

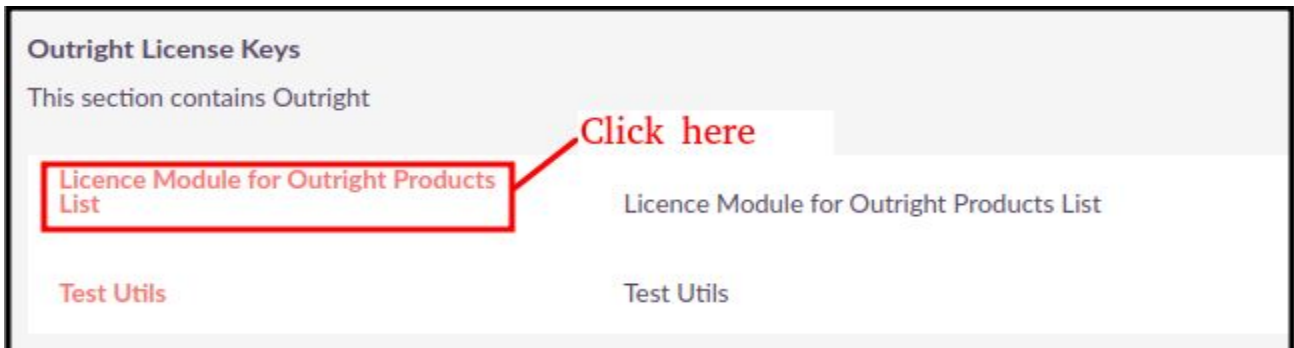


## SuiteCRM TWILIO SMS

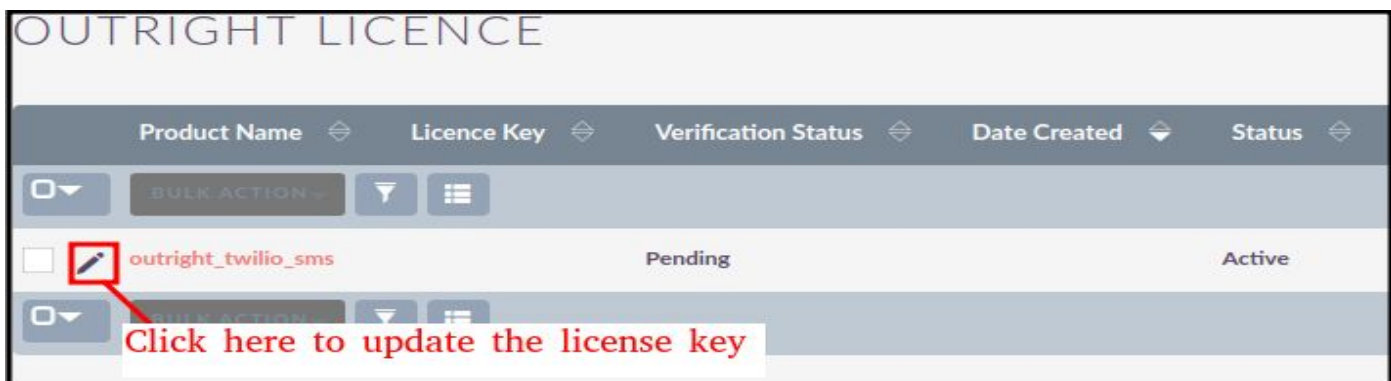
# User Guide

# Configuration Guide

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



3. Edit the outright\_twilio\_sms license key record



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

OUTRIGHT\_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.

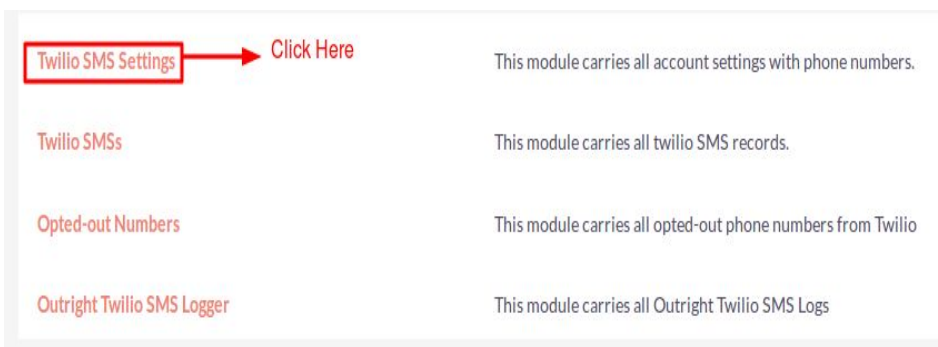
Product Name	Licence Key	Verification Status	Date Created	Status	Last Verification Date	Validate License
outright_twilio_sms	[Redacted]	Pending		Active		Validate Now

