

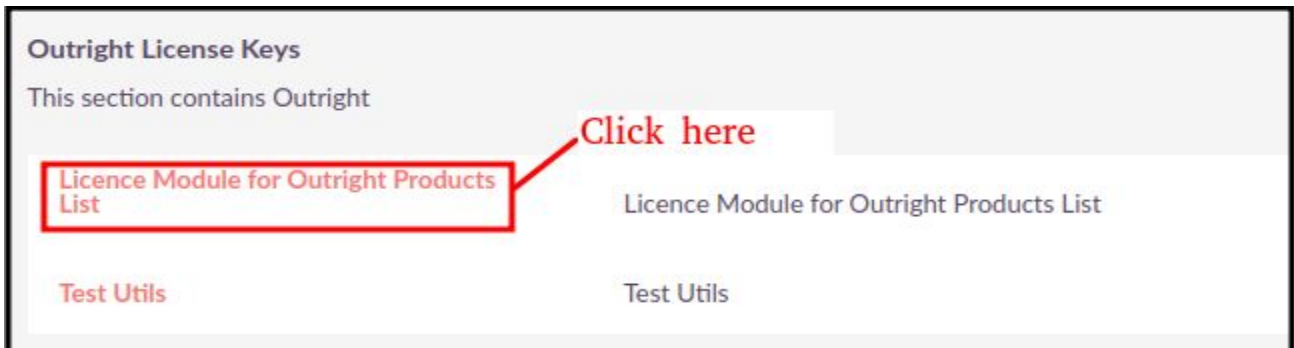


SuiteCRM TWILIO SMS

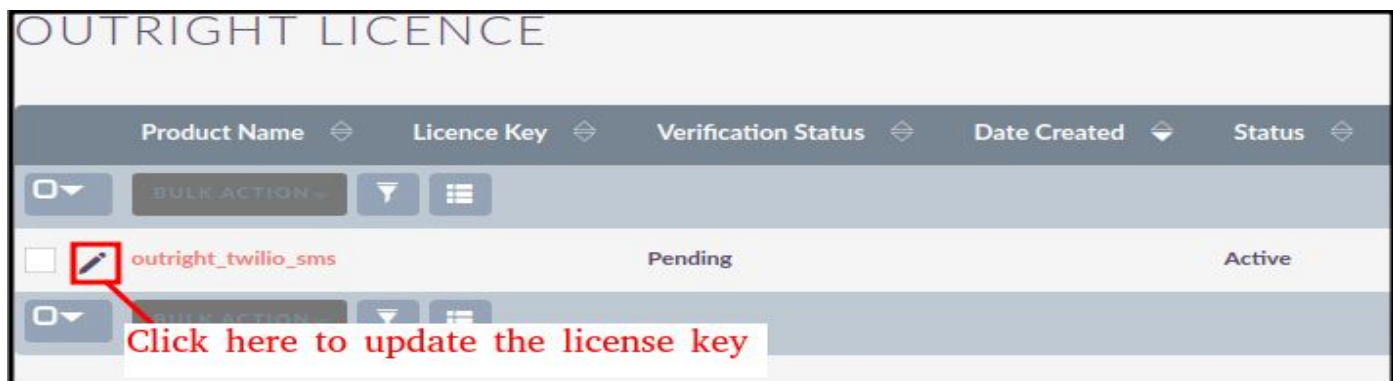
User Guide

Configuration Guide

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



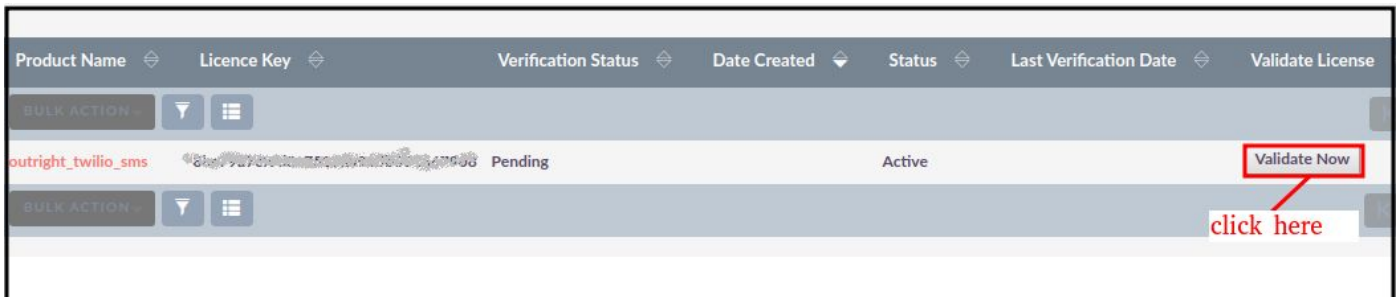
3. Edit the outright_twilio_sms license key record



