Integrating Twilio with Smart Service Cloud: A Step-by-Step Guide
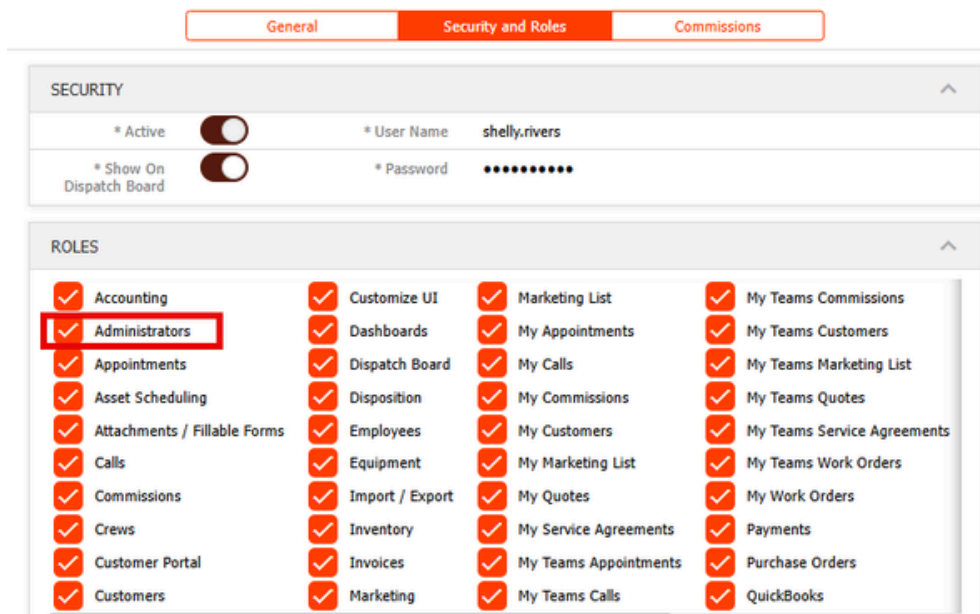
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Twilio, a leading provider of cloud communication services, powers the enhanced text messaging functionality within the Smart Service platform. This feature enables seamless two-way communication, allowing you to effortlessly receive and respond to customer messages directly within the Smart Service interface. With this integration, managing customer interactions has never been more efficient, all within a single, unified platform.

This guide will walk you through the simple steps to integrate Twilio into Smart Service, ensuring a smooth setup and an optimized communication experience.

Twilio's account signup process is subject to change. For assistance beyond the scope of this guide, please contact Twilio Support (see last page).

Setup Requirements

- Valid ID and EIN
- Form of Payment
- Smart Service Cloud Login Credentials
    - Administration Access

1. Sign Up for a Twilio Account

Go to *Twilio.com* and click Start for free to create a new account.
To set up your account, you'll need to verify your email address and personal phone number. This verification process, which you'll complete during sign-up, confirms your identity and allows you to send test messages.

2. Personalize Your Account

To personalize your Twilio account, you will be prompted to provide information about your business. The example shown on the right illustrates the recommended selections.

3. Select a Plan

Choose the 'Pay As You Go' plan for the easiest integration with Smart Service Cloud. While the 'Trial Twilio' option is available, you can upgrade your account later if you select it initially. You will be prompted to select a plan after proceeding.

3a. Continue Account Setup

Provide accurate and complete business details for verification and compliance. Review all information for accuracy before proceeding, as errors can cause delays in account verification and service activation.

3b. Enter Identity Type

When configuring your Identity Type, select 'Business Use' and 'Direct Customer' as your profile.

3c. Enter Business Information and Address

Ensure the legal business name matches official registration.

3d. Add Main Address and Payment Method

You will be prompted to add a starting balance for Twilio. The lowest amount is $20. You can set up auto renew or you can add to your balance as needed.