click here

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

Product Name	Licence Key	Verification Status	Date Created	Status	Last Verification Date	Validate License
outright_twilio_sms	[Redacted]	verified		Active		

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

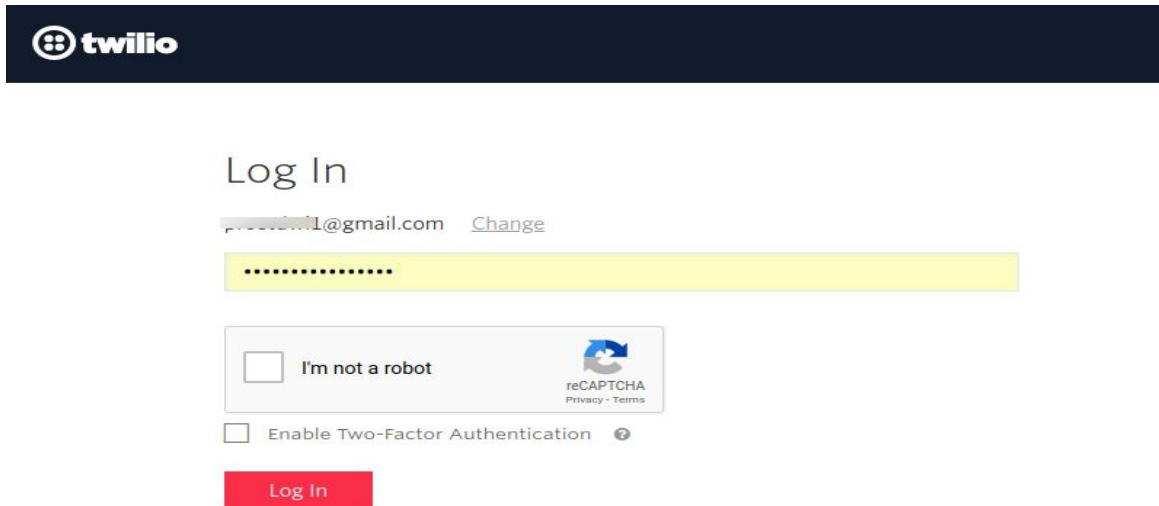


9. Create a record in Twilio Settings.

A screenshot of a 'CREATE' form for Twilio Settings. The form is titled 'CREATE' and has 'SAVE' and 'CANCEL' buttons. It is divided into a 'BASIC' section. The fields are: Name (1), Accounts ID (3), Phone Number, Status (Active), Auth Token (2), Phone SID (4), and Set Default (checkbox). The input fields are highlighted with green boxes and numbered 1 through 4.