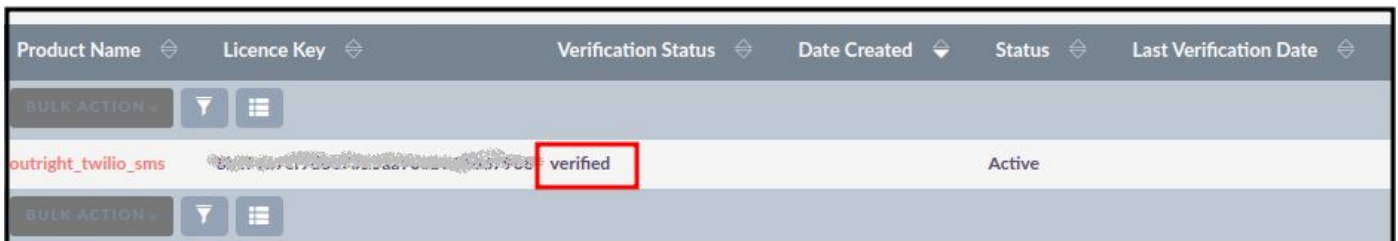
4. Add the license key from store website > My Account > License key
<https://store.outrightcrm.com/my-account/license-page/>



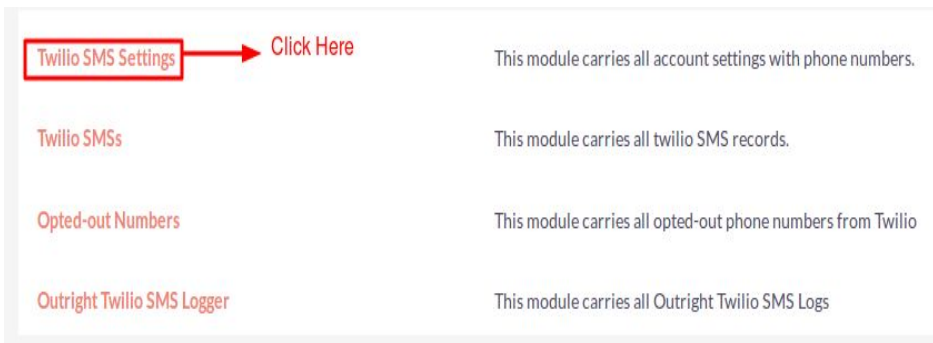
5. Click on the validate Now button and refresh the page by CTRL+F.



