

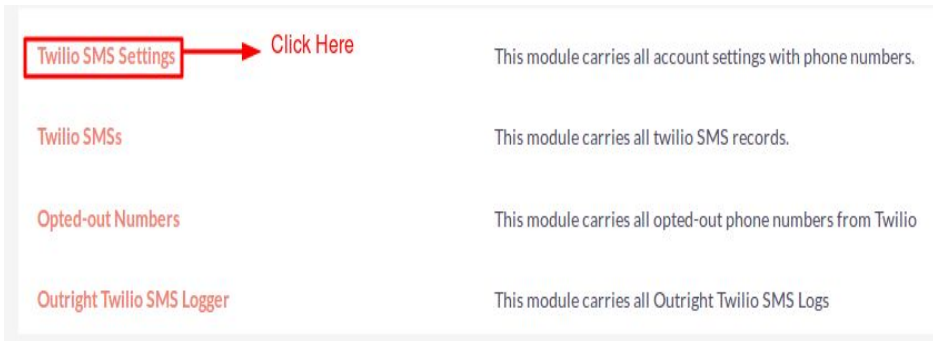


SuiteCRM TWILIO SMS

User Guide

Configuration Guide

1. Go to the Administration page.
2. Click on Twilio SMS settings.



3. Create a record in Twilio Settings.

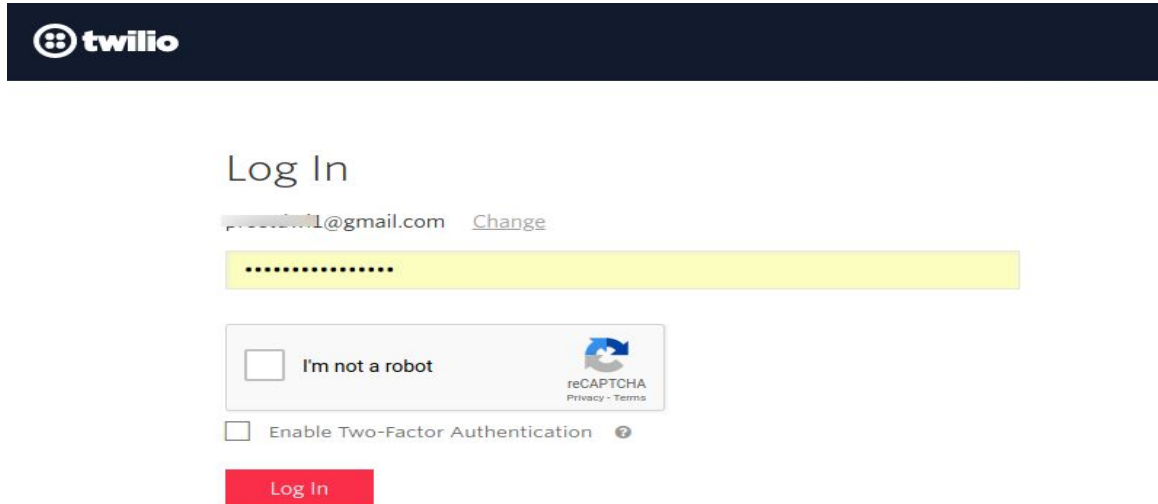
A screenshot of a web application's "CREATE" form for Twilio Settings. The form is titled "CREATE" and has "SAVE" and "CANCEL" buttons at the top. The form fields are:

- Name* (1) [input field]
- Accounts ID: (3) [input field]
- Auth Token: (2) [input field]
- Phone Number: [input field]
- Phone SID: (4) [input field]
- Status: Active (dropdown menu)
- Set Default: [checkbox]

At the bottom of the form, there are "SAVE" and "CANCEL" buttons.