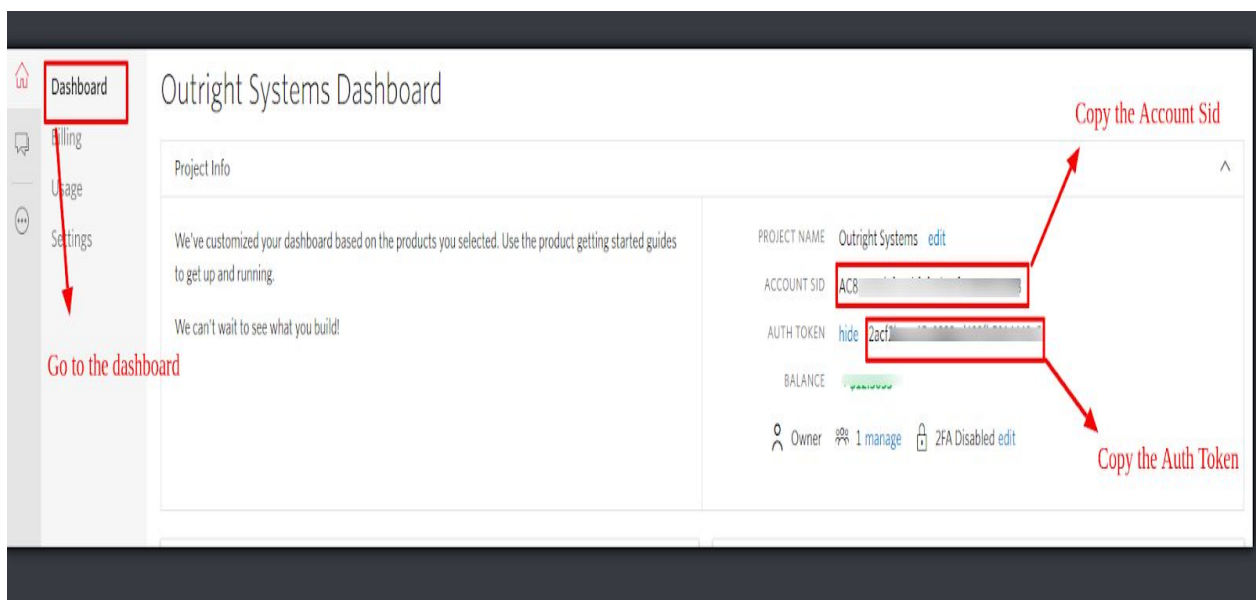
- 9.1 Enter the Name.
- 9.2 Enter the Account ID from Twilio account.
- 9.3 Enter the Auth key from Twilio account.
- 9.4 Enter phone number from Twilio account.
- 9.5 Enter phone SID from Twilio account.

