

SuiteCRM TWILIO SMS

User Guide

Twilio SMS

Outright

Configuration Guide

- **1.** For Activate License key. First go to the Administration page.
- 2. Then Click on License Module for Outright Products list

Outright License Keys	
This section contains Outright	Click hore
/	CIICK HELE
Licence Module for Outright Products List	Licence Module for Outright Products List
Test Utils	Test Utils

3. Edit the outright_twilio_sms license key record

OUT	RIGHT LICEN	NCE			
	Product Name 🔶 Lice	ence Key	Verification Status $~~\oplus~~$	Date Created 🔶	Status 👄
0-	BULK ACTION -				
	outright_twilio_sms	I	Pending		Active
•	Click here to updat	te the licens	e key		

4. Add the license key from store website > My Account > License key <u>https://store.outrightcrm.com/my-account/license-page/</u>

OUTR	IGHT_	TWILIO_SMS	» EDIT
SAVE	CANCEL	VIEW CHANGE LOG	
BASIC		_	
Licence	Key:		
SAVE	CANCEL	VIEW CHANGE LOG	Add the license key here
Click	on save		

5. Click on the validate Now button and refresh the page by CTRL+F.

Product Name \ominus	Licence Key $~~ \Leftrightarrow$	Verification Status	Date Created 👄	Status \ominus	Last Verification Date	⇔ Valio	late License
BULK ACTION-	T II						
outright_twilio_sms		Pending		Active		Valio	late Now
BULK ACTION-	T II					click h	ere

6. Finally the license key is activated and status should be displayed as verified.

Product Name	Licence Key $\ \Leftrightarrow$	Verification Status $~~$	Date Created 🔶	Status	Last Verification Date
BULK ACTION-	▼ ≡				
outright_twilio_sms	C	verified		Active	
BULK ACTION -	▼ II				

- 7. For Adding Twilio Number. First go to the Administration page.
- 8. Then Click on Twilio SMS settings.



9. Create a record in Twilio Settings.

TTI SETTINGS	SALES	MARKETING	SUPPORT	ACTIVITIES	COLLABORATION	ALL					CREATE -	Search	O,	(A) (A) admin
+ Create Twilio Setting	s <	1												
View Twilio Settings		CREAT	E											
Recently Viewed		SAVE	CANCEL											
Test 123	1	BASIC												-
		Name:*		1						0				
		Accounts	s ID:	3			A	uth Token:		0				
		Phone Nu	umber:				Ph	ione SID:	4)				
		Status:		Active			Se	t Default:						
		SAVE	CANCEL											

- 9.1 Enter the Name.
- **9.2** Enter the Account ID from Twilio account.
- **9.3** Enter the Auth key from Twilio account.
- **9.4** Enter phone number from Twilio account.
- **9.5** Enter phone SID from Twilio account.

10. Log into <u>http://www.twilio.com</u> using your Twilio Account.

🙂 twilio	
	Log In
	l@gmail.com Change
	((
	I'm not a robot
	Enable Two-Factor Authentication
	Log In

- **11.** Go to the Dashboard.
 - **11.1** Copy and paste "Account SID" and "Auth Token" from the dashboard.

😡 Dashboard	Outright Systems Dashboard			Copy the Account Sid
Gilling	Project Info			1 ^
↔ Settings Go to the d	We ve customized your dashboard based on the products you selected. Use the product getting started guides to get up and running. We can't wait to see what you build! ashboard	PROJECT NAME Outright 3 ACCOUNT SID AC8 AUTH TOKEN hide 2ac BALANCE DALLON Owner 🗱 1 mar	Systems edit	Copy the Auth Token

🔒 CTI SETTINGS SA	ILES	MARKETING SUPPORT	ACTIVITIES COLLABORATION ALL		CREATE ▼ Search Q, (A) (A) (A) admin ▼
+ Create Twilio Settings	۵				
View Twilio Settings		CREATE			
Recently Viewed		SAVE CANCEL	Enter Account ID fr	rom twilio account	Enter Auth token from twilio account
Test 123	/	BASIC			-
	L	Name:*			
	L	Accounts ID:		Auth Token:	
	L	Phone Number:		Phone SID:	
	L	Status:	Active	Set Default:	
		SAVE CANCEL			

