



IntelliSoftware

**Microsoft CRM 4.0 SMS Add-in Installation
Guide**

Version 1.2

Content subject to change

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1 Document History

Version	Date	Author	Description
1.0	11/06/2008	Chris Vine	First Release
1.1	12/06/2008	Chris Vine	Add notes to cover situation where workflow.config file does not already exist.
1.2	09/07/2008	Chris Vine	Changed instruction for CRM Plug-in Solution

2 Introduction

The IntelliSoftware SMS Add-in will add SMS feature to Microsoft CRM 4.0.

The new feature will be accessible from the Email form. A new drop-down bow will allow you to select message to be sent via SMS, in which case the contact's Mobile Phone will be used.

E-mail: New - Microsoft Internet Explorer

Save and Close Send Actions Help

E-mail New

E-mail Attachments

From: Cc:

To: Bcc:

Send Via:

Subject:

Formatting toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Decrease Indent, Increase Indent, Link, Unlink, Font Color, Background Color, Insert Template

The body of the SMS text message

Regarding:

Owner*:

Duration: Priority:

Due:

Category: Sub-Category:

Status: Draft

Done Local intranet

3 Installation Instructions

3.1 Installation Overview

Installation will follow the steps below:

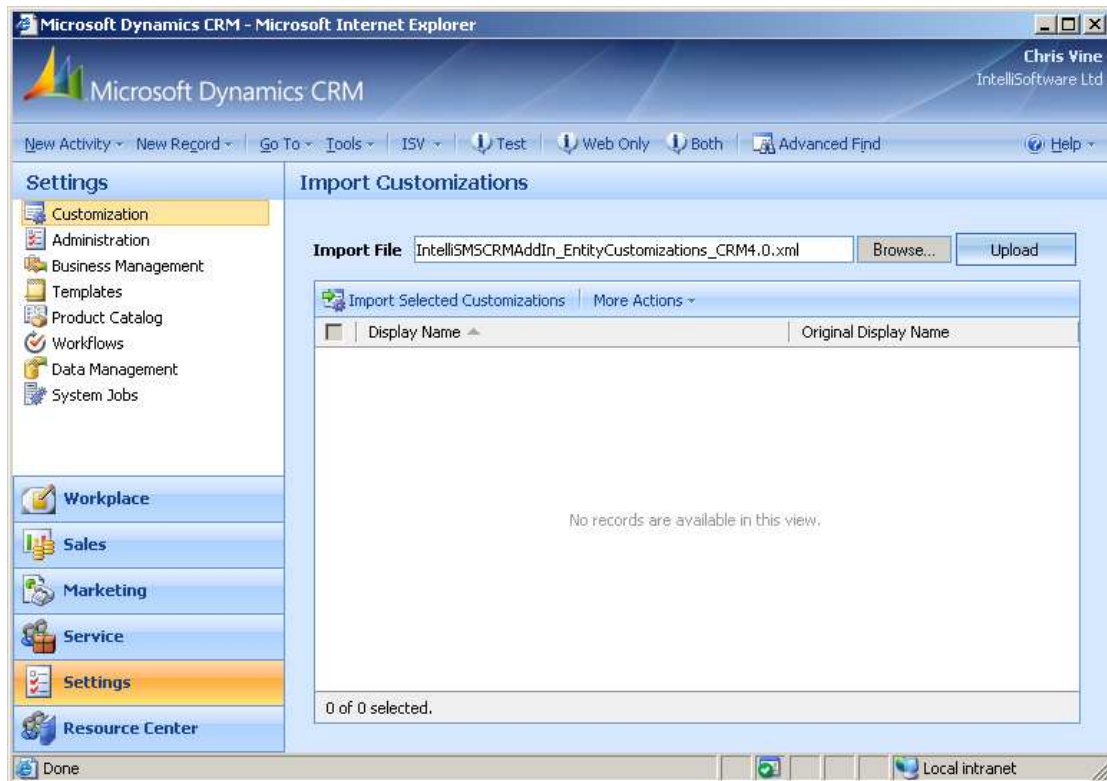
1. Install CRM User Interface Customizations
2. Install IntelliSoftware Send SMS Workflow Plug-in
3. Create Send SMS Workflow

3.2 Install CRM User Interface Customizations

1. Open Microsoft CRM Web Client and go to **Settings -> Customizations -> Import Customizations**:



- Click **Browse...** and browse to the **IntelliSMSCRMAddIn_CRM4.0_EntityCustomizations.xml** file.



