NexmoSMS for Microsoft Dynamic CRM

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# Introduction

NexmoSMS app for Microsoft Dynamic CRM, integrate Nexmo SMS APIs with the platform and allows user to enable SMS functionality in the platform. App will send predefined SMS whenever a new opportunity is created, updated or a lead qualifies into an opportunity on the CRM platform. User can define the threshold for the budget amount and SMS will be send in case the opportunity’s budget amount is more than the threshold value.

# Use Case

1. Sales Executive add a new opportunity or qualifies a lead into an opportunity, and adds the expected budget amount to that opportunity. The app will send an SMS to the respective Sales Manager if opportunity budget value is above a threshold amount.

 SMS to Sales Manager: “**A new opportunity <<Title>> for <<Account>> with probable value <<*Budget value*> has been added**.”

1. Sales Executive updates budget amount of any opportunity. The app will send an SMS to the respective Sales Manager if opportunity budget value is above a threshold amount.

SMS to Sales Manager: “**An opportunity <<Title>> for <<Account name>> has been updated with probable value < Budget VALUE>**.”

# Prerequisite

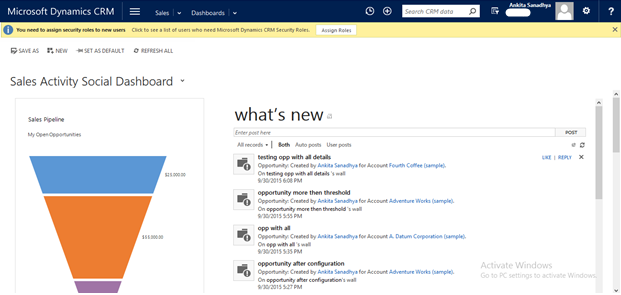
* This app requires Nexmo subscription and corresponding Nexmo API key and Secret key.
* On Microsoft Dynamic DRM, Phone number should be in international format.
* Each salesperson should have assigned manager.
* Each assigned manager should have mobile number updated in CRM System.

# Features

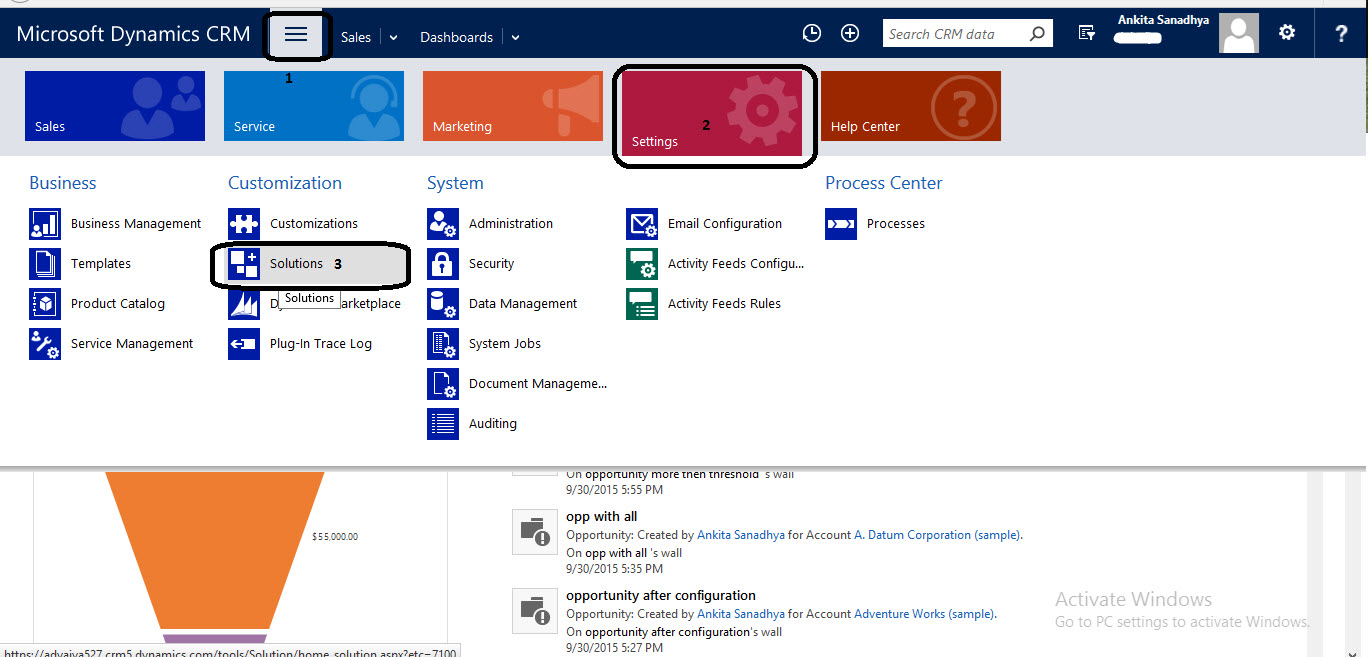
* Allow to enable and disable SMS functionality
* Allow user to edit Nexmo API key and secret using configuration form.
* Send SMS to the respective manager when the opportunity’s budget amount is more than the threshold value.
* SMS will be delivered while updating the CRM Opportunity.
* No SMS will be delivered if the respective manager doesn’t have mobile number updated in CRM System.
* Opportunity creation process will not impact in case of failure in SMS send.

