52 PM.5 got value =39 Columbia Street on index 13
BSGConnector 4:57:52 PM.5 checking= Address
BSGConnector 4:57:51 PM.989 got value =a.baker@ac.com on index 12
BSGConnector 4:57:51 PM.989 checking= Email
BSGConnector 4:57:51 PM.989 got value = on index 11
BSGConnector 4:57:51 PM.973 checking= Skype
BSGConnector 4:57:51 PM.973 got value = on index 10
BSGConnector 4:57:51 PM.973 checking= HomePhone
BSGConnector 4:57:51 PM.973 got value =+1 617 440 2031 on index 9
BSGConnector 4:57:51 PM.958 checking= Phone
```

For any questions related to connector please contact our tech support: [support@bsg.world](mailto:support@bsg.world)