

Quick2SMS for SugarCRM v3.0

SMS Module for SugarCRM

Documentation

An upgrade-safe text messaging module for SugarCRM v6.5+. SugarCRM users can now send SMS messages directly from SugarCRM.

Release

V3.0

- Inbound processing of SMS messages
- Opt in/out support. Outbound not sent if checked. Inbound STOP/JOIN support

V2.2

- JavaScript error causing Chrome to fail
- Fixed issue for CE users
- Send Mass SMS button implementation improved to support other people's customisations

V2.1

- Not released

V2.0

- Mass SMS from Target List
- Version 7 support

V1.0

- Send individual SMS messages to Leads and Contacts
- Create SMS templates
- View history of sent messages

Download and Purchase

Quick2SMS is available to purchase and download from
<https://www.sugaroutfitters.com/addons/Quick2SMS>

Installation Prerequisites

Before purchasing the module you need to ensure your version of SugarCRM is supported. Quick2SMS currently supports SugarCRM v6.5 or higher (including Sugar7). All editions are supported (e.g. CE, Pro, Ent, Ult). Both OnDemand and OnSite are supported.

Quick2SMS is upgrade safe.

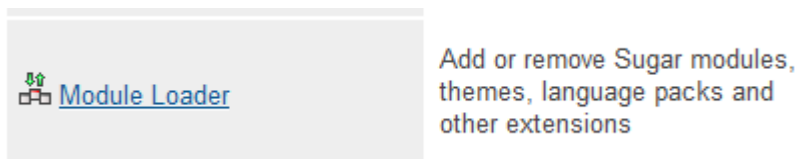
Disclaimer

Whilst this module is upgrade safe, do back up your site before applying this installation. In particular we add an enhancement to the Email Templates module and if you have had a previous customisation made to this module you may inadvertently remove these customisations. If you need to combine an existing Email Template customisation with our own customisation, please get in touch. Previous Studio customisations are not affected. This notice only applies to custom work you may have carried out outside of Studio. Either way, installation of this module is at your own risk and SouthwestCRM takes no responsibility for loss of data or disruption in operation.

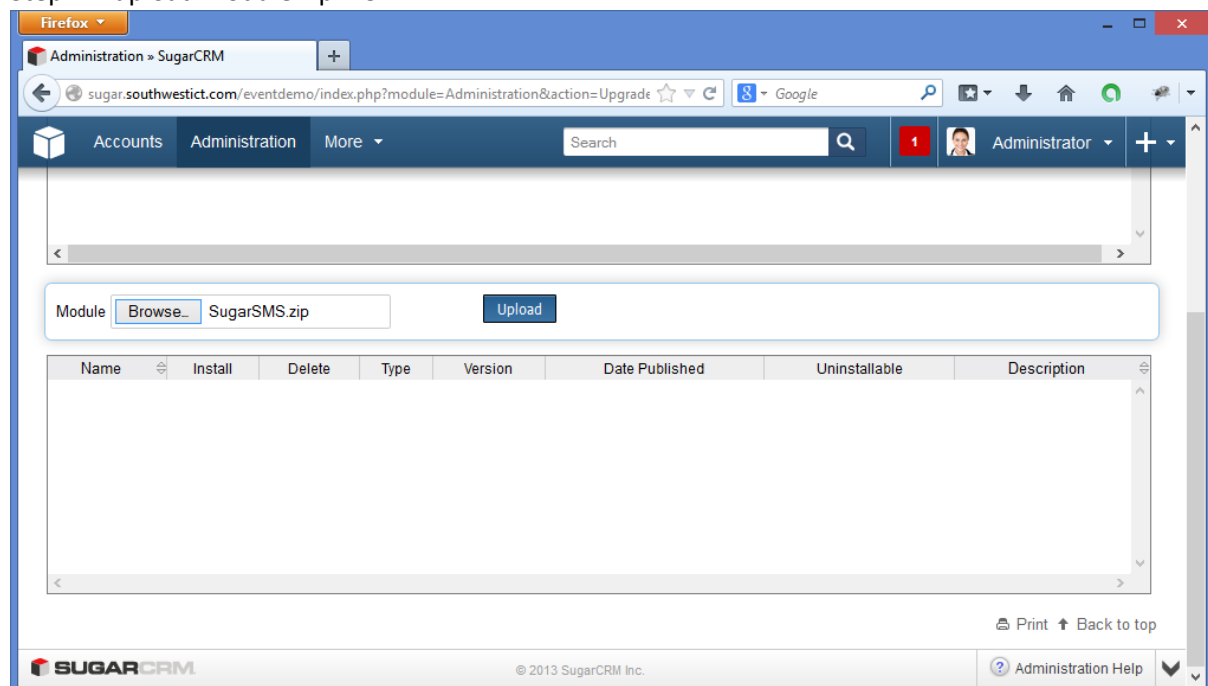
Installation Process

Having downloaded the module proceed to the Module Loader in SugarCRM.