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



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

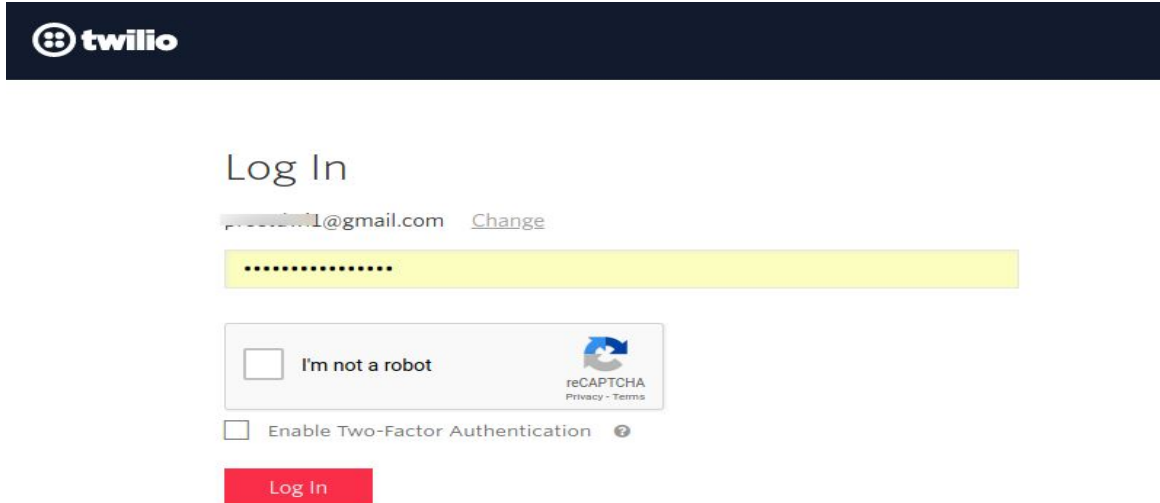


9. Create a record in Twilio Settings.

A screenshot of a web application's 'CREATE' form for Twilio settings. The form is titled 'CREATE' and has 'SAVE' and 'CANCEL' buttons at the top. It is divided into a 'BASIC' section. The fields are: 'Name:' (1), 'Accounts ID:' (3), 'Phone Number:' (4), 'Status:' (dropdown menu set to 'Active'), 'Auth Token:' (2), 'Phone SID:' (4), and 'Set Default:' (checkbox). The callouts 1, 2, 3, and 4 are circled in red.

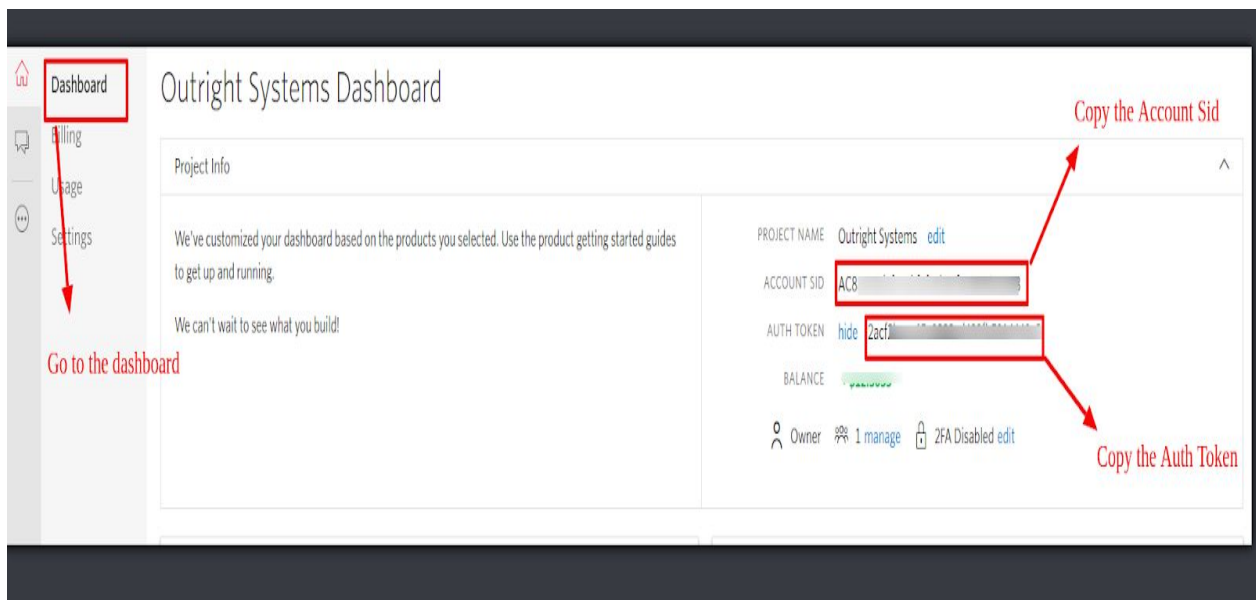
- 9.1 Enter the Name.
- 9.2 Enter the Account ID from Twilio account.
- 9.3 Enter the Auth key from Twilio account.
- 9.4 Enter phone number from Twilio account.
- 9.5 Enter phone SID from Twilio account.

