

**SendSMS SugarCRM SMS addon v1.0**

## Download and Purchase

SendSMS addon is available for purchase and download from the following URL:

<https://www.sugaroutfitters.com/addons/sendsms>

## SendSMS installation and configuration

SendSMS addon is upgrade safe and supports all major versions of SugarCRM – 6.5+ and 7+ as well as all editions of SugarCRM- CE, Pro, Ent, Ult. SendSMS supports SuiteCRM.

The Installation process is quick and easy. It requires execution of view steps described below. Before proceeding with installation please make sure that the following two essentials that SendSMS requires are met:






- You are running PHP 5.3 or greater
- cURL is enabled

### 1. Step 1 – upload SendSMS package and install it

Download SendSMS addon zip file and collect your License Key. Navigate to SugarCRM Module Loader located in SugarCRM Admin Panel.

#### Developer Tools

Create and edit modules and module layouts, manage standard and custom fields.

 <a href="#">Studio</a>	Customize module fields, layouts and relationships
 <a href="#">Module Builder</a>	Build new modules to expand the functionality of Sugar
 <a href="#">Module Loader</a>	Add or remove Sugar modules, themes, language packs and other extensions
 <a href="#">Sugar Portal</a>	Manage the Sugar Portal
 <a href="#">Dropdown Editor</a>	Add, delete, or change the dropdown lists

Upload SendSMS addon zip file and hit Install button to install addon in the system. It will take a couple minutes to install.

## Module Loader

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type	Version
<				

Module  No file selected.

Name	Install	Delete	Type	Version
SugarCRM Add-on SendSMS	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>	Module	1.0.0
<				

Follow the installation steps and make sure installation has completed without any errors.

NOTE: If you are installing SendSMS on SugarCRM v6 or SuiteCRM, system will check whether the following four files exist in your instance:

- *custom/modules/Contacts/view.list.php*
- *custom/modules/Contacts/view.details.php*
- *custom/modules/Leads/view.list.php*
- *custom/modules/Leads/view.details.php*

In case one of these files exist, SendSMS will alert you that installation cannot be continued and has to be executed manually, so that any existing customizations of Contacts or Leads modules would not be broken up.

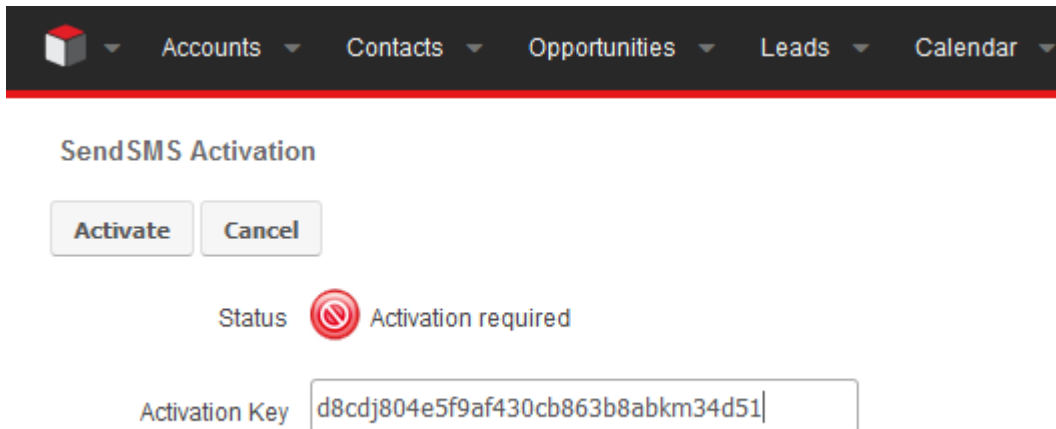
## 2. Step 2 – SendSMS activation

On Step 2 you will validate your SendSMS license through SugarOutfitters. From SugarCRM Admin Panel hit **SendSMS Activation** link.

[SendSMS Activation](#)

Activate SendSMS

Enter your SendSMS Licence Key and hit **Activate**.