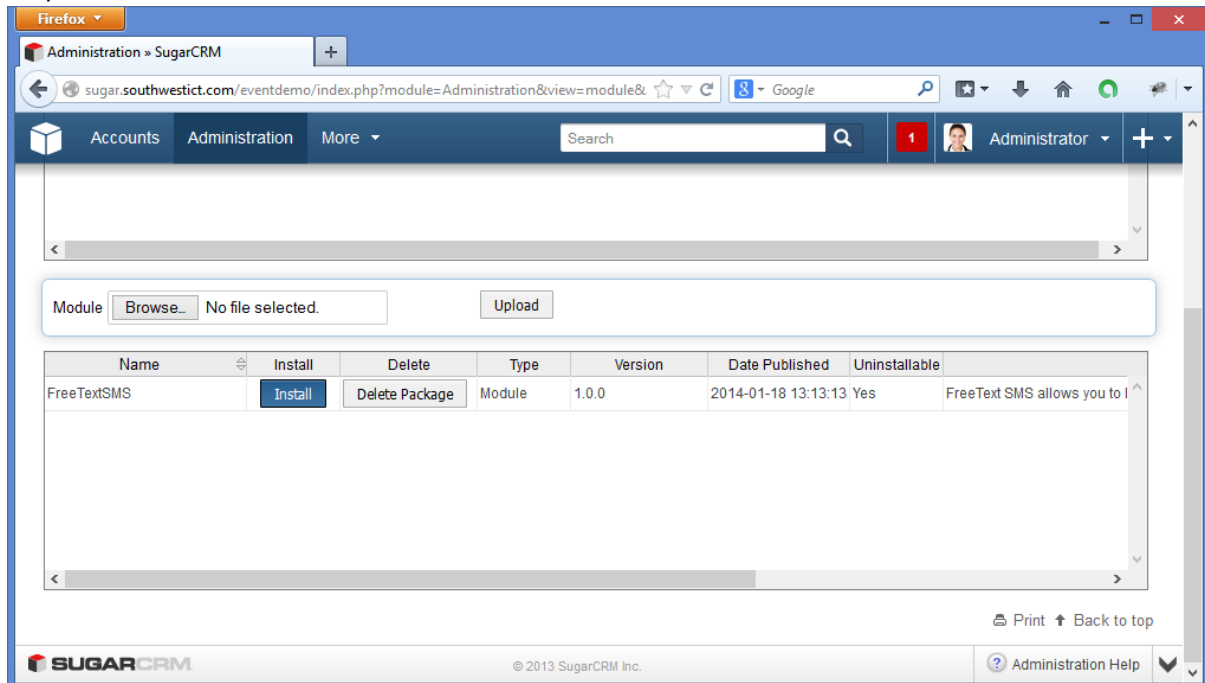
Step 1 – Access SugarCRM Module Loader



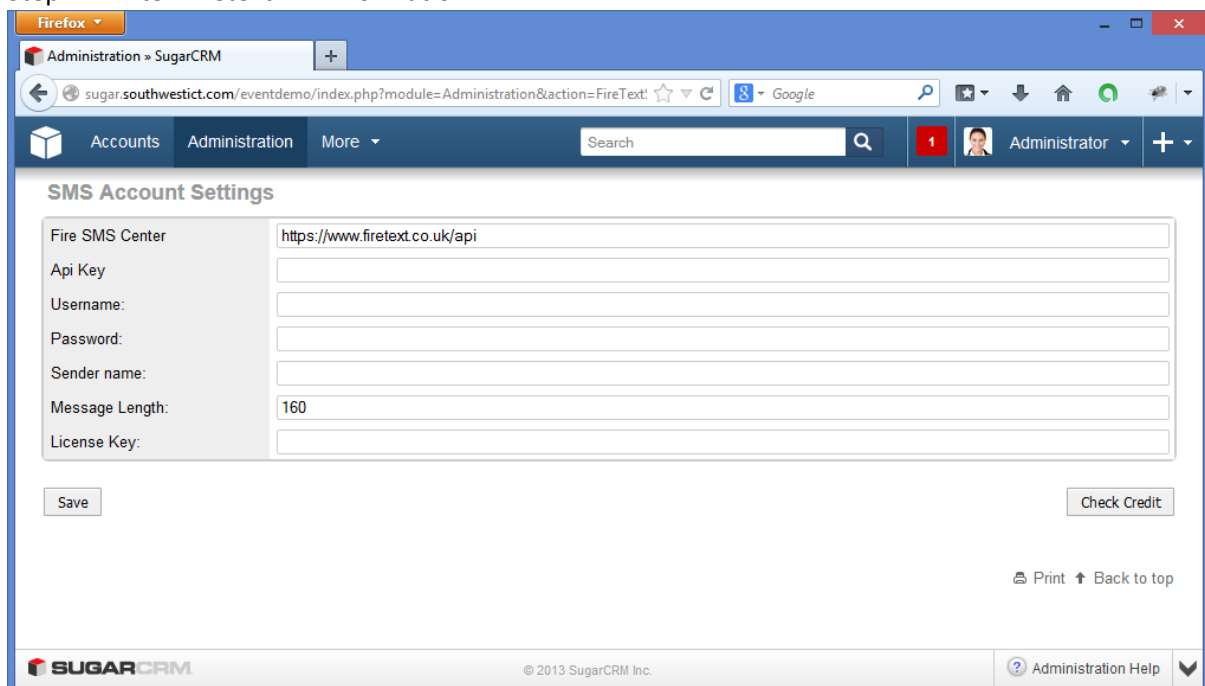
Step 2 – upload module zip file



Step 3 – Install module



Step 4 – Enter Firetext API information



Quick2SMS uses the multi-award winning FireText messaging service. You will need an account set up with this service in order to use Quick2SMS. It is free to set up an account however each message you send is charged. Please refer to the FireText price list for further details at <http://www.firetext.co.uk>

Once registered with FireText, enter your FireText username and password in the SMS Account Settings page in SugarCRM Admin module. An optional API key can be used.

Enter a default "Sender Name" which will be shown as the FROM name when recipients of your SMS texts receive messages.