After completing the 'Pay As You Go' profile setup, you might see a page indicating your account requires further approval. Regardless of whether your account is approved instantly or shortly, you can continue to the next step.
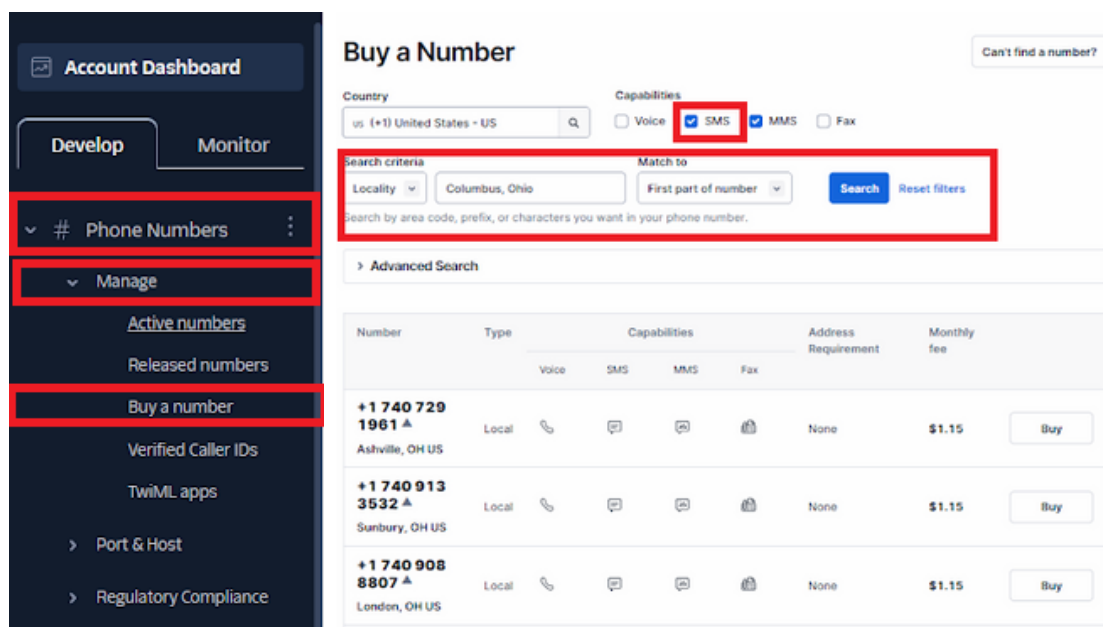
4. Get an SMS Enabled Phone Number

To buy a local phone number recognizable to your customers, go to
the left console of your Twilio account dashboard. Open the 'Phone Numbers' dropdown, then the
'Manage' dropdown, and select 'Buy a Number'.

To find phone numbers in your area, search by area code, city, or county. Ensure you check the "SMS"
box and include your local information in the search criteria.

Choose your preferred phone number from the search results and click "Buy" to finalize the purchase
and associate it with your Twilio account.

It is generally advised to acquire a new local phone number.
However, Twilio offers a number porting process if you wish to
transfer an existing phone number from another provider.
Porting allows you to continue using your current number with
Twilio's services. Detailed information regarding porting,
including eligibility, necessary documentation, and estimated
timeframes, can be found in the comprehensive guide on the
Twilio Help Center.

https://help.twilio.com/articles/223179348-Porting-a-Phone-
Number-to-Twilio

5. Complete the US A2P 10DLC Registration

A2P (Application-to-Person) 10DLC (10-digit long code) is the standard that U.S. telecom carriers have implemented to ensure SMS traffic to U.S. end-users via long code phone numbers is verified and consensual. This registration is mandated by messaging providers like Twilio, in compliance with carrier and industry requirements established by The Campaign Registry (TCR) and major U.S. mobile carriers.

To utilize Twilio's A2P Messaging service within the United States, you must first register for a designated customer profile. This profile will grant you access to Twilio's messaging services. Please consult the Twilio Help Center for a comprehensive guidance on this process. This step must also be completed by Canadian customers who will be sending messages to the US.

Navigate to the 'Onboarding' section. It's located under 'Regulatory Compliance' within the 'Messaging' drop-down menu in the left-side console 'Develop' tab.

The A2P registration is a three-step vetting process involving profile creation, brand registration, and campaign registration. While each step has its own approval timeline, all steps for standard use cases are typically completed within 10 business days.

