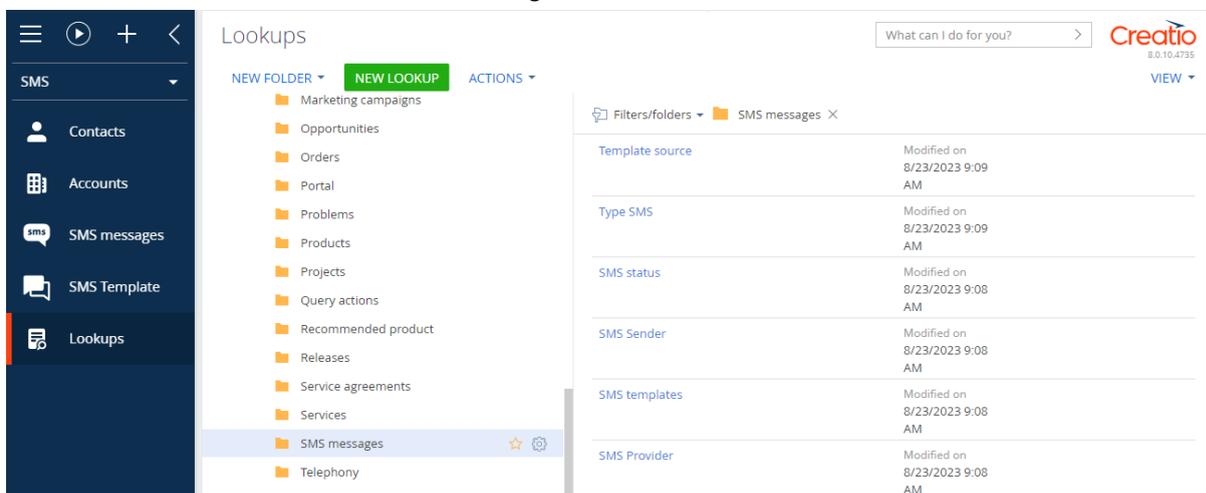


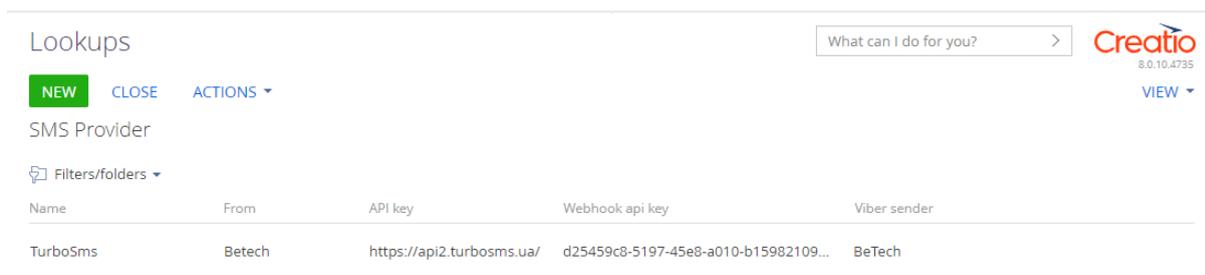
Installing packages and configuring integration in the cabinet <https://turbosms.ua/>

1. Install packages from the Marketplace
2. Go to directories, select the SMS messages folder



3. In the SMS Provider directory, fill in the existing record as follows
 - From – the name of the SMS sender. Located in the personal office
 - API key - <https://api2.turbosms.ua/>
 - Webhook api key - the field is filled only in case of Viber connection of the sender, see clause 8.4
 - Viber Sender – Viber name of the sender. Located in your personal account (the field is filled in only if you have a connected Viber sender)

Importantly! Fill in the data in the line with the name of TurboSMS.



4. Enter your SMS sender in the SMS Sender directory. There can be more than one name.

Lookups

What can I do

NEW CLOSE ACTIONS ▾

SMS Sender

Filters/folders ▾

Name Description

IrynaMasiuk

BeTech

Your Alpha name is in the TurboSMS Senders section

5. Go to System settings and select the SMS message folder.

The screenshot shows the 'System settings' interface. On the left, there is a sidebar with a 'NEW FOLDER ▾' button, an 'ADD SETTING' button, and an 'ACTIONS ▾' button. Below these are several folders: Leads section settings, Matomo connector settings, Mobile, OAuth 2.0, OpenID, Passwords, Process log, and Query actions. The 'SMS messages' folder is selected and highlighted in orange. On the right, there is a table with two columns: 'Name' and 'Code'. The table contains five rows of system settings:

Name	Code
BtcCreateContactOnIncomingTurboSMS	BtcCreateContactOnIncomingTurboSMS
BtcTurboSmsCurrentSender	BtcTurboSmsCurrentSender
BtcTurboSmsAuthToken	BtcTurboSmsAuthToken
BtcTurboSmsWebhookSecretKey	BtcTurboSmsWebhookSecretKey

6. In the BtcTurboSmsCurrentSender system setting, we set the main sender.

7. You need to insert an API key or AuthToken

- AuthToken – The current authorization HTTP API token. Located in the personal office