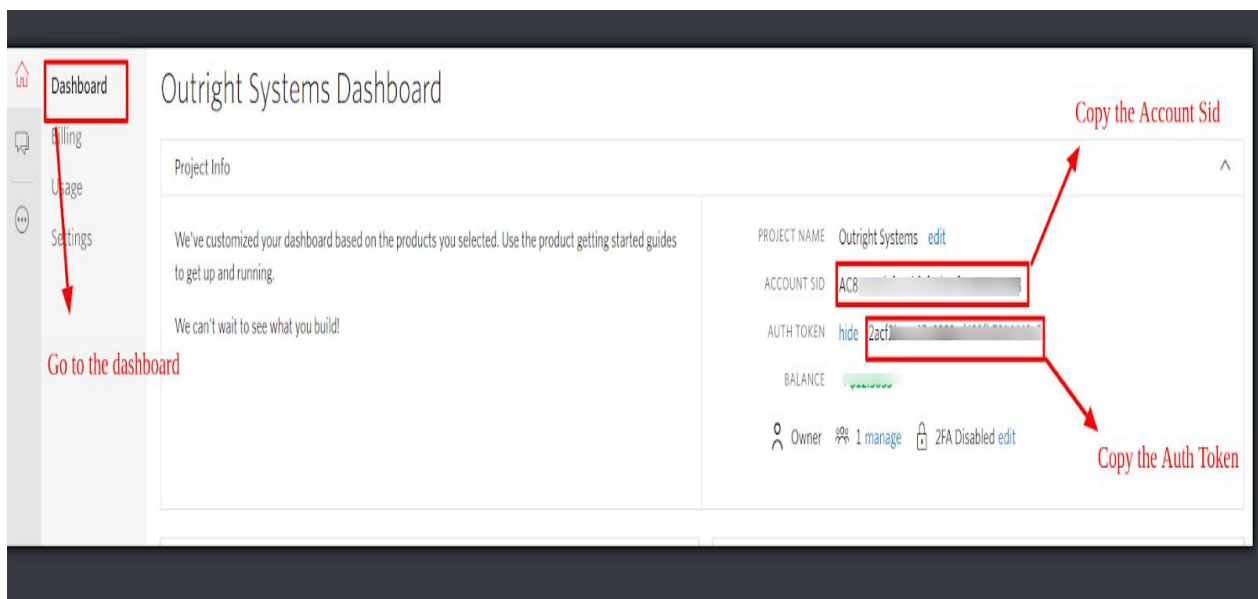
- 3.1 Enter the Name.
- 3.2 Enter the Account ID from Twilio account.
- 3.3 Enter the Auth key from Twilio account.
- 3.4 Enter phone number from Twilio account.
- 3.5 Enter phone SID from Twilio account.

