

Configuring SMS Providers in CRM



This guide provides a step-by-step process for configuring SMS provider settings in your CRM.

By following these instructions, users can effectively integrate SMS functionalities, enhancing their operational efficiency and client engagement. It simplifies the setup of essential features like sender IDs and API links, making it easier for businesses to leverage SMS for marketing and communication.



All of the SMS providers iamproperty CRM works with are subscription products and rely on the end user having an account with the provider as well as agreeing to the SMS providers charges, terms and conditions.

For more information on textanywhere [https://www.textanywhere.com/contact-us/?utm_medium=Partner&utm_source=108891&utm_campaign=IAMProperty&ls=Partner&sc=108891&sd=IAMProperty](https://www.textanywhere.com/contact-us/?utm_medium=Partner&utm_source=108891&utm_campaign=IAMProperty&ls=Partner&sc=108891&sd=IAMProperty)

1 Navigate to <https://crm.iamproperty.com/MyDay>

The screenshot shows the CRM interface with a navigation bar at the top containing 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is present with the text 'Search all records'. Below the navigation, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. The main content area is divided into two sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a table with columns 'Time' and 'Name', containing one entry: '12:00 Test test'. The 'My tasks' section shows a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', containing four entries:

Status	Name	Priority	Start date	Due date
Not Started	test	High	13/May/2025	13/May/2025
Not Started	Make Tea	High	09/Jun/2025	09/Jun/2025
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025

2 Click "My account"

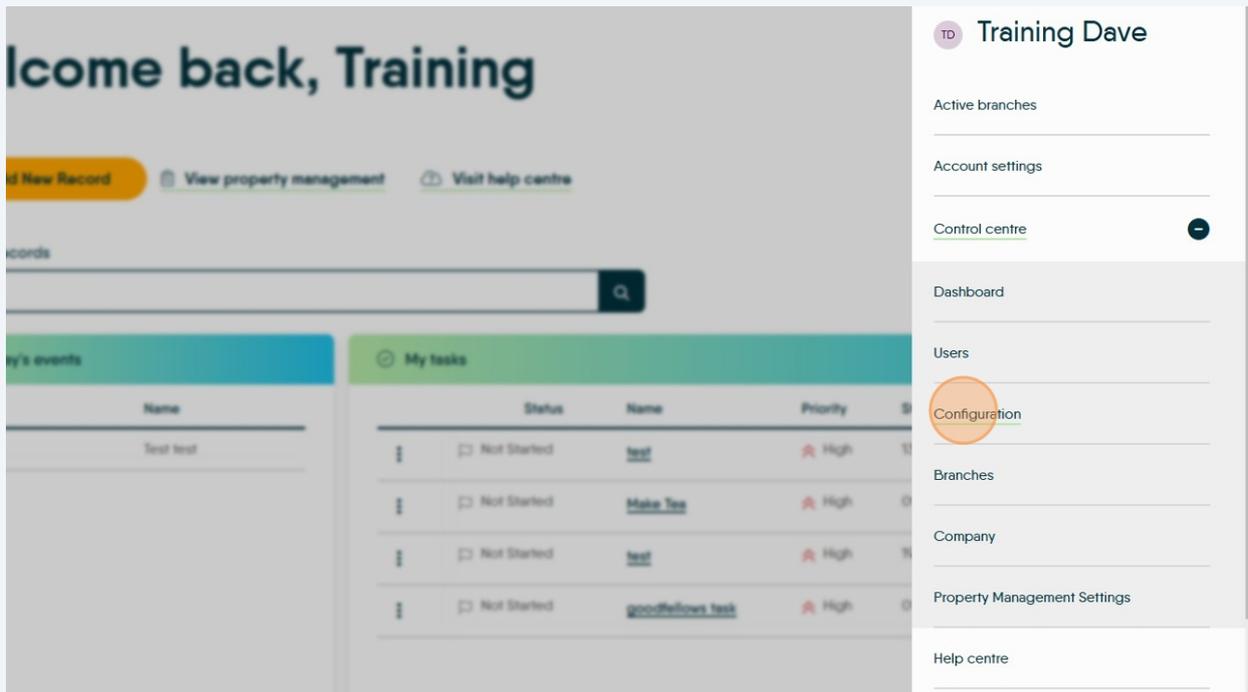
The screenshot shows the CRM dashboard with the 'My account' button highlighted in the top right navigation bar. The main content area displays a 'Welcome back, Training' message, a 'Add New Record' button, and links for 'View property management' and 'Visit help centre'. Below these are search bars and two panels: 'My events' and 'My tasks'.

