



**IntelliSoftware**

**Microsoft CRM 3.0 SMS Add-in Installation  
Guide**

Version 1.0

Content subject to change

IntelliSoftware Ltd.  
7 Cricket Chambers  
36 Cavendish Road  
Bournemouth  
Dorset  
ENGLAND  
BH1 1RG  
Tel: +44 (0)1202 311256  
Fax: +44 (0)870 762 0876

# Contents

1	Document History.....	2
2	Introduction .....	3
3	Installation Instructions.....	3
3.1	Installation Overview .....	3
3.2	Install CRM User Interface Customizations.....	4
3.3	Install IntelliSoftware Send SMS Workflow Add-in .....	5
3.4	Create Send SMS Workflow.....	6
4	Diagnostics.....	9

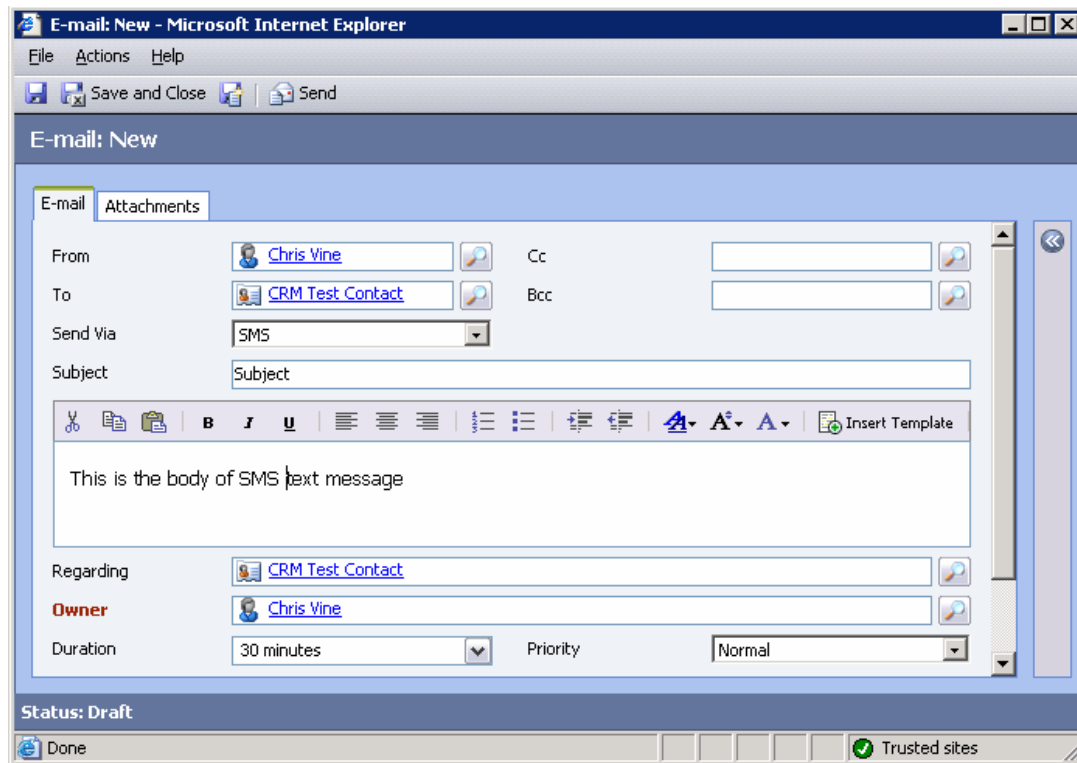
## 1 Document History

Version	Date	Author	Description
1.0	13/02/2007	Chris Vine	First Release

## 2 Introduction

The IntelliSoftware SMS Add-in will add SMS feature to Microsoft CRM 3.0.

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.



## 3 Installation Instructions

### 3.1 Installation Overview

Installation will follow the steps below:

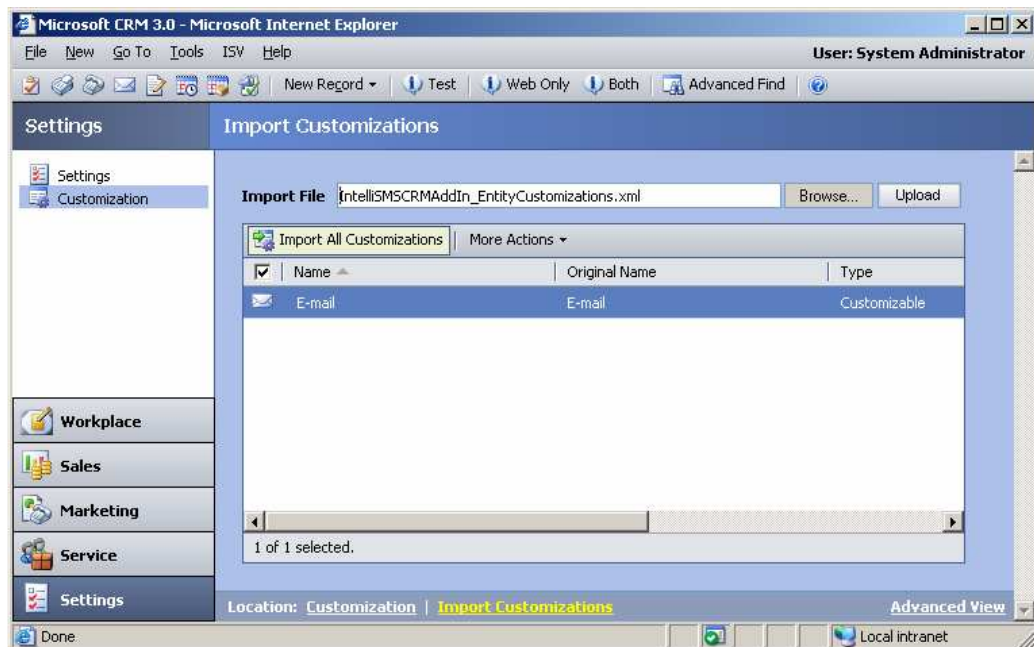
1. Install CRM User Interface Customizations
2. Install IntelliSoftware Send SMS Workflow Add-in
3. Create Send SMS Workflow

## 3.2 Install CRM User Interface Customizations

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



2. Click **Browse...** and browse to the **IntelliSMSCRMAddIn\_EntityCustomizations.xml** file.
3. Click the **Upload** button.
4. Click the **Import All Customizations** button to complete the customization.



5. Open Microsoft CRM Web Client and go to **Settings -> Customizations -> Customize Entities**
6. Highlight the **Email entity**
7. Click **Publish**

### 3.3 Install IntelliSoftware Send SMS Workflow Add-in

1. Copy **IntelliSMSDotNet.dll** to **C:\Program Files\Microsoft CRM\Server\bin\assembly**
2. Copy **IntelliSoftware.Crm.IntelliSMSCRMAddin.dll** to **C:\Program Files\Microsoft CRM\Server\bin\assembly**
3. Using Notepad open **IntelliSMSCRMAddIn\_WorkflowConfig.xml** and copy the **method** element to clipboard ( text starting **<method..** and ending **</method>** )
4. Using Notepad open **C:\Program Files\Microsoft CRM\Server\bin\assembly\workflow.config** and paste the **method** element:

```
<workflow.config xmlns="http://microsoft.com/mscrm/workflow/" >
  <methods>

    <method name="Add date and time"
      assembly="Microsoft.Crm.Platform.WorkflowAssembly.dll"
      typename="Microsoft.Crm.Platform.Workflow.BuildIn"
      methodname="AddDateTime"
      group="Date and time functions">
      <parameter name="Date and Time" datatype="datetime"/>
      <parameter name="Years" datatype="integer" default="0"/>
      <parameter name="Months" datatype="integer" default="0"/>
      <parameter name="Days" datatype="integer" default="0"/>
      <parameter name="Hours" datatype="integer" default="0"/>
      <parameter name="Minutes" datatype="integer" default="0"/>
      <result datatype="datetime"/>
    </method>

    <method name="Subtract date and time"
      assembly="Microsoft.Crm.Platform.WorkflowAssembly.dll"
      typename="Microsoft.Crm.Platform.Workflow.BuildIn"
      methodname="SubtractDateTime"
      group="Date and time functions">
      <parameter name="Date and Time" datatype="datetime"/>
      <parameter name="Years" datatype="integer" default="0"/>
      <parameter name="Months" datatype="integer" default="0"/>
      <parameter name="Days" datatype="integer" default="0"/>
      <parameter name="Hours" datatype="integer" default="0"/>
      <parameter name="Minutes" datatype="integer" default="0"/>
      <result datatype="datetime"/>
    </method>

    <method name="Execute"
      assembly="Microsoft.Crm.Platform.BulkOperationControlAssembly.dll"
      typename="BulkOperationControlService"
      methodname="Execute"
      group="BulkOperationControl"
      isvisible="0"
      timeout="7200">
      <parameter name="Caller" datatype="caller"/>
      <parameter name="BulkOperationId" datatype="lookup" entityname="bulkoperation"/>
      <result datatype="string"/>
    </method>

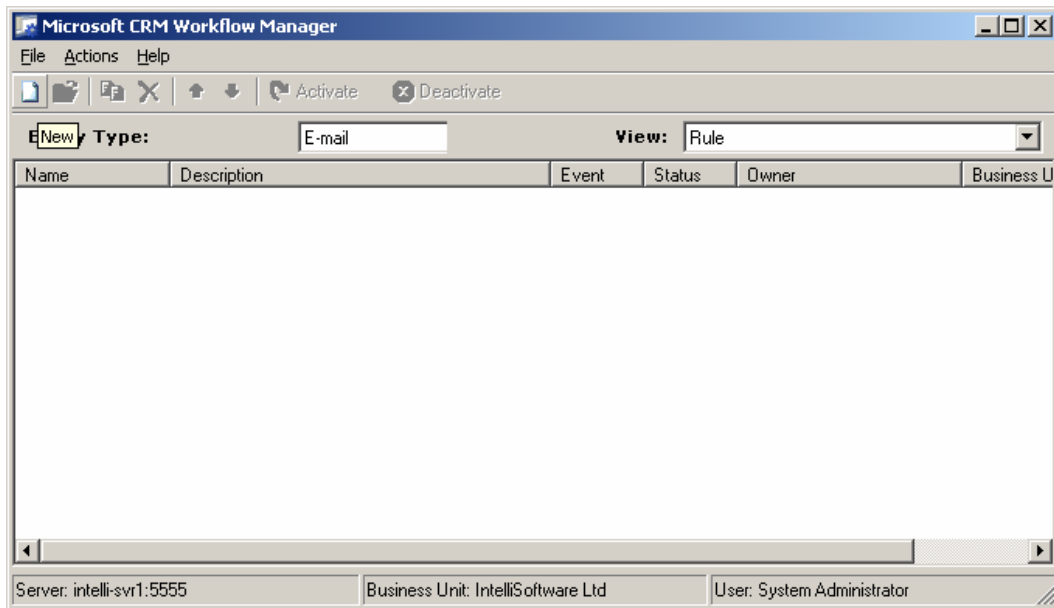
    <method name="Send SMS"
      assembly="IntelliSoftware.Crm.IntelliSMSCRMAddin.dll"
      typename="IntelliSoftware.Crm.IntelliSMSCRMAddin.WorkflowAddin"
      methodname="SendSMS"
      group="IntelliSoftware">
      <parameter name="Email" datatype="lookup" entityname="email"/>
      <parameter name="Caller" datatype="caller"/>
      <parameter name="CRM Server" datatype="string" />
      <parameter name="IntelliSMS Username" datatype="string" />
      <parameter name="IntelliSMS Password" datatype="string" />
      <parameter name="IntelliSMS HTTP Proxy Address" datatype="string" />
      <parameter name="IntelliSMS HTTP Proxy Username" datatype="string" />
      <parameter name="IntelliSMS HTTP Proxy Password" datatype="string" />
      <parameter name="IntelliSMS Log File" datatype="string" />
      <result datatype="integer"/>
    </method>

  </methods>
</workflow.config>
```

5. Close Notepad and save changes
6. Go to **Start Menu -> Programs -> Administrative Tools -> Services**
7. In the Services window, in the details pane, right-click **Microsoft CRM Workflow Service**, and then click **Restart**.