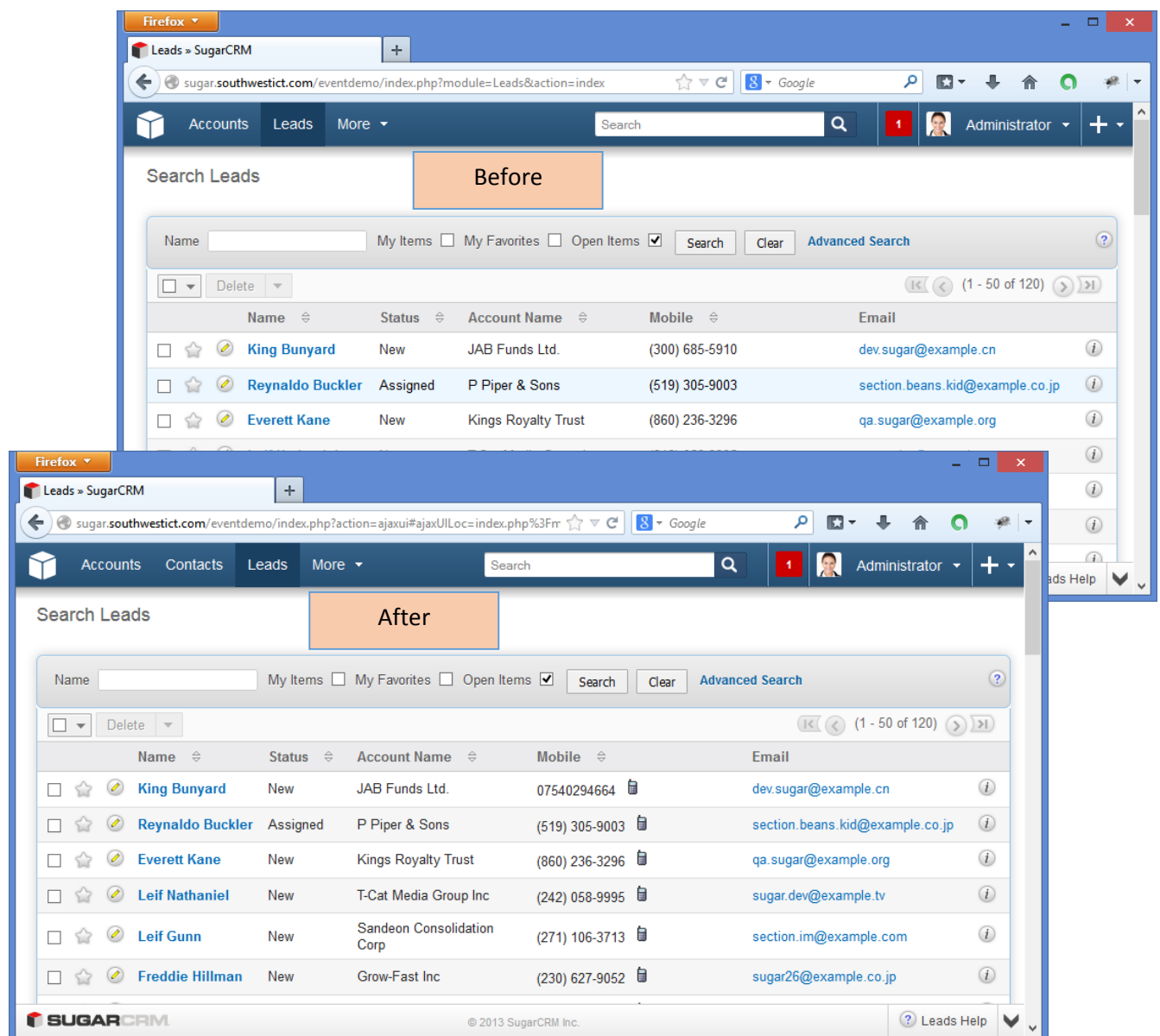
www.fibrecrm.com Copyright © 2014 FibreCRM Limited

Set a limit to the size of a message if you wish to restrict what can be sent to recipient by users.

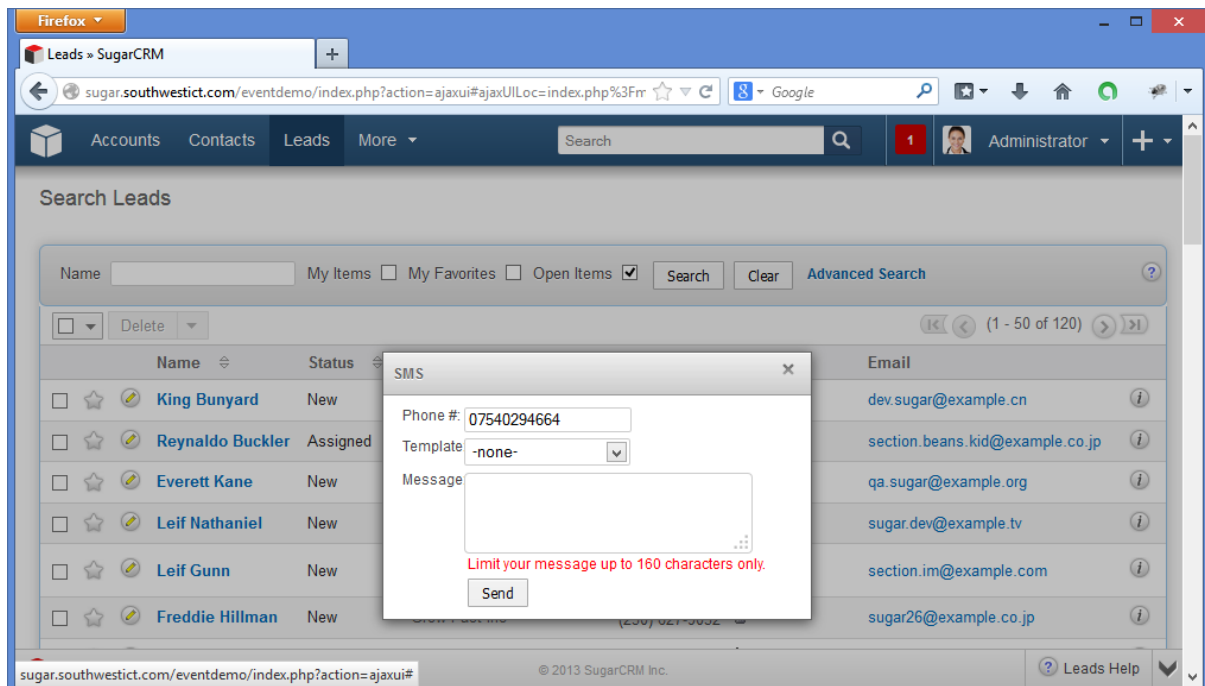
Check Credit. Having entered your FireText details correctly, the Check Credit button will show the amount of remaining credit available to your users. If you need to add credit please login to FireText and purchase credit from them. Once this has been done click the Check Credit button again to see the amount of credit available to you.