# Steps to install NexmoSMS App

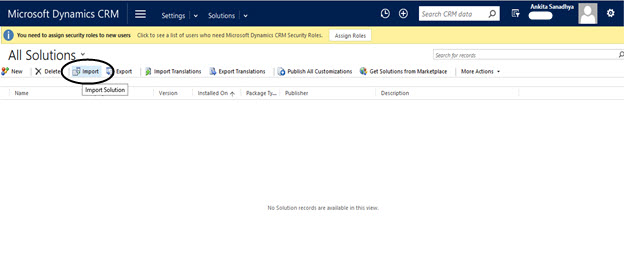
1. Login to Dynamic CRM Online using following credentials:
   1. URL = <https://advaiya832.crm5.dynamics.com/>
   2. Login ID = arun.salvi@Advaiya832.onmicrosoft.com
   3. Password = pass@word1
2. Dynamic CRM dashboard will appear.

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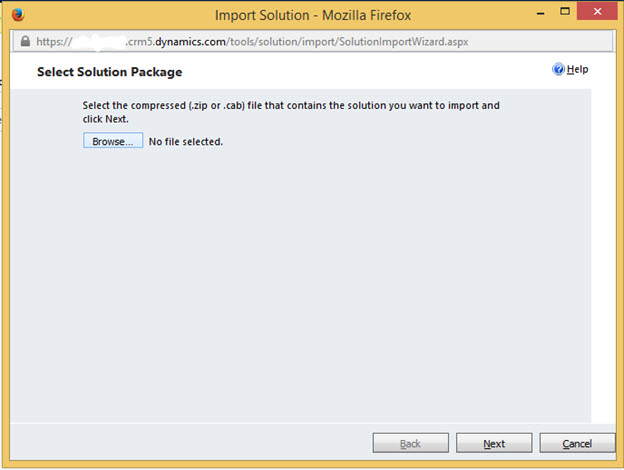
1. On Dashboard, click on menu  icon. Select ***Settings > Solutions*** for package installation as shown in the image below:



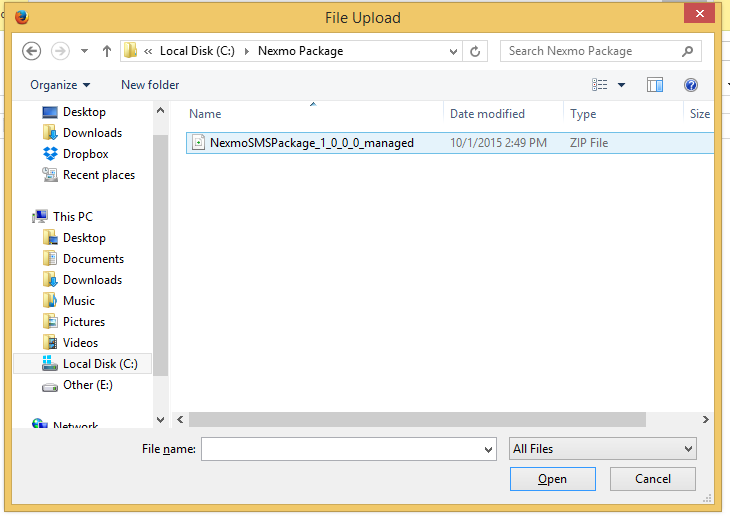
1. On ***All Solutions*** screen, click on **Import** button to import solution package.