Status	Name	Priority	Start date	Due date
Not Started	test	High	13/May/2025	13/May/2025
Not Started	Make Tea	High	09/Jun/2025	09/Jun/2025
Not Started	test	High	19/Jun/2025	19/Jun/2025

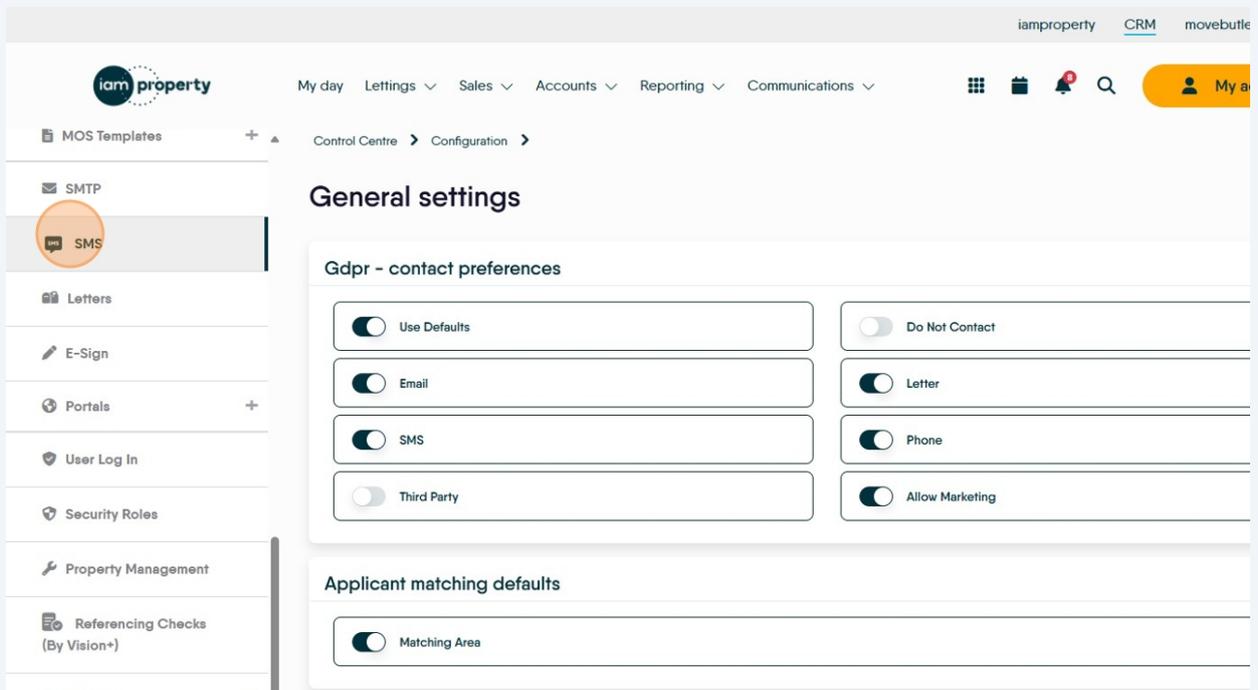
3 Click "Control centre"

The screenshot shows the CRM dashboard with the 'Control centre' option highlighted in the user profile menu. The main content area is dimmed, showing the same 'Welcome back, Training' message and navigation elements as in the previous screenshot. The user profile menu on the right includes options for 'Active branches', 'Account settings', 'Control centre', 'Help centre', and 'Log out'.

