SMS Plugin for Microsoft CRM 2011

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1.0 Overview

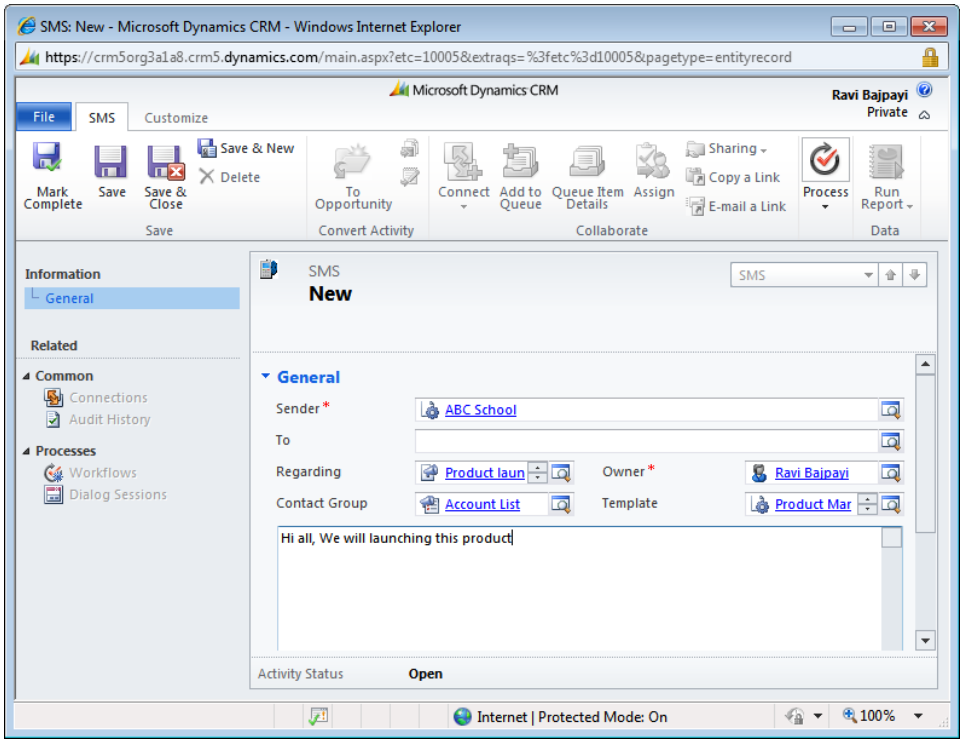
This custom SMS module enhances the capabilities of Microsoft Dynamics CRM 2011 by adding sms as an additional communication channel. This tightly integrated module allows client sales representatives to be able to manage sms marketing campaigns as well as setup automated sms alerts for certain events. Its incoming sms capabilities make it a complete solution allowing clients to manage all of their sms communication from within Microsoft Dynamics CRM.

2.0 Features

2.1 SMS Marketing

Enables the user to initiate an SMS marketing campaign from the 'Marketing' tab under Microsoft CRM 2011.

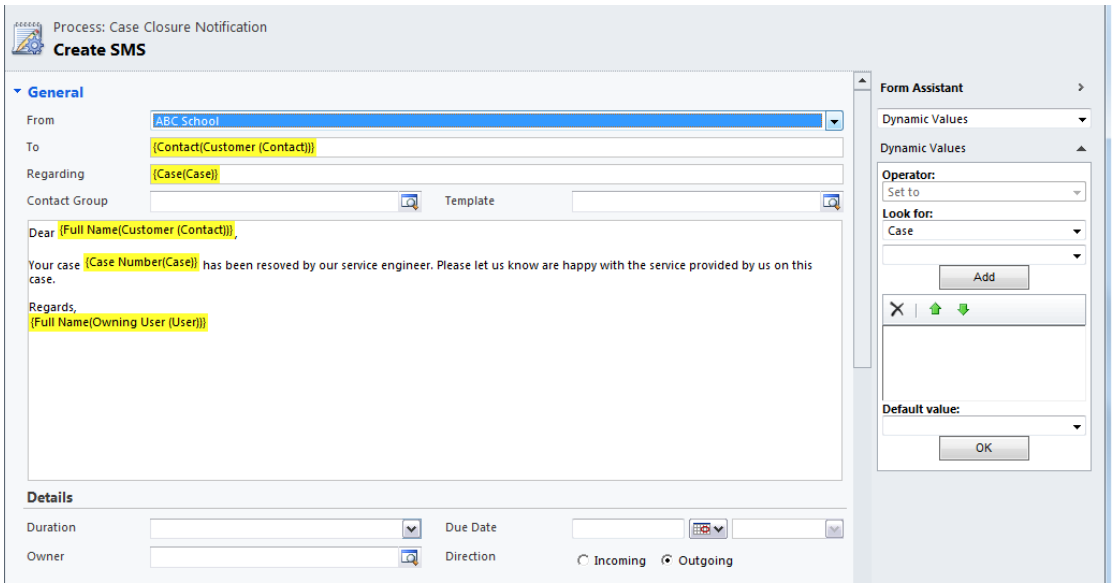
- The user is able to create and manage groups of contacts.
- The user is be able to select individual or a predefined group of contacts to send sms to.
- The user is able to type a custom sms message.
- The user is able to create and select a template sms message.