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

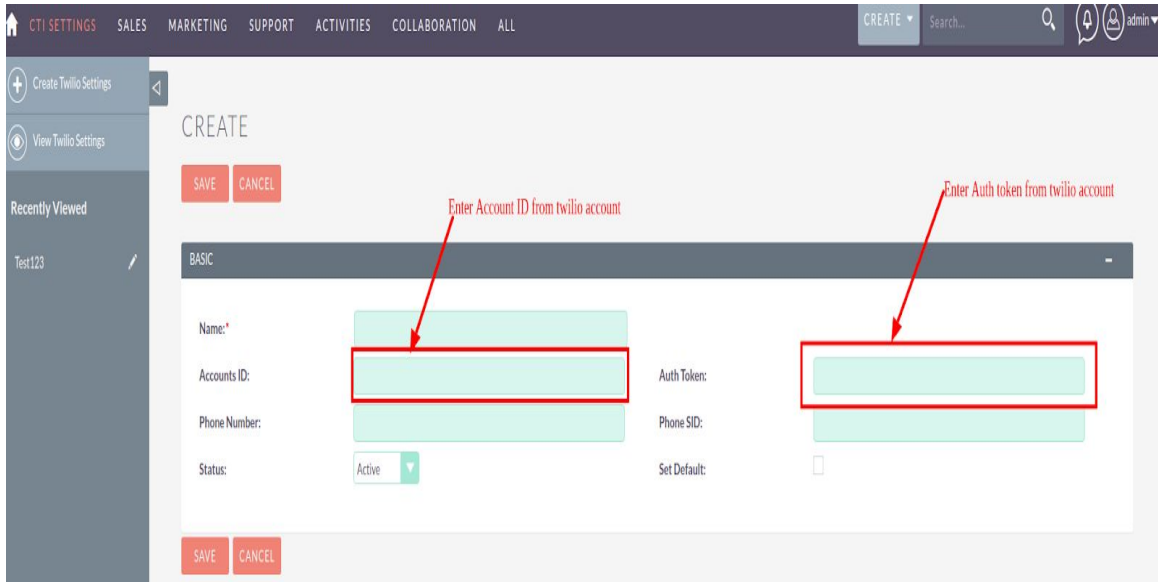


11. Go to the Dashboard.

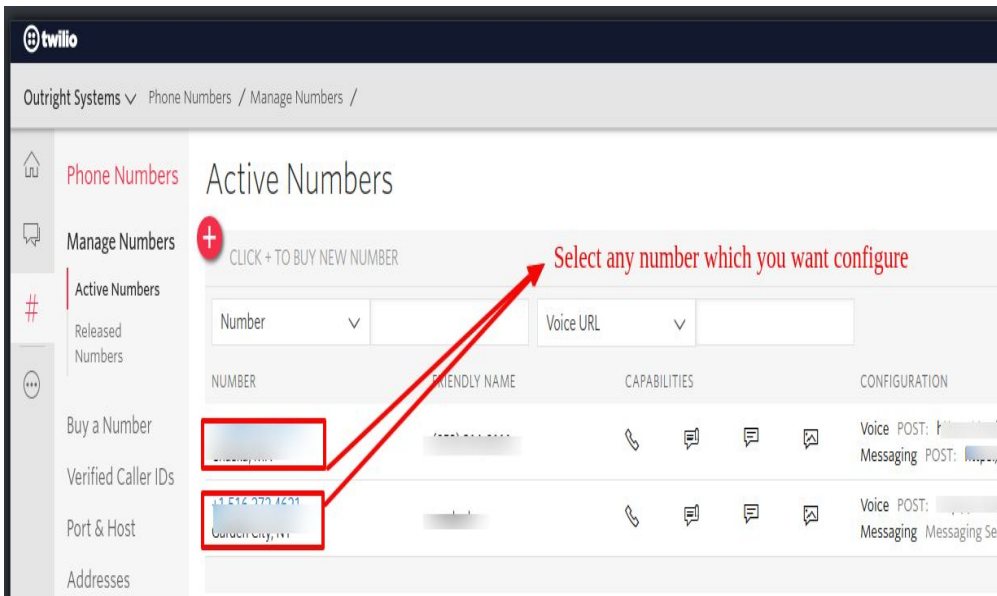
11.1 Copy and paste "Account SID" and "Auth Token" from the dashboard.