User Guide

SMS messages can be sent to any phone field in SugarCRM Contacts and Leads modules. An icon will appear next to the phone number enabling users to click to send an SMS message.

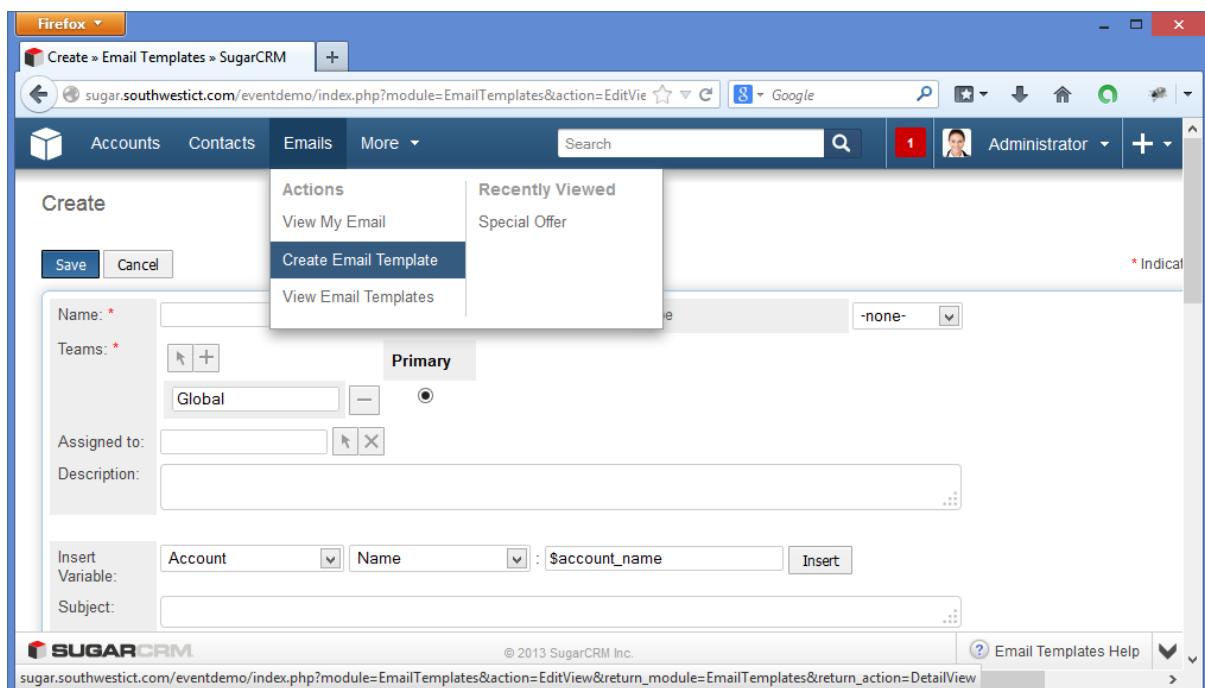


Now click on the phone icon next to a number to send a message....



Pick a template or manually type a message then click Send.

Templates need to be created before users can select from the Templates dropdown. To create a template use the Email Templates feature in SugarCRM. Navigate to Emails | Create Email Template.



Enter the Name of the SMS Template and click on the "SMS Only" checkbox next to the Name field.

Firefox

Create > Email Templates > SugarCRM

sugar.southwestict.com/eventdemo/index.php?module=EmailTemplates&action=EditView

Accounts Contacts Emails More

Search

Administrator

Save Cancel

* Indicates required field

Name: * Special Offer SMS SMS Only ☒ Type -none-

Teams: * Global Primary

Assigned to:

Description: An SMS Template to promote a product....

Insert Variable: Contact/Lead/Target First Name : \$contact_first_name Insert

☒ Send Text Only

Body:

Hi {\$contact_first_name}, did you know we are closing the 30% off promotion tomorrow. Do you still want to go ahead?

SUGARCRM © 2013 SugarCRM Inc. Email Templates Help

Note that Variables can be used (e.g. Dear \$contact_first_name) however do not forget to enclose each variable in {} characters.

Save your SMS Template. Now you can select a template to use when sending an SMS message...

Firefox

Leads > SugarCRM

sugar.southwestict.com/eventdemo/index.php?action=ajaxui#ajaxUIloc=index.php%3Fm...