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

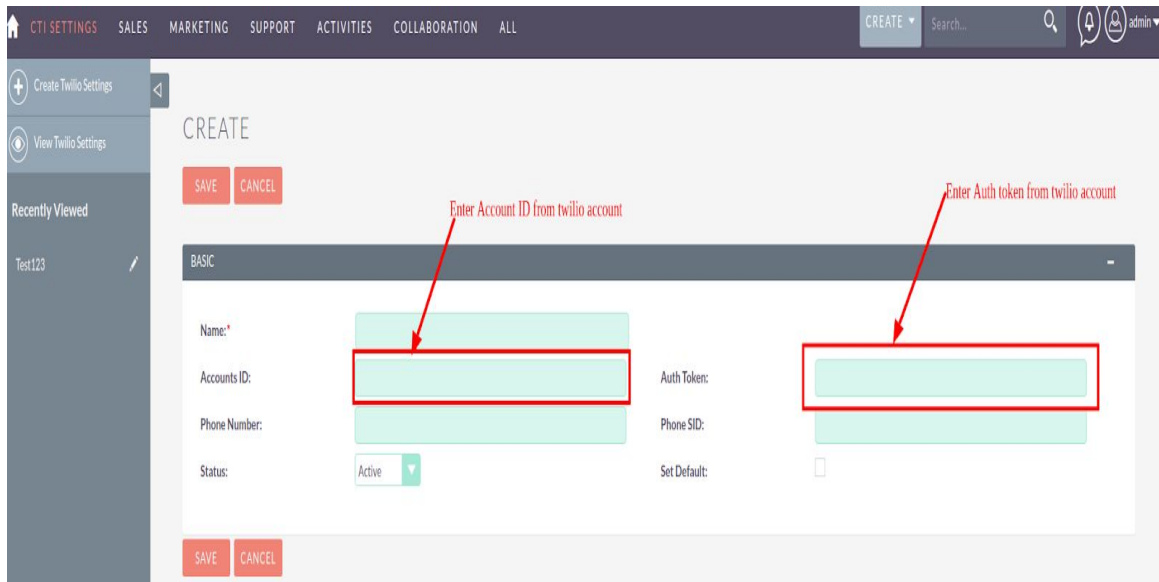


11. Go to the Dashboard.

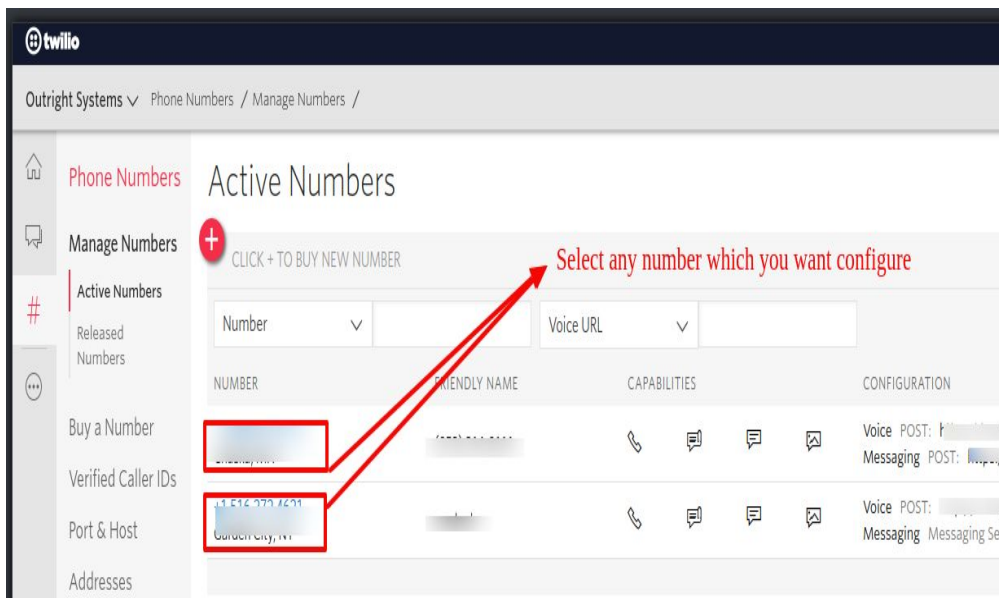
11.1 Copy and paste "Account SID" and "Auth Token" from the dashboard.



### 11.2 Paste Account ID and Auth key into CTI settings.



### 11.3 Select any number which you want to configure.



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

The screenshot shows the 'CREATE' form for Twilio Settings. The form is titled 'CREATE' and has a 'SAVE' and 'CANCEL' button at the top. Below the title is a 'BASIC' section with the following fields:

- Name:\*
- Accounts ID:
- Phone Number:
- Status: Active (dropdown)
- Auth Token:
- Phone SID:
- Set Default:

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. The 'Phone Number' and 'Phone SID' fields are highlighted with red boxes.

# 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 OUTRIGHT1 ☆

BASIC ACTIONS (2 of 2) PREVIOUS NEXT

Name: Test Outright1 Accounts Options: Twilio

Twilio Account ID: [Redacted] Auth Token: [Redacted]

Phone Number: [Redacted] Phone SID: [Redacted]

Messaging Services id: [Redacted]

Status: Active Set Default:

USERS

Name	User Name	Email	Phone
Create	No results found.		