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 in the Outright interface. The form is titled 'CREATE' and has a 'BASIC' tab selected. It contains the following fields:

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

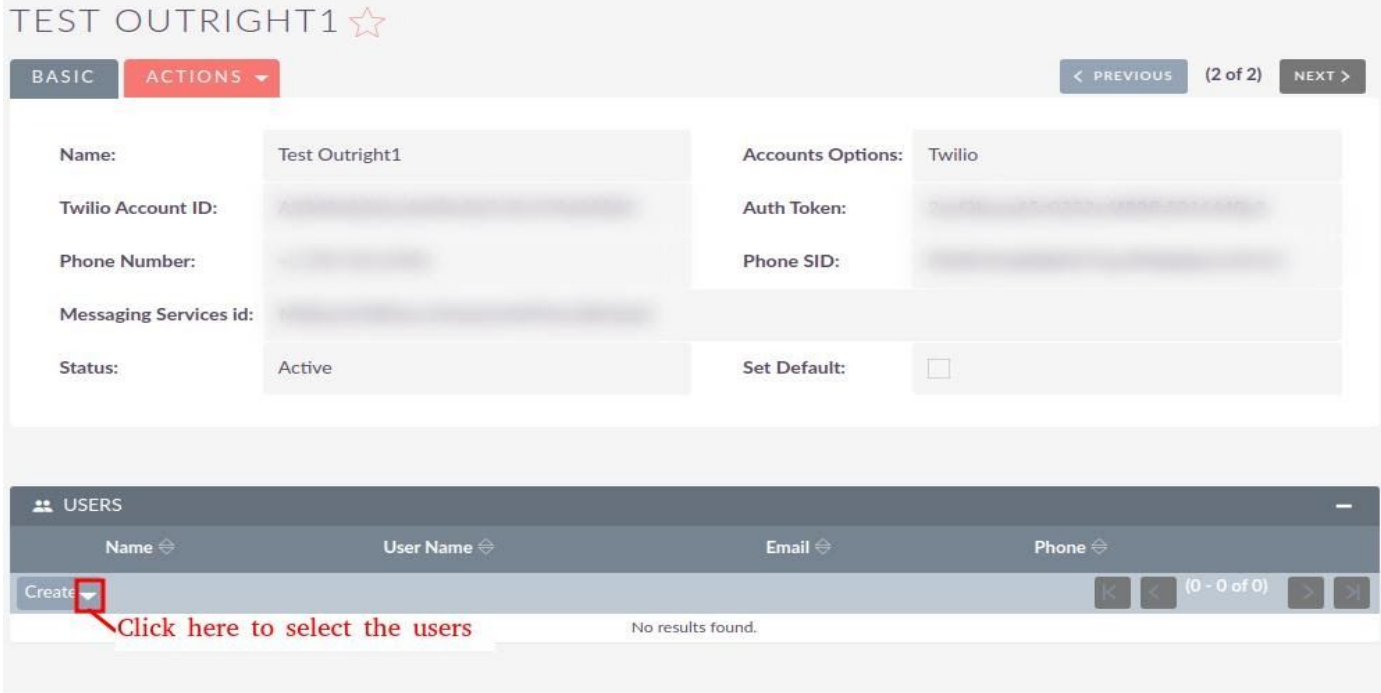
Red arrows point to the 'Phone Number' and 'Phone SID' fields, with the following text:

