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QUICK START GUIDE

Dynamics 365 Integration

with BulkSMS.com

Connect Microsoft Dynamics 365 to the BulkSMS Integration Gateway with your own app registration or your Microsoft sign-in, create message templates and send bulk SMS to your contact and lead marketing lists.



Welcome to BulkSMS.com

Trusted, scalable SMS messaging for your business

IN THIS GUIDE

01 Connect Dynamics 365 your way

02 Create templates with contact and lead tokens

03 Send bulk SMS to your marketing lists

Microsoft Dynamics 365

BULKSMS.COM INTEGRATION GATEWAY FOR MICROSOFT DYNAMICS 365

VERSION 4.1 · UPDATED 2026/10/22

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01 Foreword

The Dynamics 365 integration sends bulk SMS to the contacts and leads on your Dynamics 365 marketing lists. You can connect it in either of two ways: with an **App Registration** you create in your own Microsoft Entra ID, or with **Microsoft Sign-in**, where you sign in and approve the BulkSMS app. Before you start, make sure you have the following ready.

Environment URL
The web address of your Dynamics 365 environment, e.g. https://yourcompany.crm.dynamics.com

App Registration
If you use this method: the Directory (tenant) ID, Application (client) ID and a Client Secret of an app registered in Microsoft Entra ID

Microsoft work account
If you use Microsoft Sign-in: a Dynamics 365 user who can read your marketing lists, contacts and leads

Country code
The country most of your contacts are in, e.g. 44 for the UK

You'll also need your BulkSMS account details saved in the Integration Gateway, so that you can choose a sender address when you send.

Not sure which method to use? See Choose a connection method in the next section. Many organisations prefer App Registration, because no access is granted to an outside app and you control exactly what it can read in Dynamics 365.

02 Dynamics 365 Credentials

Environment URL

This is the address of the Dynamics 365 environment that holds your contacts and leads. Both connection methods need it. Find it in either of these ways:

1. Open your Dynamics 365 app (for example Sales) in the browser and look at the address bar. The environment URL is everything up to and including `.dynamics.com`, for example `https://yourcompany.crm4.dynamics.com`.
2. Or sign in to the Power Platform admin center, open **Manage** → **Environments**, select your environment and copy the **Environment URL**.

! Enter only the address up to `.dynamics.com`, starting with `https://`. Don't include anything after it (such as `/main.aspx?appid=…`), and use the `.crm…dynamics.com` address rather than a custom domain—the integration builds its Microsoft permissions from this address.

Choose a connection method

	APP REGISTRATION	MICROSOFT SIGN-IN
How it connects	With an app you register in your own Microsoft Entra ID, using its client ID and secret	You sign in with your Microsoft account and approve the BulkSMS Integration Gateway app
Access	Whatever security role you give the app in Dynamics 365. Nothing is granted to BulkSMS	The permissions of the user who signs in
Who sets it up	Someone who can create app registrations in Microsoft Entra ID and application users in Dynamics 365	Any licensed user, though your organisation may require an administrator to approve the app
Keeping it working	Client secrets expire; create a new one and connect again before yours does	Stays connected unless the sign-in is revoked, for example after a password change

App Registration

Create the app once, in the Microsoft Entra ID that your Dynamics 365 environment belongs to:

1. In the Microsoft Entra admin center (or Microsoft Entra ID in the Azure portal), open **App registrations** and click **New registration**. Give it a name, e.g. BulkSMS Integration Gateway, keep **Accounts in this organizational directory only**, leave **Redirect URI** empty and click **Register**.
2. On the app's **Overview** page, copy the **Application (client) ID** and the **Directory (tenant) ID**.
3. Open **Certificates & secrets**, click **New client secret**, choose when it expires and click **Add**. Copy the secret's **Value** straight away—it's only shown once. Don't copy the **Secret ID**.

4. In the Power Platform admin center, open your environment, then **Settings** → **Users + permissions** → **Application users** and click **New app user**. Add the app you registered, choose its business unit, and give it a security role that can read contacts, leads and marketing lists.

! Note the date your client secret expires. Before then, create a new secret, click **Disconnect Account** on the Settings page and connect again with the new one. Bulk messages can't be prepared once the secret has expired.

Microsoft Sign-in

Microsoft Entra ID (formerly Azure Active Directory) handles the sign-in. BulkSMS has registered the Integration Gateway app with Microsoft, so with this method you **don't** need to create an app registration or look up a tenant or client ID.

When you click **Sign in with Microsoft**, Microsoft asks you to sign in and to allow the app to:

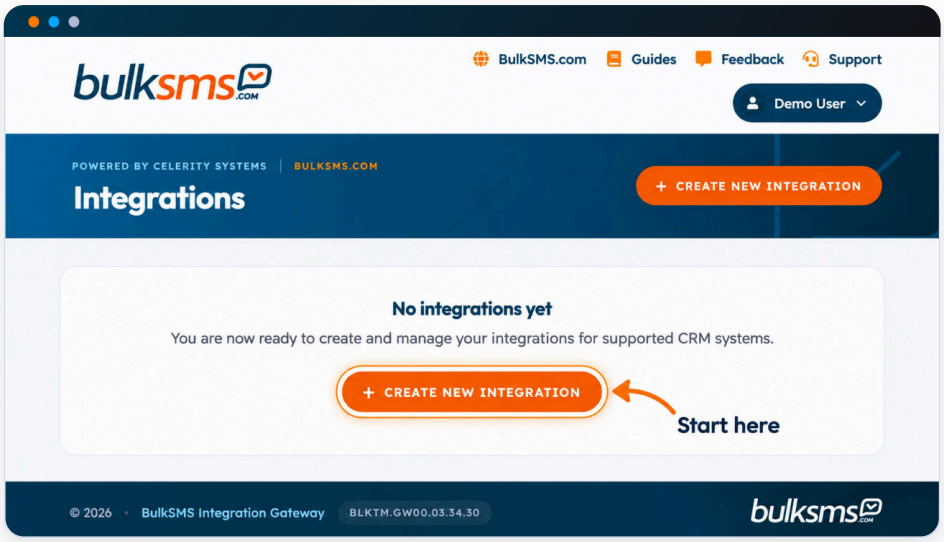
- access Dynamics 365 as you (to read your marketing lists, contacts and leads);
- keep that access, so bulk messages can be prepared later without signing in again;
- read your basic profile (sign-in name and email address).

