

SMS Sequences Feature Setup (Infusionsoft)

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 triggering it from your CRM, from a contact or potential contact to your Twilio 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

How would you like to start this SMS Sequence?

- ☒ Both via text of keyword or a HTTP Post in a Campaign Sequence
- ☐ Only via HTTP Post in a Campaign Sequence

Which Twilio phone number would you like to use?

(480) 418-7220



Where should we store requester's mobile number?

Phone 2



PlusThis will try to find an existing contact record using this field. If none is found, a new one will be created

Keyword that starts this sequence

candy

Not case sensitive.

Keywords you've used on this phone number:

You aren't using any keywords on this phone number.

- ☒ Collect email address first.

Recommended. This option reduces duplicate contacts.

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 the 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.

Candy type?
Remove

Message to send

What's your favorite kind of Candy? Chocolate or Gummies?

59 characters. Estimate only, merged content length will vary.

Insert Merge Field

Select a field to insert it +

If this is a new contact, then you will only have information that was stored in previous steps.

Include the following media (MMS):

Link to the media you want included.

Media will be displayed on user's phone. Leave empty if you don't want to send any media.

When a response to this message is received...

Save the response to this field

Candy Type
+

What should happen next?

Which message should be sent next?

☐ The Next Message (the one below this)
☒ Let Me Decide (configure conditions)
☐ Don't Send Anything (finish)

Sequence Tagging and Next Step (Conditions)

Conditions are evaluated **after** a response has been received from top to bottom. The actions from the first matching condition will occur.

Condition: Equals / Contains
Remove

If the response contains ANY of the following words/phrases:

gum

Asterisk (*) for wild card. Not case sensitive.

Which tag should be applied when this condition is met?

Don't apply a tag
+

Which Sequence Message should be sent next when this condition is met?

Likes Gummies
+

Condition: Equals / Contains
Remove

If the response contains ANY of the following words/phrases:

choco

Asterisk (*) for wild card. Not case sensitive.

Which tag should be applied when this condition is met?

Don't apply a tag
+

Which Sequence Message should be sent next when this condition is met?

Chocolate lover
+

Add Condition ▼
 (Tagging and Next Message)

Default Actions

If none of the criteria are met, which tag should be applied?

Unknown Response
+

If none of the criteria are met, which sequence should be sent next?

I'm sorry.
+