- Enter phone number from twilio account
- Enter Phone SID from twilio account

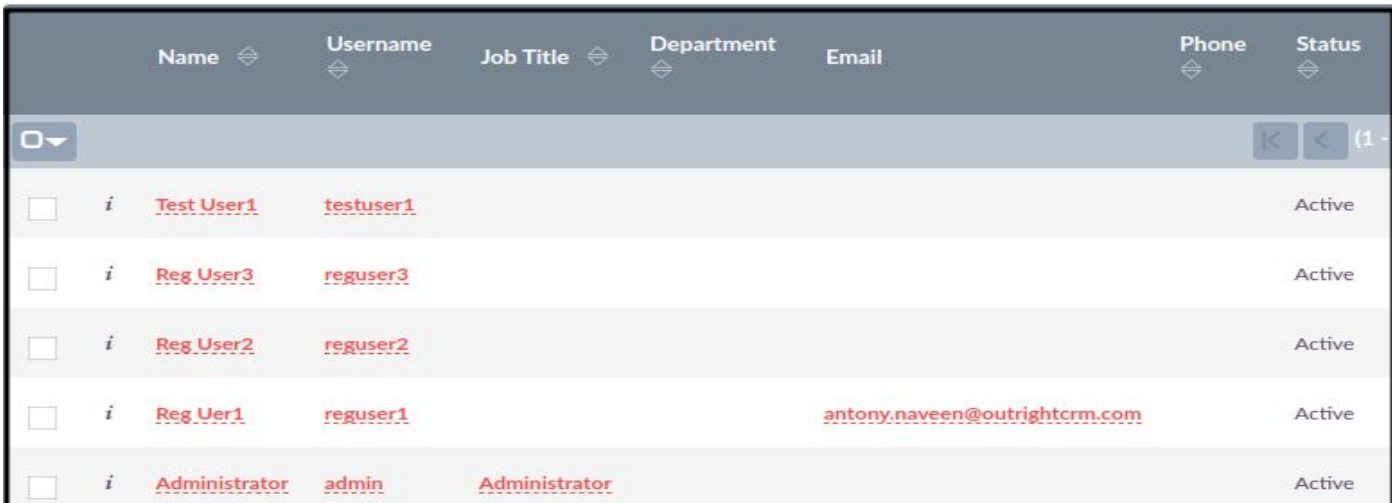
The 'Phone Number' and 'Phone SID' input fields are highlighted with red boxes. There are 'SAVE' and 'CANCEL' buttons at the top and bottom of the form.