11.2 Paste Account ID and Auth key into CTI settings.

11.3 Select any number which you want to configure.



🔒 CTI SETTINGS	SALES	MARKETING SUPPORT	ACTIVITIES COLLABORATION		CREATE - Search	Q, (A) (A) ad
+ Create Twilio Settings	⊲					
View Twilio Settings		CREATE		Enter phone number from twilio account	Ente	Phone SID from twillio account
Recently Viewed		SAVE CANCEL		Einer phone number nom twino account	/	
Test123	1	BASIC				-
		Name:*				
		Accounts ID:		Auth Token:		
		Phone Number:		Phone SID:		
		Status:	Active	Set Default:		
		SAVE CANCEL				

11.4 Copy and paste "phone SID" and "Phone number" from the dashboard.

User Guide

1. To assign users to the each twilio number. Go the twilio settings detail view page of any record. Go to the Users Sub panel and select the user.

TEST OUTRIG	HT1 ☆			
BASIC ACTIONS -			< PREVIOUS (2 of 2) NEXT >	
Name:	Test Outright1	Accounts Options:	Twilio	
Twilio Account ID:		Auth Token:		
Phone Number:		Phone SID:		
Messaging Services id:				
Status:	Active	Set Default:		
L USERS			-	
Name 🕀	User Name	Email 🕀	Phone \ominus	
Create			(0 - 0 of 0)	
Click here to	o select the users	No results found.		

2. Select the users from the list page.

		Name \ominus	Username ⇔	Job Title $\ \Leftrightarrow$	Department ⇔	Email	Phone ⇔	Status ⇔
•-								(1 -
	i	Test User1	testuser1					Active
	i	Reg User3	reguser3					Active
	i	Reg User2	reguser2					Active
	i	Reg Uer1	reguser1			antony.naveen@outrightcrm.com		Active
	i	Administrator	admin	Administrator				Active

3. Assigned users should be displayed on the Users sub panel of the twilio settings.

TEST OUTRIG	HT1 🏠				
BASIC ACTIONS -				< previous (2 of 2)	NEXT >
Name	Tast Outsight1	Accounts Onti	Tulla		
Name.	lest Outright1	Accounts Optic	ons: Twino		
Twilio Account ID:		Auth Token:			
Phone Number:		Phone SID:			
Messaging Services id:					
Status:	Active	Set Default:			
					_
Name \ominus	User Name 🕀	Email \ominus	Phone		
Create				K < (1 - 1 of 1)	K K
Test User1	testuser1			Remove	

4. Assigned users can able to send bulk / non bulk sms to the customer.

- 5. Go to the module list page (For which you want to click to SMS functionality).
 - **1.1** Create and save a record and to fill with the phone number.

ACCOUNTS	SALES	MARKETING SUPPORT	ACTIVITIES COLLABORATION	ALL		CREATE 👻 Search	Q, (A) (A) admin▼
+ Create Account		۷					
View Accounts		CREATE					
Import Accounts		SAVE CANCEL					
Recently Viewed		OVERVIEW					-
🔶 Test		Name:*	twilio test		Office Phone:	980500000	
		Website:	http://		Fax:		
Test123		Email Address:	•				
testizi			email@example.com		Primary Opted Out Inval	id	
Lest 122							
			Billing Address			Shipping Address	
		Street:			Street:		
				4			li li

6. Click on the SMS icon button as well as.

Office Phone:	733277103 💟 🛄

7. When clicking on the SMS icon button, a pop-up will appear now you can start chattin

ACCOUNTS								CREATE - Search	Q. (A) Admin
(+) Create Account		4							
		Note: To send record assignment not	fications, on SMTP server r	must be configured in)	inal fettines				
		TWILIO TEST							
Recently Viewed		OVERVIEW MORE IN	FORMATION	OTHER ACT	IONS 🔻				(1 of 1) NEXT >
🐡 twilio test	1	Name:	twilip test	t			Office Phone:		
🕎 Test	1								
	1	Website:	http://				Fax:		
🖨 test121	1	Email Address:	-None-						
		0007000000	- ×			COPY	Shipping Address:		COPY
		No Conversation Found							
		Tune a marrana							-
		type a measage		Status	-	Contact	Due Date 👻	Assigned User 🖯	
			9			Noresult	found		
		Salast Tanalata	Clear						-
		Blank	-	Contact	Category	Date Modified	Date Created +	Due Date 🗸	Calling Terito

8. You can also select a Template for a chat.