Set the value in the BtcTurboSmsAuthToken system setting

The screenshot shows the configuration form for the 'BtcTurboSmsAuthToken' system setting. At the top, there is a 'CLOSE' button and a search bar with the text 'What can I do for you?'. Below the form, there are several fields:

- Name*: BtcTurboSmsAuthToken
- Type*: Encrypted string
- Default value: [Redacted]
- Description: [Empty]
- Code*: BtcTurboSmsAuthToken
- Save value for current user:
- Cache:

In the cabinet, it is located in the Gateway (API) section

8. Setting up a web hook

It is carried out to configure the receipt of SMS via Viber

TurboSMS О компанії Услуги Инфоцентр Цены Контакты РУС

ИринаМасиук ID: 1208896 Остаток на балансе: 50.99грн.

Мои вебхуки

[Добавить вебхук](#) [Логи вебхуков](#)

№№	Коллбек URL	События	Дата создания	Последнее событие	Последнее выполнение	Статус	Действие
1.	https://126728-crm-bundle.creatio.com/0/rest/BtcViberController/GetViberMessage	Получение входящего Viber сообщения	15.03.2023 17:14:09	-	-	✓	Отключить

We fill in the data in the open page of the web hook

Редагування вебхука

[Назад до списку вебхуків](#)

Коллбек URL, на який будуть надсилатися дані

Події, при настанні яких буде викликано коллбек

Секретний ключ

Логін HTTP авторизації

Пароль HTTP авторизації

Формат даних, що передаються

[Редагувати вебхук](#)

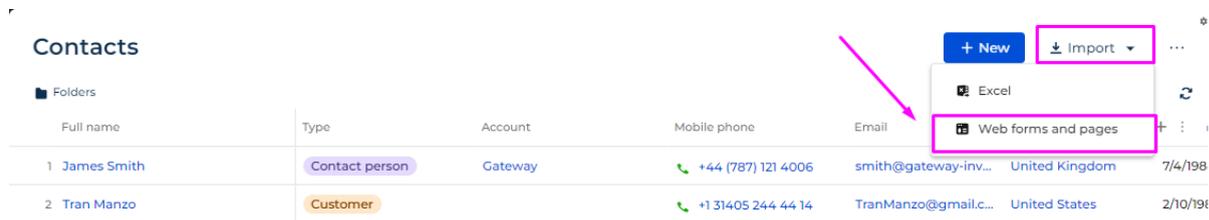
8.1. The callback URL to which the data will be sent -