User Guide

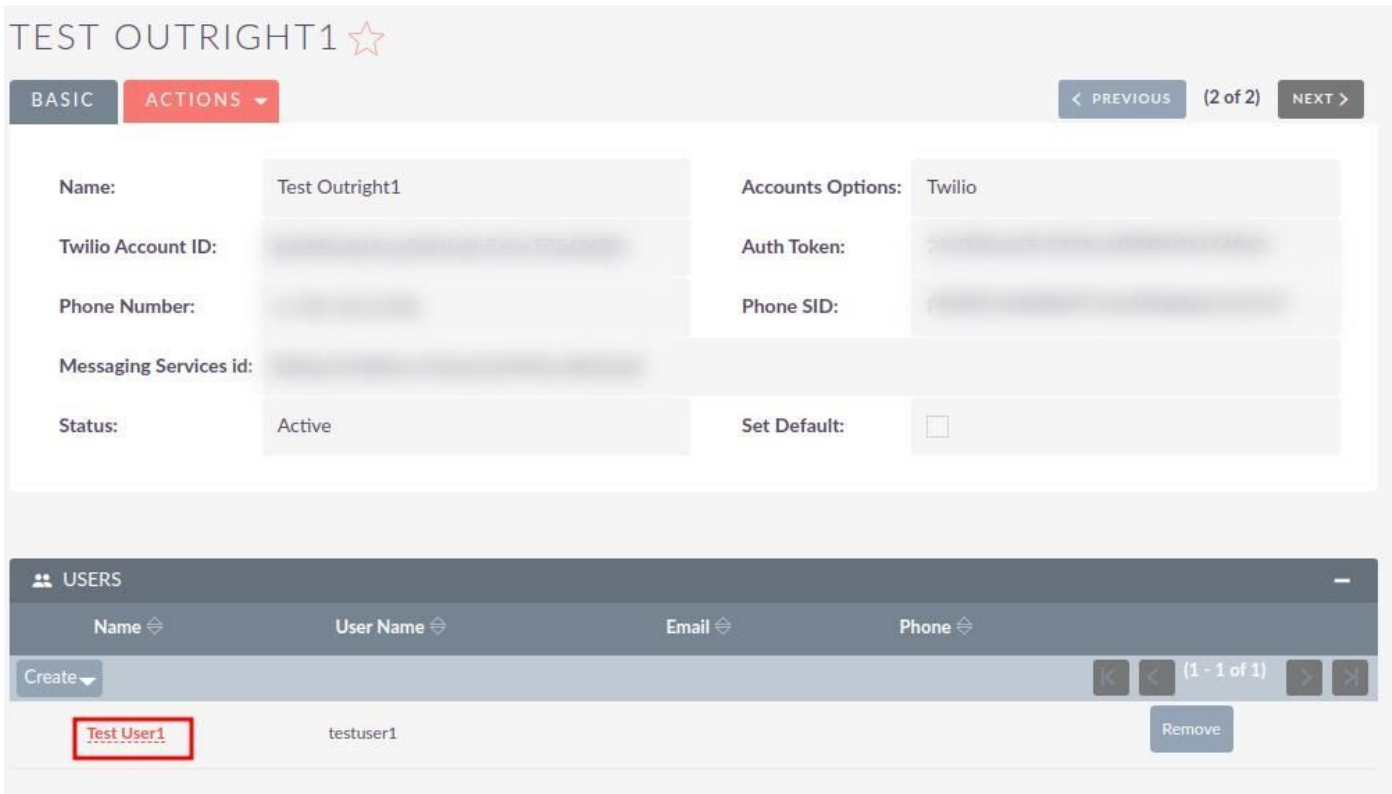
1. To assign users to the each twilio number. Go the twilio settings detail view page of any record. Go to the Users Sub panel and select the user.