Accounts Contacts Leads More

Search

Administrator

Search Leads

Name My Items My Favorites Open Items ☒ Search Clear Advanced Search

Delete

(1 - 50 of 120)

Name Status Email

King Bunyard New dev.sugar@example.cn

Reynaldo Buckler Assigned section.beans.kid@example.co.jp

Everett Kane New qa.sugar@example.org

Leif Nathaniel New sugar.dev@example.tv

Leif Gunn New section.im@example.com

Freddie Hillman New sugar26@example.co.jp

SMS

Phone #: 07540294664

Template: Special Offer SMS

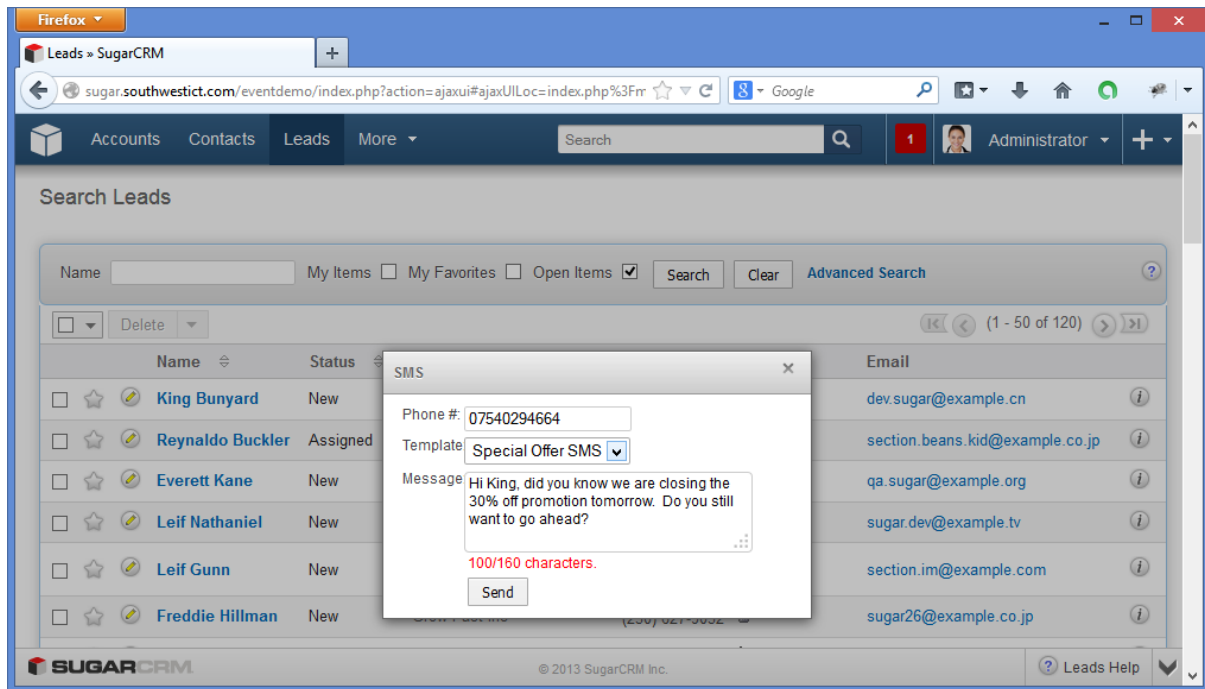
Message: Special Offer SMS

Limit your message up to 160 characters only.