https://webhooks.creatio.com/webhooks/eea80483-c0da-41ad-ab40-7e5a3cf4105d

You can get a webhook by going to the Creatio with Freedom UI system

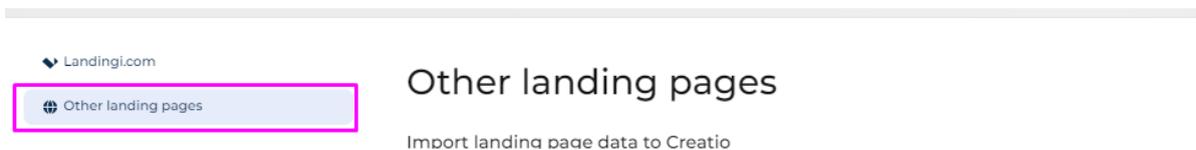
Go to the Contacts section

Click the Import button and select Web Forms and Pages



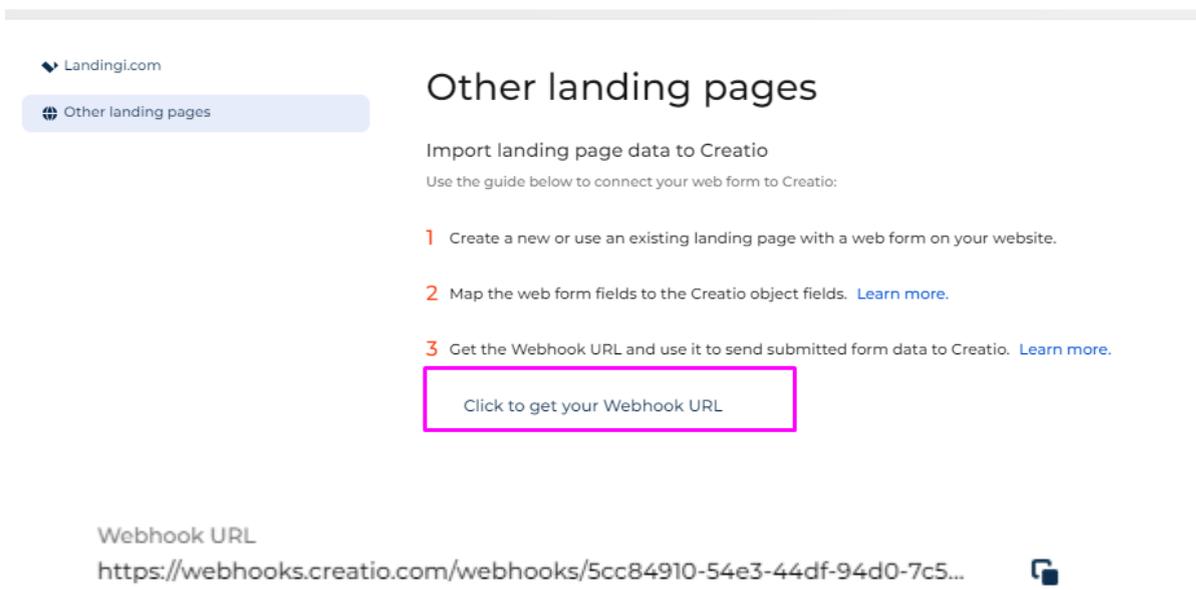
Select Other Landing Pages

← Web forms and pages



Click below to copy the Webhook

← Web forms and pages



8.2. Events, upon occurrence of which the callback will be called -
Receiving an incoming Viber message

8.3. Secret key - prescribe a set of numbers of your choice

And also note it in the **BtcTurboSmsWebhookSecretKey** system settings

CLOSE

Name* BtcTurboSmsWebhookSecretKey

Type* Text (50 characters)

Default value 123

Description

Code* BtcTurboSmsWebhookSecretKey

Cached

Save value for current user

8.4. In the SMS Provider directory, you need to insert the webhook id in the Webhook api key field - **eea80483-c0da-41ad-ab40-7e5a3cf4105d**

Sending SMS from the Contact/Accounts card

1. Open the Contact or Accounts card
2. Click the "Send Message" button.

Contacts

Accounts

SMS messages

SMS Template

Lookups

Tomas Anderson

CLOSE ACTIONS SEND A MESSAGE

95%

14:11,

Full name*
Tomas Anderson

Full job title
Sales Department Manager

NEXT STEPS (1)

Нарада

30.11.2022 | Tomas

CONTACT INFO

3. In the new message card:
Contact/Accounts and the main phone will be added automatically (1-2).
Add text or select a template (3).
Select message type (4)

4. Press the "Send SMS" button (5)

Sending SMS from the card of any section (manually)

To send an SMS from any card, you need to set up a business process, using the preconfigured subprocess **"Create SMS from a card"**

Consider the example of Activities

User actions:

1. Create a business process
2. Add elements necessary for the business process, which must be completed before sending the SMS message.
3. To send a message, add the subprocess "Create SMS with cards"
4. Specify the parameters of the [Send SMS] element:

[*Template source*] – the object from which macro substitutions will be used;

[*Contact*] – consignee received from Activities ;

[*Accounts*] – consignee received from Activities;

[*SMSProvider*] – a link to the system setting with the specified TurboSMS provider;

[*Record Id*] – unique identifier of the record to which the SMS is attached.

5. Set up a business process from a card

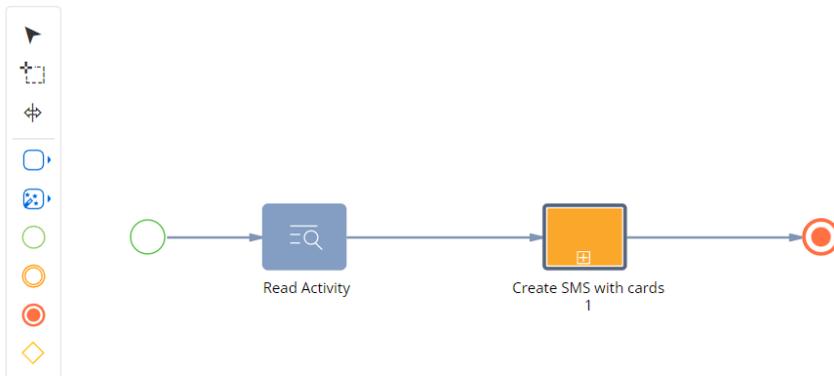
Example

In the example below, the contact, counterparty, and sales identifier are subtracted from the sale. The data is transferred to the input of the subprocess “**Create SMS with cards**”:

- the template source is the Sales object
- we transfer the values deducted from the sale to the Contact/Accounts parameters
- We link the SMS to the sales card

Sending Activity SMS

SAVE ▾ RUN CANCEL ACTIONS ▾





Which process to run?