2. Select the users from the list page.

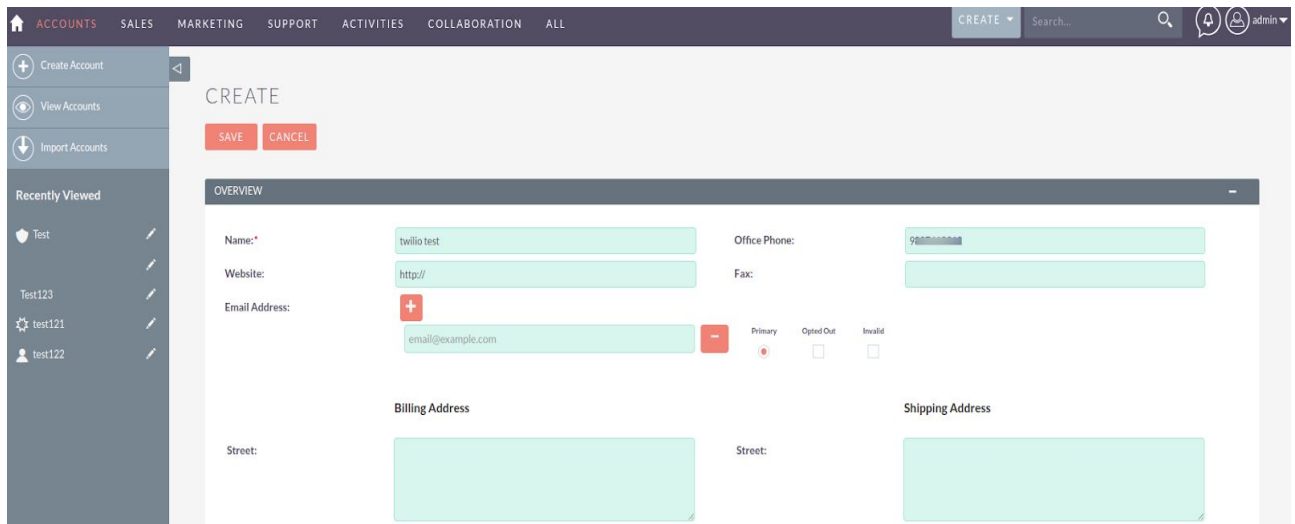


3. Assigned users should be displayed on the Users sub panel of the twilio settings.



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.



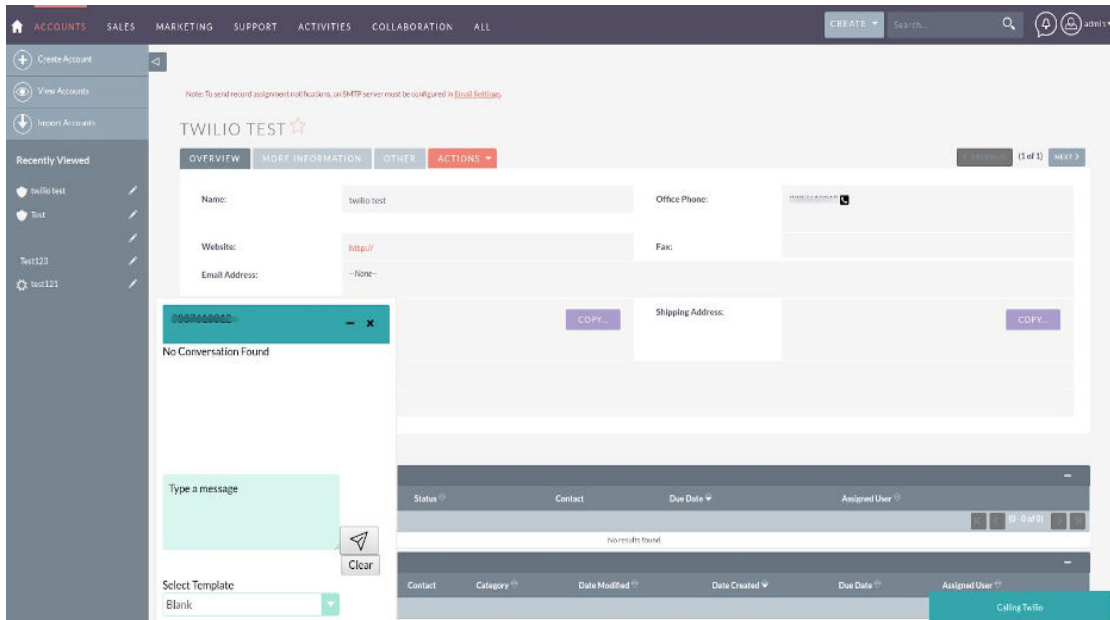
The screenshot shows the 'CREATE' form in a Twilio CRM interface. The form is titled 'CREATE' and has 'SAVE' and 'CANCEL' buttons. The 'OVERVIEW' section contains the following fields:

- Name: twilio test
- Office Phone: 9202222222
- Website: http://
- Fax: (empty)
- Email Address: email@example.com (with a '+' icon to add more)
- Primary: (selected)
- Opted Out:
- Invalid:
- Billing Address: Street: (empty)
- Shipping Address: Street: (empty)

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.