2.2 SMS Workflow Module

Enables the user to build custom workflows from within Microsoft CRM 2011 and send automated alerts to individual contacts for which the workflow is initiated. The workflow can be triggered from

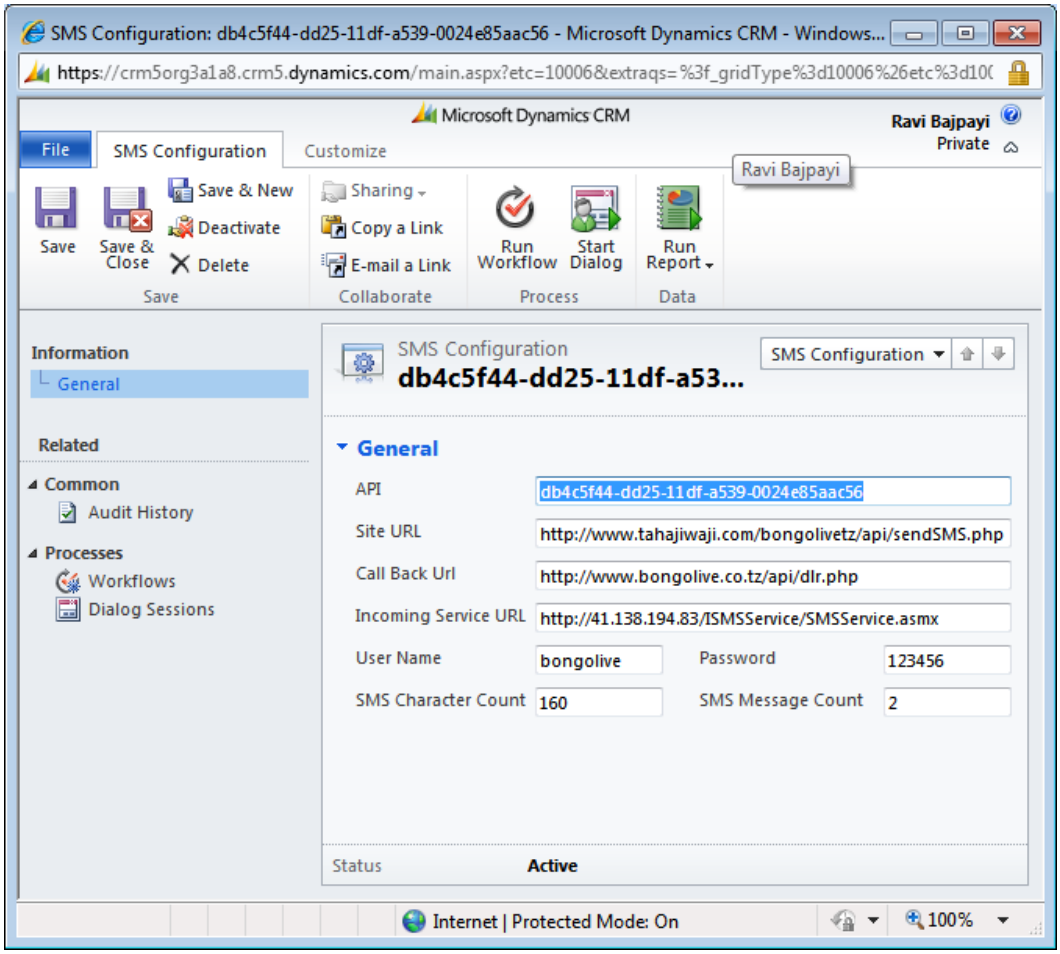
- Sales Opportunities
- Contacts
- Service
- Tasks (created, pending, completed)
- Emails (incoming, outgoing)
- Invoices (created, paid)
- Other entities that are visible within the workflow section



2.3 SMS Receiving Module

Enables the system to accept incoming sms from the multitech modem.

- Incoming SMS are and tagged to existing contacts, leads or accounts.
- A specified user also gets a notification when the sms is received as an 'Activity' in Microsoft CRM as well as an email notification.
- SMS received are logged and searchable as an Activity.

2.4 Configuration & Logs

- SMS gateway parameters are configurable (API Key, Username, Password, Default Sender) and can be modified to work with different gateways.
- Outgoing sms gateway is configurable via HTTP Post.
- Incoming sms will be received via a HTTP Post from a Multitech iSMS Server.