Create SMS with cards 

Process parameters

 Account

 [#Read Activity.First item of resulting collection.Account#]

 Contact

 [#Read Activity.First item of resulting collection.Contact#]

 Created SMS

 Select value

 RecordId

 [#Read Activity.First item of resulting collection.Id#]

 SmsId

 Select value

 SMSProvider

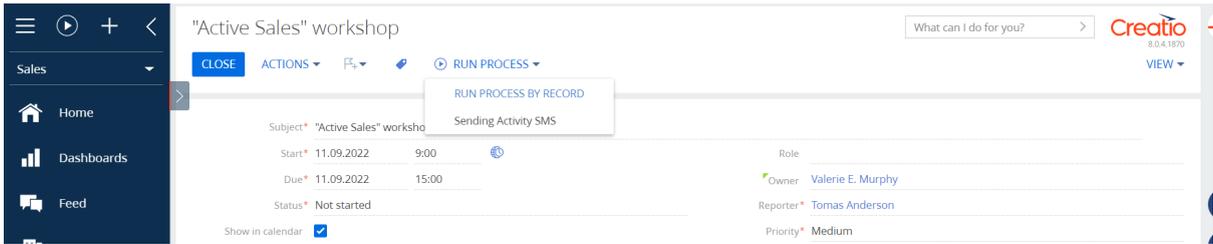
 [#System setting.Provider#]

 Template source

 [#Lookup.Template source.Activity.c70aac9a-0f4d-4ba5-b0f0-11039b4ff7d...

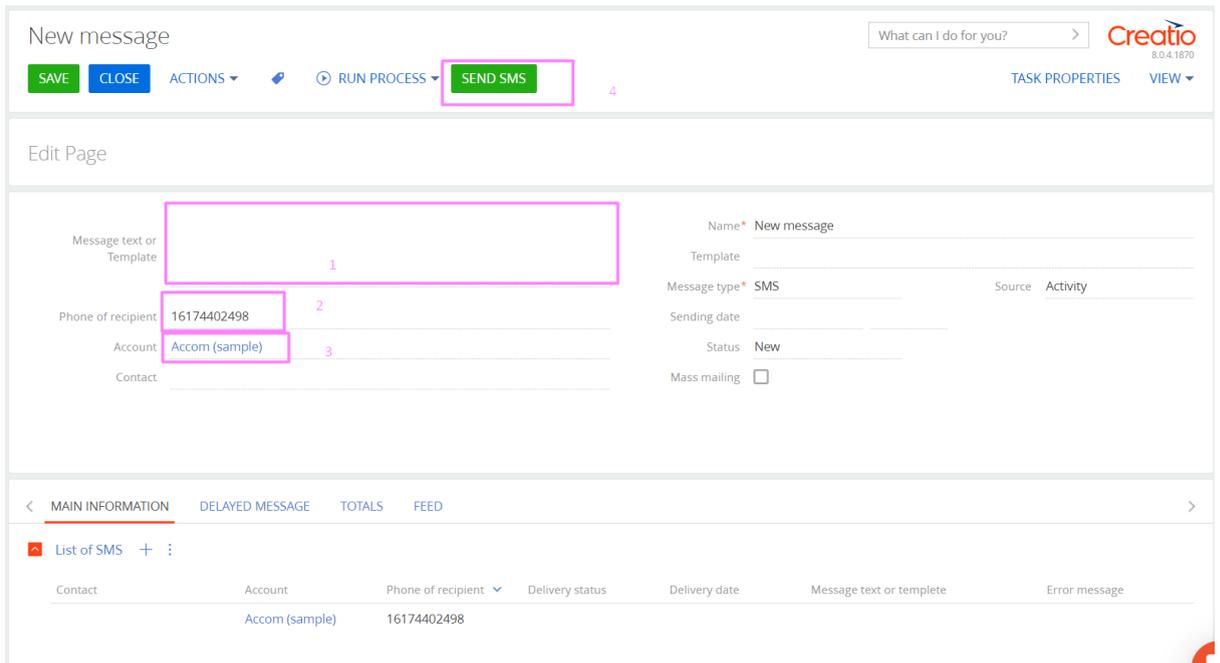
Result:

1. We start the process from the Activity card



2. A new message card opens:

- It indicates the text of the message (1)
- Contact/Accounts is automatically pulled up (3)
- The main phone number (2) is pulled from the Contact/Accounts card



4. Press the "Send SMS" button (4)

Setting SMS templates and macros

1. Setting up SMS templates. Executed in the "SMS Templates" section.

1.1. Create a new template by clicking the "Add" button

1.2. Fill in the columns:

A list of the fields of the "SMS Template" object that are used.

Field name	Data type	Notes
Name	Text	Mandatory field. You need to save the template in the system, it is not sent to

		SMS.
Template source	Template source	Specify the object from which macro substitutions will be pulled
Template type	Types of SMS	SMS, Viber, Hybrid
Template	Text, multiline field	Description

1.3. Form the text of the message as needed with macro wildcards

Congratulations with birth day What can I do for you?

SAVE CANCEL

Name* Congratulations with birth day

Source of template SMS type

Button label Image link

Address of the transition

< **TEMPLATE**

[#Name#], Congratulations on your day!

2. Configuring macro substitutions in the SMS template.

To use macro substitutions, you need to specify the object from which the fields will be displayed in the template source

Congratulations with birth day What can I do for you? Crea 8.0 VIE

SAVE CANCEL

Name* Congratulations with birth day

Source of template SMS type

Button label Image link

Address of the transition

< **TEMPLATE**

[#Name#], Congratulations on your day!