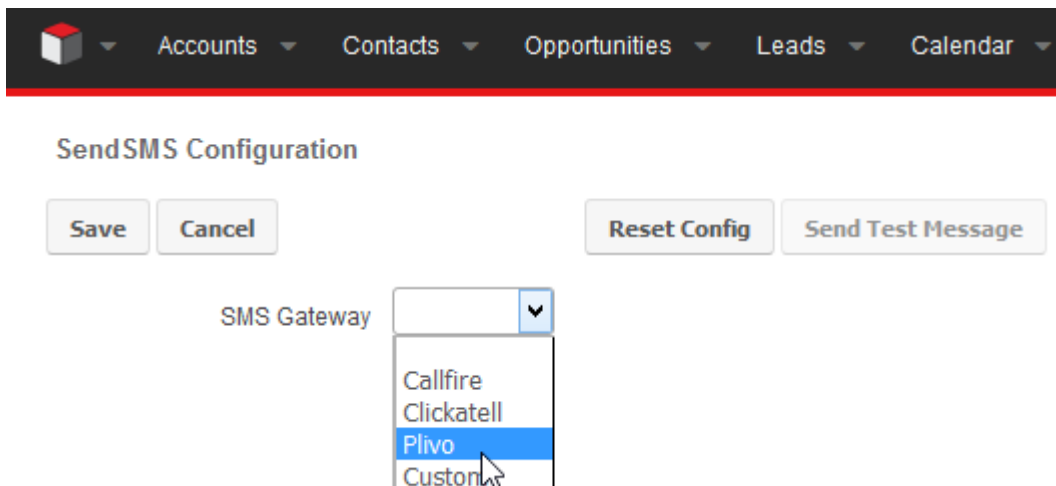


The screenshot shows the 'SendSMS Activation' interface. At the top is a navigation bar with a cube icon and dropdown menus for 'Accounts', 'Contacts', 'Opportunities', 'Leads', and 'Calendar'. Below the navigation bar, the title 'SendSMS Activation' is displayed. There are two buttons: 'Activate' and 'Cancel'. The status is shown as 'Status' with a red prohibition icon and the text 'Activation required'. Below this, there is a text input field labeled 'Activation Key' containing the alphanumeric string 'd8cdj804e5f9af430cb863b8abkm34d51'.

If you attempt to Validate an inappropriate key, SendSMS will inform you that the Validation was unsuccessful. Once the License Key is successfully validated, you can continue to Step 3.

### 3. Step 3 – SendSMS configuration

On Step 3 you will configure SMS Gateway settings. From SugarCRM Admin Panel hit **SendSMS Configuration** link, to display SendSMS configuration page.