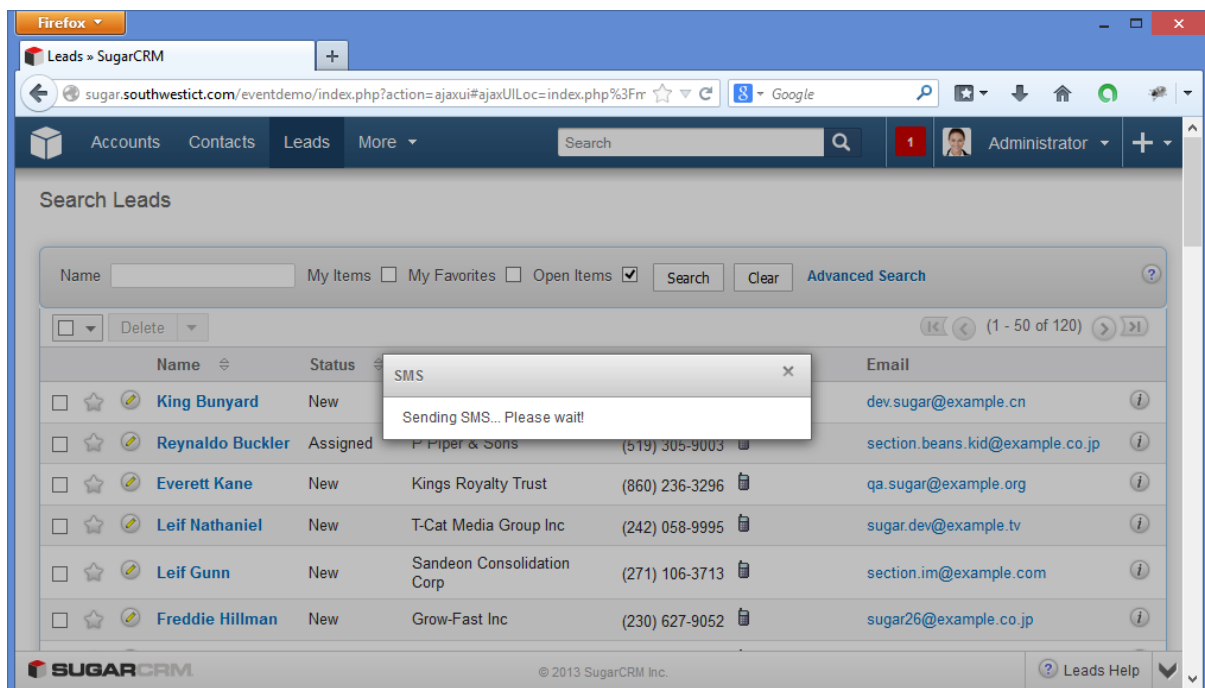
Send

SUGARCRM © 2013 SugarCRM Inc. Leads Help

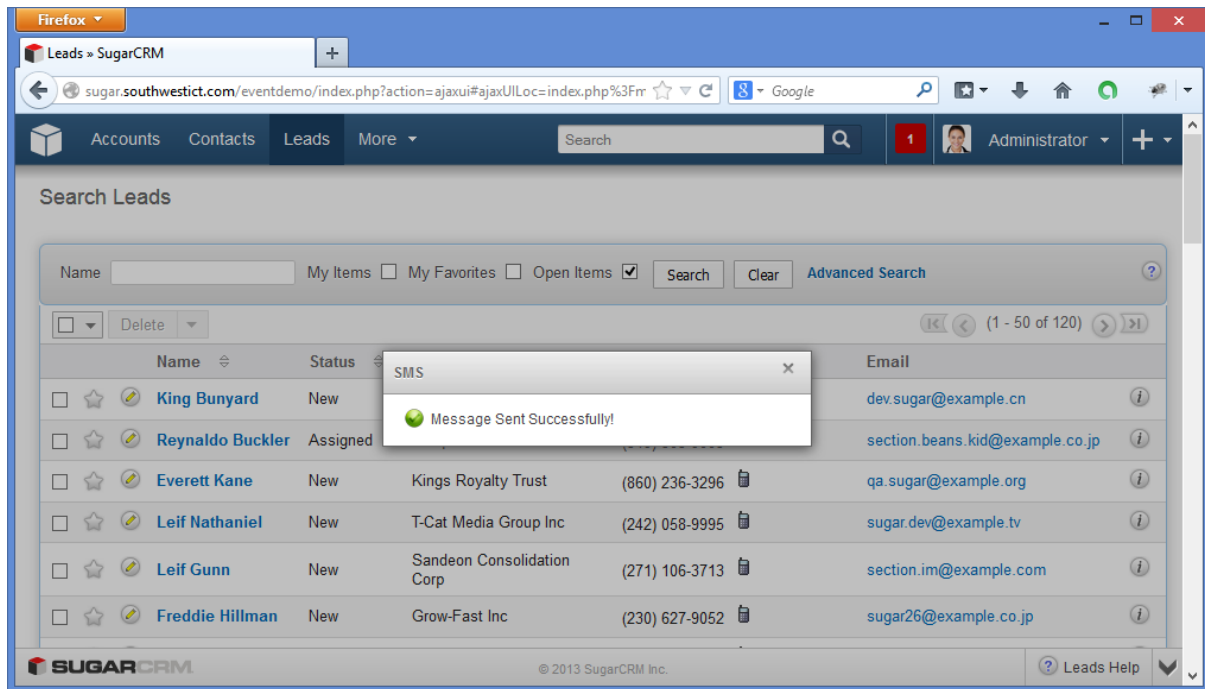
Pick the template and the variables will be merged and show the recipients details in the body of the message...



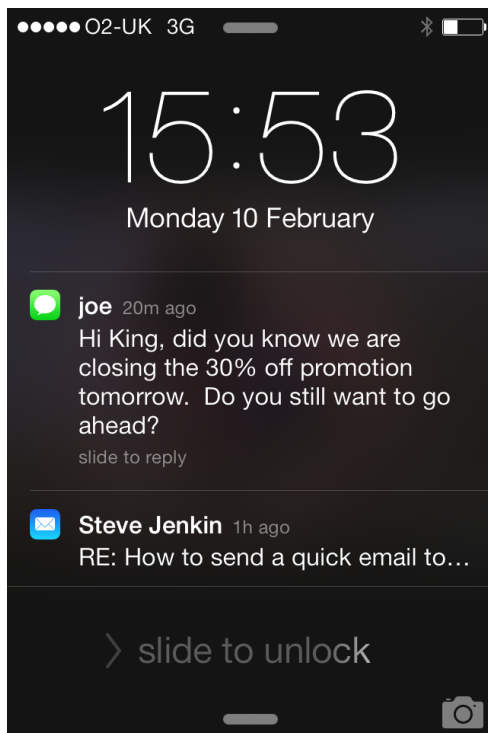
Click Send and Quick2SMS will send your message immediately....