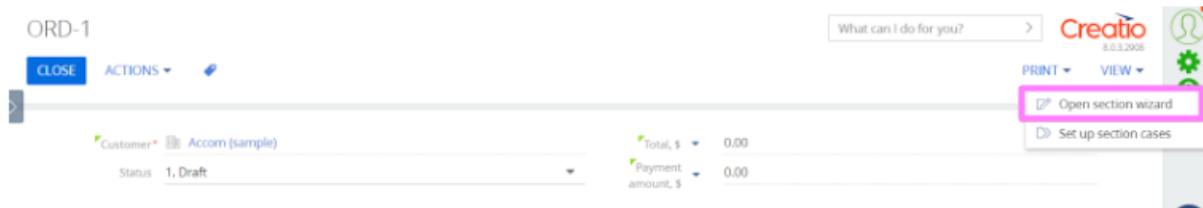
Template

A macro substitution has the form

“[#Code (in English)#]”,

where *Code (in English)* is the name of the column in the database. You can find it out in the section wizard.

For example, the order delivery date can be specified using the `[#ActualDate#]` macro substitution by opening the master page and looking at the column code



Column

SAVE

CANCEL

General

Title *

Actual end date

Code

ActualDate

Mass sending of SMS messages

1 Sending mass SMS from the SMS message section to a group of contacts

1. Go to the SMS message section
2. Press NEW
3. Click Mass mailing

New message

What can I do for you? > Creatio 8.0.4.1870 VIEW

SAVE CANCEL ACTIONS RUN PROCESS SEND SMS

Message text or Template

Name* New message

Template

Phone of recipient

Message type* Source

Account

Sending date

Contact

Status New

Mass mailing

4. The fields for a single SMS (Phone number, Contact, Account) disappear

New message

What can I do for you? > Creatio 8.0.4.1870 VIEW

SAVE CANCEL ACTIONS RUN PROCESS SEND SMS

Message text or Template

Name* New message

Template

Phone of recipient

Message type* Source

Account

Sending date

Contact

Status New

Mass mailing

We can not click this button, it will disappear automatically when there is more than one contact in the List of SMS details

3. On the List of SMS details, you can select the list of contacts we need

By pressing +

- Add contact\account (1) is an opportunity to select a contact or Account one by one
- Add contact Folder (2) is the selection of a folder with a certain dynamic group of Contacts
- Add accounts contact (3) - this is a selection of Contacts that are assigned to the Account
- Add account group (4) is a dynamic group selection in the Accounts section

< MAIN INFORMATION TOTALS FEED

List of SMS + :

1 Add contact

2 Add Contact Folder

3 Add accounts contact

3 Add account group

5. Select Add Contact Folder, a list will open where you can select any dynamic group or several groups

Select: Contact folder

SELECT CANCEL ACTIONS

Records selected: 1 VIEW

Name SEARCH

Name

- Atlanta
- Austin
- BE TECH
- Bounced
- Bounce reason
- By regions
- Campaign filters
- Cases history
- Clicked link in emails

6. List of SMS will be filled

< MAIN INFORMATION TOTALS FEED >

List of SMS + :

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
Christine Nelson		447882471010				
James Smith		447871214006				
Lynn A. Collins		447724512078				
Christopher Brown		447522547058				
Andrew Baker (sample)		16172215187				
Scarlett Chapa		1345685582571				
Romelia Brummitt		1343809051836				

7. We write the text that we want to send to this group of Contacts and press the Save button

**Happy birthday

What can I do for you? Creatio 8.0.4.1870 VIEW

SAVE CANCEL ACTIONS RUN PROCESS **SEND SMS**

Message text or Template: [#SalutationType.Name#] [#Dear#], You smile are beautiful. Happy birthday! Your manager - [#Owner.Name#]

Name: **Happy birthday

Template: **Happy birthday

Message type: SMS Source: Contact

Sending date: _____

Status: New

Mass mailing:

8. In the List of SMS details, the Message Text field will be filled in according to the text or template

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
Zulma Mara		1315694619385			Zulma Mara, Smile, you are beautiful. Happy birthday. You are 36 years old	
Zandra Haller		1327595732229			Zandra Haller, Smile, you are beautiful. Happy birthday. You are 32 years old	
Zachariah Kershner		1252908934979			Zachariah Kershner, Smile, you are beautiful. Happy birthday. You are 53 years old	
Yung Moncrief		1331555294045			Yung Moncrief, Smile, you are beautiful. Happy birthday. You are 31 years old	
Yvette Heisey		1334603267371			Yvette Heisey, Smile, you are beautiful. Happy birthday. You are 30 years old	
Youlanda Mcwhorter		1335537726819			Youlanda Mcwhorter, Smile, you are beautiful. Happy birthday. You are 30 years old	
Yong Derosé		1256013043842			Yong Derosé, Smile, you are beautiful. Happy birthday. You are 52 years old	