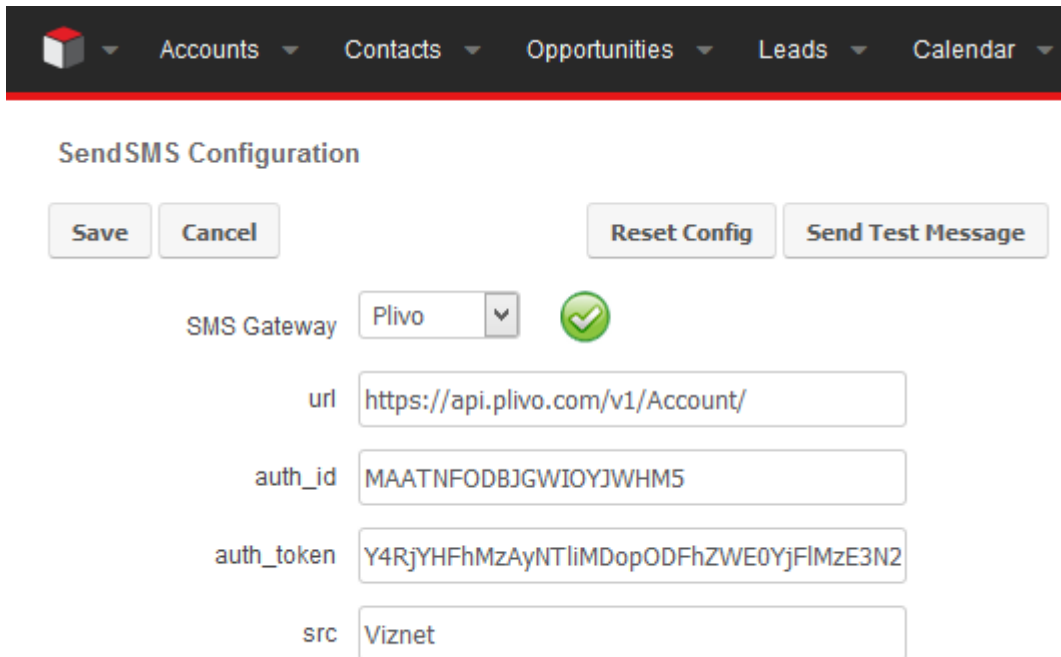


The screenshot shows the 'SendSMS Configuration' interface. At the top is a navigation bar with a cube icon and dropdown menus for 'Accounts', 'Contacts', 'Opportunities', 'Leads', and 'Calendar'. Below the navigation bar, the title 'SendSMS Configuration' is displayed. There are four buttons: 'Save', 'Cancel', 'Reset Config', and 'Send Test Message'. Below the buttons, there is a dropdown menu labeled 'SMS Gateway'. The dropdown menu is open, showing four options: 'Callfire', 'Clickatell', 'Plivo', and 'Custom'. The 'Plivo' option is currently selected and highlighted in blue.

SendSMS supports three well known SMS Gateway providers, for which predefined configuration forms are available – Callfire, Clickatell and Plivo. If you are going to use other SMS Gateway provider, please select **Custom** option, which enables configuring SMS service using simple HTTP integration. Sending SMS messages over the SMS gateways is a paid service and require setting up an


account with the service provider and purchasing a relevant plan. Please refer to the selected SMS service provider web page for further details and pricing.

Select your SMS Gateway provider from the dropdown box. This will display relevant form. Fill out the form with values corresponding to your SMS Gateway account and hit **Save** button to store active SMS gateway configuration.



SendSMS Configuration

Save Cancel Reset Config Send Test Message

SMS Gateway Plivo 

url https://api.plivo.com/v1/Account/

auth\_id MAATNFODBJGWIOYJWHM5

auth\_token Y4RjYHFhMzAyNTliMDopODFhZWE0YjFIMzE3N2

src Viznet

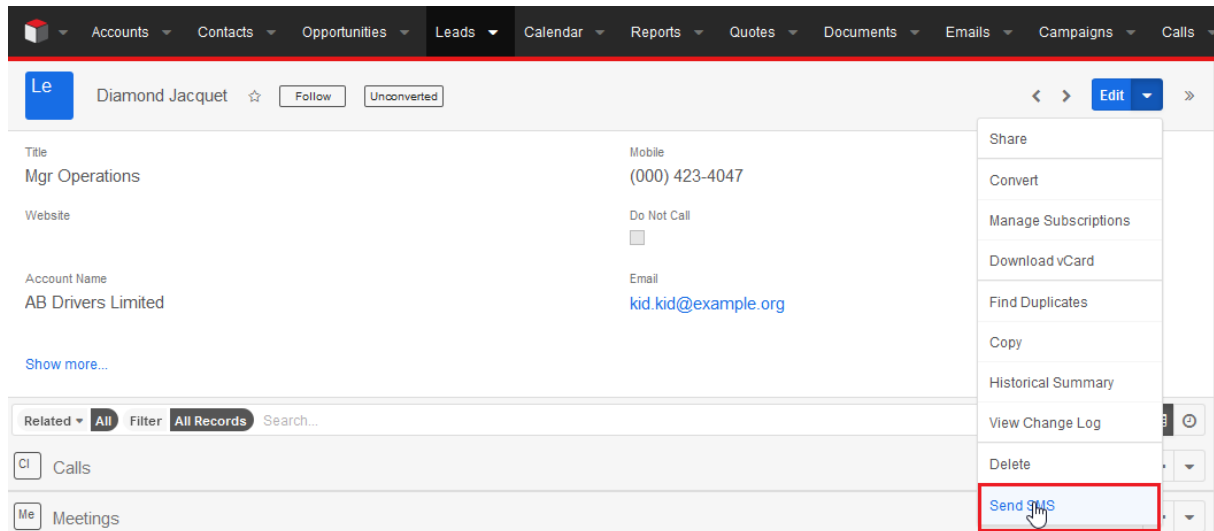
NOTE: Please refer to your SMS Gateway account to find values for the required fields on the form, like auth\_id, token, username, password etc.

