

SuiteCRM SMS Drip Campaign

User Guide

User Guide:-

1. In Step 1, make sure the license is activated and verified.

Geocode your object addresse. This process may take a few minutes!	Auto-To send record and ment aphinshows, or SVTP server an at be contracted in Email Settings
Address Cache	
Provides access to Address Cache information. This is only cache.	OUTRIGHT LICENCE
Twilio Drip SMS(Premium) by Outright Store	Product Name \ominus Elsence Key \ominus Verthcatton Status \ominus Date Created φ Status \ominus
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Liconse Activated	
Please Complete Step 2	Security Groups: Mass Assign ASSIGN REMOVE Group:None 🔽
Configure Twito Accounts and Phone Numbers	
Please Complete Step 3	O Supercharges by SureCRM O Provered By SupprCRM VEServer resource times 0x3 seconds. DACK TO TOP A
Create a New SMS Drip Campaign	
See All Drips	
View all Existing SMS Drip Campaigns	
Drip Queue	
Status of all the SMS in the Drip Queue	
Twilio SMSs	
See all SMS sent via Drip Campaign	
Opted-out Numbers	
Phone Numbers that have been opted-out	

2. In step 2, you need to configure your Twilio account settings.



SMS Drip Campaign

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Outright	

3. The third step is to configure the SMS Drip Campaign. Here, select the module, field (for condition-based), and other details.

Generate your object addresses. This process may take a tew minutes! Anteres Cache Provides access to Address Cache information. This is only cache.	Note: To send record accignment instituctions, so 54TP server must be configured in <u>Exact Sections</u>
Twillo Drip SMS(Premium) by Outright Store Iwillo Drip Premium (SMS) by Outright Store	SAVE CANCEL
Please complete Stop1: Lineos Activated	Name:" Drip for Lood Medulo
Please Complete Step 2. Configure Twillo Accounts and Phone Numbers Places Complete Step 3. Crostice a New SMS Drip Campaign See All Drips View all Existing SMS Drip Campaigns	Modula List: Listis: Select Module Field: Status: Field Value: New Automated Drip: X Choose SMS Sender:* Sander -1 Description: X
Drip Queue Status et all the SMS in the Urip Queue Twillin SMSie	
Soo all SMS sore via Drip Campaign Optrad-out Numbers	SAVE CANCEL
Phone Numbers that have been opted-out	ବ Supercharged by Suite CRM କ Powered By Sugar CRM 🛛 🖗 Server response time: ପି.05 accords. ଅନ୍ୟାନ 🔺 ଅନ୍ୟାନ କର

4. Once the module is selected, you need to choose the SMS template and delay time for that SMS series.

Note: To send record asognm CREATE SAVE CANCEL BASIC	nd with callocs, an TMTP server must be camp	ured a <u>Eand Setting</u>	_	Note: To send from a bit graneer analysis an DATP server much the configured in Excel Section; DEFAULT AUTOMATED CONTROLLER FOR > DRIP FOR LEAD MODULE * EDIT SAVE CANCEL VIEW CHANGE LOG
Name:" Module List:" Select Module Field:" Field Value:" Automated Drip: Choose SMS Sender:" Description:	Dribter Laad Module Laads V Status V New Sender-1	Romore Old Driptif		RASIC - Name:* Default automated Controller for xDripf After Days: • Schedule Time: Outer Template:* Case Cloure SAVE CANCEL
SAVE CANCEL				7-Separatorged by SubacRM & Roward by Separative Operator separate DDS seconds. BACK TO TOP A

SMS Drip Campaign

5. In Drip Manager, you can see the details of the SMS Drip series.

Note: To send record assignment notifications, an SMTP server must be configured in Email Settlings.	Note: Josend record assignment notifications, an SMTP server must be configured in Email Settings.
DRIP MANAGER	DRIP FOR LEAD MODULE お
Name $\hat{\Theta}$ Module List $\hat{\Theta}$ Select Module Field $\hat{\Theta}$ Choose SMS Sender $\hat{\Theta}$ Field Value $\hat{\Theta}$	BASIC ACTIONS
□▼ 2345AGTION* ▼ III (1-1of1) 10 10	Name: Drip for Load Module
Chip for Lead Module Leads status Sender-1 New	Module List: Leads
	Select Module Field: Status
	Field Value: New
¢ Supurcharged by SuiteCRM © Periorited By Sugar CRM	Automated Drip: 🔀 Remove Old Drip!!! 🔀
	change): Description:
	DETAILVIEWPANEL -
	DRIP CONTROLLER -
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	Create - (1 2012) [3]
	Datault automated Controller for - Drip for Lead Mudule Case Closury Instant D 09/20/2022 05-40
	Controller 2 Case Closure 15 Mins 0 09/20/2022 05:42 Remove

6. Drip Queue and Twilio SMS, both are empty means no records are added to any SMS Drip Series.



SMS Drip Campaign

7. Now, we'll modify this record status so it can be automatically added to the drip series.

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State: "to word record and general calification; wo Statt? or DRIP QUEUE Var correctly have no records saved. CREATE or in	on motheconforcetin built Betting		Note: To end reveal any TWILLO SM You currently have no	need not fair Ease, an Witte Larcer ma S econds saved, CREATE or Import o	a he modigies in East Battings	
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	LEADS SALES MARKE JOHN DOE Load View MORE II	CREATE - Q (A) admin				
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	Job Title:		Mobile:	8826776268		
	Department:		Fax:			
	Account Name:		Website:	http://		
	Primary Address:		Other Address:			
	Fmail Address:	sharma.mohih@outrightrzm.com (Phinary)				
	Description:		Status:	New		
	Assigned to:	admin				

8. You can check the drip queue to see the status of the SMS if its sent or if there is some time left.



9. You also get the report of daily plugin activity on email.

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