Brand and Campaign Approval Tips:

During the application process, you will need to describe your business use case for your messaging service. For a smoother application and approval, it is advisable to begin with a 'Mixed' use case. This option will accommodate the main text messaging features within Smart Service. Should you later wish to send marketing text messages, a separate campaign application using a dedicated phone number can be submitted for those functionalities.

Suggested Registration Options:

Customer Type: Direct Brand
Brand Type: Low Volume Standard Brand
Campaign Use Case: Low Volume Mixed

Campaign Message Examples:

Provide example messages in your campaign application to facilitate approval. Include typical customer communications (e.g., arrived, in-route, work completed). If you intend to send marketing messages, explicitly state this in your application.

Example of Standard Customer Communication: Appointment confirmations, reminders, etc.
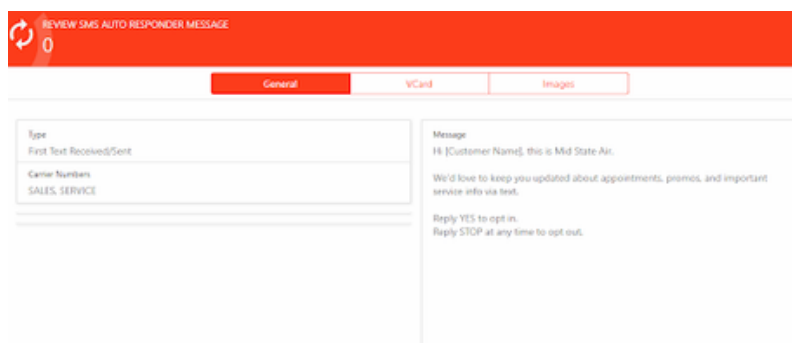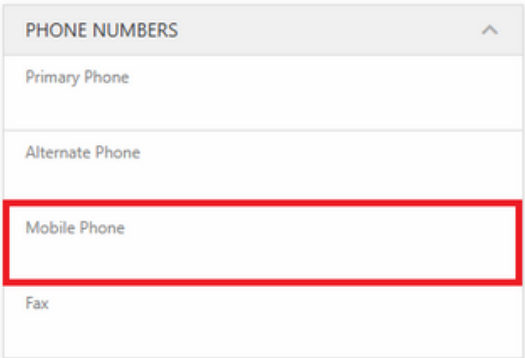

Example of Marketing Message:

🔥 Spring Tune-Up Special!🔧 Get your A/C ready for summer with a $69 system check-up from [Your Company Name]. Book now 👉 [Link]

Opt-In/Opt-Out Messaging for SMS Consent:

General Text Messaging (Consent Request): For standard customer communication, you can set up an SMS auto-responder to request consent for messaging.

Managing Opt-Outs: If a customer opts out by responding with keywords like "STOP," you will need to manually remove the customer's mobile number from the system in Smart Service Cloud. This will not be done automatically when they opt out. Ensure that the opt-out language and keywords are included in the campaign application to avoid any issues
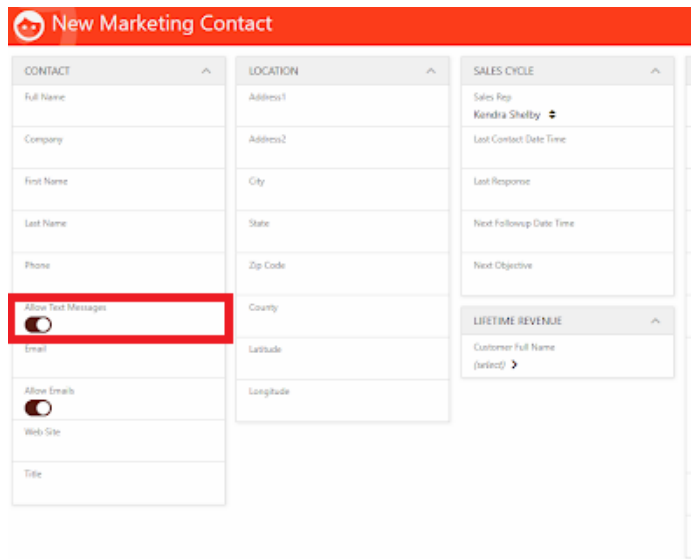
Opting In for Marketing: If you plan to use Smart Service for marketing messages, you can enable a toggle in the Smart Service Cloud to allow text messages for marketing purposes.

