



**SuiteCRM** SMS Drip Campaign

**User Guide**

## User Guide:-

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

Geocode your object addresses. This process may take a few minutes!

**Address Cache**  
Provides access to Address Cache information. This is only cache.

Twilio Drip SMS( Premium ) by Outright Store  
Twilio Drip ( Premium )SMS by Outright Store

**Please complete Step 1:**  
License Activated

**Please Complete Step 2**  
Configure Twilio Accounts and Phone Numbers

**Please Complete Step 3**  
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

Note: To send record assignment notifications, an SMTP server must be configured in Email Settings

### OUTRIGHT LICENCE

Product Name	Licence Key	Verification Status	Date Created	Status
outright_sms_drip	*****	verified		active

Security Groups: Mass Assign ASSIGN REMOVE Group: --None

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

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### TWILIO SMS SETTINGS

Name	Accounts Options	Twilio Account ID	Status	Modified By Name
Sender -1	Twilio	*****	Active	
Sender -2	Twilio	*****	Active	

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

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**CREATE**

SAVE CANCEL

**BASIC**

Name:\* Drip for Lead Module

Module List:\* Leads

Select Module Field:\* Status

Field Value:\* New

Automated Drip: ☒ Remove Old Drip If value change: ☒

Choose SMS Sender:\* Sender -1

Description:

SAVE CANCEL

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

Note: To send record assignment notifications, an SMTP server must be configured in Email Settings

**CREATE**

SAVE CANCEL

**BASIC**

Name:\* Drip for Lead Module

Module List:\* Leads

Select Module Field:\* Status

Field Value:\* New

Automated Drip: ☒ Remove Old Drip If value change: ☒

Choose SMS Sender:\* Sender -1

Description:

SAVE CANCEL

Note: To send record assignment notifications, an SMTP server must be configured in Email Settings

DEFAULT AUTOMATED CONTROLLER FOR->DRIP FOR LEAD MODULE » EDIT

SAVE CANCEL VIEW CHANGE LOG

**BASIC**

Name:\* Default automated Controller for->Drip f

After Days: 0 After Hours: Instant

Schedule Time: 00 am

Template:\* Case Closure

SAVE CANCEL VIEW CHANGE LOG

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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 Settings.

### DRIP MANAGER

Name	Module List	Select Module Field	Choose SMS Sender	Field Value
<a href="#">Drip for Lead Module</a>	Leads	status	Sender: 1	New

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Note: To send record assignment notifications, an SMTP server must be configured in Email Settings.

### DRIP FOR LEAD MODULE

**BASIC** **ACTIONS** (1 of 1)

Name: Drip for Lead Module

Module List: Leads

Select Module Field: Status

Field Value: New

Automated Drip: ☒ Remove Old Drip (if value change): ☒

Description:

**DETAIL VIEW PANEL**

**DRIP CONTROLLER**

Name	Template	After Hours	After Days	Date Created
Default automated Controller for: <Drip for Lead Module>	Case Closure	Instant	0	09/20/2022 05:40
Controller 2	Case Closure	15 Mins	0	09/20/2022 05:42

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

Note: To send record assignment notifications, an SMTP server must be configured in Email Settings.

### DRIP QUEUE

You currently have no records saved. [CREATE](#) or [Import](#) one now.

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Note: To send record assignment notifications, an SMTP server must be configured in Email Settings.

### TWILIO SMS

You currently have no records saved. [CREATE](#) or [Import](#) one now.

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**ADMINISTRATION**

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

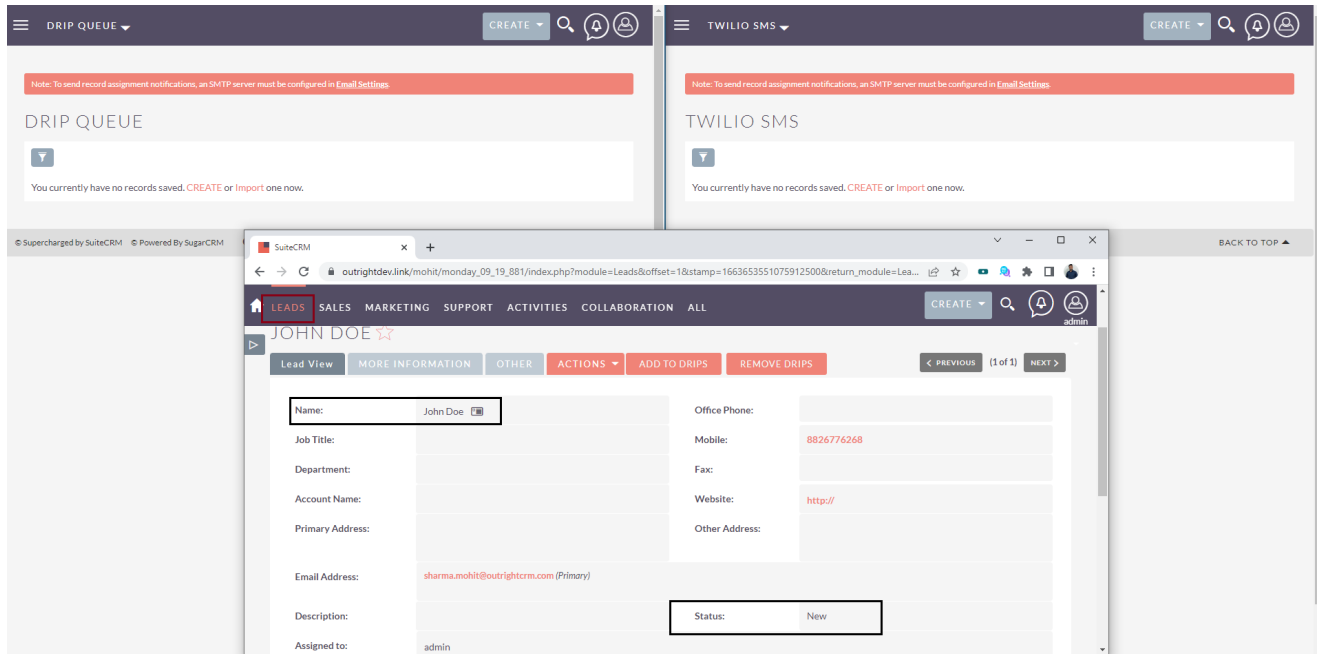
[Twilio SMSs](#)