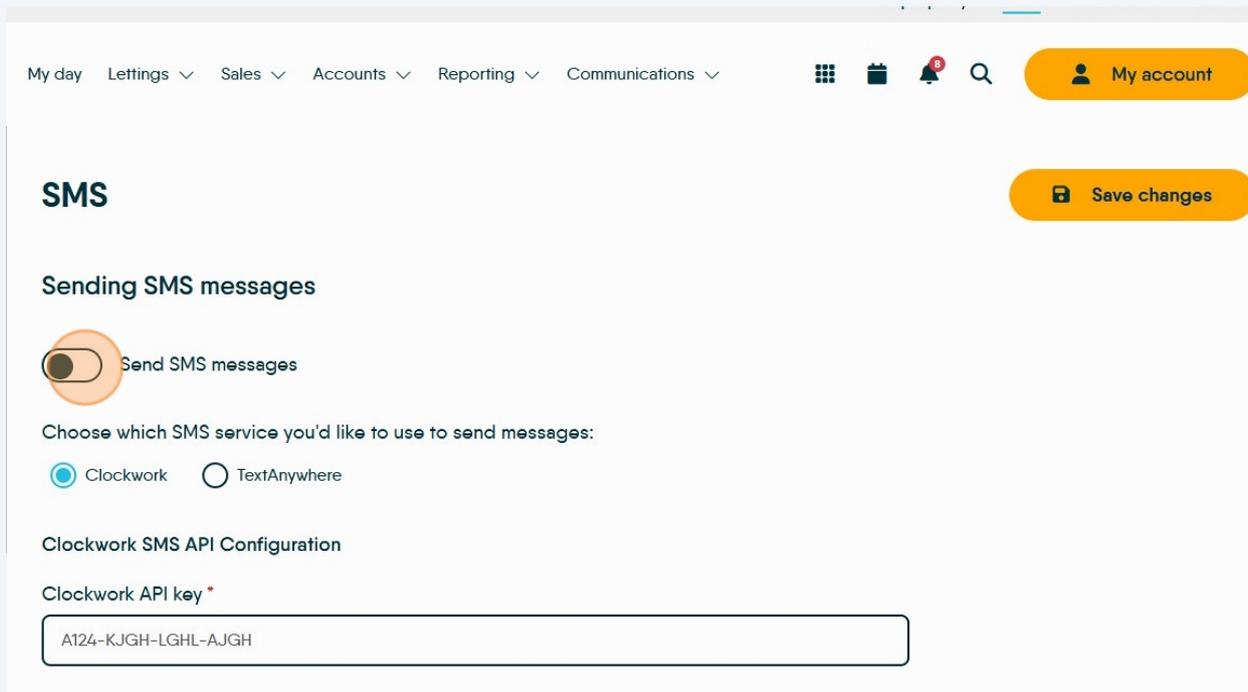
4 Click "Configuration"