The integration works with your Dynamics 365 permissions, so sign in with a user who has a Dynamics 365 licence and can read the lists you want to message.

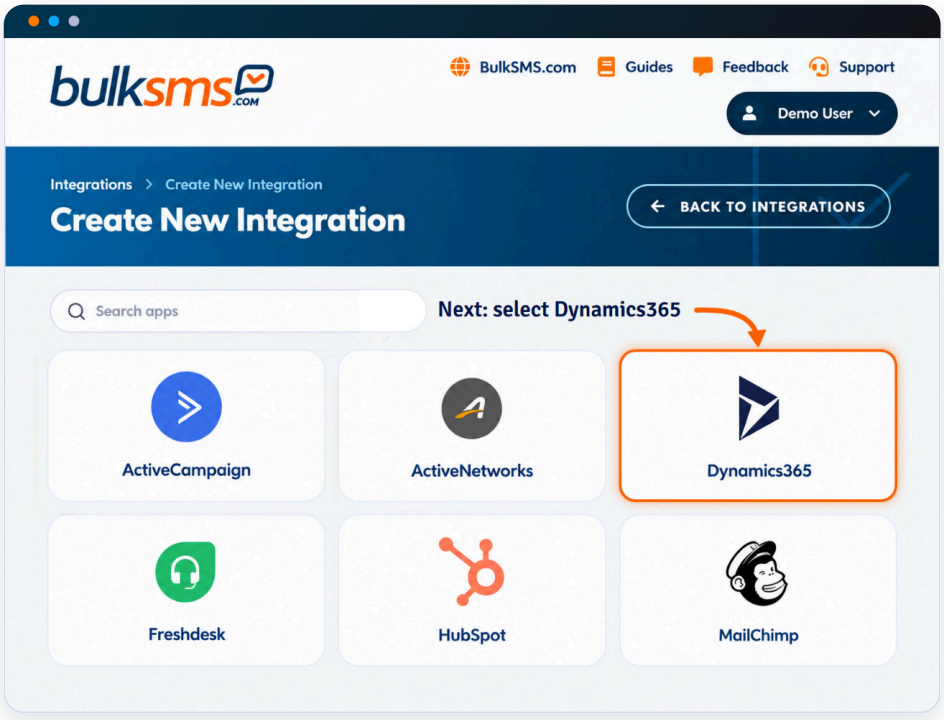
i If Microsoft shows **Need admin approval**, your organisation only lets administrators approve apps. Ask an administrator (for example a Global Administrator or Cloud Application Administrator) to approve it —either by signing in through **Sign in with Microsoft** themselves and consenting on behalf of your organisation, or under **Identity** → **Applications** → **Enterprise applications** → **Admin consent requests** in the Microsoft Entra admin center. Or use App Registration instead, which needs no approval of the BulkSMS app.

03 Integration Setup

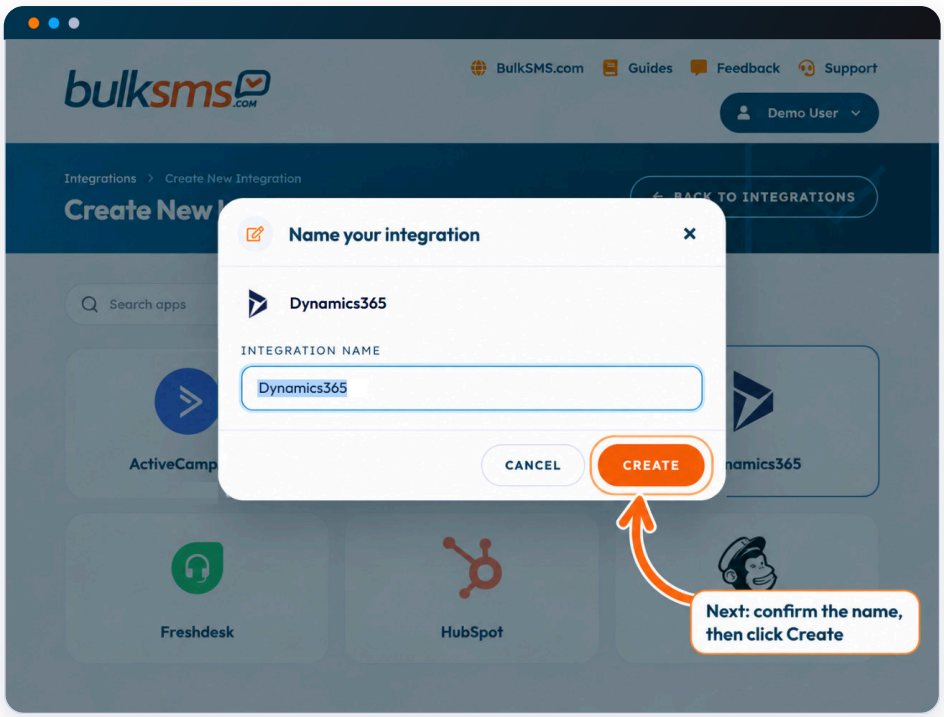
1 Sign up or log in to the BulkSMS Integration Gateway at bulksms.com/integration-gateway and click **Create New Integration**.