See all SMS sent via Drip Campaign

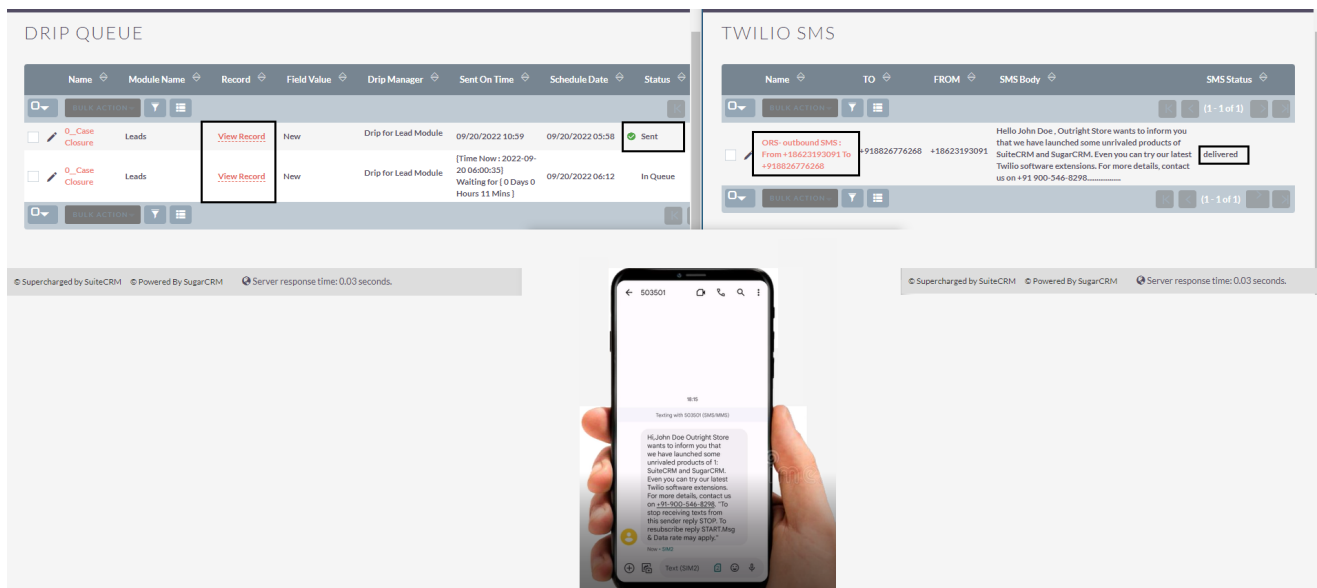
[Opted-out Numbers](#)

Phone Numbers that have been opted-out

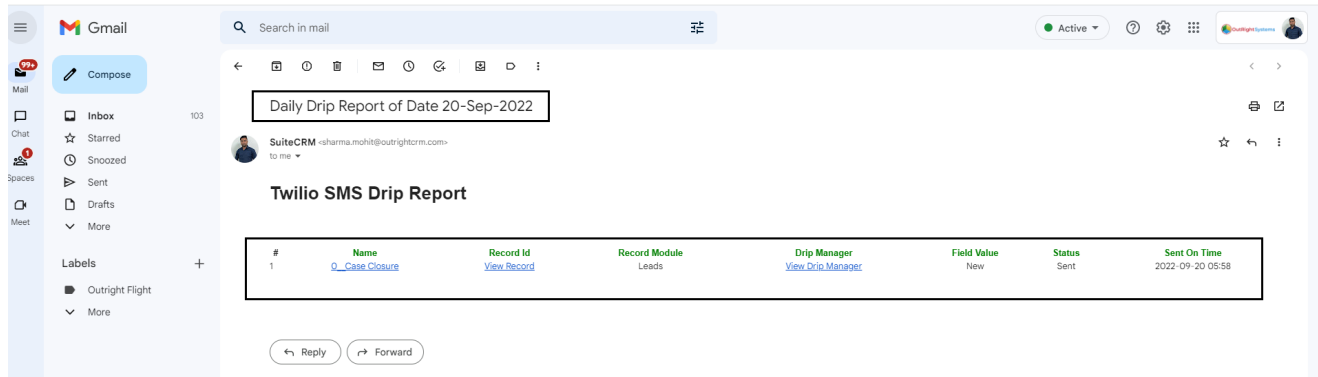
- Now, we'll modify this record status so it can be automatically added to the drip series.



- 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.



Daily Drip Report of Date 20-Sep-2022

SuiteCRM <sharma.mohit@outrightcrm.com> to me

**Twilio SMS Drip Report**

#	Name	Record Id	Record Module	Drip Manager	Field Value	Status	Sent On Time
1	<a href="#">0_Case Closure</a>	<a href="#">View Record</a>	Leads	<a href="#">View Drip Manager</a>	New	Sent	2022-09-20 05:58

Reply Forward