9. Press SEND SMS
and Sending date is inserted
and SMS Status changes from Saved to Sent

Name* **Happy birthday. Mass mailing

Template **Happy birthday

Message type* SMS Source Contact

Sending date 07.12.2022 15:36

Status Sent

Mass mailing

10. To check for each delivered SMS, run the Business process “Refresh SMS status manually”, or it will automatically update the Delivery status field after 15 and 60 minutes

**Happy birthday. Mass mailing

CLOSE ACTIONS RUN PROCESS **SEND SMS**

RUN PROCESS

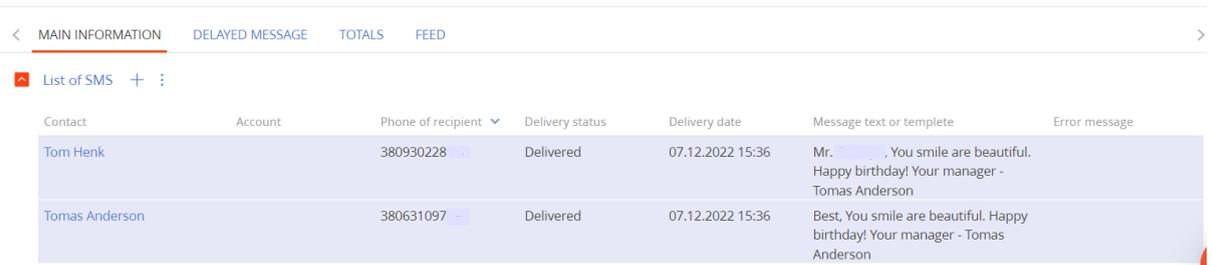
Update message statuses on a schedule

Message text or Template [#Salutation] Happy birthday!
Your manager - [#Owner.Name#]

Mess

Senc

You can view the current status and delivery date of the SMS in the List of SMS details



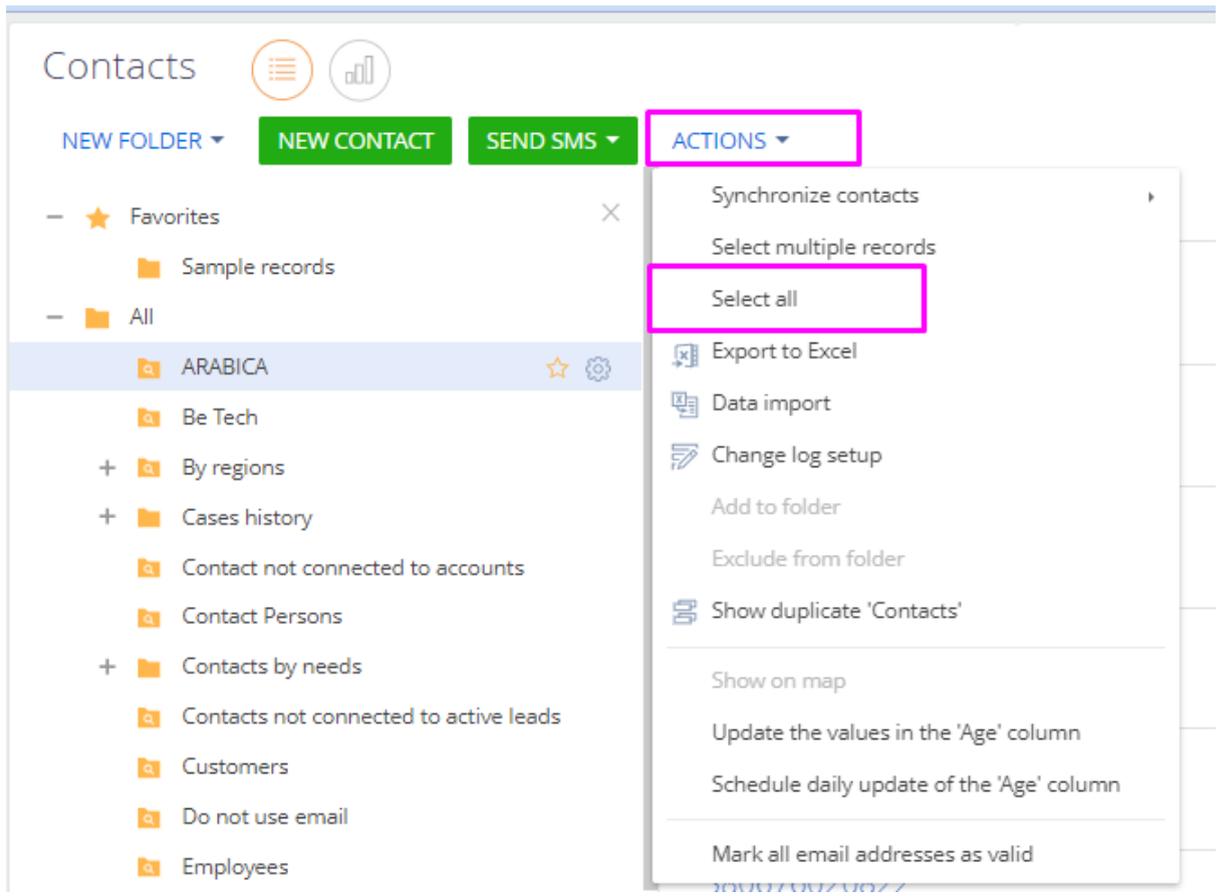
Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text or template	Error message
Tom Henk		380930228	Delivered	07.12.2022 15:36	Mr. [redacted], You smile are beautiful. Happy birthday! Your manager - Tomas Anderson	
Tomas Anderson		380631097	Delivered	07.12.2022 15:36	Best, You smile are beautiful. Happy birthday! Your manager - Tomas Anderson	