5 Click "SMS"



6 Click here to enable the sending of SMS messages.



7 There are 2 SMS providers Clockwork and TextAnywhere you can use either one. The set up for each is shown below.

Clockwork

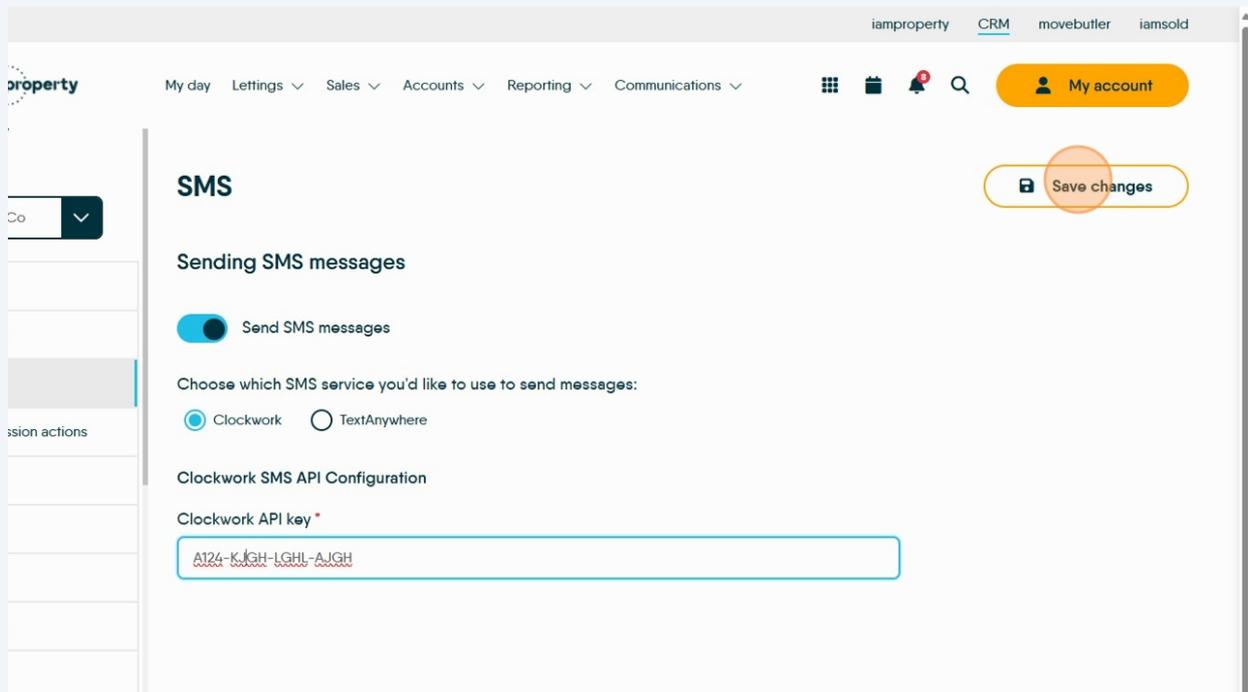
8 Click "Clockwork"

The screenshot shows the 'iam property' interface. The left sidebar contains a 'Branch' dropdown set to 'Morgan & Co' and a list of menu items: Inspections, Data Transfer, SMS (highlighted), Sales progression actions, News feed, Accounts, Activity list, UDF settings, Checklists, and Lookups. The main content area is titled 'SMS' and includes a 'Send SMS messages' toggle switch which is turned on. Below this, a heading reads 'Choose which SMS service you'd like to use to send messages:'. Two radio buttons are present: 'Clockwork' (selected and highlighted with an orange circle) and 'TextAnywhere'. Underneath, the 'Clockwork SMS API Configuration' section contains a 'Clockwork API key' field with the value 'A124-KJGH-LGHL-AJGH'.

9 Click this text field and enter the API key you have been provided by Clockwork.

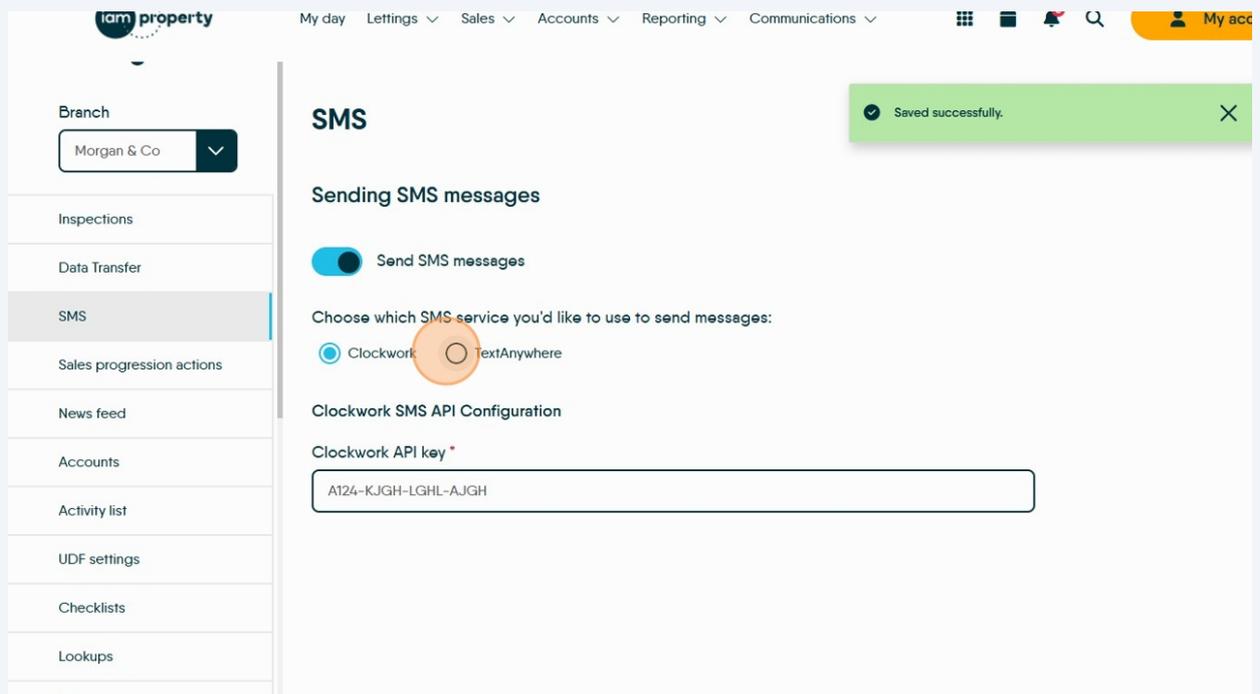
This screenshot is identical to the one above, showing the 'SMS' configuration page. The 'Clockwork' radio button is selected. The 'Clockwork API key' field contains the text 'A124-KJGH-LGHL-AJGH' and is highlighted with an orange circle. The left sidebar menu is now extended to include 'Reports' and 'Viewing templates' at the bottom.