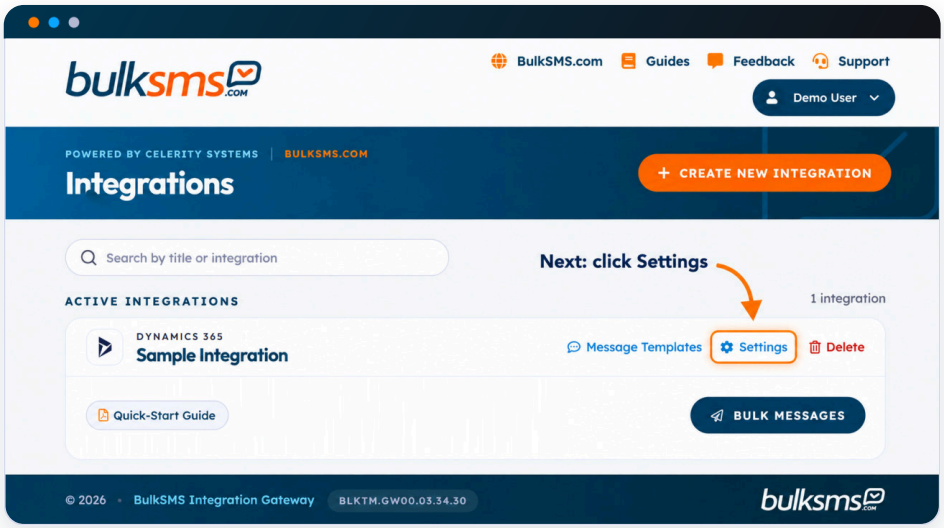
2 Select **Dynamics365**. You can type in **Search apps** to find it quickly.



3 Give your integration a name, or keep the one suggested, and click **Create**. The name can use letters, numbers, spaces, hyphens and underscores, up to 40 characters.



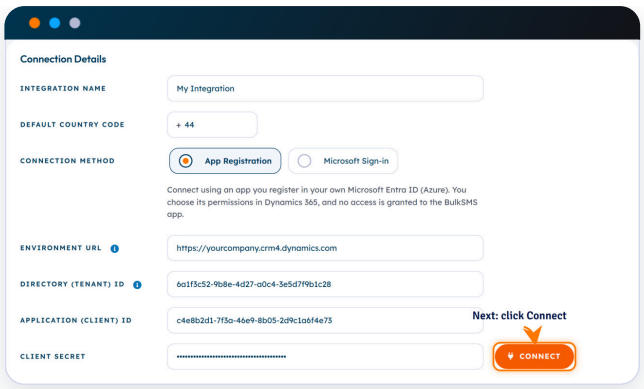
4 Your integration now appears on the Integrations page. Click **Settings**.



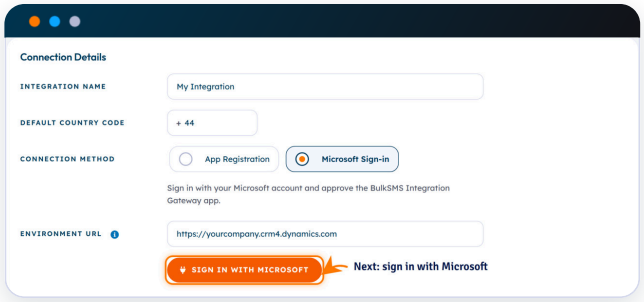
5 Enter your **Default Country Code**, then choose a **Connection Method** (see Choose a connection method) and enter your **Environment URL**.

6 Connect with the method you chose:

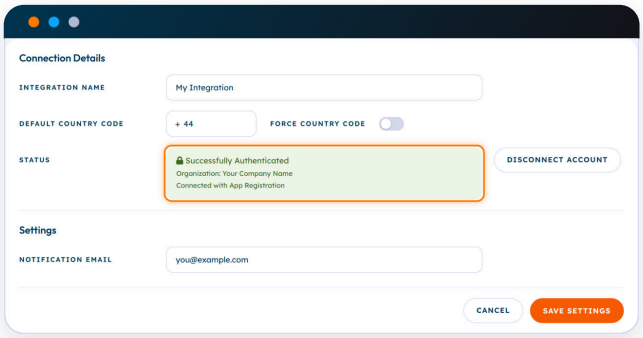
- **App Registration** – enter the **Directory (tenant) ID**, **Application (client) ID** and **Client Secret**, then click **Connect**.



- **Microsoft Sign-in** – click **Sign in with Microsoft**. The button becomes available once the address starts with `https://`. A Microsoft window opens: sign in with your work account and accept the permissions. When the window shows **Successfully Authenticated**, click **OK** to close it.



7 The Settings page reloads. Under **Status** it shows **Successfully Authenticated**, the name of your Dynamics 365 organisation and the method you connected with. Complete the rest of the page, then click **Save Settings**:



- **Integration Name** – change it here if you need to.
- **Default Country Code** and **Force Country Code** – how numbers without a country code are handled (see Sending Tips).
- **Notification Email** – where the Integration Gateway sends notifications about this integration.

Disconnect Account removes the connection straight away, without asking you to confirm, and clears the details for either method. You'll need to connect again—with either method—before you can prepare bulk messages. To change the client secret, disconnect and connect again with the new one.

04 Automation Setup

The Integration Gateway sends bulk messages to your Dynamics 365 marketing lists. It doesn't add an SMS step to Dynamics 365 workflows. To send an SMS automatically when something happens in Dynamics 365—a new lead, or a changed record—use the BulkSMS connector for Power Automate.

Microsoft Dynamics 365 Setup Guide

All the ways to send SMS from Dynamics 365, including a step-by-step Power Automate flow with the Microsoft Dataverse trigger.

OPEN →

BulkSMS connector for Power Automate

Microsoft's reference for the Send SMS Message action. It's a Premium connector, so it needs a Power Automate Premium licence.

OPEN →

ClickDimensions Setup Guide

Send SMS as part of ClickDimensions marketing campaigns for Dynamics 365 leads, contacts and accounts.

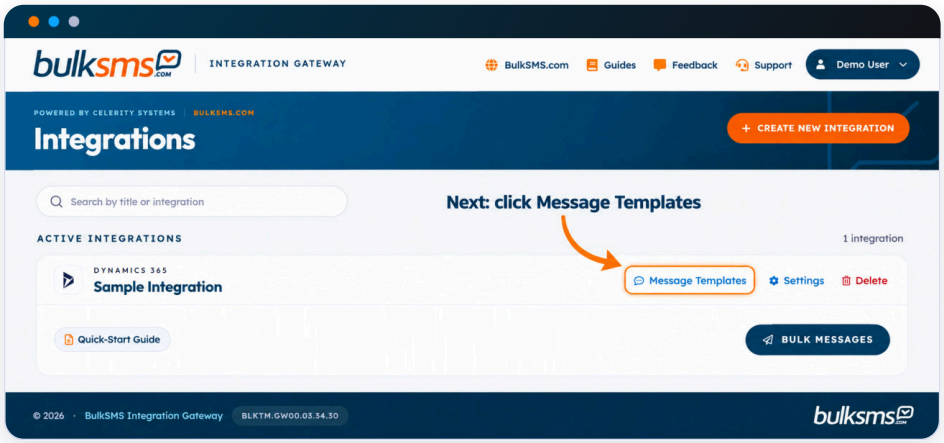
OPEN →

The Power Automate connector uses a BulkSMS API token rather than the Integration Gateway, so you can use it alongside this integration.

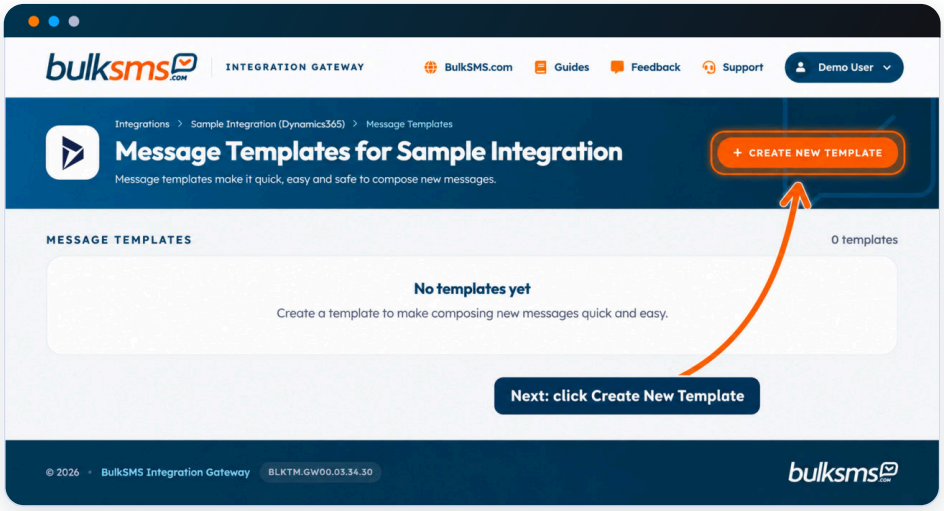
05 Message Templates

Templates let you save messages you send often, with tokens that personalise each message for the contact or lead.

1. On the Integrations page, click **Message Templates** for your integration.

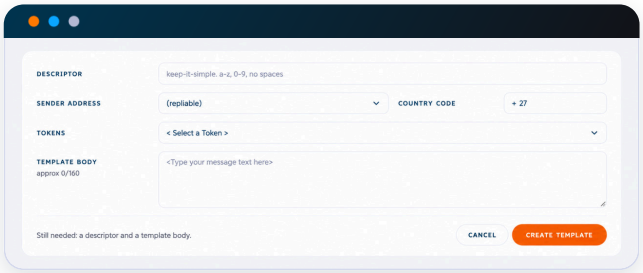


2. Click **Create New Template**.

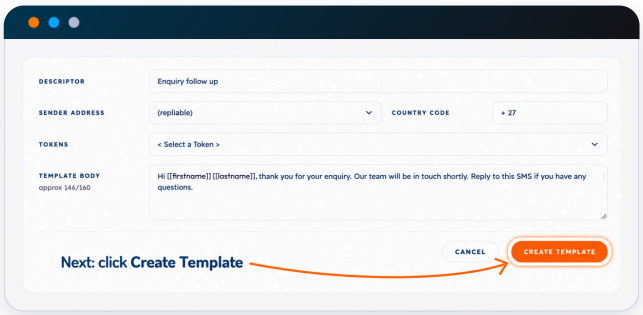


3 Fill in the template:

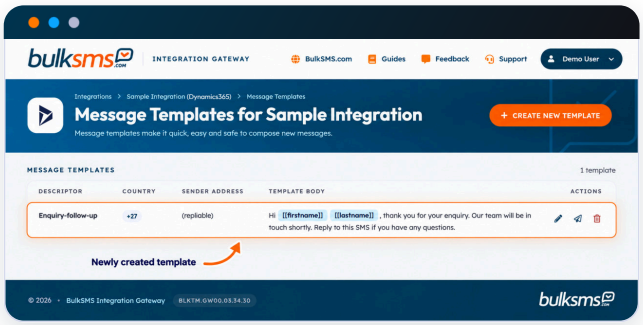
- **Descriptor** – a unique name for the template, using letters, numbers, spaces and hyphens (up to 30 characters). Spaces are saved as hyphens.
- **Sender Address** – keep **(repliable)** if you want people to be able to reply.
- **Country Code** – the default for this template. You can change it when you prepare a message.
- **Tokens** – pick a field to insert it into the message. The list has **Contact Tokens** and **Lead Tokens**; see Sending Tips.
- **Template Body** – your message. The counter shows the approximate length against 160 characters.



4 When the template is complete, click **Create Template**.



5 Your new template is listed under **Message Templates**. Use the icons on the right to **edit** it, **prepare a bulk message** from it, or **delete** it.

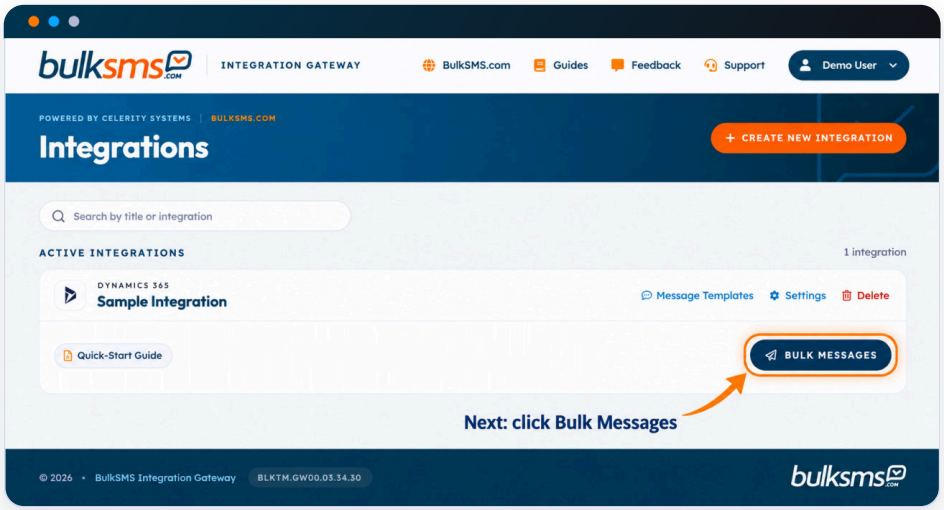


06 Bulk Messaging

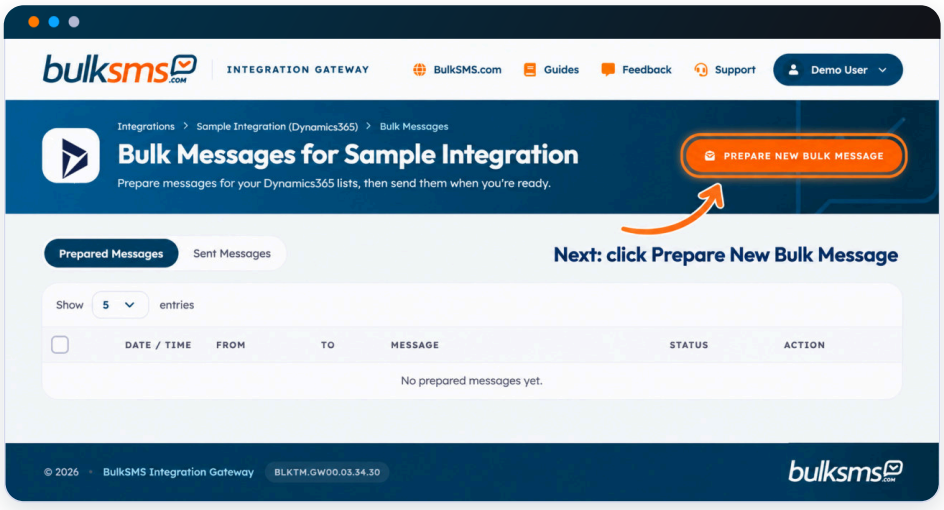
Send an SMS to everyone on a Dynamics 365 contact or lead marketing list. You prepare the message first, check a sample, then send it.

Prepare the message

1. On the Integrations page, click **Bulk Messages** for your integration.

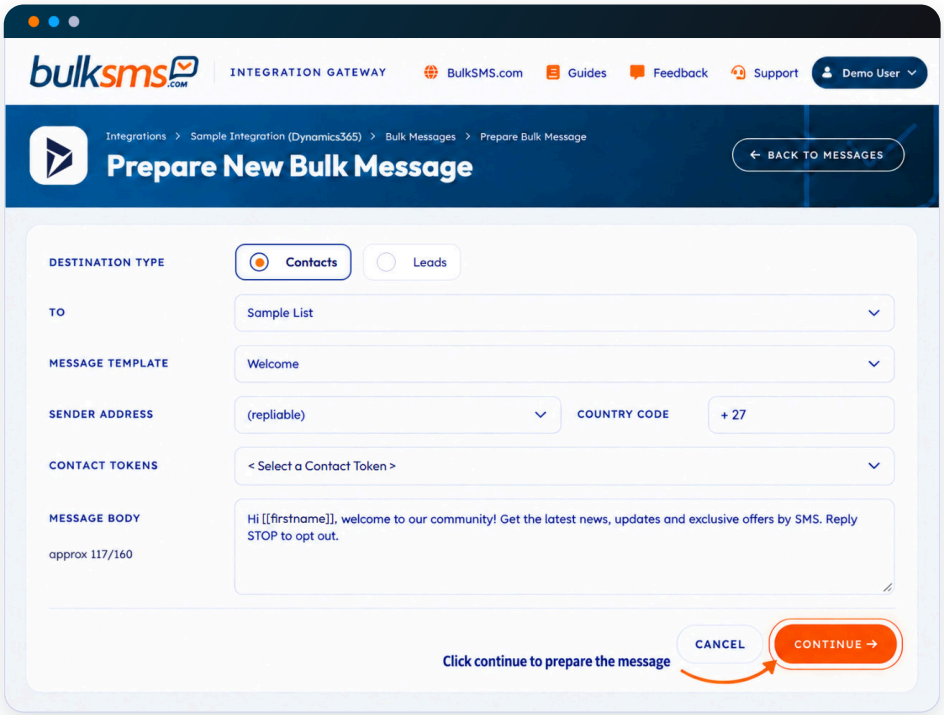


2. Click **Prepare New Bulk Message**.

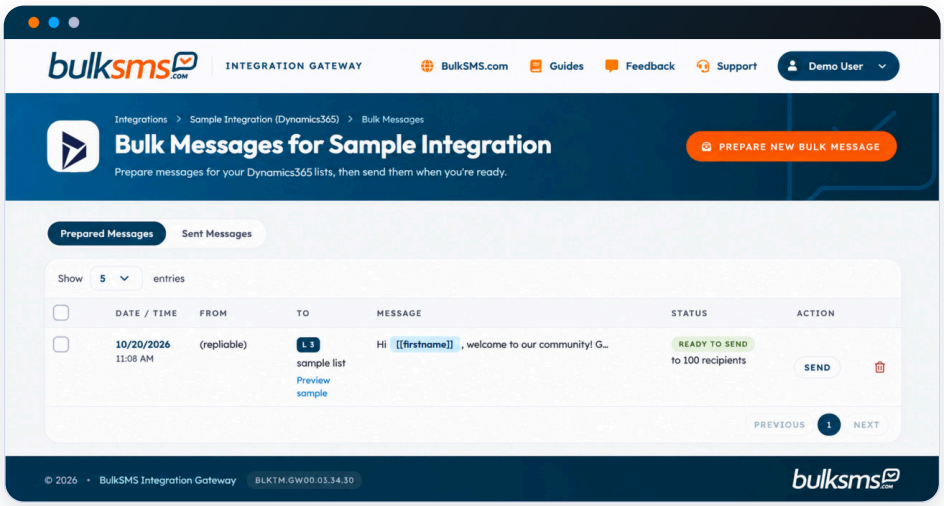


3. Fill in the form, then click **Continue**:
   - **Destination Type** – **Contacts** or **Leads**, then choose the marketing list under **To**.
   - **Message Template** – optional. Choosing one fills in the message, sender and country code, and you can still edit them.
   - **Sender Address** and **Country Code** – as for templates.

- **Contact Tokens** or **Lead Tokens** and **Message Body** – write or adjust the message, adding tokens as needed.

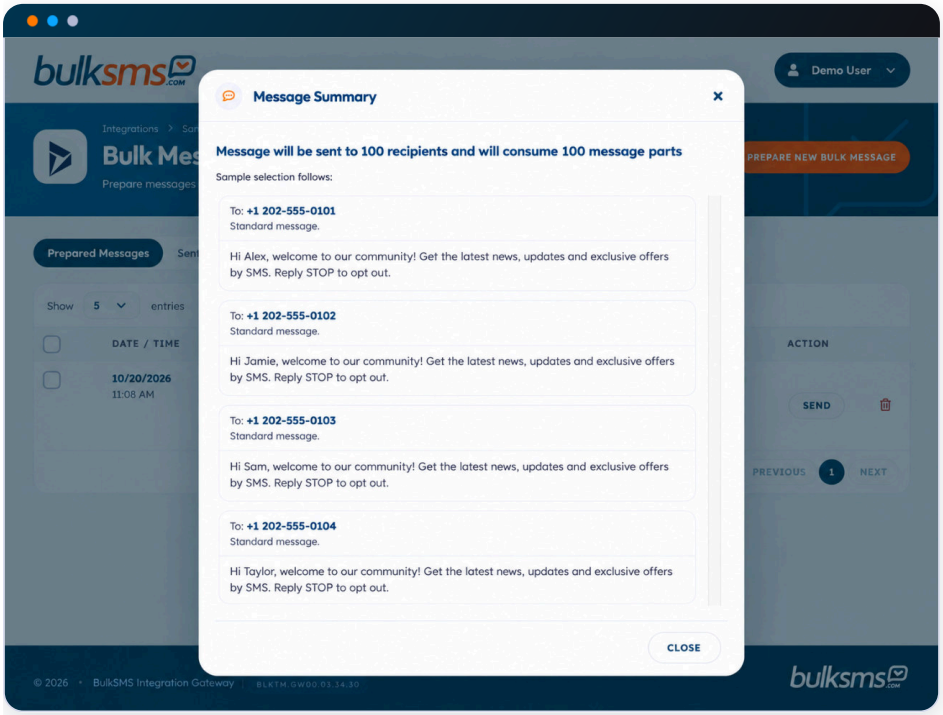


4 The integration collects the people on the list and shows the message under **Prepared Messages**. When it shows **Ready to Send** you can preview it, send it, or delete it with the bin icon.

