

SuiteCRM SMS Drip Campaign (premium)

# **User** Guide

**SMS Drip Campaign** 

Outright

## **User Guide:-**

**1.** Go to admin panel and select the Twilio SMS Settings option.

TWILIO SMS SETTI	NGS This is the twilio set	ting we are using for sending drip		
Name 🗢	Accounts Options $~~\Leftrightarrow~$	Twilio Account ID	Status 🗢	Set Default
				🔣 🛃 (1 - 1 of 1) 🚺 🔊
Test Drip Product	Twilio	e	Active	
O- BULKACTION ▼ Ξ				(1-1 of 1)

**2.** Fill all the required information including account id, phone number etc.

SAVE CANCEL VIE	W CHANGE LOG	e number we are using for sending drip	SMS.
ASIC			
Name:*	Test Drip Product	Accounts Options:	Twilio
Twilio Account ID:	*********	Auth Token:	
Phone Number:	+18327304342	Phone SID:	
Messaging Services id:	*****	Assigned to:	admin 🔀 🗶
Status:	Active	Set Default:	
Status.		Set Derault.	

SMS Drip Campaign

**3.** Go to the admin panel and click on see all see all drips options settings. You can also create new settings from here.

Outright SMS Dri	) Campaign	
Create New Drij	1	
See All Drips	Go to admin panel and click here.	
Drip Queue		
Twilio SMS Setti	ngs.	
Twilio SMSs		
Opted-out Num	Jers	
Drip Logger		

**4.** Here is the drip setting that we have created.

DRIP MANAGER Here you can s	ee all drip settings		
Name 🔶	Description	Date Created 🗢	
			🔀 🤾 (1-1 of 1) 💽 💽
Test Drip SMS		04/29/2021 07:07	
			(1-1 of 1)

**5.** Here we have created two different drips with different time duration.

MS ★				
•				< PREVIOUS (1 of 1) NEXT >
Test Drip SMS		Date Created:	04/29/202107:07	
		Date Modified:	04/29/2021 08:09	
			-	
	_	These are two	SMS drips we have created	-
Activity Type 🔶	Template. 🗢	After Days	⇔ Date Created ⇔	
				K < (1-2 of 2)
Sms	System-generated password email	1	04/29/2021 10:12	Remove
Sms	Confirmed Opt In	0	04/29/2021 10:11	Remove
	MS * Test Drip SMS Activity Type  Sms Sms	MS * Test Drip SMS Activity Type  Template. Sms System-generated password email Sms Confirmed Opt In	MS★ Test Drip SMS Date Created: Date Modified: These are two Activity Type ♦ Template. ♦ After Days Sms System generated password enail 1 Sms Confirmed Opt in 0	Test Drip SMS     Test Drip SMS     Date Created:   04/29/2021 07:07   Date Modified:   04/29/2021 08:09     These are two SMS drips we have created     Activity Type      Template.      After Days    Date Created!     Sms   System generated password email   1   04/29/2021 10:12   Sms   Confirmed Optin   0   04/29/2021 10:11

**6.** Go to the Account module and open the record.

Name 🗢	City 🗢	Billing Country	Phone 👄	User 😂	Email Address	Date Created 🗢	
	]					(1-1 of 1)	
/ Test Drip SMS Product			+14145090611	admin		04/29/2021 08:41	
	3					🔣 🔇 (1 - 1 of 1)	

#### SMS Drip Campaign

### 7. Now we'll assign the drips that we created earlier to this record.

TEST DRIP SM	SPRODUCT ★ Assign drips to this re	ecord		
OVERVIEW OTHER	ACTIONS - ADD TO DRIPS REMOVE DRIPS			< previous (1 of 1) NEXT >
Name:	Test Drip SMS Product	Office Phone:	+14145090611	
Website:	http://	Fax:		
Email Address:	None			
Billing Address:		Shipping Address:		
Description:				
Assigned to:	admin			

**8.** Click on yes button and confirm.

		×
	PLEASE CONFIRM ×	
	Click on yes button and confirm	
Name	Are you sure you want to assign the drip Test Drip SMS to the	ption
Test Drip SMS	current record	
	Ver No	
lest Unp SMS Product	Tes No	- HITTING VOLL

**9.** In the Drip queue subpanel, you can see the assign drips with information like status, schedule date ctc.

INVOICES						+
						+
IN PRODUCTS AND SERVICES PURCHASED						+
TWILIO SMS						+
DRIPQUEUE						-
Name ⇔	Drip Manager ⇔	Status: ⇔	Template Name 🗢	Schedule Date 😂	Date Created 😂	
Create Here you will see the	e status, schedule date	and other infor	mation		K < (1 - 2 of 2)	× 3
0_Test Drip SMS Product_Confirmed Opt In	Test Drip SMS	Sent	Confirmed Opt In	04/29/2021	04/29/2021 10:13	
1_Test Drip SMS Product_System-generated password email	Test Drip SMS	in_queue	System-generated password email	04/30/2021	04/29/2021 10:13	

**10.** Go to the admin panel and click to the Twilio sms option.

Outright SMS Drip Camp	aign		
Create New Drip			
See All Drips			
Drip Queue			
Twilio SMS Settings			
Twilio SMSs	Go to admin panel and clich h	ere	
Opted-out Numbers			
Drip Logger			

### **11.** Here you can see the send and recipient informations.