10 Click "Save changes"



Text Anywhere

11 Click "textanywhere"



12 Click this text field add the email address you used to register with textanywhere

The screenshot shows the 'SMS' configuration page for the 'Morgan & Co' branch. The left sidebar contains a menu with items: Inspections, Data Transfer, SMS (highlighted), Sales progression actions, News feed, Accounts, Activity list, UDF settings, Checklists, Lookups, Reports, and Viewing templates. The main content area is titled 'SMS' and includes a 'Save changes' button in the top right. Under 'Sending SMS messages', the 'Send SMS messages' toggle is turned on. Below this, a message says 'Choose which SMS service you'd like to use to send messages:'. A dark blue callout box contains the text 'Registration email' and 'This should be the email address you used to register with TextAnywhere'. The 'Registration email' field is empty and highlighted with an orange circle. Below it is the 'API password' field, which is also empty. At the bottom, there are 'Cancel' and 'Link with TextAnywhere' buttons. The 'TextAnywhere aliases & sender IDs' section is partially visible at the bottom.

13 Click the "API password" field and add the password supplied.

This screenshot shows the same 'SMS' configuration page as above, but with the 'API password' field highlighted by an orange circle. The 'Send SMS messages' toggle remains on. The 'Choose which SMS service...' section now shows two radio buttons: 'Clockwork' (unselected) and 'TextAnywhere' (selected). The 'TextAnywhere SMS API Configuration' section is expanded, showing the 'Registration email' field filled with 'david.morgan@iamproperty.com'. The 'API password' field is empty and highlighted with an orange circle. The 'Cancel' and 'Link with TextAnywhere' buttons are still present at the bottom.

14 Click "Link with textanywhere"

Branch

Morgan & Co

Inspections

Data Transfer

SMS

Sales progression actions

News feed

Accounts

Activity list

UDF settings

Checklists

Lookups

Reports

Viewing templates

SMS

Save changes

Sending SMS messages

Send SMS messages

Choose which SMS service you'd like to use to send messages:

Clockwork TextAnywhere

TextAnywhere SMS API Configuration

Registration email * ⓘ

david.morgan@iamproperty.com

API password ⓘ

Cancel Link with TextAnywhere

TextAnywhere aliases & sender IDs ⓘ

Branch alias Branch sender ID



Alert! To use the Branch Alias/Alias and Branch Sender ID/Sender ID as shown below, these need to be enabled in your textanywhere account before being added in CRM.

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Click the "Branch alias" field. This is sender name clients see when you send an SMS. You can select it when creating a message.

