SageCRM and

SendQuick SMS Gateway

Integration Guide

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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 number>@<SMS domain>. For example **086122346@sms.domain.com**. (the **sms.domain.com** is the hostname of sendQuick server)
2	SMTP server for SMS messaging	This is the name of the mail server or IP address of 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
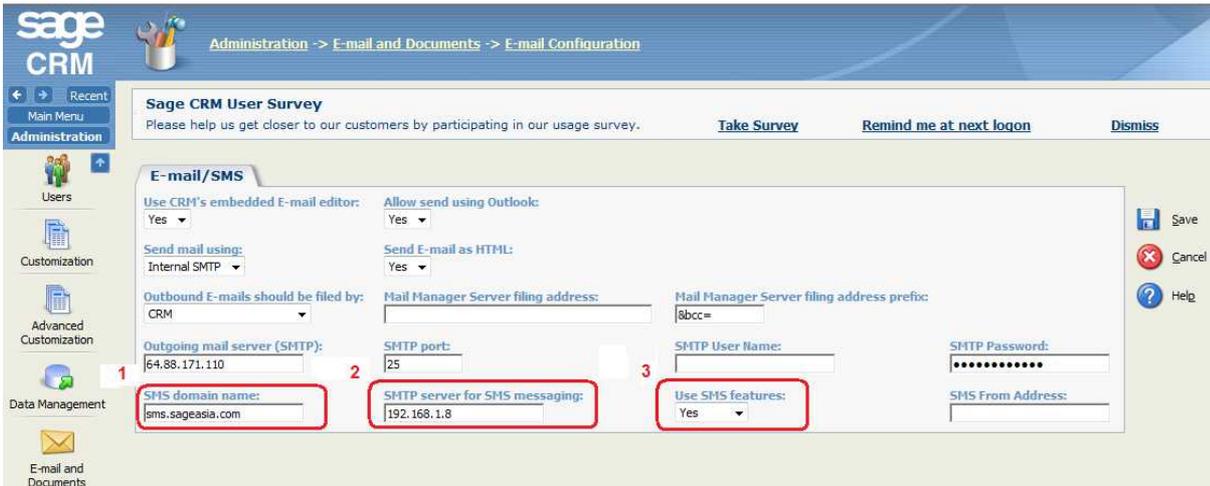
II) Users Configuration