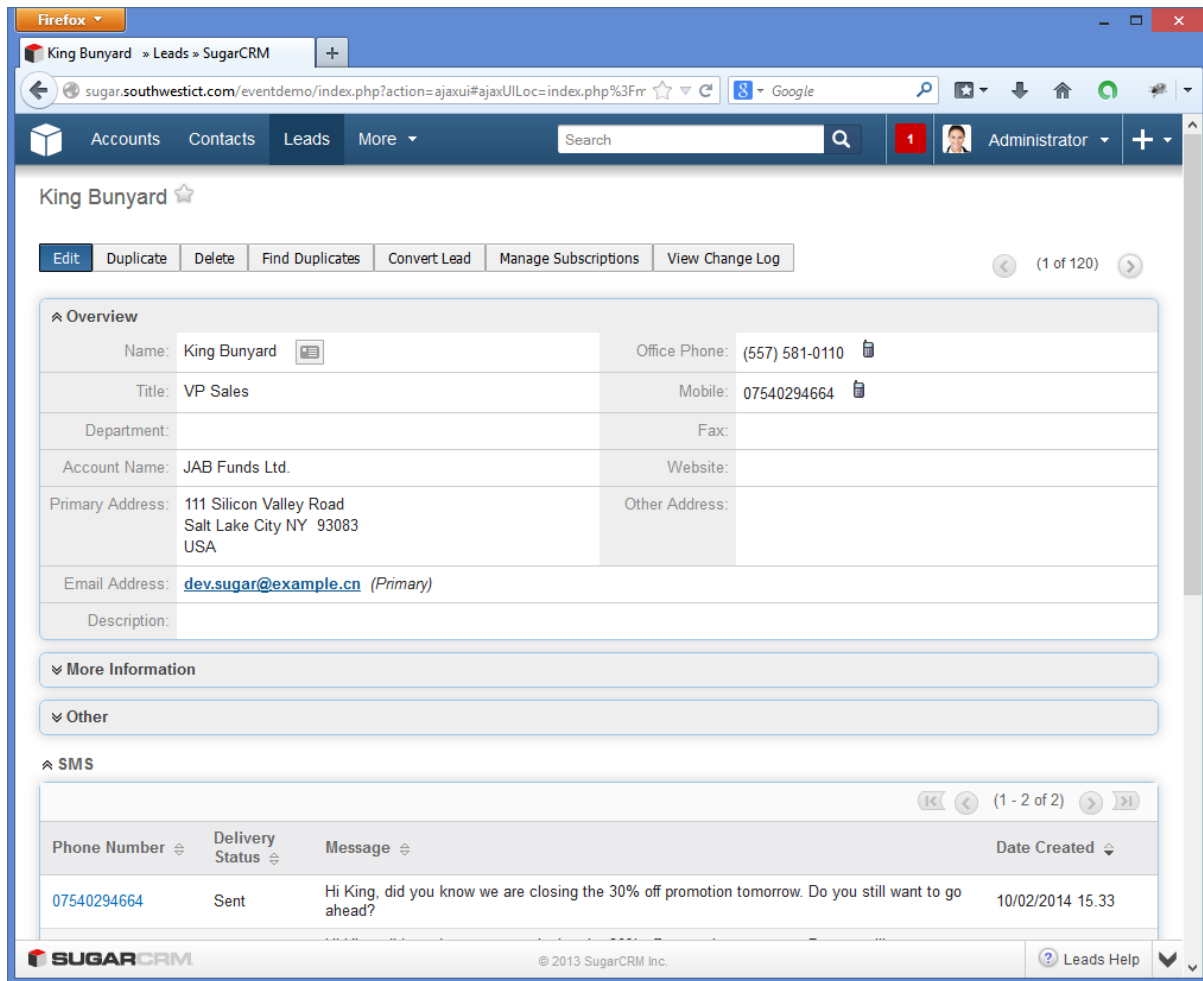
If the message is sent successfully a message will be displayed. If the message fails to send, a message will be displayed to highlight the potential issue.



...and the message appears on the recipient's phone...



Back in SugarCRM, all users can see the SMS message that has been sent to the Lead/Contact...

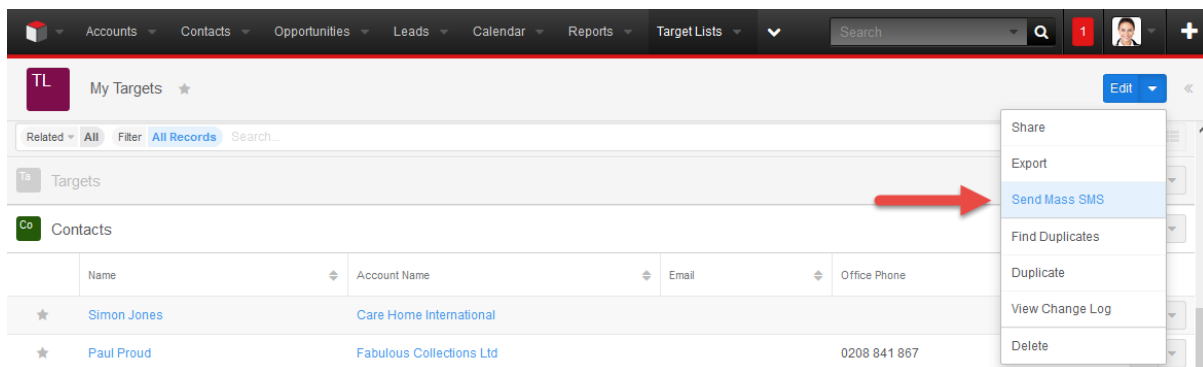


Mass SMS

The following instructions explain how to send SMS messages to all records within a Target List.

Create a Target List containing Contacts and Leads (This module only works across these two modules currently).

Open the Target List and use the Action Menu (see screenshot) to select “Send Mass SMS”



A window will load where you can select a SMS template or type in a random message. Click send to send the SMS to all records in the Target List.