The screenshot shows the 'TextAnywhere aliases & sender IDs' configuration page in the iamproperty CRM. The page has a top navigation bar with 'iamproperty', 'CRM', and 'movebutler'. Below this is a secondary navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A left sidebar contains a 'Branch' dropdown menu set to 'Morgan & Co' and a list of menu items: 'Inspections', 'Data Transfer', 'SMS', 'Sales progression actions', 'News feed', 'Accounts', 'Activity list', 'UDF settings', and 'Checklists'. The main content area features a 'Cancel' button and a 'Link with TextAnywhere' button. Below these are two input fields: 'Branch alias' and 'Branch sender ID'. The 'Branch alias' field is highlighted with an orange circle. Underneath is a section titled 'User aliases & sender IDs' with a search icon. This section contains a table with three columns: 'User', 'Alias', and 'Sender ID'. The table lists three users: David-George Morgan, Ian Johnson, and James Morgan, each with corresponding empty input fields for their alias and sender ID.

User	Alias	Sender ID
David-George Morgan	<input type="text"/>	<input type="text"/>
Ian Johnson	<input type="text"/>	<input type="text"/>
James Morgan	<input type="text"/>	<input type="text"/>

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Click the "Branch sender ID" field. This is the number that the recipient sees when you send a message.

The screenshot shows the 'TextAnywhere aliases & sender IDs' configuration page in the iamproperty CRM. The page has a top navigation bar with 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this is a secondary navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A left sidebar contains a 'Branch' dropdown menu set to 'Morgan & Co' and a list of menu items: 'Inspections', 'Data Transfer', 'SMS', 'Sales progression actions', 'News feed', 'Accounts', 'Activity list', 'UDF settings', and 'Checklists'. The main content area features a 'Cancel' button and a 'Link with TextAnywhere' button. Below these are two input fields: 'Branch alias' and 'Branch sender ID'. The 'Branch sender ID' field is highlighted with an orange circle. Underneath is a section titled 'User aliases & sender IDs' with a search icon. This section contains a table with three columns: 'User', 'Alias', and 'Sender ID'. The table lists three users: David-George Morgan, Ian Johnson, and James Morgan, each with corresponding empty input fields for their alias and sender ID.

User	Alias	Sender ID
David-George Morgan	<input type="text"/>	<input type="text"/>
Ian Johnson	<input type="text"/>	<input type="text"/>
James Morgan	<input type="text"/>	<input type="text"/>

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These Alias and Sender ID sections are for individual users, allowing flexibility in who is shown to be sending a message e.g. Accounts, Property Management etc.

Click here to add the Name

Click here to configure the number that is shown as sending the message

Branch: Morgan & Co

TextAnywhere aliases & sender IDs

Branch alias: iamproPERT

Branch sender ID: [Empty]

User	Alias	Sender ID
David-George Morgan	[Highlighted]	[Highlighted]
Ian Johnson	[Empty]	[Empty]
James Morgan	[Empty]	[Empty]
Training Dave	[Empty]	[Empty]
VTUK USER	[Empty]	[Empty]