2 Sending Mass SMS from the Contacts or Accounts section

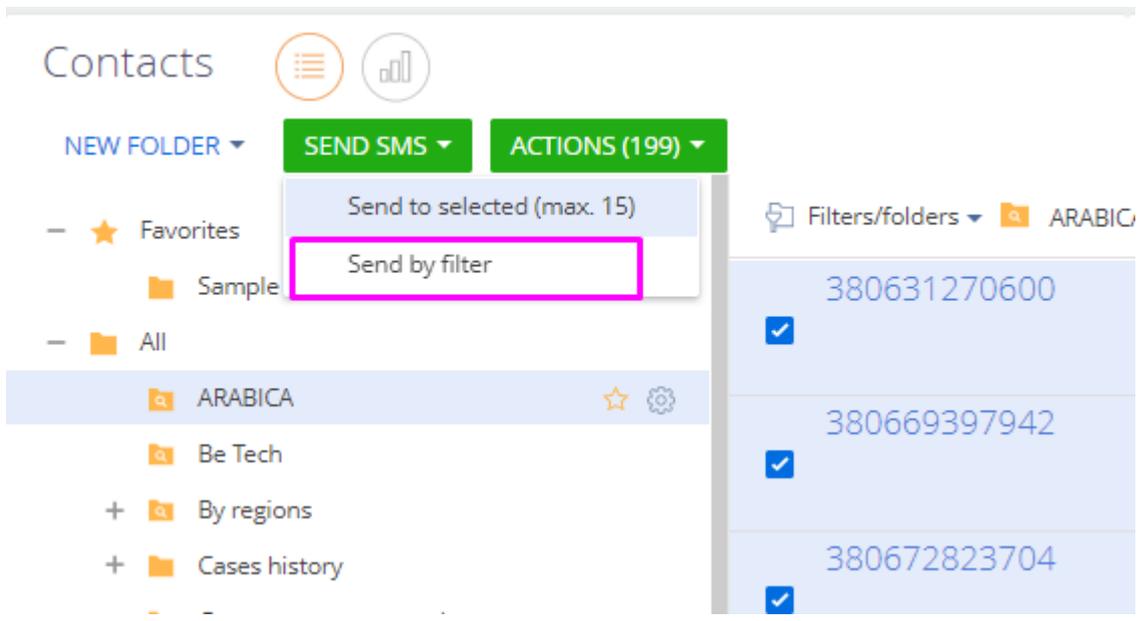
Mass SMS can be sent to only one object (for example, a group of accounts). To send an SMS to another object (leads, contacts), you need to create a new SMS

User actions to create a mass mailing:

1. Create the required dynamic group in the **Contacts** or **Accounts** section
2. Select all or desired entries



3. Select "Send by filter" in the SEND SMS button



4 Fill in the fields of the SMS card. You can specify a message template

The selected Contacts/Accounts will be automatically added to the item
 Click Save so that the text is drawn for each Contact

Contact	Account	Phone of recipient	Delivery status	Delivery date	Message text	Error message
	Apex Solutions	441514282834			Your items are reserved for you. We'll call you as soon as possible	
	Console Solutions	12122185471			Your items are reserved for you. We'll call you as soon as possible	
	Clearsoft	14045712302			Your items are reserved for you. We'll call you as soon as possible	
	Axiom	14045323976			Your items are reserved for you. We'll call you as soon as possible	

The dispatch is identical to the other sections mentioned before

Mass SMS can be sent to only one object (for example, a group of accounts). To send an SMS to another object (leads, contacts), you need to create a new SMS

An example of a Viber SMS type template

Specify Message type - Viber

If you want the client to go to the link, you can specify in the Button label (1), the link where the client will go to in the Address of the transition (3).

Also, in order to add a photo to Image link (2), you need to specify the URL of the image.