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

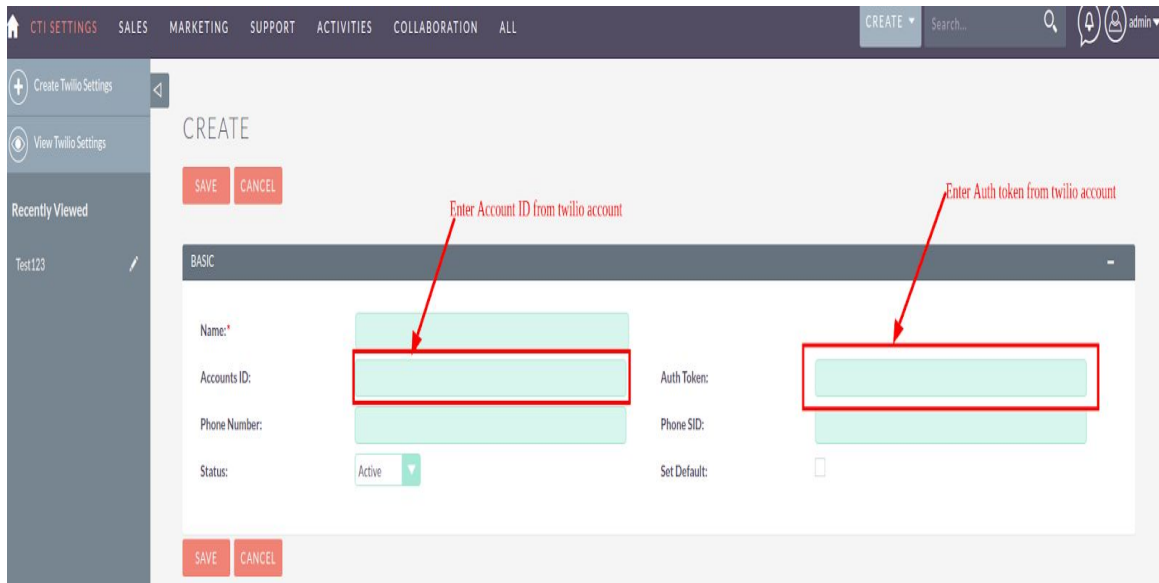


5. Go to the Dashboard.

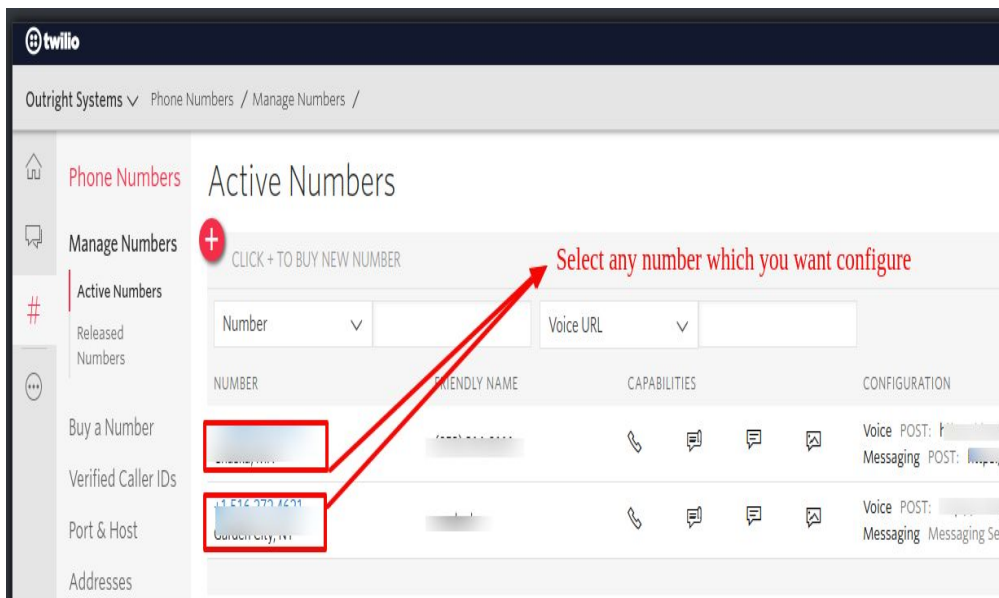
5.1 Copy and paste “Account SID” and “Auth Token” from the dashboard.