Once configuration step is completed, users can start sending SMS messages.

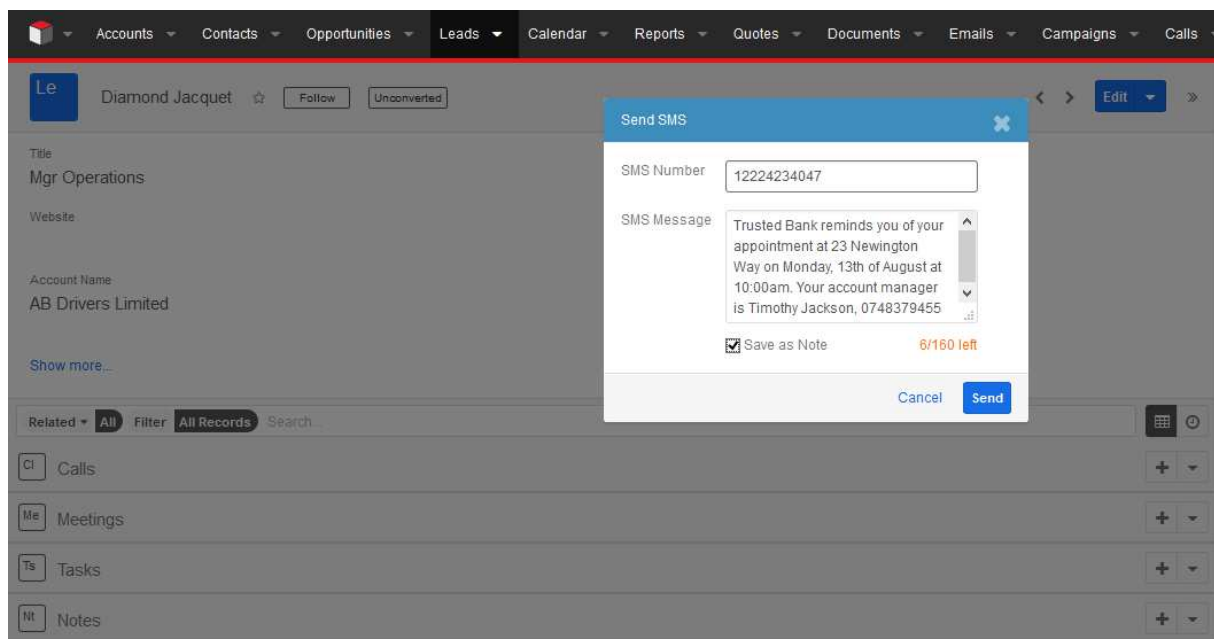
## User Guide

### **Sending SMS to Contact/Lead from record view page.**

From Contact/Lead detail view page expand actions list and hit **Send SMS** action