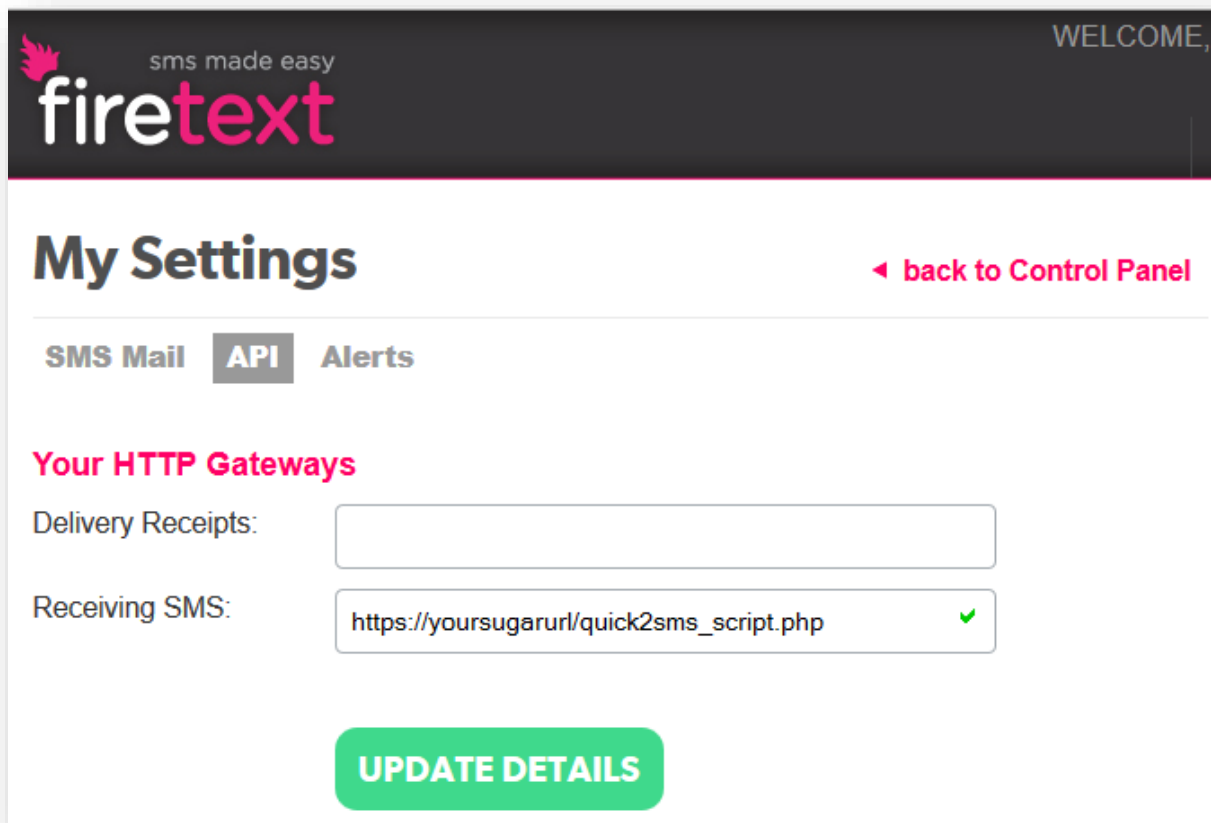
A message will be sent to the mobile number (default mobile field in Contact and Leads modules).

Inbound SMS

If your Firetext account is enabled for inbound SMS message processing then Quick2SMS will process these messages and import them into Sugar.

The FireText service ‘pushes’ received messages to the Sugar as soon as Firetext receives an SMS text. To set up this process you will need to configure Firetext. The following steps describe how to go about this.

Login into your Firetext Control Panel and go to SETTINGS >> API



The screenshot shows the Firetext 'My Settings' page with the 'API' tab selected. The page has a dark header with the Firetext logo and 'sms made easy' tagline. A 'WELCOME,' greeting is visible in the top right. Below the header, the 'My Settings' title is followed by a 'back to Control Panel' link. Three tabs are present: 'SMS Mail', 'API' (active), and 'Alerts'. Under the 'Your HTTP Gateways' section, there are two input fields. The 'Delivery Receipts' field is empty. The 'Receiving SMS:' field contains the URL 'https://yoursugarurl/quick2sms_script.php' and is marked with a green checkmark. A large green 'UPDATE DETAILS' button is at the bottom.

In the field called “Receiving SMS:” enter the location of your Sugar instance and point to the file called quick2sms_script.php (e.g. http://localhost/quick2sms_script.php) and click the Update Details button.

Firetext will now attempt to pass all inbound messages to this Quick2SMS script for processing into Sugar.

As with outbound, all inbound messages will appear in the SMS history subpanels.

Opt In/out

For Sugar Contacts and Leads an “SMS opt out” checkbox has been added to the database.

If you tick this box for a Contact/Lead then no SMS message will be sent TO this person(s).

If the person replies via SMS with the word STOP this checkbox will become ticked and the person will no longer receive SMS messages from you.

The recipient will receive one last SMS from Firetext confirming they have opted out as follows:

“You have successfully unsubscribed from this SMS list. If you would like to re-subscribe, please text JOIN to xxx xxxxx xxxx”

If the person replies via SMS with the word JOIN this checkbox will become unticked and the person will continue to receive SMS messages from you.

Troubleshooting

Before calling our helpline here are some common questions together with potential solutions.

- The installation completed however the settings page is highlighting errors and or showing code. Or a white page is displayed with ill-formed text.
 - It is likely that the installation failed to complete for some reason. Possibly due to bad file permissions on your SugarCRM installation directories and/or file system. Please ensure permissions are set correctly and then try reinstalling.
- Certain characters are not showing correctly when a message arrives. For example it says “We've” instead of “We’ve”
 - Ensure your email message is using standard keyboard character sets. For instance in this example the accented character ‘ is different to the non-accented character and therefore may not be supported by the text messaging service.
- The FireText connection keeps failing even though I have entered my user details correctly.
 - We have seen situations where the password contains characters that FireText API does not support (e.g. # symbol in password). Either change your password or enter an API key. An API key can be obtained from FireText.
- Replies to SMS messages keep failing.
 - Make sure the “Sender Name” field in Sugar is set to the SMS number and not a “Name”. Currently Firetext only supports a valid number in the ‘From’ field. Whilst it’s possible to use a synonym in this field for outbound (e.g. “ACME SMS”), replies will fail if it is not a number.