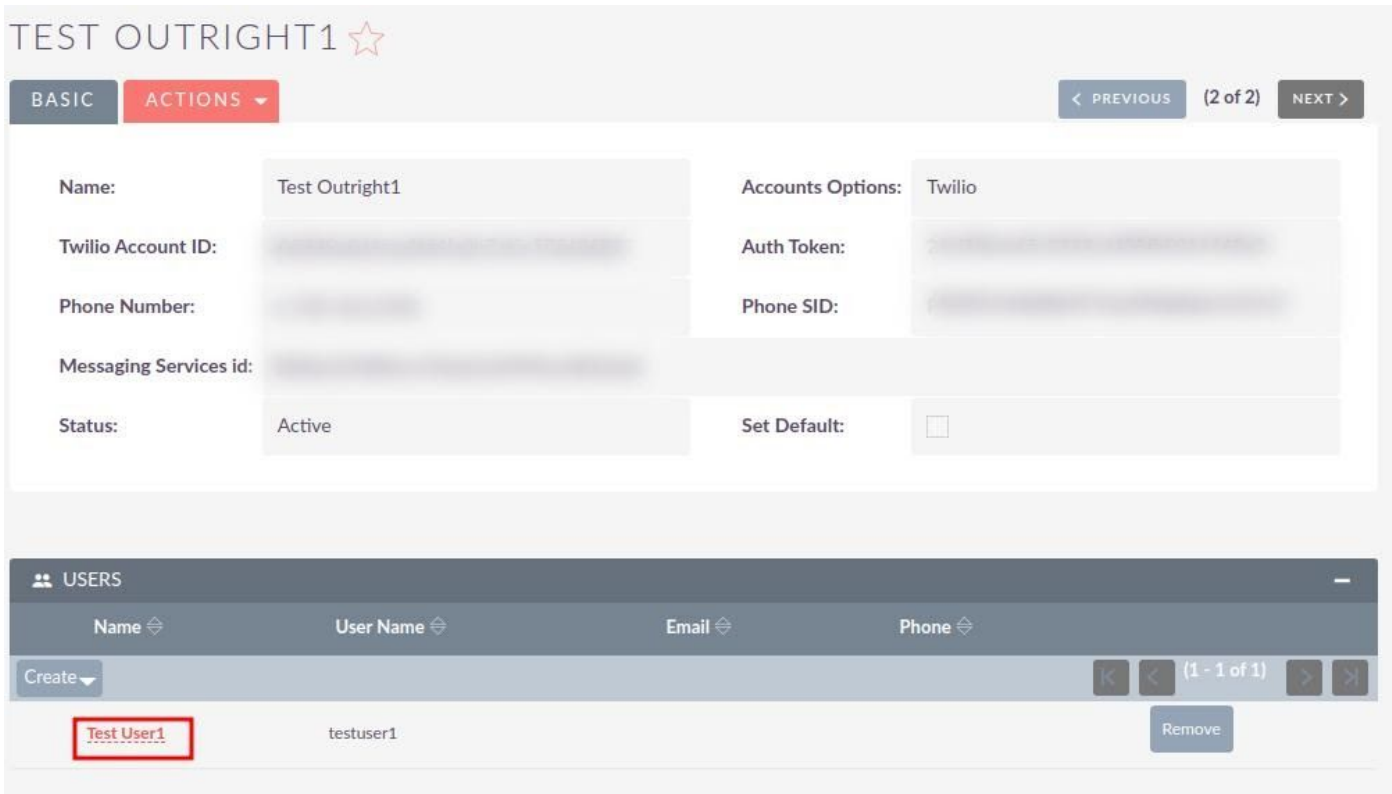
Click here to select the users

2. Select the users from the list page.

Name	Username	Job Title	Department	Email	Phone	Status
<input type="checkbox"/>	<i>i</i> <a href="#">Test User1</a>	<a href="#">testuser1</a>				Active
<input type="checkbox"/>	<i>i</i> <a href="#">Reg_User3</a>	<a href="#">reguser3</a>				Active
<input type="checkbox"/>	<i>i</i> <a href="#">Reg_User2</a>	<a href="#">reguser2</a>				Active
<input type="checkbox"/>	<i>i</i> <a href="#">Reg_Uer1</a>	<a href="#">reguser1</a>		<a href="mailto:antony.naveen@outrightcrm.com">antony.naveen@outrightcrm.com</a>		Active
<input type="checkbox"/>	<i>i</i> <a href="#">Administrator</a>	<a href="#">admin</a>	<a href="#">Administrator</a>			Active