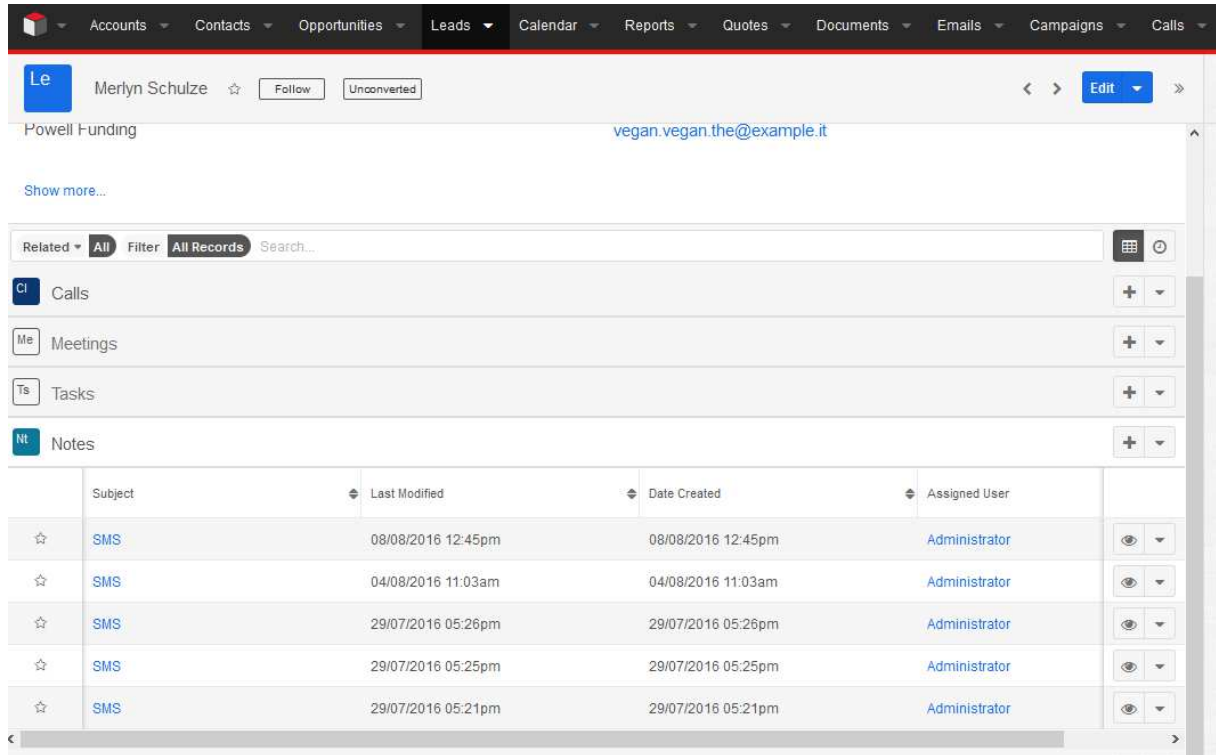


SMS message dialog will popup



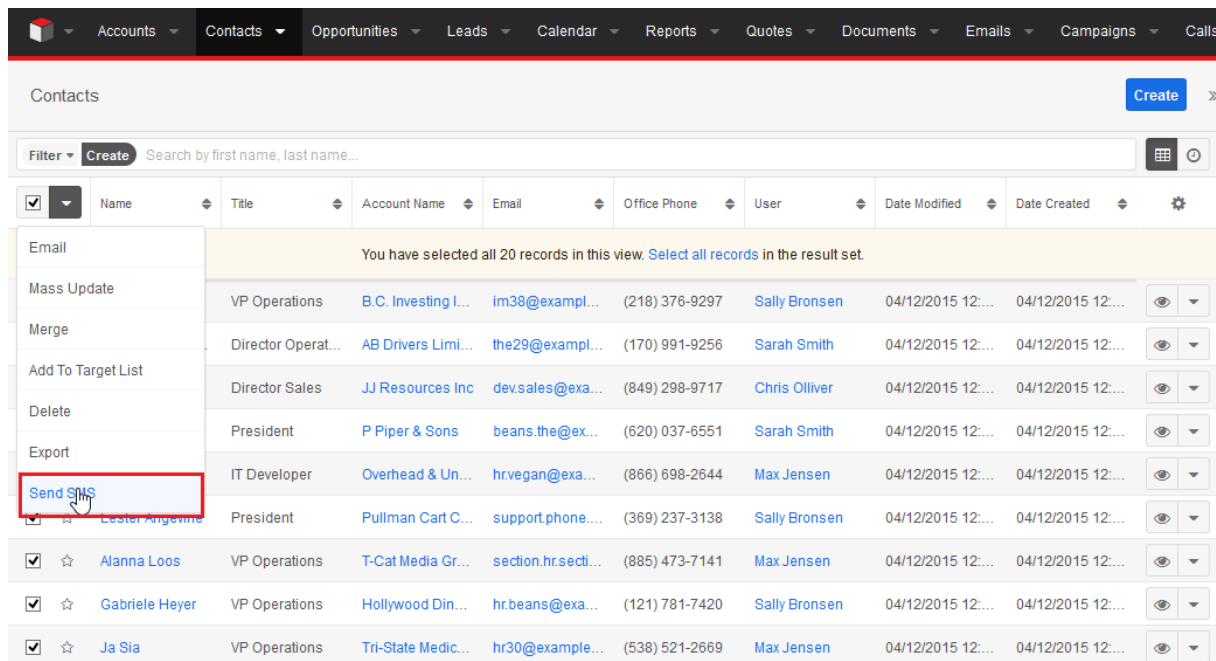
SMS Number will be filled automatically. Please note that SMS Number should consist of country code, area code and phone number. Only digits are allowed. Fill out the message field. The length of single message shall not exceed 160 characters. Select **Save as note** checkbox if you want the SMS message to be stored as a Note. Hit **Send** to send message.

