SMS Sequences Feature Setup

What does it do?

SMS Sequences allows for you to configure a conversation style SMS sequence to take place upon receiving a keyword, or via pinging a url (HTTP Post), from a contact or potential contact to your phone number.

PlusThis Integration:

1. To start the SMS sequence by having a contact send a keyword to a specified phone number, select the keyword you would like to use to trigger this sequence. (ie. When the phone number specified receives an SMS with this keyword in it - it will trigger the sequence.)

2. Select your preferred Twilio phone number (if you haven’t already purchased a phone number, click the + symbol to do so).

3. Select the field to store the contact’s mobile number in (We suggest you pick a phone number field that you designate specifically as a mobile phone number field - that is not to be used for office or home phones). Note * PlusThis will try to find an existing contact record using the specified field. If no matching records are found- a new contact record will be created. If you chose to collect email address first, PlusThis will try find a contact using the collected email address.

4. Sequence Steps (you can add as many as you’d like)
5. Name your sequence step by clicking the Title in green at the top right of the sequence.
6. Compose a message you’d like to send. (if you are triggering the sequence through a keyword – this will be sent in response to the keyword being sent in). If you would like to use a merge field - note that if the contact record is new, only the information previously requested will be available to merge in.
7. Select the field to store the response in and select a tag(s), if desired, to be applied upon receipt of response. Choose which message should be sent next, and configure any conditions around how to respond and tag the recipient.
8. Create as many sequences as necessary by clicking the blue “add sequence step message” button
9. Under Additional Options you can check the box to create a note on the contact record with the Conversation and you can configure tags to apply to contacts if they opt out of messaging or if the mobile number is incorrect.
10. PlusThis will provide you with an HTTP post URL for use in URL Pings and HTTP Posts and if configured, PlusThis will also provide the keyword and Phone number for the keyword to be sent to.