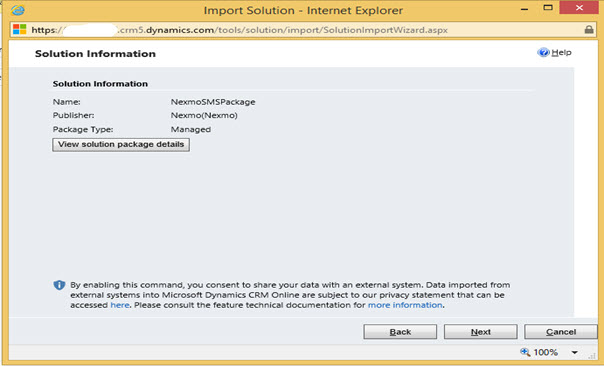
1. On***Import Solution*** wizard, click on **Browse** button to choose file to upload

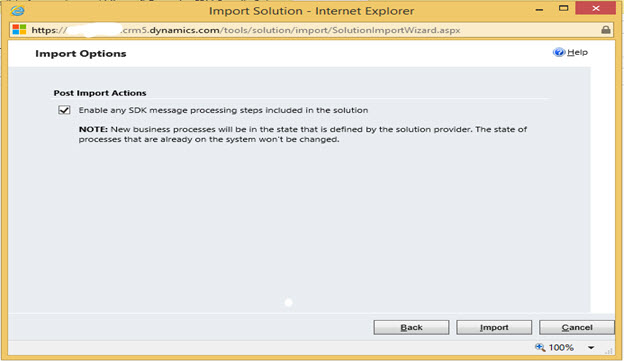


1. Select ZIP file “**NexmoSMSPackage\_1\_0\_0\_0\_managed.zip**” stored on local system and click on **Open** button.

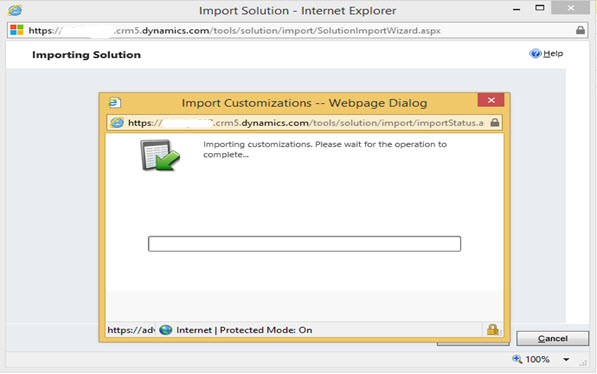
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1. On next screen, click on **Next** button of this screen.

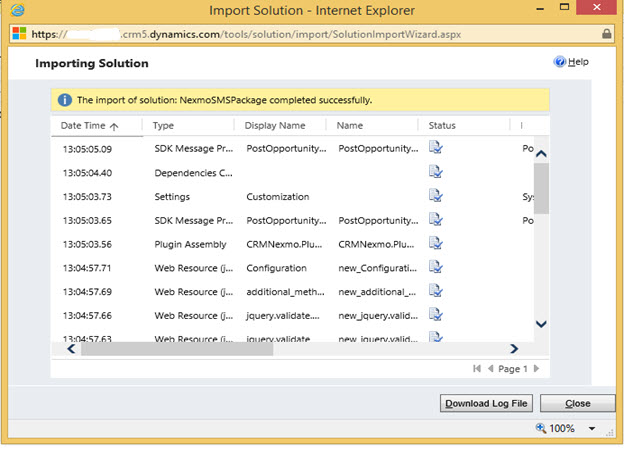


1. Again click on **Next** button. 

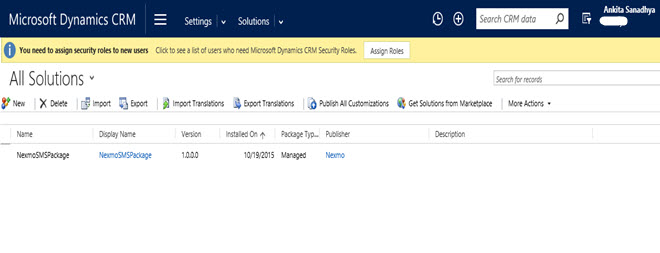
1. Click on **Import** button, file upload process starts