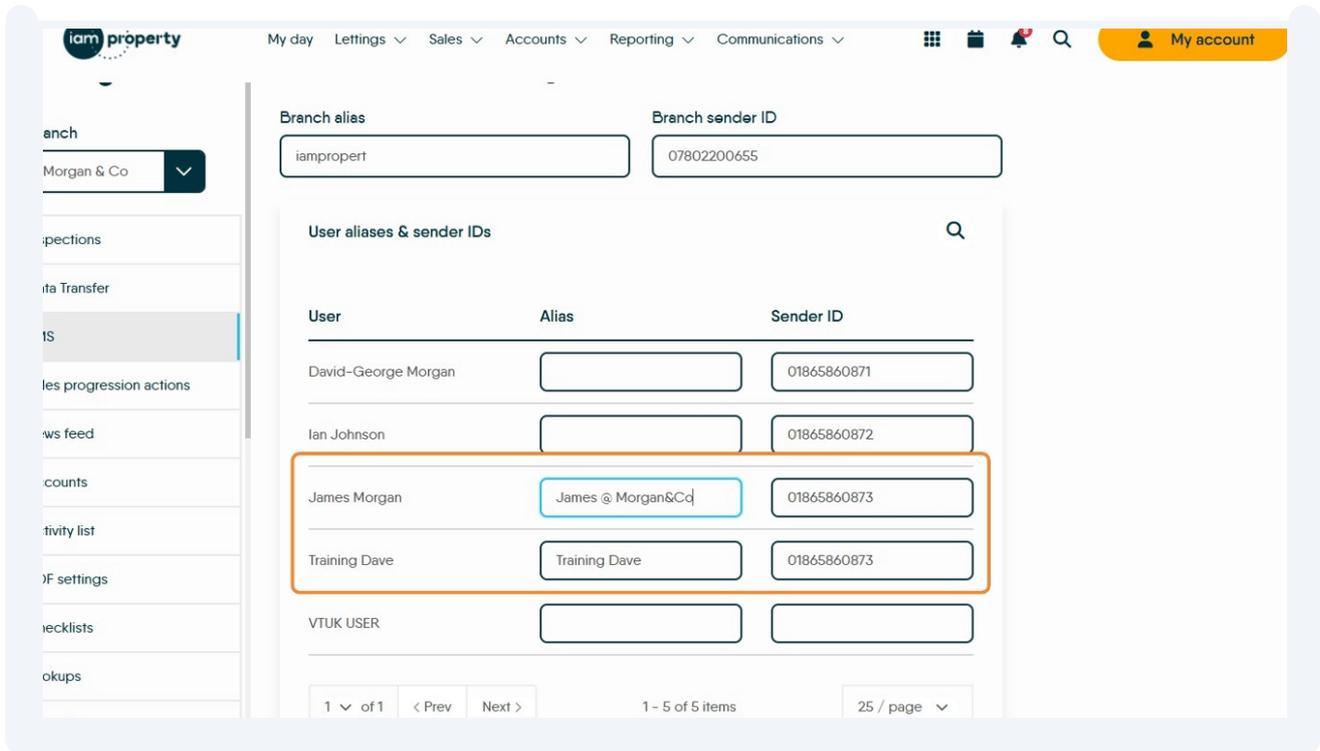
Co

TextAnywhere aliases & sender IDs

Branch alias: iamproPERT

Branch sender ID: [Empty]

User	Alias	Sender ID
David-George Morgan	[Highlighted]	[Highlighted]
Ian Johnson	[Empty]	[Empty]
James Morgan	[Empty]	[Empty]
Training Dave	[Empty]	[Empty]
VTUK USER	[Empty]	[Empty]



Pricing

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As mentioned at the start of this guide, Clockwork and textanywhere are subscription services CRM provides users with access to. To confirm service requirements and pricing please contact the providers directly.

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textanywhere pricing

Contact https://www.textanywhere.com/contact-us/?utm_medium=Partner&utm_source=108891&utm_campaign=IAMProperty&ls=Partner&sc=108891&sd=IAMProperty for further information.

SMS pricing that won't break the bank; we only provide competitive, flexible and transparent rates.

Pricing by bundle

<p>Deliver £29.95 / month 500 messages</p> <ul style="list-style-type: none"> Unlimited Phone and Chat Support Unlimited Contacts API Access Virtual Mobile Number Reporting <p>Start a Free Trial</p>	<p>Grow £100.50 / month 2000 messages</p> <p><i>Most Popular!</i></p> <ul style="list-style-type: none"> Unlimited Phone and Chat support Unlimited contacts API access Virtual Mobile Number Reporting SMS Analytics Auto Top-up <p>Start a Free Trial</p>	<p>Expand £296 / month 6000 messages</p> <ul style="list-style-type: none"> Unlimited Phone and Chat Support Unlimited Contacts API Access Virtual Mobile Number Reporting SMS Analytics Auto Top-up <p>Start a Free Trial</p>	<p>Scale However many messages you need</p> <p>A Custom Bundle Looking for a larger bundle? No problem, build your own perfect bundle.</p> <p>Contact Us</p>
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Pay-as-you-go pricing

Credits per pack	Price per message (exc VAT)
500	6.5p
1,000	6.3p
5,000	6.1p
10,000	6.0p
25,000	5.1p
50,000	4.8p
100,000	4.3p

Are you after something a little more customised for your business?
We can help with that too, all you have to do is get in touch with us: