



BSG connector for BPM.Online

User manual

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2 INSTALLATION

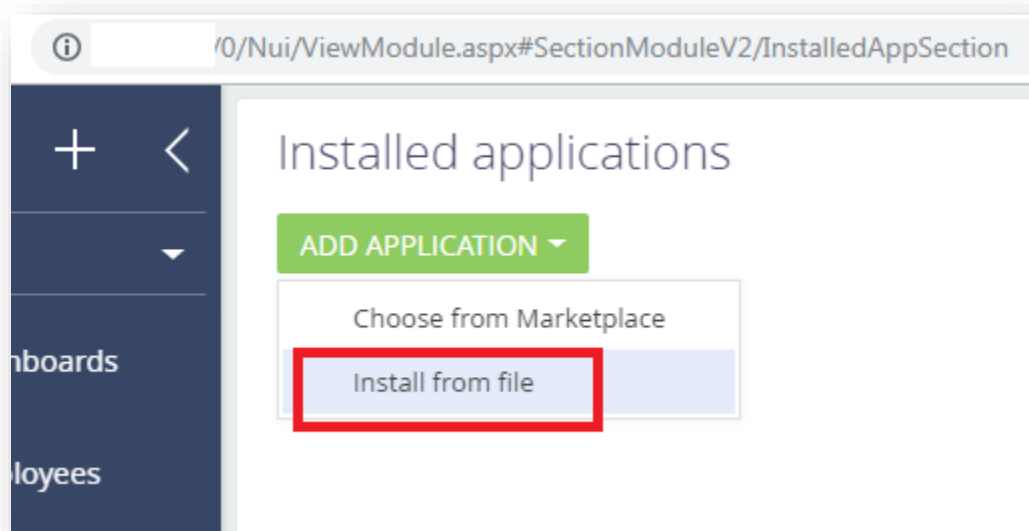
Installation could be done either from BPM Marketplace or from archive file, since installation from marketplace could be completed in single click – it’s not covered in this manual.

2.1 MANUAL INSTALL

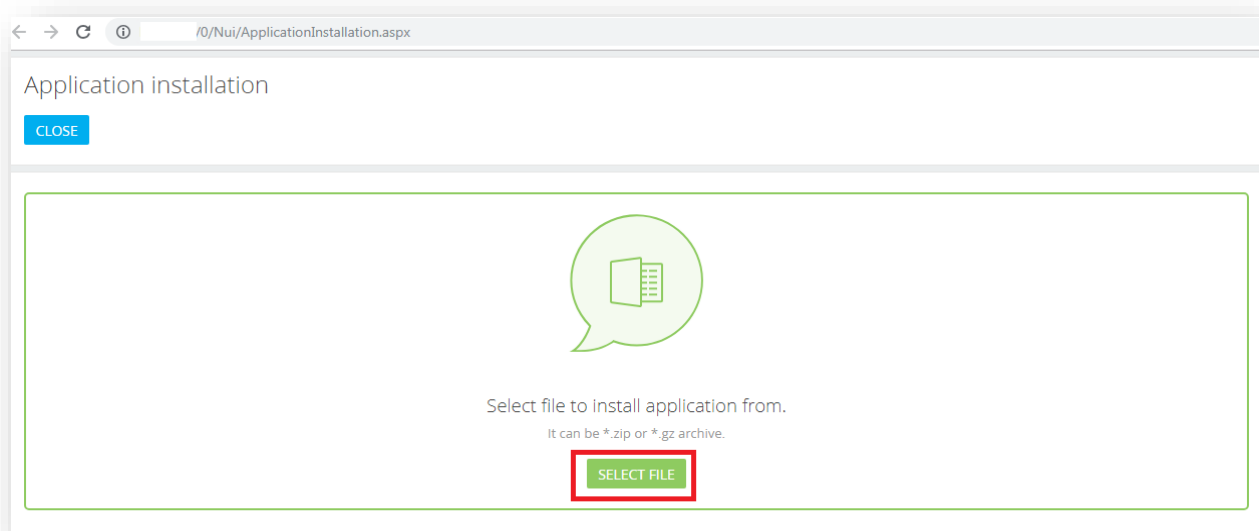
The archive with BSG connector can be downloaded from here:

https://drive.google.com/drive/folders/1VFidh4SVA1-orOpxNehKV_KX_dcBY14D?usp=sharing

To install BSG Connector from archive, go to "Installed application" section in "System designer" and choose "Install from file" from a dropdown:



On next screen, select the archive file and upload it:

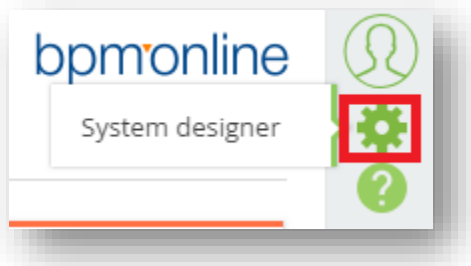


Installation process will start automatically, if there will be errors – please keep installation log and forward to our support: support@bsg.world

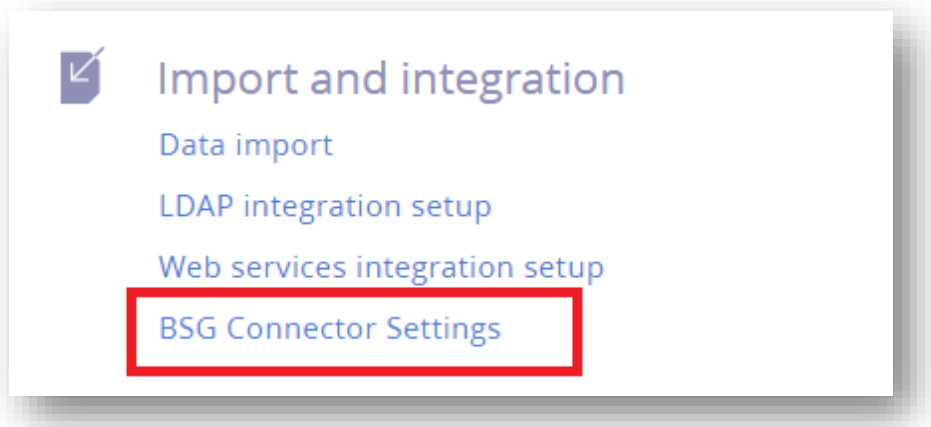
3 CONFIGURATION

You need to configure BSG Connector before usage: specify API key and default sender name.

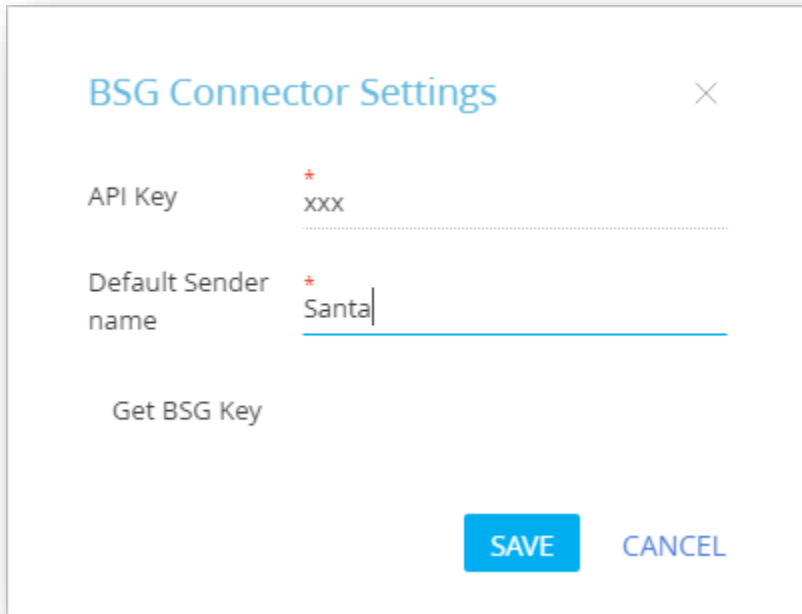
To reach configuration page for BSG Connector please go to "System Designer":



Then in 'Import and integration' section click on 'BSG Connector Settings' link:

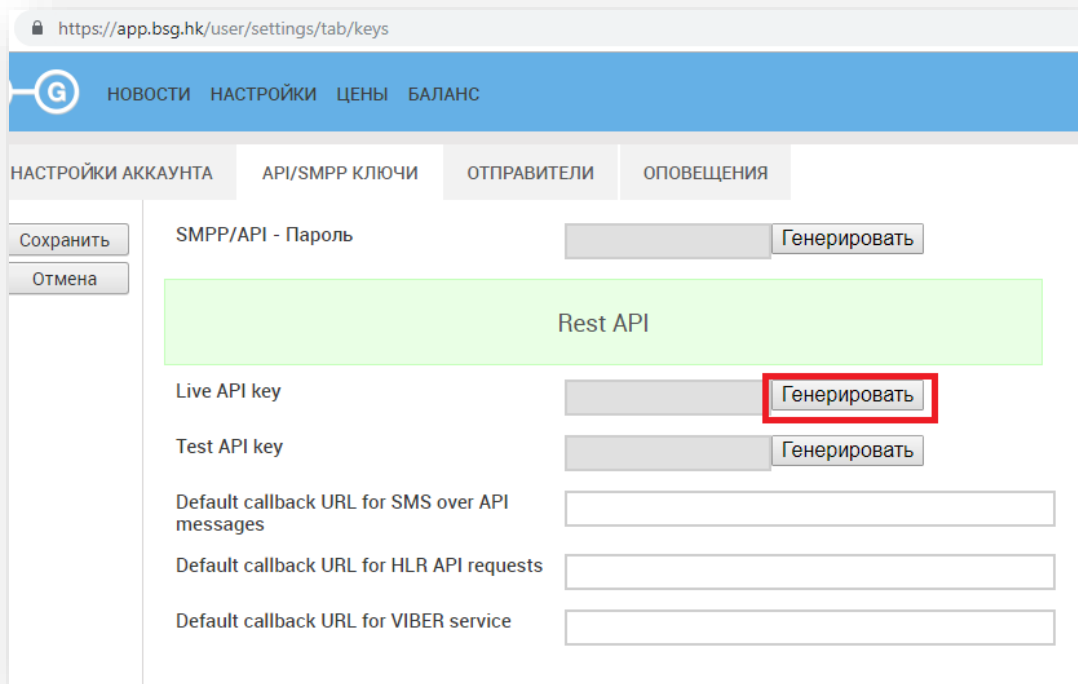


The modal dialog with BSG Connector settings:



The modal dialog is titled "BSG Connector Settings" and features a close button (X) in the top right corner. It contains two input fields: "API Key" with a red asterisk and the value "xxx", and "Default Sender name" with a red asterisk and the value "Santa". Below these fields is a link labeled "Get BSG Key". At the bottom of the dialog are two buttons: "SAVE" and "CANCEL".

If you don't have API key for BSG service – please click on link 'Get BSG Key' and authenticate in BSG panel:



The screenshot shows the "API/SMPP КЛЮЧИ" tab in the BSG user settings panel. The URL in the browser is "https://app.bsg.hk/user/settings/tab/keys". The page has a blue header with a logo and navigation links: "НОВОСТИ", "НАСТРОЙКИ", "ЦЕНЫ", "БАЛАНС". Below the header are tabs for "НАСТРОЙКИ АККАУНТА", "API/SMPP КЛЮЧИ", "ОТПРАВИТЕЛИ", and "ОПОВЕЩЕНИЯ". On the left side, there are "Сохранить" and "Отмена" buttons. The main content area includes a "SMPP/API - Пароль" field with a "Генерировать" button. A green highlighted section titled "Rest API" contains several fields: "Live API key" with a "Генерировать" button (highlighted with a red box), "Test API key" with a "Генерировать" button, and three empty text input fields for "Default callback URL for SMS over API messages", "Default callback URL for HLR API requests", and "Default callback URL for VIBER service".

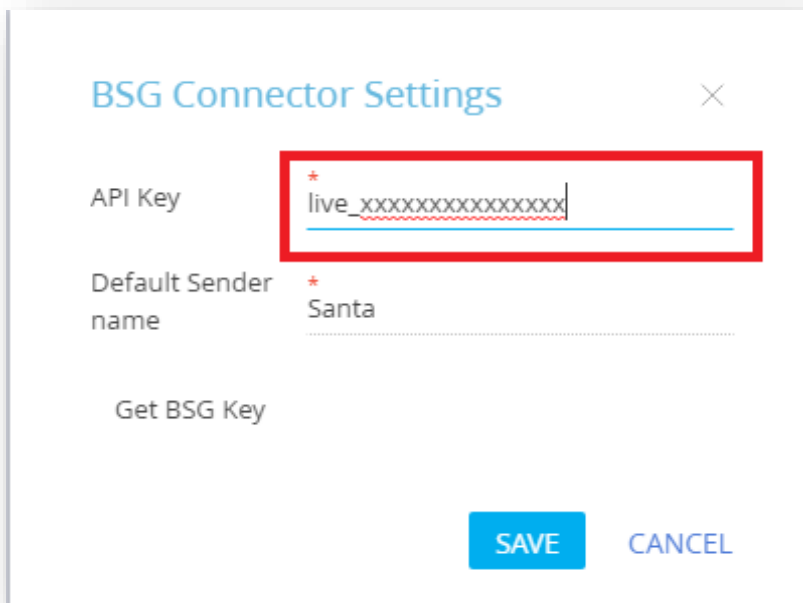
Press 'Generate' button and copy received API key::

live_1omLRXzXXXXXXXXXX – for production

or

test_1omLRXzXXXXXXXXXX – for testing

Put received key into 'API Key' input field:

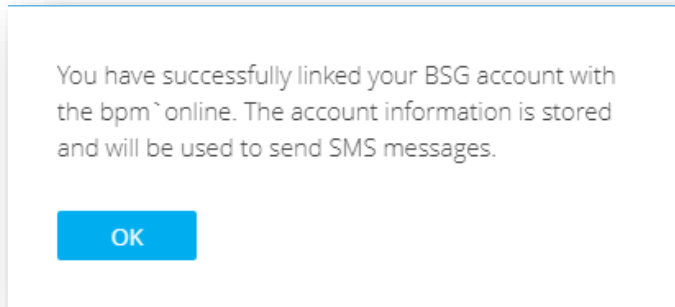


The image shows a dialog box titled "BSG Connector Settings" with a close button (X) in the top right corner. The dialog contains the following fields and buttons:

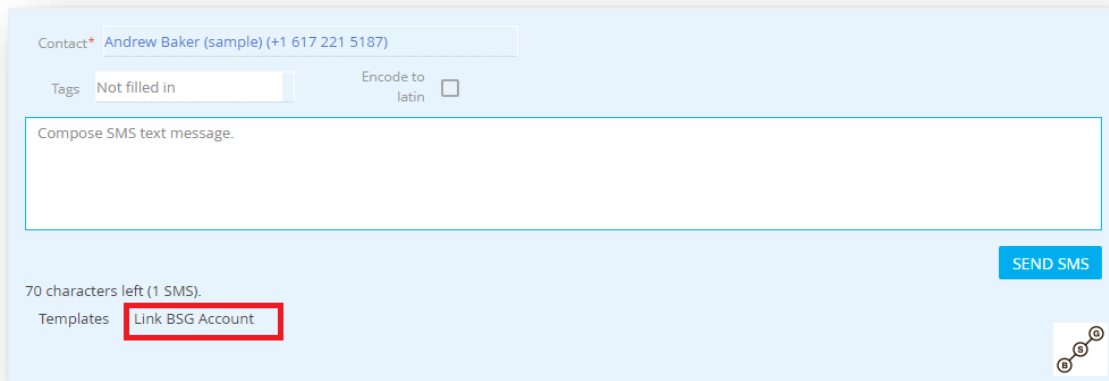
- API Key:** A text input field containing "live_XXXXXXXXXXXXXXXXXX". This field is highlighted with a red rectangular border. A red asterisk (*) is positioned above the field.
- Default Sender name:** A text input field containing "Santa". A red asterisk (*) is positioned above the field.
- Get BSG Key:** A button located below the "Default Sender name" field.
- SAVE:** A blue button located at the bottom center of the dialog.
- CANCEL:** A blue button located at the bottom right of the dialog.

and press 'Save' button.

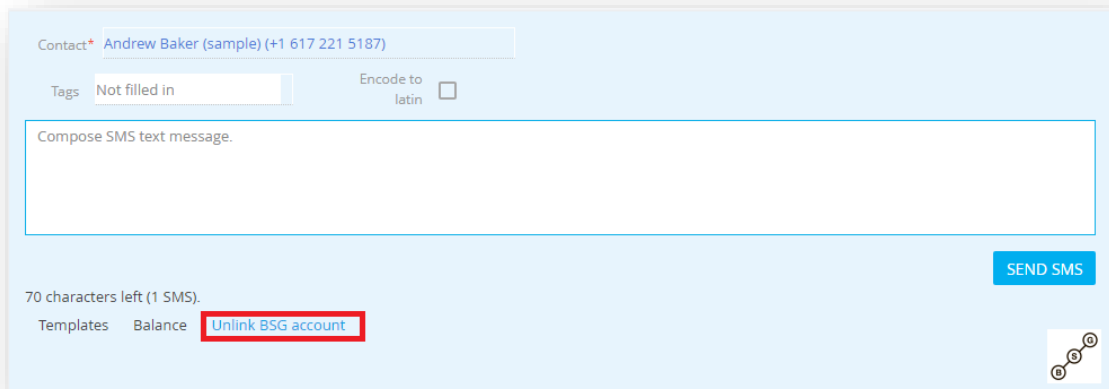
On success you'll see the confirmation window:



There is also the direct link to connector's configuration page right from main form, but only if current user is administrator:



If connector was configured before – there will be a link to disconnect it from BSG Service instead:



4 USAGE

Our BSG Connector is designed for common use cases and has key features :

- single SMS delivery,
- mass delivery,
- message templates,
- template tags
- balance check
- count SMS messages

If your business requires more specific features or you need advanced customization – feel free to contact our support team support@bsg.world

4.1 SINGLE SMS DELIVERY

Main form for SMS sending is on 'BSG' tab, top section of selected contact page:

The screenshot displays a contact profile for Andrew Baker (sample). At the top, there is a 'CLOSE' button and an 'ACTIONS' dropdown menu. Below the name, a profile picture placeholder is shown next to a green progress bar at 100%. To the right, a clock icon indicates a time of 6:01 AM in Boston. The contact details listed are: Full name* (Andrew Baker (sample)), Full job title (Specialist), and Mobile phone (+1 617 221 5187). On the right side, a 'NEXT STEPS (0)' section contains icons for phone, email, chat, and a 'BSG' icon, which is highlighted with a red box. Below these icons is a form for sending an SMS, with the 'To' field populated with 'Andrew Baker (sample) <a.baker@ac.com>' and the 'Subject*' field empty. A paperclip icon and a slash followed by three dots are visible at the bottom of the form.

Main form in details:

The screenshot shows a light blue form for composing an SMS. At the top, there is a 'Contact*' field with the value 'Andrew Baker (sample) (+1 617 221 5187)' and a red '1.' next to it. Below this is a 'Tags' dropdown menu with 'Not filled in' selected and a red '2.' next to it. To the right of the tags is an 'Encode to latin' checkbox with a red '10.' next to it. The main body of the form is a large text area labeled 'Compose SMS text message.' with a red '3.' next to it. Below the text area is a blue button with the text 'Enter a value' and a red '4.' next to it. At the bottom left, there is a character count: '70 characters left (1 SMS)' with a red '5.' next to it. Below the character count are three links: 'Templates' with a red '6.', 'Balance' with a red '7.', and 'Unlink BSG account' with a red '8.'. At the bottom right, there is a blue button with the text 'SEND SMS' and a red '9.' next to it. In the bottom right corner, there is a small icon of three circles connected by lines.

Control elements:

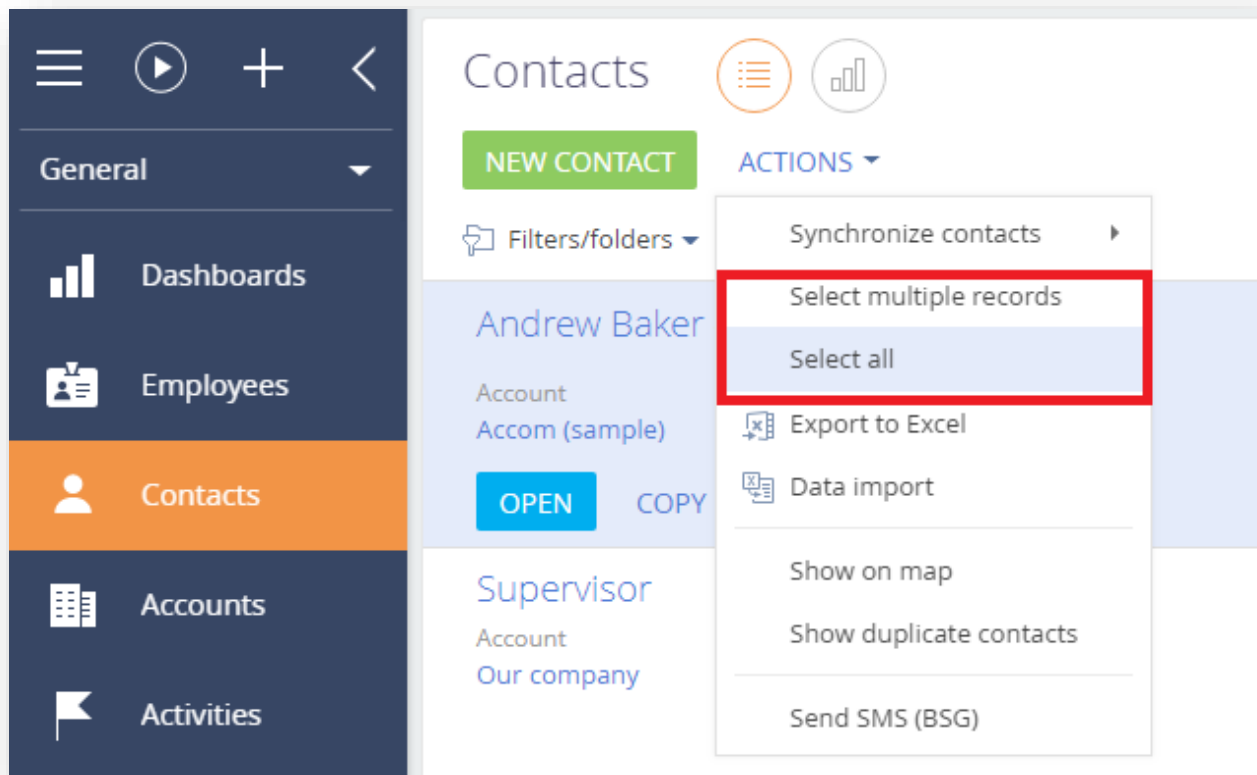
1. Selected contact and the phone that SMS message will be send to
2. Dropdown with allowed tags
3. Message text
4. Validation messages
5. Symbol counter with split for actual SMS messages
6. Select pre-defined message template
7. Check balance in BSG Service (if connected)
8. Link/Unlink BSG Account from connector
9. Send SMS action button
10. Encode message into translit

On successful delivery you will see notification window:

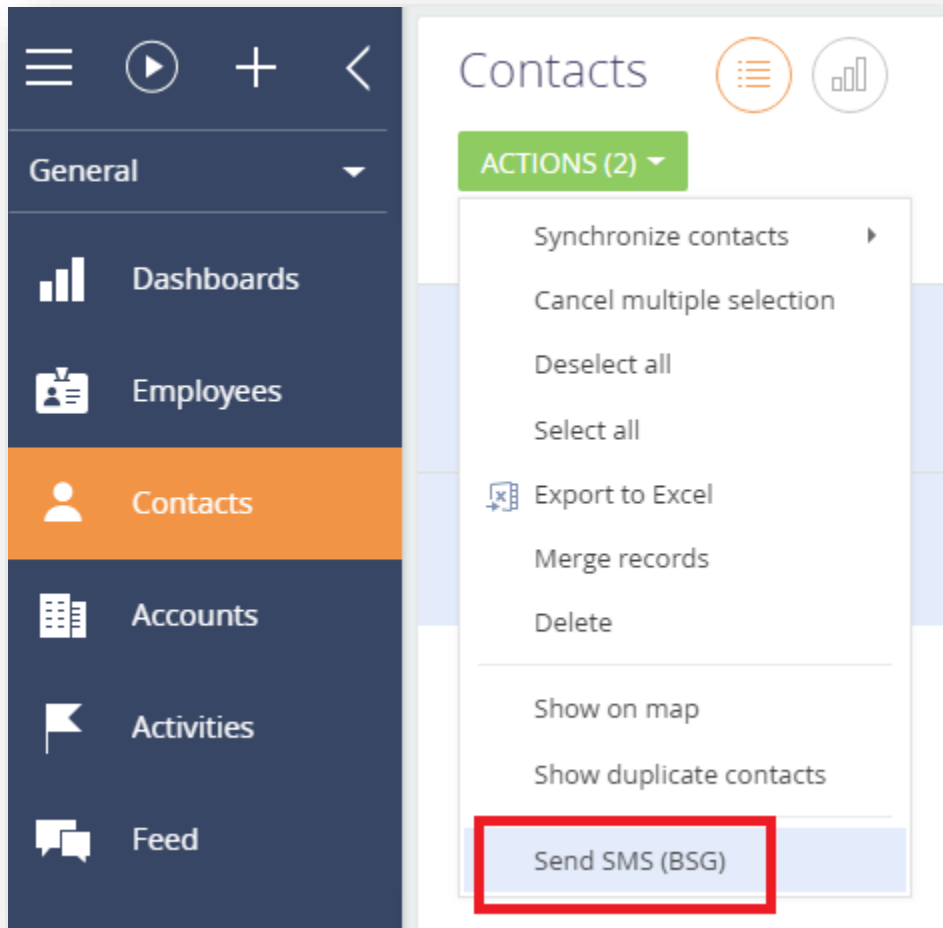
The screenshot shows a white notification window with a blue border. The text inside reads 'Sms text message was sent successfully.' Below the text is a blue button with the text 'OK'.

4.2 MASS SMS DELIVERY

Our BSG connector allows mass delivery of SMS messages to multiple selected contacts (or to all). To do that, you need to go to 'Contacts' section and in 'Actions' menu select 'Select multiple records' or 'Select all' :



Next, after finish selecting of required contacts, you'll need to select 'Send SMS (BSG)' option:



There will be a modal dialog with details for mass SMS delivery:

Send SMS to 2 contacts **1.**

Encode to latin
 6.

Message

2.

Templates **3.**

70 characters left (1 SMS). **4.**

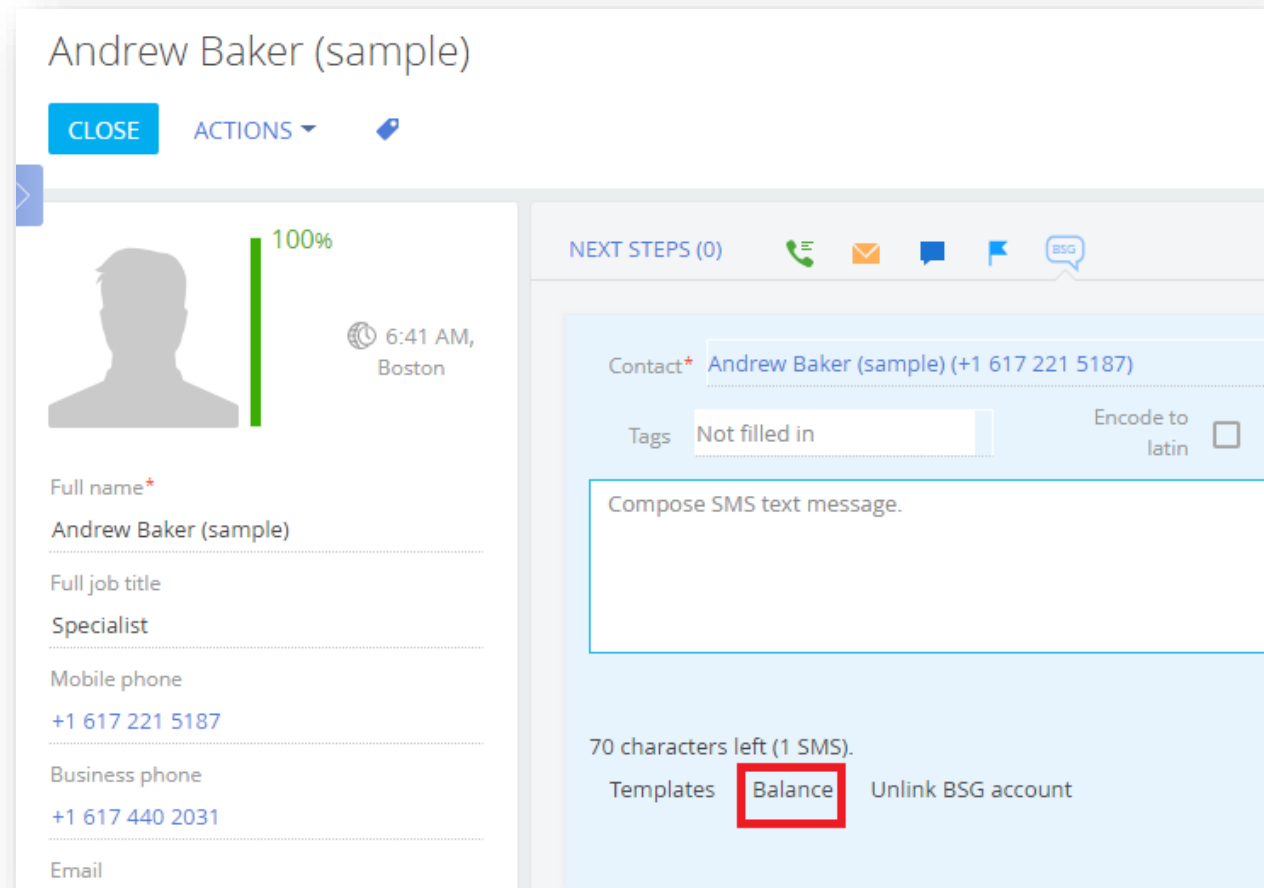
5. SEND CANCEL

Control elements:

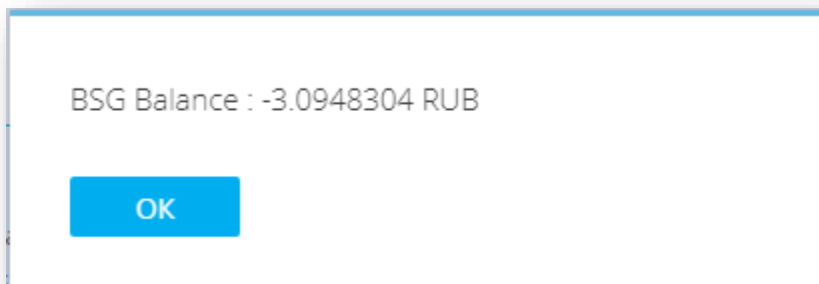
1. Number of selected contacts
2. SMS message text, supports tags input
3. Selection of pre-defined message template
4. Symbol counter with split for actual SMS messages
5. Action button to start mass delivery
6. Encode message to translit

4.3 CHECK BALANCE

This option will be available only after successful linking with BSG Account. To see your balance in BSG, click on 'Balance' link in main connector form:

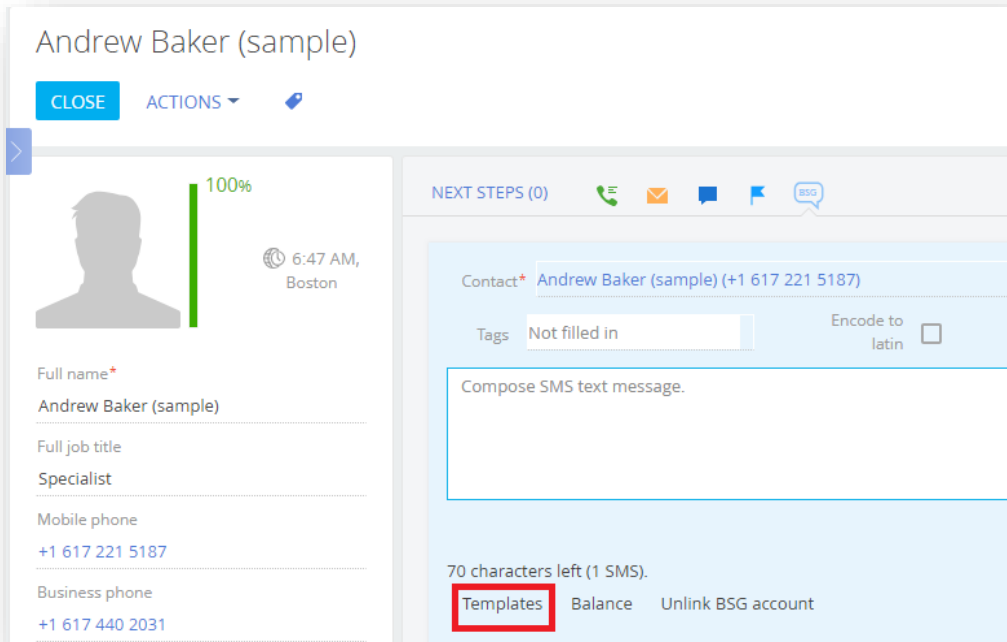


There will be modal window with balance details:



4.4 SMS MESSAGE TEMPLATES

Our connector allows to create, use and manage SMS message templates. To use this feature please click on 'Template' link from main connector form (or from mass delivery form):



Andrew Baker (sample)

CLOSE ACTIONS

100%

6:47 AM, Boston

Full name*
Andrew Baker (sample)

Full job title
Specialist

Mobile phone
+1 617 221 5187

Business phone
+1 617 440 2031

NEXT STEPS (0)

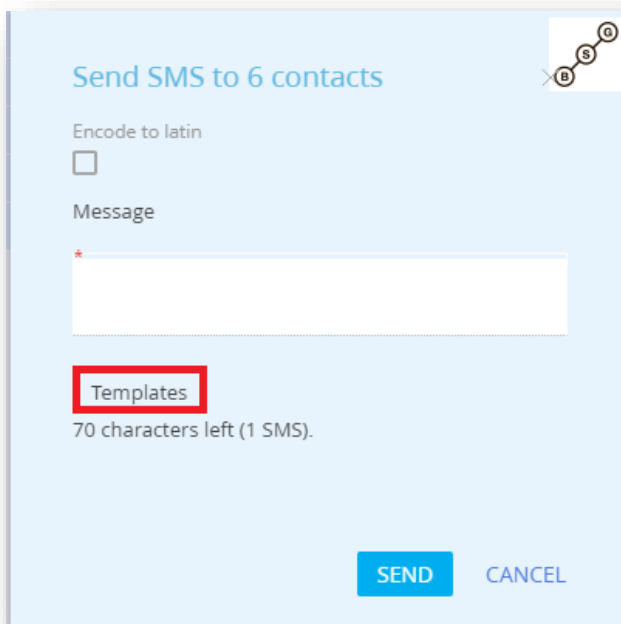
Contact* Andrew Baker (sample) (+1 617 221 5187)

Tags Not filled in Encode to latin

Compose SMS text message.

70 characters left (1 SMS).

Templates Balance Unlink BSG account



Send SMS to 6 contacts

Encode to latin

Message

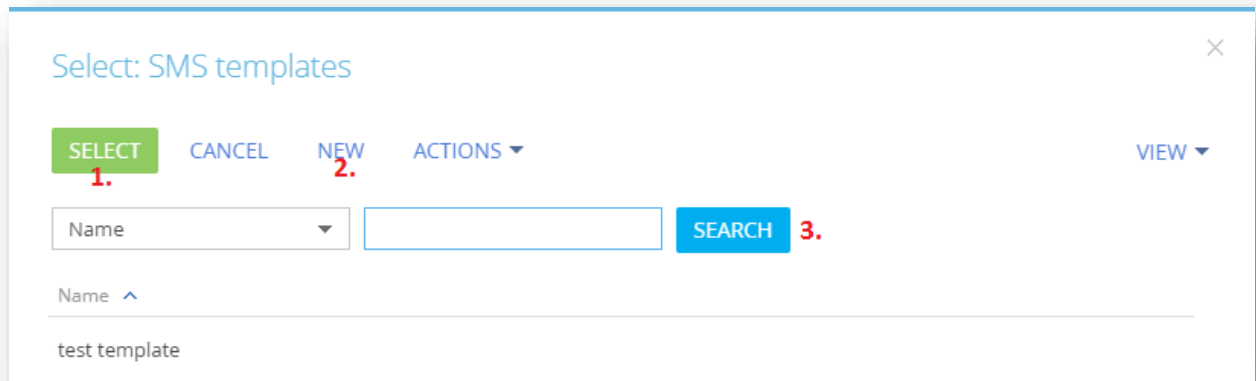
*
[Text input field]

Templates

70 characters left (1 SMS).

SEND CANCEL

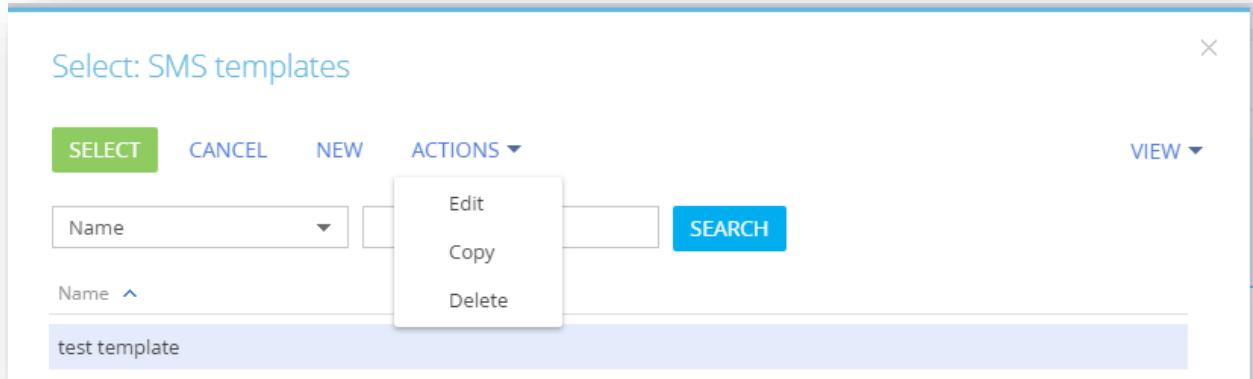
Main screen for SMS message templates:



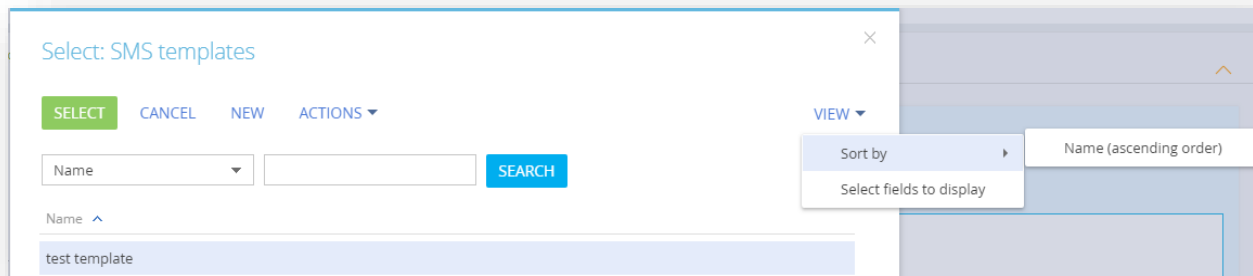
Control elements:

1. Select current template from list and back to delivery form
2. Add new template
3. Template search

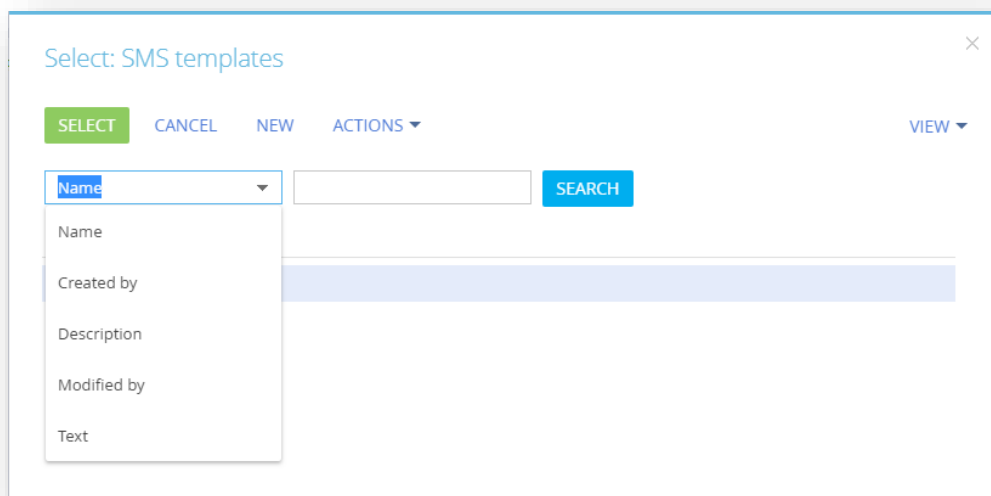
On template select, there are common dictionary actions allowed:



And default control of current view:



Filter options for template search:



To create the new template, press 'New' button, there will be modal window:

Shiny new template

SAVE CANCEL

1.

Name* Shiny new template

2.

< TEMPLATE

Template

3.

Happy New Year , #name# !

Control elements:

1. Action button to Save template
2. Template name
3. SMS message text

SMS message also allows tags input.

4.5 TEMPLATE TAGS

Our connector supports tags in SMS messages. To use them you need to put special keyword into message text and it will be automatically replaced to actual contact details.

Below is the list of supported tags:

Tag	Description
#name#	Full name of a contact
#GivenName#	First name
#MiddleName#	Middle name
#Surname#	Surname
#JobTitle#	Job Title
#BirthDate#	Date of birth
#MobilePhone#	Mobile phone
#Phone#	Work phone
#HomePhone#	Home phone
#Skype#	Skype
#Email#	Email
#Address#	Address
#Zip#	Zip

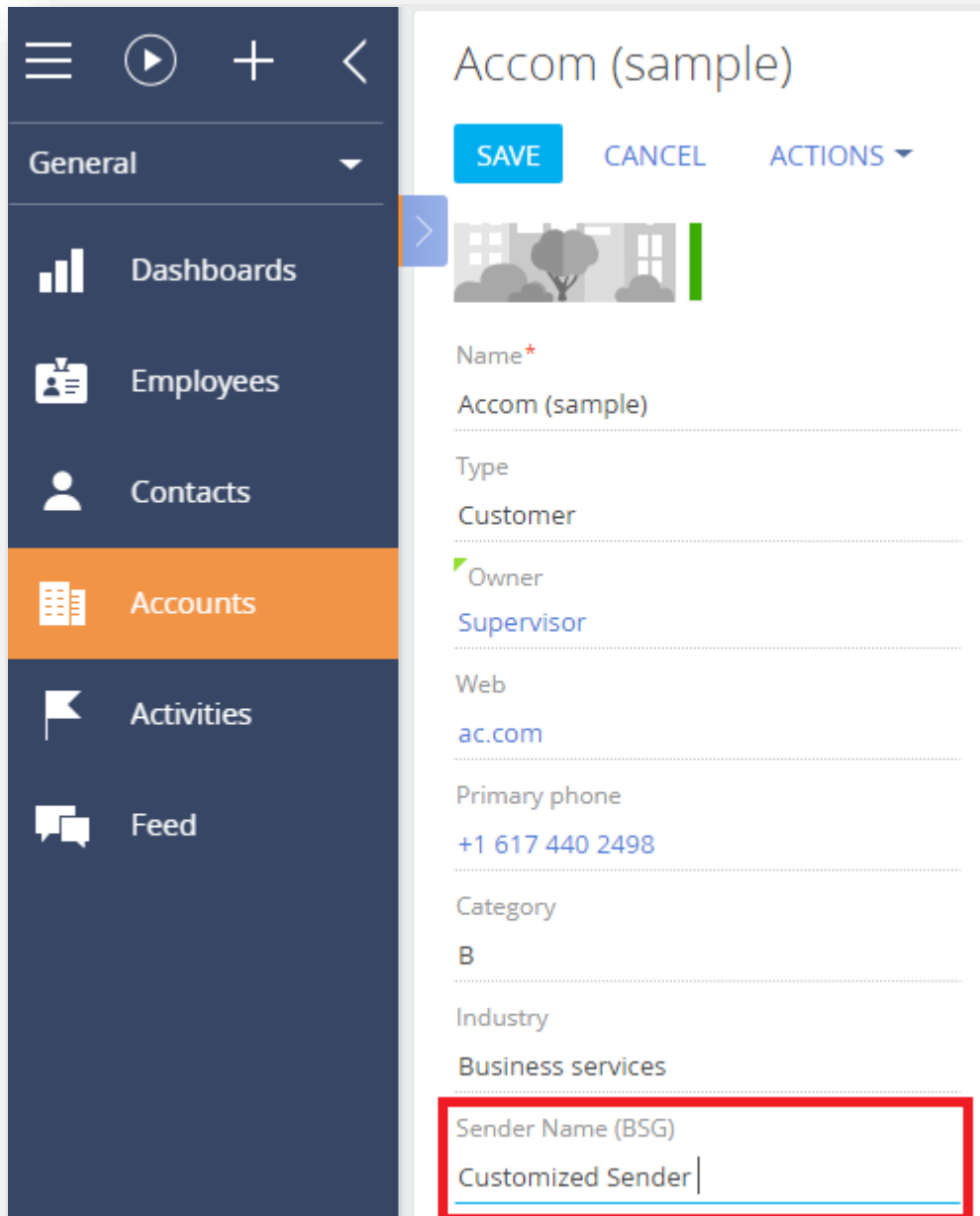
All tags are case insensitive, so all of them will work: #name# , #NAME# , #Name#

4.6 OVERRIDE SENDER NAME

Our connector allows to override default sender name for a value specified in associated Account.

There is specific field 'Sender name (BSG)' that our connector adds on install to Account entity, if this field is filled – the value will be used for all contacts associated with this Account entity.

To use this feature, go to Account page::



The screenshot displays the 'Accom (sample)' account page. The left sidebar contains navigation options: General, Dashboards, Employees, Contacts, Accounts (highlighted), Activities, and Feed. The main content area shows the account details for 'Accom (sample)'. The fields and their values are:

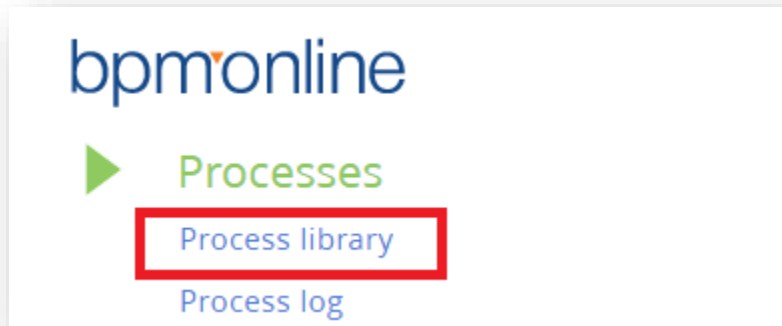
- Name*: Accom (sample)
- Type: Customer
- Owner: Supervisor
- Web: ac.com
- Primary phone: +1 617 440 2498
- Category: B
- Industry: Business services
- Sender Name (BSG): Customized Sender (highlighted with a red box)

And fill 'Sender Name (BSG)' field, then press 'Save' button.

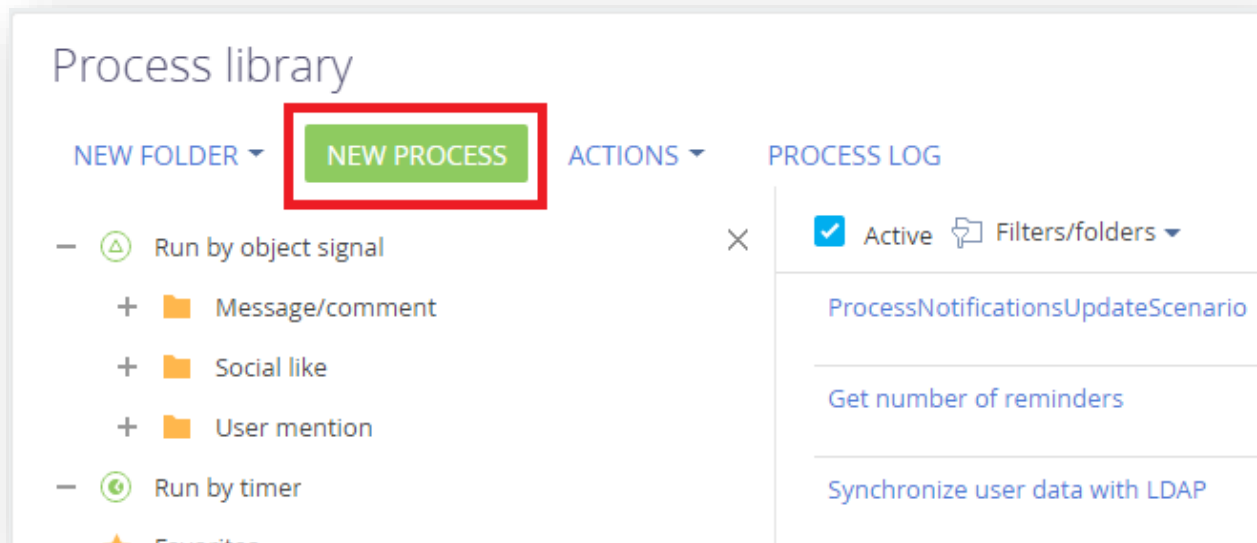
4.7 USAGE IN BPM PROCESS

Our connector allows to use BSG service delivery as step in BPM process. Below is step-by-step sample of how to add such step into new BPM process.

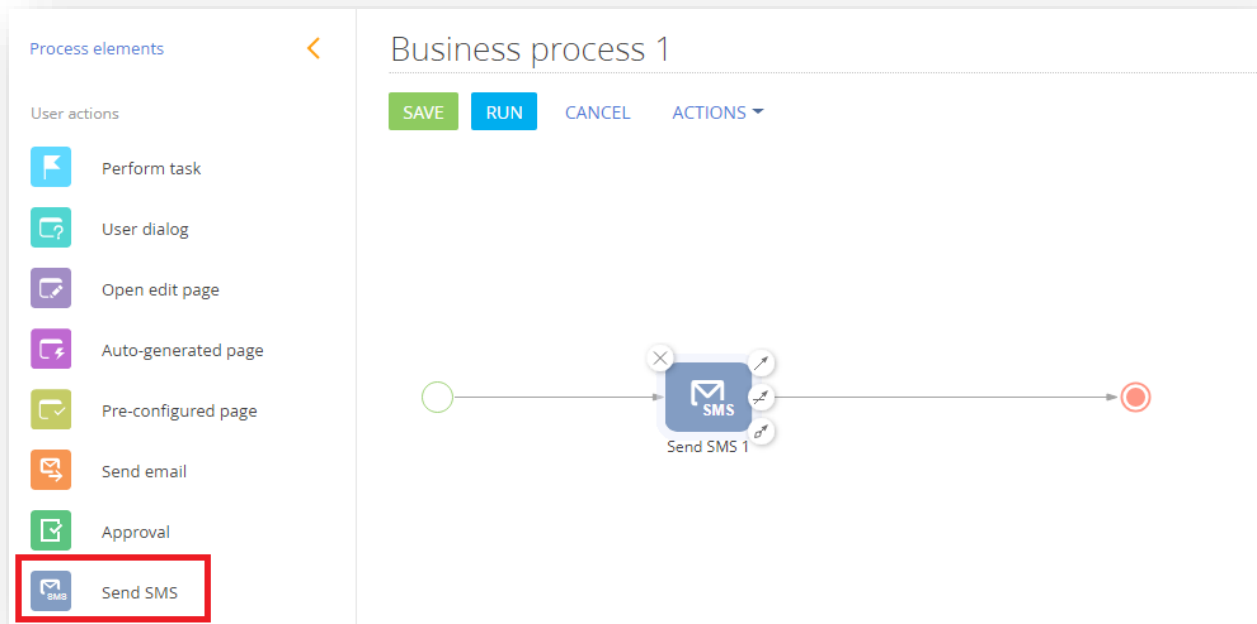
Go to 'Process library':



Press 'New process' button:

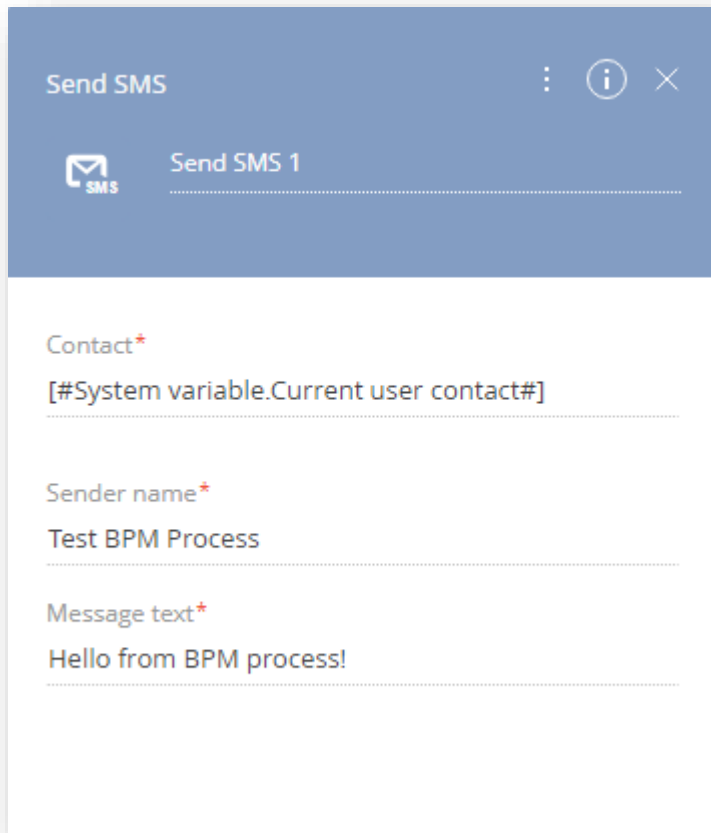


From the list on left (titled 'User actions') select 'Send SMS' option and drag it to BPM diagram:



The line from start of process should be connected to our step, same as line from our step to 'end of process' point.

Now you'll need to fill the step parameters from (on right):

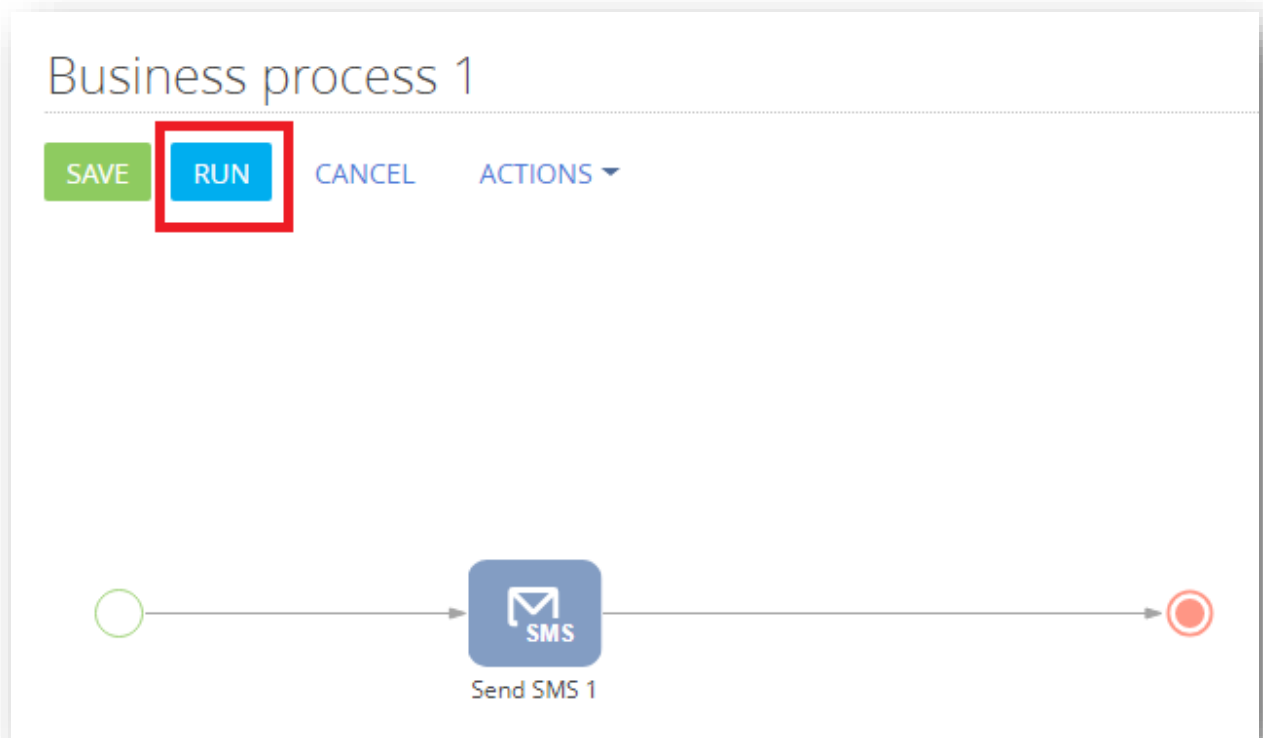


The image shows a configuration window for a 'Send SMS' step in a BPM process. The window has a blue header with the title 'Send SMS' and icons for help and close. Below the header, there is a sub-header 'Send SMS 1' with an SMS icon. The main area contains three required parameters, each with a red asterisk:

- Contact***: The value is `[#System variable.Current user contact#]`.
- Sender name***: The value is `Test BPM Process`.
- Message text***: The value is `Hello from BPM process!`.

These parameters are typically filled from previous steps of BPM process, so delivery step will take them from environment of current process.

To check that we created process correctly, press 'Run' button:



5 TROUBLESHOOTING

Our connector supports multiple levels of logging, so to investigate source of problem you can adjust connector's log level to see more details of its internal work.

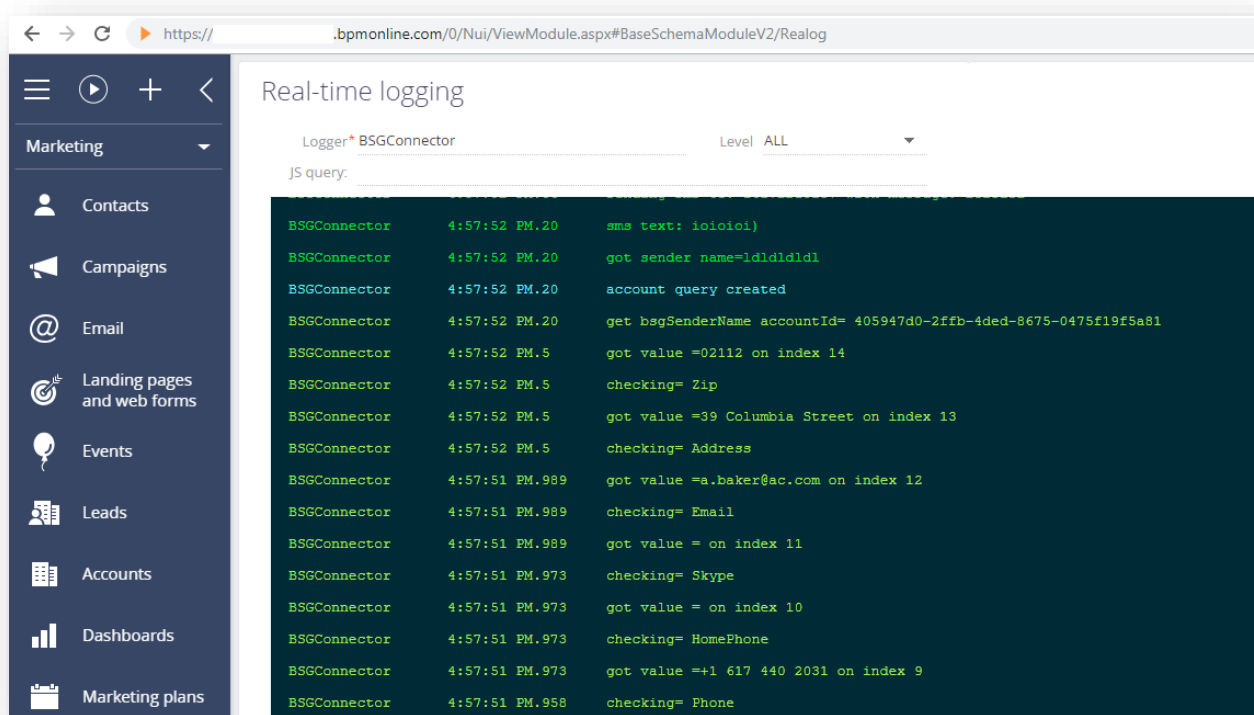
Logger name: BSGConnector

Detailed guide of how to setup logging in BPM.Online offsite instance could be found in BPM.Online documentation.

For cloud instances, you can try this extension «Telemetry log for bpm'online»:

<https://marketplace.bpmonline.com/app/telemetry-log-bpmonline>

that will allow to observe connector logs in real-time:



For any questions related to connector please contact our tech support: support@bsg.world