SMS message can be saved as Note. Saved messages are displayed in the Notes subpanel

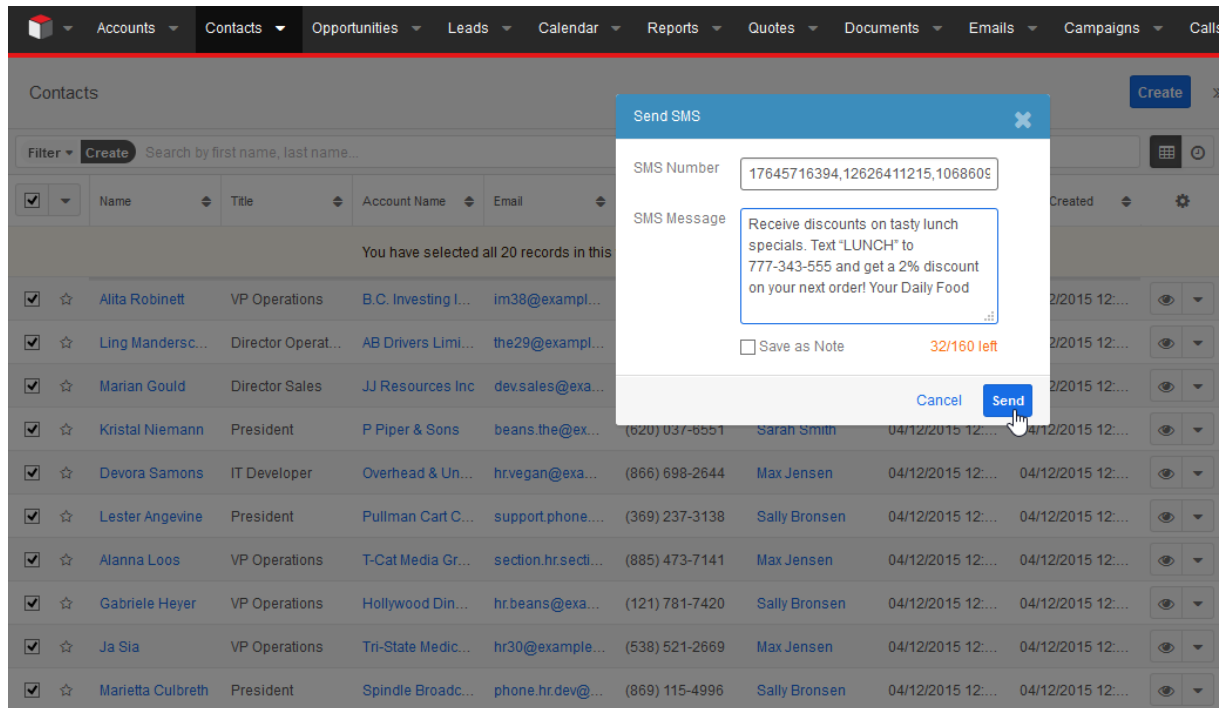


### Sending group SMS to many Contacts/Leads from record list page.

Group messages can be sent to multiple recipients from record list page.



Select SMS recipients from record list then expand action list dropdown and select **Send SMS** action. The SMS dialog will popup with SMS Number field automatically filled-in with mobile number of each recipient.



Fill out SMS Message field and hit **Send** to send message to all recipients. Please note that for the performance reasons maximum number of recipients for one transaction is set to 500.