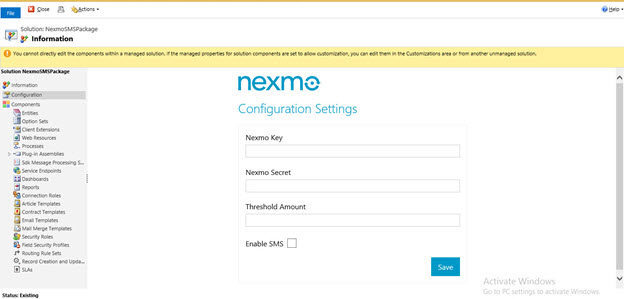
1. Click on **Close** button.



1. Next screen will show the installed package



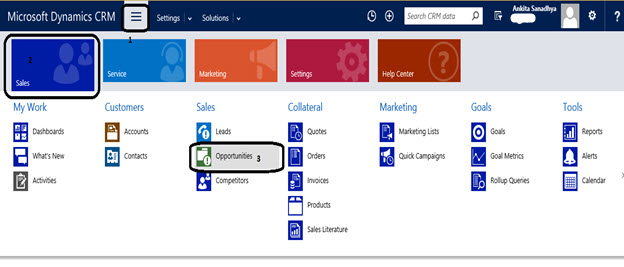
1. Click on **Package name**, it will open configuration form for Nexmo setting



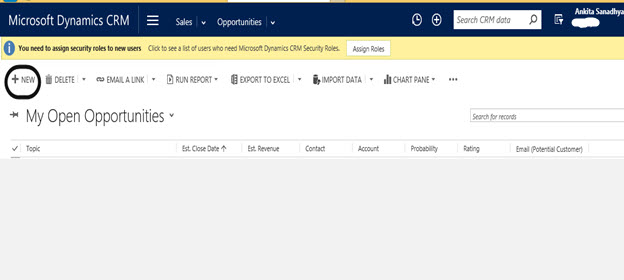
1. Provide the following details:
   1. Nexmo Key
   2. Nexmo Secret
   3. Threshold Amount
2. Enable Nexmo SMS checkbox to allow App to send SMS and click on **Save**
3. Click on **Close** button
4. On **All Solutions scr**een, select **NexmoSMSPackage** solution and click on **Publish All Customization** button.

# Steps to use the NexmoSMS App

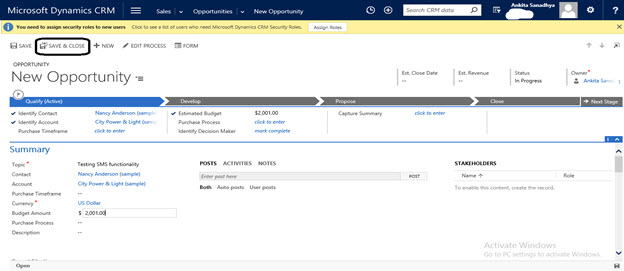
1. Click on 3 line  icon, Select **Sales**tab and click on ***Opportunities*** to create an opportunity



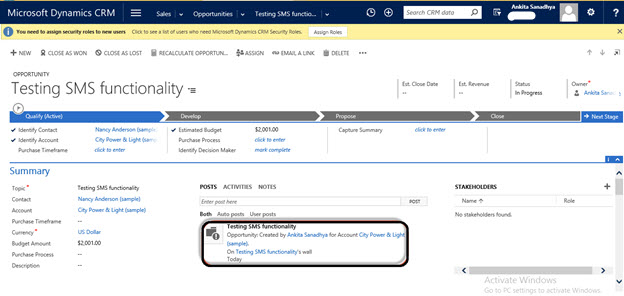
1. Click on **New** button to add a new opportunity



1. Fill the opportunity details with at least these mandatory fields (Topic, Account and Budget) and click on “Save and Close” button.



1. New Opportunity is created and SMS is also delivered to Manager.



1. Manager will receive SMS as per the following format:

“**A new opportunity <<*Title*>> for <<*Account*>> with probable value <<*Budget value*> has been added**.”