



# SageCRM and SendQuick SMS Gateway

## **Integration Guide**

Prepared by

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## SAGECRM AND SENDQUICK SMS INTEGRATION GUIDE

## 1. INTRODUCTION

This document is prepared as a configuration guide to integrate between SageCRM and sendQuick SMS gateway to allow SageCRM users to send and receive SMS from SageCRM. The integration will allow SageCRM to enjoy the benefits of having the ability to send SMS to enhance the CRM functionalities.

### 2. SETUP & CONFIGURATION

#### A) Setup sendQuick SMS gateway

First, perform the sendQuick configuration by configuring the IP address, provide a hostname and complete the setup of the system. The key to the configuration is to use the sendQuick built-in SMTP server to convert the email-to-SMS. The emails will be sent from SageCRM to sendQuick, and converted to SMS.

For more details, refer to sendQuick Server Administration Manual.

#### B) Configure SageCRM

The way to integrate SageCRM with sendQuick is to use the SMS sending function which is an existing feature in SageCRM. The function is called **Mobile Email Address**. This means SageCRM has a built-in method to send SMS using the email (SMTP method).

There are two (2) steps to perform in the SageCRM configuration which is documented below:

#### I) Specify E-mail / SMS settings as follows:

- (a) Open Administration > E-mail And Documents > E-mail Configuration.
- (b) Select the **Change** action button.
- (c) Once you have completed the fields, select Save.
- (d) The following table describes the fields on the E-mail / SMS settings page (shown below)

No	Field	Description			
1	SMS domain name	The sendQuick SMS gateway will process the received			
		email and convert to SMS. The address format it			
		recognizes to send as the SMS message is <phone< th=""></phone<>			
		number>@ <sms domain="">. For example</sms>			
		086122346@sms.domain.com. (the sms.domain.com is the			
		hostname of sendQuick server)			
2	SMTP server for SMS	This is the name of the mail server or IP address of			
	messaging	sendQuick's built-in SMTP server. This is used to receive			
		the e-mails to be sent as SMS messages.			
3	Use SMS features	Specify whether you want to use SMS features. You need			
		to restart the application if you set this field to Yes.			
4	SMTP Authentication	Disable this function as sendQuick does not use SMTP			
		authentication			

	Administration -> E-mail	and Documents -> E-mail Configuration			/
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E-mail and Documents					

#### II) Users Configuration

Once the above steps were completed, you will need to configure the Users configuration to receive the SMS. The steps are documented below:

#### Set the Mobile Email Address

The typical format for sending out SMS using the email's TO address needs to be #mobile\_number#@sms.domainname that will also depends on the format specified in the SMS gateway. Note that the '@sms' is hardcoded in CRM.

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Advanced	Disabled:						Reassign
Customization	More User Details						and Disable
	Department: IS			Phone: 353 1 612 3456		Ext.: 3456	Disable
Data Management	Display Team: Direct Sales, Telesales, Custome	er Service, Marketing		Home Phone:		Fax: 353 1 612 3444	Help
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#### **Setting of Reminder Preferences to include SMS**

You can configure on what the user will receive SMS and one of the function is reminder SMS.

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Q	Log Me In To: Calendar	Empty Recent List for each session: No	Recent List activation by: Click	Pop Out List activation by: Click	Change	
Find	My default Find screen: Company	Show Solutions In My CRM: No	Show outbound calls In My C No	RM: Currency: \$	Reinstall CRM Outlook	
New	Show Leads Pipe Line: Yes	Show Opportunities Pipe Line: Yes	Show Cases Pipe Line: Yes	Grid Size: 15	<ul> <li>integration</li> <li>Change Password</li> </ul>	
C)	E-mail Screen Position: Split	Line Item Screen Position: Split	Default E-mail address:		About CRM	
My CRM	Report Print Preview Default Page Size:	Report Print Preview Default Orientation	ion: Default E-mail Template:	Hide CTI On Idle: Yes	Pelp	
Team CRM	Single-Column Calendar: No	Number of Calendar Columns: 4	Full menu in Outlook: No	Preferred Theme: Default		
PERMIT	CSV File Export Delimiter:					
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earch Document	Calendar View:	Calendar Start Time: 09:00	Calendar End Time: 18:00	My week starts on: Monday		
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ſ	Reminder Preferences					
	Default targets for high priority reminde	er messages: Default targets for normal pri SMS	iority reminder messages: Default tar SMS	rgets for low priority reminder messages;		

### 3. SMS APPLICATIONS

SageCRM is a powerful application platform that can be designed to use for many applications. Some of the SMS applications using SageCRM includes:

- (a) SMS Alert for task and appointment
- (b) Send SMS to assignee when re-assigning a ticket
- (c) Mass SMS to group of contacts
- (d) SMS marketing (may require a script from Sage)
- (e) SMS for helpdesk for job deployment
- (f) SMS for contact centres
- (g) Other SMS applications, as long as it can be sent using the SMS tool on SageCRM.