- Click the **Upload** button.
- Click the **Import Selected Customizations** button to complete the customization.
- Go to **Settings -> Customizations -> Customize Entities**
- Highlight the **E-mail** entity
- Click **Publish**

3.3 Install IntelliSoftware Send SMS Workflow Plug-in

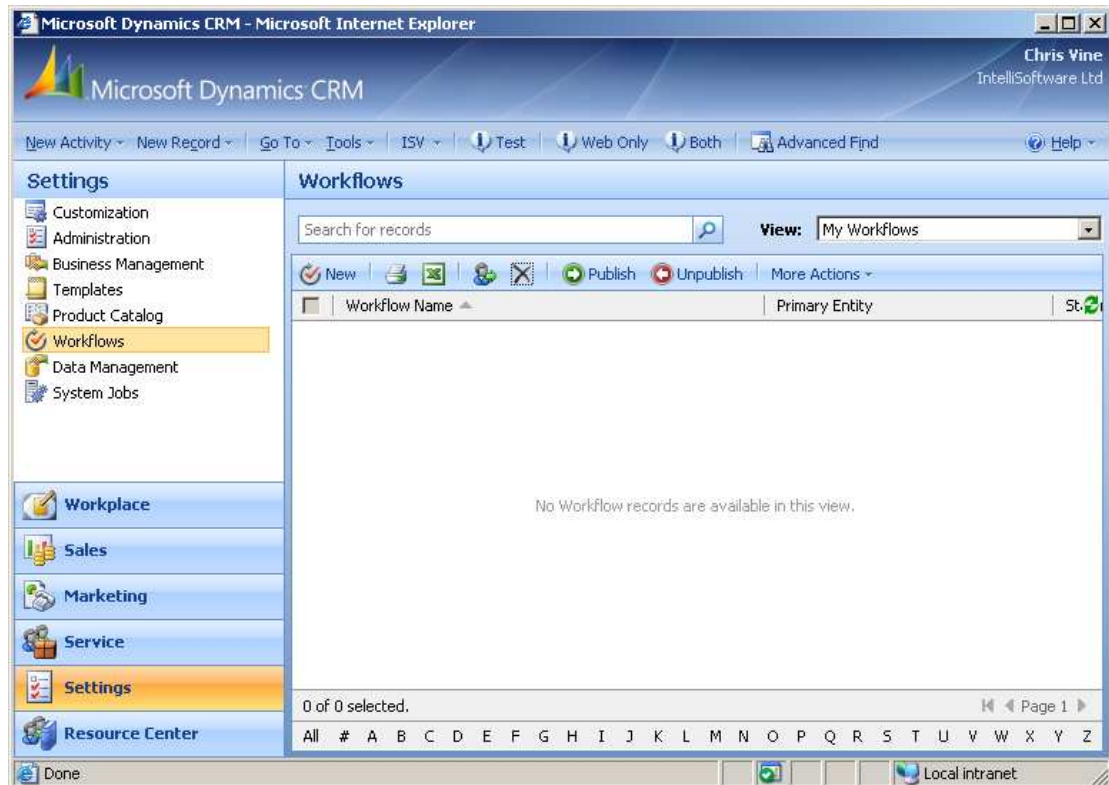
- Using Windows Explorer drag and drop the following files into the **C:\WINDOWS\assembly** directory:

microsoft.crm.sdk.dll
microsoft.crm.sdktypeproxy.dll
- Launch the plug-in registration tool by double-clicking on **PluginRegistration.exe**
- In the PluginRegistration tool's **Connection** dialog, enter your Microsoft Dynamics CRM server information and click the **Connect** button. Next select an organization and click the **Connect** button again or just double click an organization in the list.
- In the PluginRegistration tool's **New Connection: <org name>** tab, click on the **Register** button and select **Register New Assembly**.
- In the **Register New Plugin** dialog, click on the browse button in **Step #1** and browse to the **IntelliSoftware.Crm.IntelliSMSCRMPlugin.dll** file. Click the Open button.
- In **Step #2**, you should see the plug-in assembly: **IntelliSoftware.Crm.IntelliSMSCRMPlugin**. Check (select) the empty box next to the assembly and then click the **Register Selected Plugins** button.
- Go to **Start Menu -> Programs -> Administrative Tools -> Services**

8. In the Services window, in the details pane, right-click **Microsoft CRM Asynchronous Processing System**, and then click **Restart**.
9. In the Services window, in the details pane, right-click **World Wide Web Publishing Server**, and then click **Restart**.

3.4 Create Send SMS Workflow

1. Open Microsoft CRM Web Client and go to **Settings -> Workflows**:



2. Click the **New** button.

Enter the following details for the new Workflow Rule:

Workflow Name: **Send SMS**

Entity: **E-mail**

Workflow: New -- Web Page Dialog

Create Workflow
Create a blank workflow or a workflow based on a workflow template.

Workflow name: Entity:

Type:

☒ New blank workflow

☐ New workflow from template (select from list):

Template Name ▲	Primary Entity	Owner
No Workflow Template records are available in this view.		

0 of 0 selected. Page 1

http://localhost:5555/IntelliSoftwareLtd/sfa/workflow/workflowTemplate/workflowTer Local intranet

Click the **OK** button.