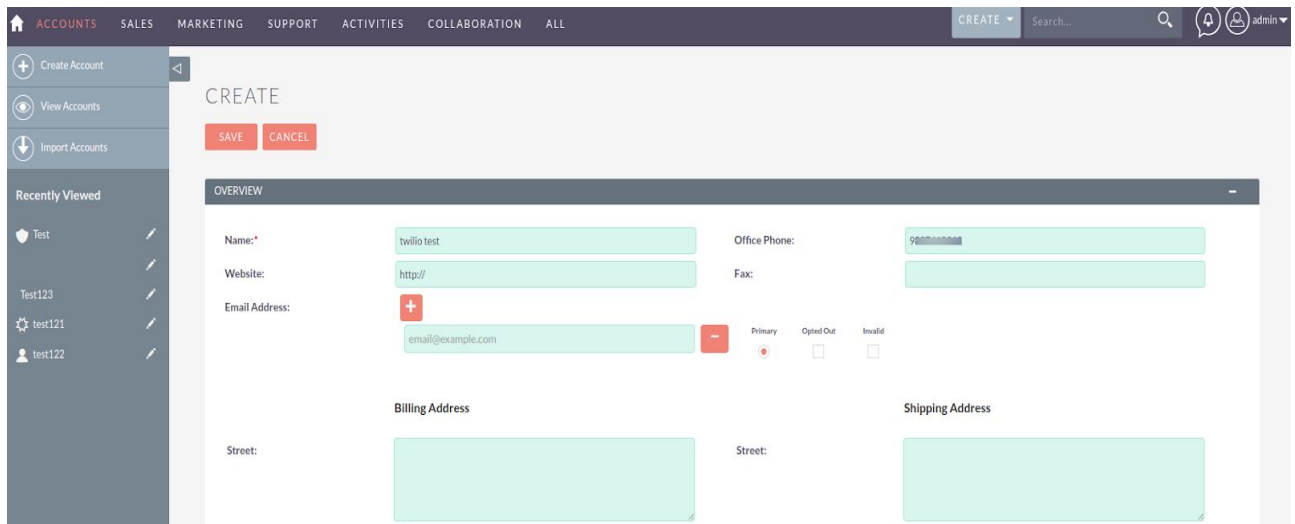


3. Assigned users should be displayed on the Users sub panel of the twilio settings.



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.

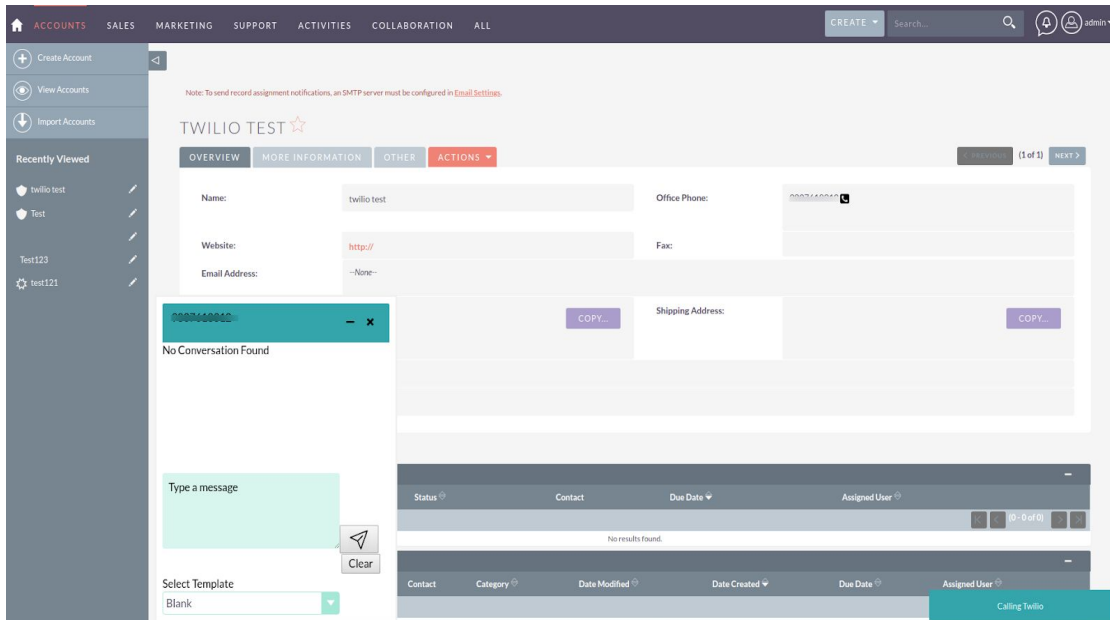


The screenshot shows the 'CREATE' form in a CRM system. The form is titled 'CREATE' and has 'SAVE' and 'CANCEL' buttons. The form is divided into several sections: 'OVERVIEW', 'Name', 'Website', 'Email Address', 'Billing Address', and 'Shipping Address'. The 'Name' field contains 'twilio test'. The 'Website' 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 '920-233-1000'. The 'Fax' field is empty. There are also checkboxes for 'Primary', 'Opted Out', and 'Invalid'.

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



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



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