5.2 Paste Account ID and Auth key into CTI settings.



5.3 Select any number which you want to configure.

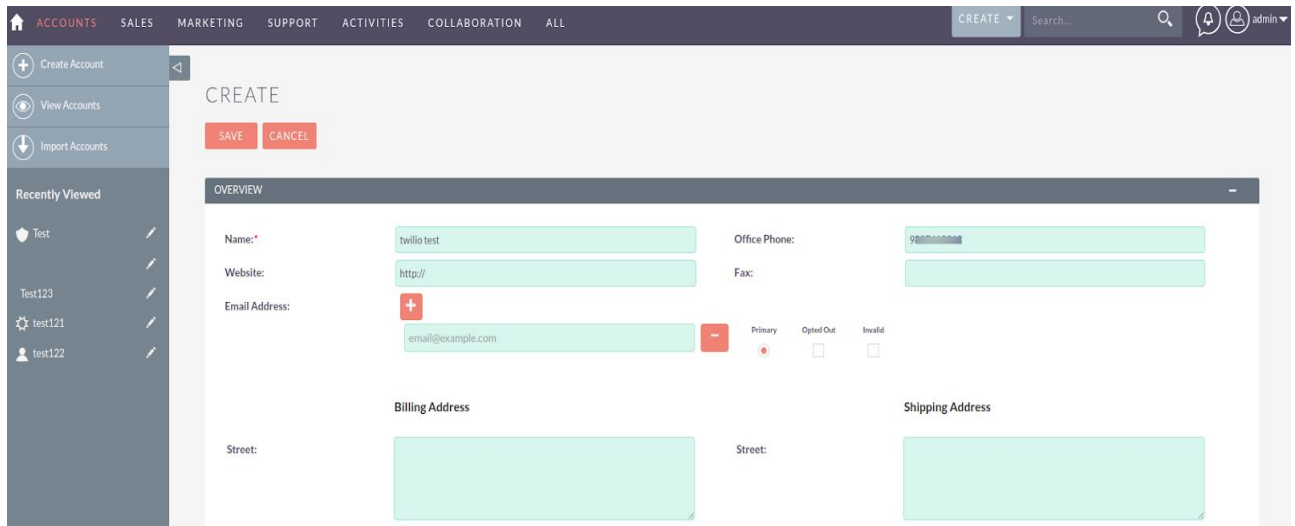


5.4 Copy and paste “phone SID” and “Phone number” from the dashboard.

The image shows a screenshot of the Twilio dashboard's 'CREATE' form. The form is titled 'CREATE' and has a 'BASIC' tab selected. It contains several input fields: 'Name:*', 'Accounts ID:', 'Phone Number:', 'Status:' (with a dropdown menu set to 'Active'), 'Auth Token:', 'Phone SID:', and 'Set Default:'. Two red arrows point to the 'Phone Number' and 'Phone SID' fields, with labels 'Enter phone number from twilio account' and 'Enter Phone SID from twilio account' respectively. Both the 'Phone Number' and 'Phone SID' input fields are highlighted with a red rectangular box. The form also includes 'SAVE' and 'CANCEL' buttons at the top and bottom.

User Guide

1. 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.

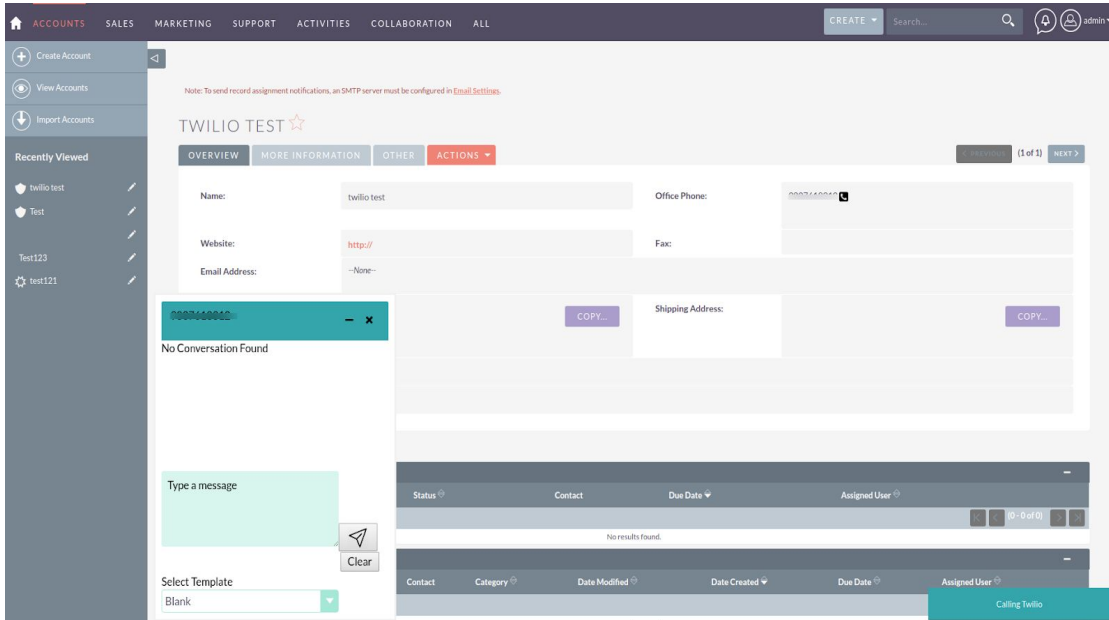


The screenshot shows the 'CREATE' form in a CRM system. The form is titled 'CREATE' and has 'SAVE' and 'CANCEL' buttons. The form is divided into several sections: 'OVERVIEW', 'Name', 'Website', 'Email Address', 'Billing Address', and 'Shipping Address'. The 'Name' field contains 'twilio test'. The 'Website' field contains 'http://'. The 'Email Address' field contains 'email@example.com'. The 'Billing Address' and 'Shipping Address' fields are empty. The 'Office Phone' field contains a masked phone number. The 'Fax' field is empty. The 'Email Address' field has a '+' icon to add more addresses. The 'Primary', 'Opted Out', and 'Invalid' checkboxes are all unchecked. The 'Recently Viewed' sidebar on the left shows a list of accounts: 'Test', 'Test123', 'test121', and 'test122'.

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



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



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