CLOSE

Name*	Congratulations with birth day		
Source of template	Contact	SMS type	Viber
Button label	Greeting 1	Image link	https://btbpm.com/wp-content/uploads/2019/07/be-tech-crm-creatio-... 2
Address of the transition	https://btbpm.com/ 3		

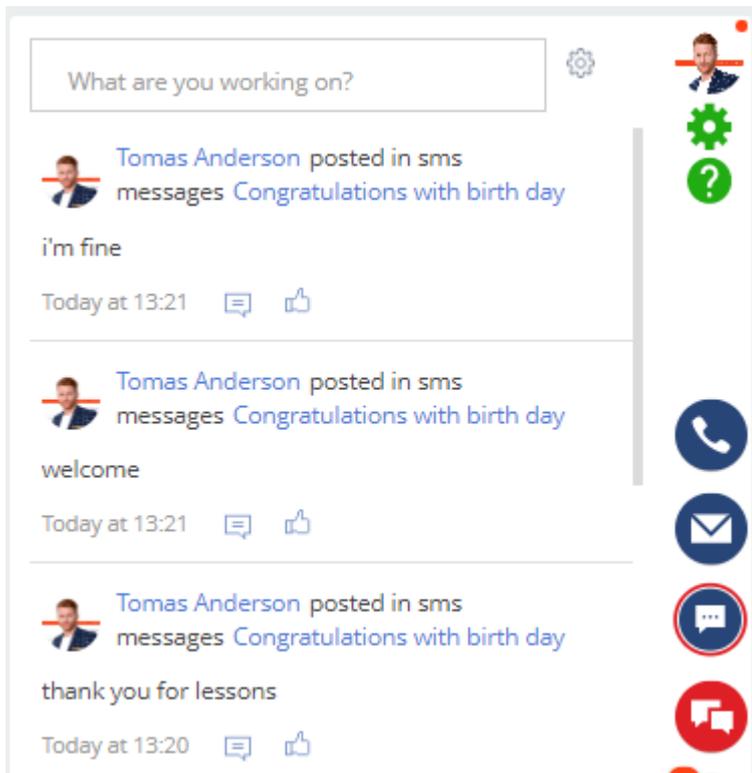
< TEMPLATE

Congratulations on your day!

Template

Receiving Viber messages

- Customers can send a reply to your SMS
- You can get an answer only through Viber messages, not through regular messages
- In the Creatio system, the user receives an SMS notification



- The received SMS will be displayed in the SMS and Viber section with the status Received and in green color

SMS messages

What can I do for you? Creatio 8.0.4.1870 Debug VIEW

NEW ACTIONS RUN PROCESS

SMS status = Received Tag

Title	Phone number	Message Text	Sending date	Status
BE TECH. Incoming message.	+17473068289	Test 10	10/28/2022 9:52 PM	Received
	Account: BE TECH	Mass mailing: No	Number of recipients: 1	Successfully delivered: 0
		Created by: Jessica Boolman	Created on: 10/28/2022 9:52 PM	
Title	Phone number	Message Text	Sending date	Status
+17473068289. Incoming message.	+17473068289	Test 4	10/27/2022 5:01 PM	Received
		Mass mailing: No	Number of recipients: 0	Successfully delivered: 0
		Created by: Supervisor	Created on: 10/27/2022 5:01 PM	

- If this is a response to a client that is in the system, you can view the SMS in Contact, its History and List of SMS

< CONTACT INFO CONNECTED TO CURRENT EMPLOYMENT **HISTORY** TIMELINE ATTACHMENTS AND NOTES ENGAGE >

Website events

Activities

List of SMS + :

SMS	Phone	Delivery date	Delivery statu...	Message text	Created on	Modified by
Dima Gavrilov. Incoming message.	+174 0682		received	Test twilio 2 words. 3	10/19/2022 12:53 PM	Supervisor
Dima Gavrilov. Incoming message.	+174 0682		received	Okay Biill	10/19/2022 6:09 PM	Supervisor
Dima Gavrilov. Incoming message.	+174 0682		received	Test twilio 2 words. 2	10/19/2022 12:32 PM	Supervisor
Dima Gavrilov. Incoming message.	+174 0682		received	Test twilio 2 words	10/19/2022 11:26 AM	Supervisor
Dima Gavrilov. Incoming message.	+174 0682		received	Test twilio 2 words	10/19/2022 11:26 AM	Supervisor

9.1. Receiving an SMS from an unknown number

There are 2 system settings that are required for this process

VIEW

Name Contains Btc X

Name	Code
BtcCreateContactOnIncomingTurboSMS	BtcCreateContactOnIncomingTurboSMS
BtcDefaultOwnerForNewSMS	BtcDefaultUserForNewTurboSMS

BtcDefaultUserForNewTurboSMS - in this setting, you specify the user who will receive SMS notifications

BtcDefaultOwnerForNewSMS

What can I do for you? Creatio

CLOSE

Name* BtcDefaultOwnerForNewSMS

Type* Lookup

Lookup* Contact

Default value Tomas Anderson

Description

Code* BtcDefaultUserForNewTurboSMS

Cached

Save value for current user

BtcCreateContactOnIncomingTurboSMS- y in this setting, check the Default value checkbox

BtcCreateContactOnIncomingTurboSMS What can I do for you? > 

[CLOSE](#)

Name* BtcCreateContactOnIncomingTurboSMS Code* BtcCreateContactOnIncomingTurboSMS

Type* Boolean

Default value Cached

Save value for current user

Description

- 1 - Yes - when an SMS is received from an unknown number, a new contact is created
- 2 - No - when an SMS is received from an unknown SMS number, the contact is not created