### 3.4 Create Send SMS Workflow

1. Open CRM Workflow Manager.
2. Select **Entity Type: E-Mail**



3. Select **File -> New...**

Enter details below for the new Workflow Rule:

The screenshot shows the "Rule Form" dialog box. The title bar reads "Rule Form". The main heading is "Create Workflow Rule". Below the heading, there is a instruction: "Provide a name and description for this record in addition to selecting the event that will trigger the rule." The form contains four fields: "Name:" with the value "Send SMS", "Description:" with the value "Send SMS message via IntelliSoftware SMS Gateway", "Entity:" with a dropdown menu set to "E-mail", and "Event:" with a dropdown menu set to "Create". At the bottom of the dialog, there are three buttons: "Help", "Next >", and "Cancel".

Click the **Next >** button.

4. Click **Insert Condition -> Check Condition:**

The 'Rule Form' dialog box is titled 'Select Behavior'. It contains a 'Rule name' field with the value 'Send SMS' and a 'Rule description' field with the value 'Send SMS message via IntelliSoftware SMS Gateway'. On the left, under 'Common Tasks', there are four options: 'Insert Condition' (highlighted), 'Insert Action', 'Edit Selected', and 'Delete Selected'. The main area on the right is titled 'When e-mail is created' and contains a code editor with the following text: 'if', '<<add conditions here >>', 'then', '<<add actions here >>', and 'end if'. At the bottom, there are 'Help', 'Save', and 'Cancel' buttons.

5. Select <<add conditions here>> and select **Insert Condition -> Check entity condition.**

Enter the details below and click **OK**.

The 'Check Entity Condition' dialog box is titled 'Create Condition'. It contains an 'Entity' dropdown menu with 'E-mail' selected and a 'Field' dropdown menu with 'Send Via' selected. To the right of the 'Field' dropdown is an equals sign followed by a dropdown menu with 'SMS' selected. At the bottom, there are 'Help', 'OK', and 'Cancel' buttons.

6. Click <<add actions here>> and select **Call Assembly -> IntelliSoftware -> Send SMS**.

**Rule Form**

Select Behavior

Use the menus in Common Tasks to define the behavior of the rule, sales process, or template.

Rule name: Send SMS

Rule description: Send SMS via IntelliSoftware Gateway

Common Tasks

- Insert Condition
- Insert Action
- Edit Selected
- Delete Selected

When e-mail is created

if E-mail Send Via = SMS

then <<add actions here >>

end if

Call assembly -> Date and time functions -> IntelliSoftware -> Send SMS

Help Save Cancel

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

**Send SMS**

Create Assembly Call

Specify the name and parameter values for the Microsoft .NET assembly call.

Action Name: Send SMS

Parameter	Value
Email	E-mail
Caller	Caller
CRM Server	CrmServer:5555
IntelliSMS Username	MyUsername
IntelliSMS Password	MyPassword
IntelliSMS HTTP Prox...	null
IntelliSMS HTTP Prox...	null
IntelliSMS HTTP Prox...	null
IntelliSMS Log File	null

Help OK Cancel



8. Double click on the **Email** parameter and select **Dynamic Value** and click.
9. Double click on the **CRM Sever** parameter and enter the name of your CRM Server (including port number).
10. Double click on the **IntelliSMS Username** and **IntelliSMS Password** parameters and enter login information for your IntelliSoftware SMS Account.
11. Click **OK**
12. Click **Save**
13. Click **Activate** to activate the new Workflow Rule.

## 4 Diagnostics

The follows tools can help you resolve any installation issues:

**CRM Workflow Monitor** – This will show you the progress of any ‘Send SMS’ workflow jobs that you have created. The Log tab will show you detailed error information.

**System Event Log** – CRM will write errors to the System Application log if there are any setup problems (e.g. workflow.config is not valid XML).

**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\IntelliSMS CRMLog.txt’). Make sure the path is valid and that there are no security restrictions on the folder.