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.
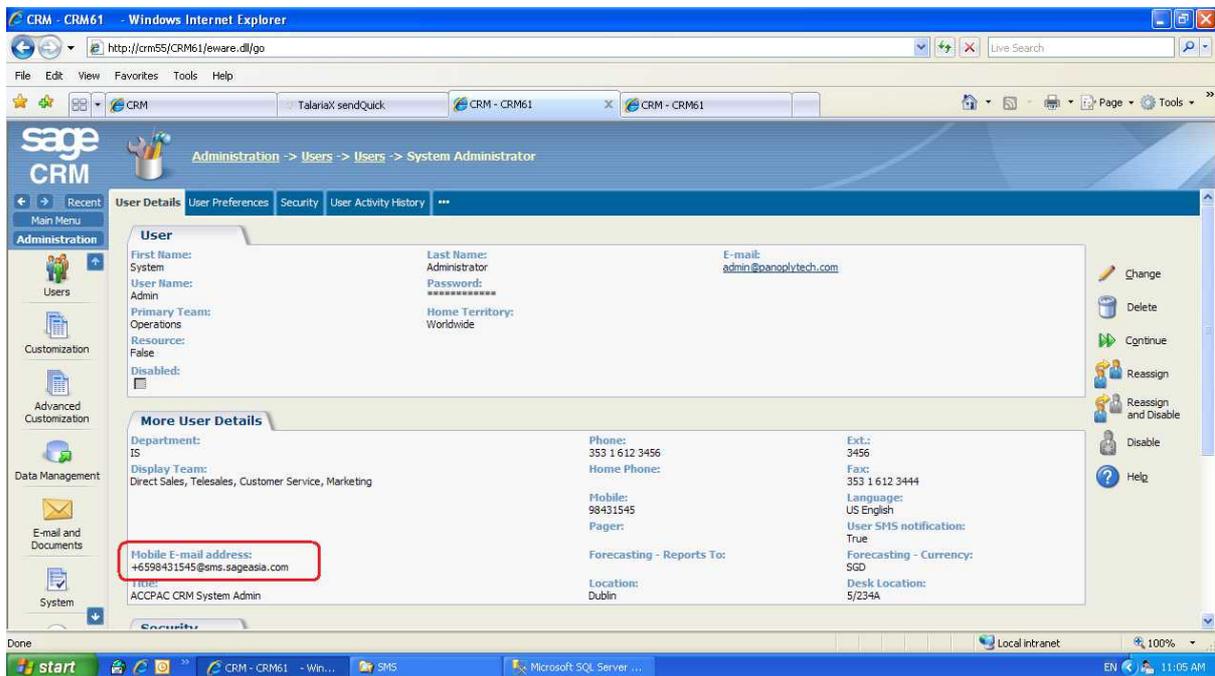
Setting of Reminder Preferences to include SMS
You can configure on what the user will receive SMS and one of the function is reminder SMS.
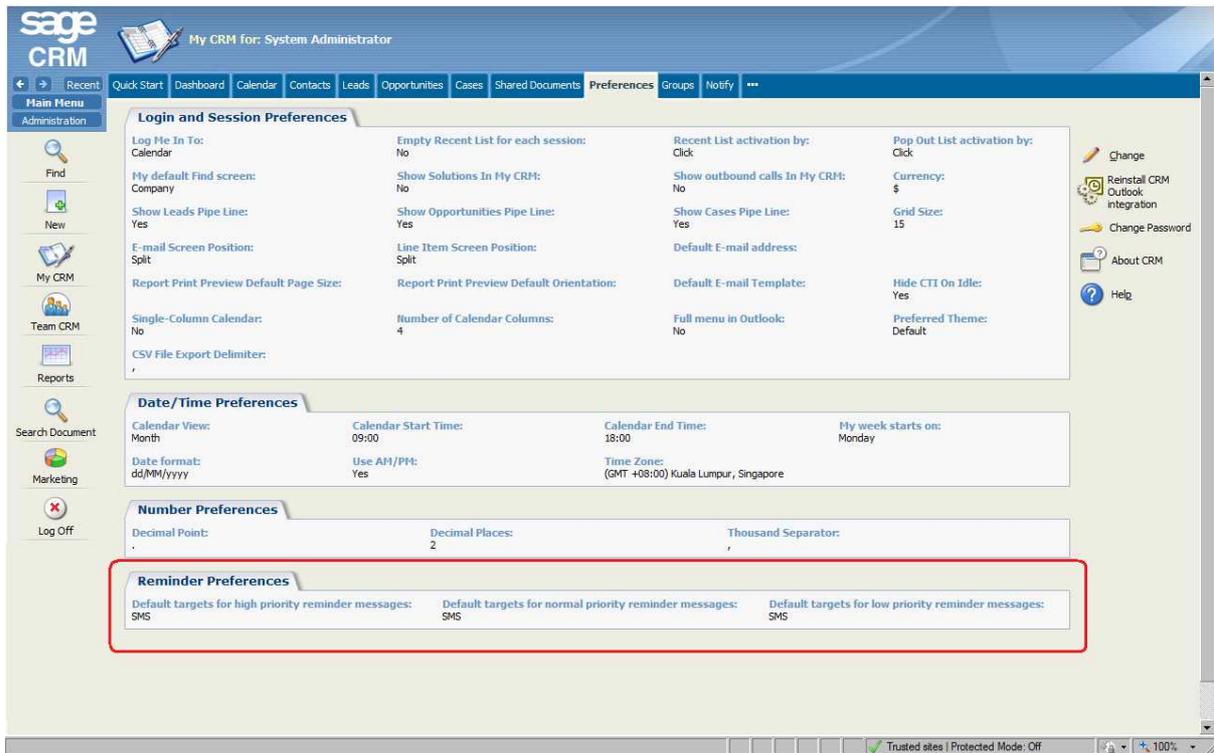
3.   SMS APPLICATIONS

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.