3. On the next screen set the following:

Scope: **Organisation**

Workflow: Send SMS - Microsoft Internet Explorer

Workflow: Send SMS

Information

General Administration Notes

Hide Workflow Properties

Workflow Name * Send SMS

Entity E-mail

Publish As Workflow

Options for Automatic Workflows

Scope Organization

Start when:

☒ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record attributes change

☐ Record is deleted

Available to Run

☐ On demand

☐ As a child workflow

Add Step Insert X

Send SMS message via IntelliSoftware SMS Gateway when Send Via = SMS

If <condition> (click to configure), then:

Select this row and click Add Step.

Status: Draft

Done Local intranet

4. Select **Add Step -> Check Condition**

Enter the following details for the Check Condition:

Entity: **E-mail**
Attribute: **Send Via**
Condition: **Equals**
Value: **SMS**

Specify Workflow Condition -- Web Page Dialog

Save and Close

Clear

Entity	Attribute	Condition	Value
E-mail	Send Via	Equals	SMS

Select

Form Assistant

Dynamic Values

Dynamic Values

Look for:

E-mail

Send Via

http://localhost:5555/IntelliSoftwareLtd/Condition/Condition.aspx?PrimaryEntityType=email&EntityId=ff41e733-1291-4537-8286-888f Local intranet

Click **Save and Close**

- Highlight the row after the condition.

Select **Add Step -> IntelliSoftware -> Send SMS (Forward Email to SMS)**

Enter **Action Name: 'Send SMS'**

Workflow: Send SMS - Microsoft Internet Explorer

Workflow: Send SMS Information

Details: Information System Jobs: Workflows

General Administration Notes

Hide Workflow Properties

Workflow Name * Send SMS

Entity E-mail

Publish As Workflow

Options for Automatic Workflows

Scope Organization

Start when: ☒ Record is created ☐ Record status changes ☐ Record is assigned ☐ Record attributes change ☐ Record is deleted

Available to Run

☐ On demand ☐ As a child workflow

Add Step Insert X

Send SMS when Send Via = SMS

If E-mail:Send Via equals [SMS], then:

Send SMS

IntelliSoftware:Send SMS (Forward Email to SMS) Set Properties

Status: Draft

Done Local intranet

- Click **Set Properties**

Set Custom Step Input Properties -- Web Page Dialog

Workflow: Send SMS Set Custom Step Input Properties

Property Name	Data Type	Value
Email	lookup	{E-mail Message(E-mail)}
IntelliSMS Sender's Id (Optional - Leave b...	nvarchar	
IntelliSMS Username	nvarchar	MyUsername
IntelliSMS Password	nvarchar	MyPassword
IntelliSMS HTTP Proxy Address (Optional)	nvarchar	
IntelliSMS HTTP Proxy Username (Optional)	nvarchar	
IntelliSMS HTTP Proxy Password (Optional)	nvarchar	
IntelliSMS Log File (Optional)	nvarchar	

Form Assistant

Dynamic Values

Operator: Set to

Look for: E-mail

Activity Status

Add

Move Up Move Down

Default value:

OK

http://localhost:5555/IntelliSoftwareLtd/SFA/Workflow/customactivityform.aspx?workflowId=04a94f65-03 Local intranet

7. Select the **Email** parameter and do the following:
 - In the Form Assistant ensure that **E-mail** and **E-mail Message** is selected
 - Click the **Add** button
 - Click the **OK** button
8. For the other parameters:

IntelliSMS Username:	Enter username of your IntelliSoftware SMS Account
IntelliSMS Password:	Enter password of your IntelliSoftware SMS Account

The other fields can be left blank.
9. Click **Save and Close**
10. Click **Save and Close**
11. Click **Publish** to activate the new Workflow Rule.

4 Diagnostics

The follows tools can help you resolve any installation issues:

CRM Workflow Monitor – This can be access with in the Microsoft CRM Web Client, go to: **Settings -> System Jobs**. Set the filter to **Entity: Email**.

CRM Trace Log – CRM Trace Log can provide you more information when a Workflow has failed. See section 4.1 for further instructions.

IntelliSoftware CRM SMS Add-in Trace Logging – To enable trace logging open the Workflow Manager and open the Send SMS workflow. Edit the Send SMS action, set the **IntelliSMS Log File** to valid filename and path (e.g. 'C:CRMLog\IntelliSMSCRMLog.txt'). Make sure the path is valid and that there are no security restrictions on the folder.

4.1 Enable Microsoft CRM Trace Logging

1. Double click on the **Diagnostics\CRM4.0_EnabledTraceLogging_ON.reg** and click **OK**.
2. Go to **Start Menu -> Programs -> Administrative Tools -> Services**
3. In the Services window, in the details pane, right-click **Microsoft CRM Asynchronous Processing System**, and then click **Restart**.

To disable trace logging repeat the procedure using the **CRM4.0_EnabledTraceLogging_OFF.reg** file.