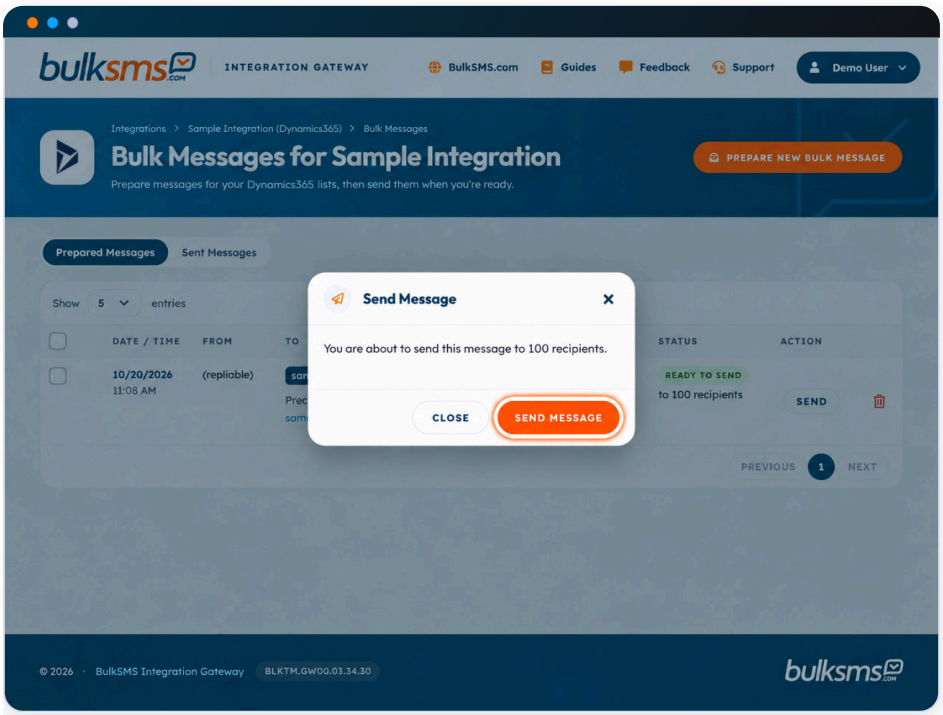


Preview and send

Click **Preview sample** to see how the message looks for a sample of up to 100 recipients, with each person's tokens filled in. The summary also shows how many recipients and message parts the send will use.

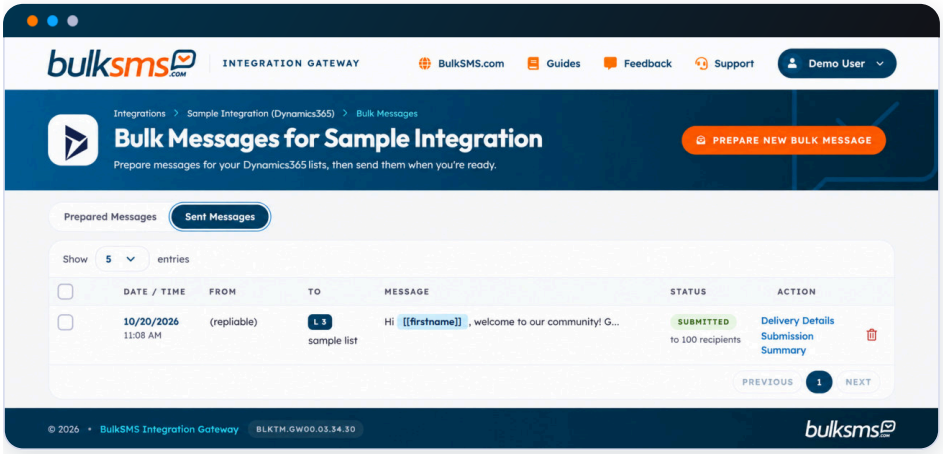


When you're happy, click **Send** and confirm with **Send Message**.



Track your message

Sent messages move to the **Sent Messages** tab. Click **Delivery Details** to see what happened to each message, or **Submission Summary** for totals, including anyone who was skipped.



07 Sending Tips

Who receives a bulk message

- **Static marketing lists only.** The **To** list shows your static contact and lead marketing lists. Dynamic marketing lists, and account lists, aren't shown.
- **Every member of the list** receives the message—the integration doesn't check Dynamics 365 contact preferences such as *Do not allow* settings, so keep your lists clean.
- Messages go to the **Mobile Phone** field. People with no Mobile Phone (for example only a Business Phone) are skipped.
- Duplicates aren't removed: two people sharing a number will both be messaged.

Phone numbers and country codes

Numbers are sent in international format. If a number in Dynamics 365 doesn't include a country code, the integration adds the country code from the message. **Force Country Code** on the Settings page changes when it is added. With a country code of 44:

MOBILE PHONE IN DYNAMICS 365	FORCE COUNTRY CODE OFF	FORCE COUNTRY CODE ON
`07700900123`	`447700900123`	`447700900123`
`7700900123`	`7700900123` (not valid)	`447700900123`
`12025550143`	`12025550143`	`4412025550143` (wrong)
`+12025550143` or `0012025550143`	`12025550143`	`12025550143`

> The safest option is to store numbers in Dynamics 365 with a **+** and the country code (e.g. +44 7700 900123). Only turn on Force Country Code if all your contacts are in one country and their numbers are saved without a country code.

Message length

- One SMS holds up to **160 characters**, or **70** if the message contains Unicode characters such as emoji or some accented letters.
- Longer messages are sent in several parts, and each part uses credits. The Prepare screen shows an approximate character count and a **Long Message** warning with the number of parts.
- A message can't be sent if it reaches 10 parts or more—the **Continue** button stays disabled until you shorten it.

Tokens

Tokens use the Dynamics 365 field name, in lower case, inside double square brackets.

TOKEN	INSERTS	TOKEN	INSERTS
`[[firstname]]`	First Name	`[[address1_city]]`	City

TOKEN	INSERTS	TOKEN	INSERTS
`[[lastname]]`	Last Name	`[[address1_stateorprovince]]`	State
`[[mobilephone]]`	Mobile Phone	`[[address1_country]]`	Country
`[[emailaddress1]]`	Email	`[[address1_postalcode]]`	Postal Code
`[[jobtitle]]`	Job Title	`[[address1_composite]]`	Full Address
`[[websiteurl]]`	Website	`[[description]]`	Description

Contacts also have `[[birthdate]]` (Date of Birth). Leads also have `[[companyname]]`, `[[numberofemployees]]`, `[[revenue]]` and `[[sic]]`. A message can only use tokens for the destination type you choose—a template with `[[companyname]]` can't be sent to Contacts.

If someone has no value for a token, they are skipped (First Name and Last Name are simply left blank). Smart token options let you control this:

OPTION	EXAMPLE	EFFECT
`:default=`	`Hi [[firstname:default=there]]`	Uses "there" when there is no first name.
`:if(>n)`	`[[firstname:default=friend:if(>10)]]`	Uses the default if the value is longer than 10 characters.
`:if(unicode)`	`[[lastname:default=friend:if(unicode)]]`	Uses the default if the value contains Unicode characters, so the message stays at 160 characters per part.

Sender address and replies

- **(repliable)** or **a phone number** – people can reply. Replies come to your BulkSMS account; they aren't added to Dynamics 365.
- **A name** (e.g. your brand) – people **can't reply**.
- Delivery reports aren't written back to Dynamics 365 either—check them under **Sent Messages** → **Delivery Details**.

> **Opt-outs:** the Integration Gateway doesn't unsubscribe people who reply STOP, and bulk messages don't check Dynamics 365 contact preferences. Remove opted-out contacts and leads from your SMS marketing lists in Dynamics 365.

08 Troubleshooting

YOU SEE	WHAT TO DO
Sign in with Microsoft is greyed out	Enter the Environment URL starting with `https://`.
"Enter the Environment URL, Directory (tenant) ID, Application (client) ID and Client Secret."	All four are needed for App Registration (see App Registration).
"Microsoft sign-in failed: AADSTS7000215 ..." (invalid client secret)	The Client Secret is wrong or has expired. Check you copied the secret's **Value**, not its Secret ID, or create a new secret.
"Microsoft sign-in failed: AADSTS700016 ..." or "AADSTS90002 ..."	The Application (client) ID or Directory (tenant) ID is wrong, or the app is registered in a different directory. Copy both again from the app's Overview page.
"Signed in, but Dynamics 365 refused access ..."	The app isn't set up in that environment. Add it as an application user with a security role that can read contacts, leads and marketing lists, and check the Environment URL.
"Need admin approval" in the Microsoft window	Ask an administrator to approve the app in Microsoft Entra ID (see Dynamics 365 Credentials).
"Invalid Dynamics365 CRM instance URL."	Check the address: only up to `.dynamics.com`, e.g. `https://yourcompany.crm.dynamics.com`. Click **Disconnect Account**, correct it and connect again.
Status shows "Unable to access content, not licensed or no permissions."	The Microsoft user you signed in with can't read that Dynamics 365 environment. Disconnect and sign in with a licensed user who has access, or check the Environment URL.
"Unable to obtain Dynamics365 authentication token: ..."	Microsoft Sign-in: the sign-in has expired or been revoked (for example after a password change). App Registration: the client secret has expired or been deleted. Click **Disconnect Account**, then connect again.
"Special characters are not allowed." (Integration Name)	Use only letters, numbers, spaces, hyphens and underscores, up to 40 characters.
Your list isn't in the **To** list	Only static marketing lists of the chosen type are shown. Check you picked **Contacts** or **Leads** to match the list, and that it isn't a dynamic list.
"Please select a Contact List and try again." (or Lead List)	Choose a list under **To**.
"Message contains the following invalid token: ..."	Check the token's spelling and square brackets, and that it belongs to the destination type (Contact or Lead tokens).
Skipped: "MSISDN is invalid"	The person has no Mobile Phone, or the number isn't valid once the country code is applied. See Phone numbers and country codes.
Skipped: "Missing data for ... token."	The person has no value for a token in your message. Add a default, e.g. `[[firstname:default=there]]`.
Continue is greyed out	Choose a destination type, write a message, and check it is under 10 parts.

You can download the list of skipped contacts and leads, with the reason for each, from the Prepared Messages table.

Questions

We're here to help you every step of the way.

Please email **support@bulksms.com** or visit **www.bulksms.com** for other contact options.

Please be sure to mention **your username** and that you are using the **Integration Gateway for a Dynamics 365 integration**.

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