6. Setup Messaging Configuration

While your A2P registration is pending approval, you can proceed with setting up your messaging configuration.

Navigate to the Account Dashboard, then Develop > Phone Numbers > Manage > Active numbers. Select the purchased phone number, scroll to Messaging Configuration, choose Webhook for incoming messages, and enter the provided URL:

https://smartservice365dataservice.azurewebsites.net/Twilio/ReceiveTextMessage

7. Integrate Twilio into Smart Service

Login into your Twilio account and access your account dashboard. At the bottom of the webpage, find and copy your **Account SID** and **Auth Token**. You will need to enter these credentials into Smart Service.
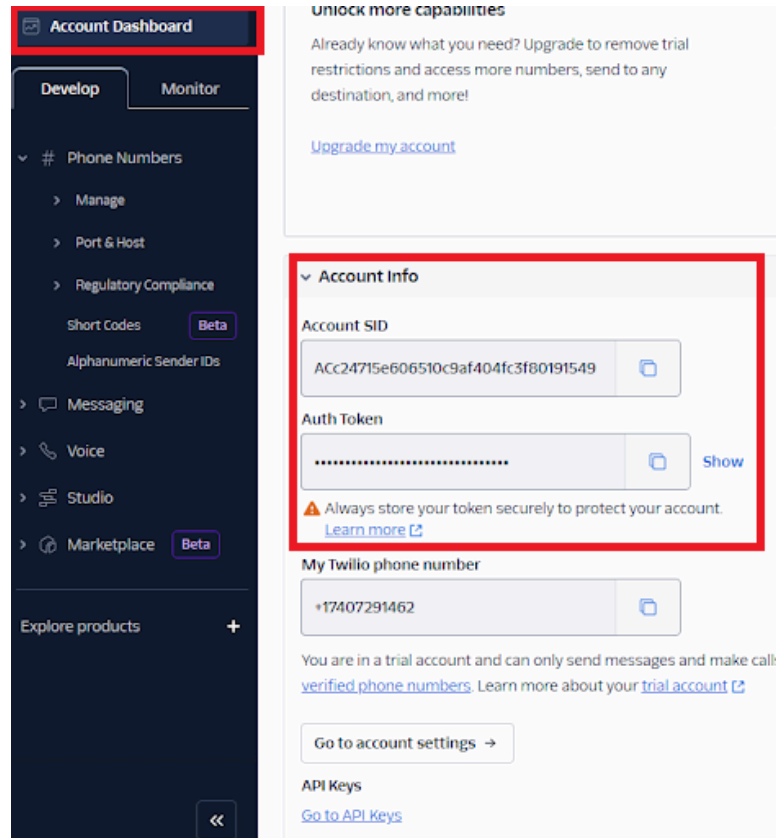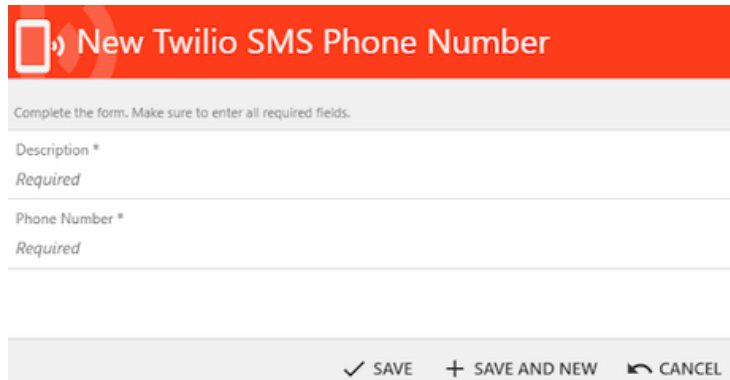
To integrate your Twilio account within Smart Service, first have your Twilio SID and Auth token then navigate to Administration > System Settings, click EDIT (bottom right corner), and scroll down to 'Integrations' to input these credentials. Then SAVE
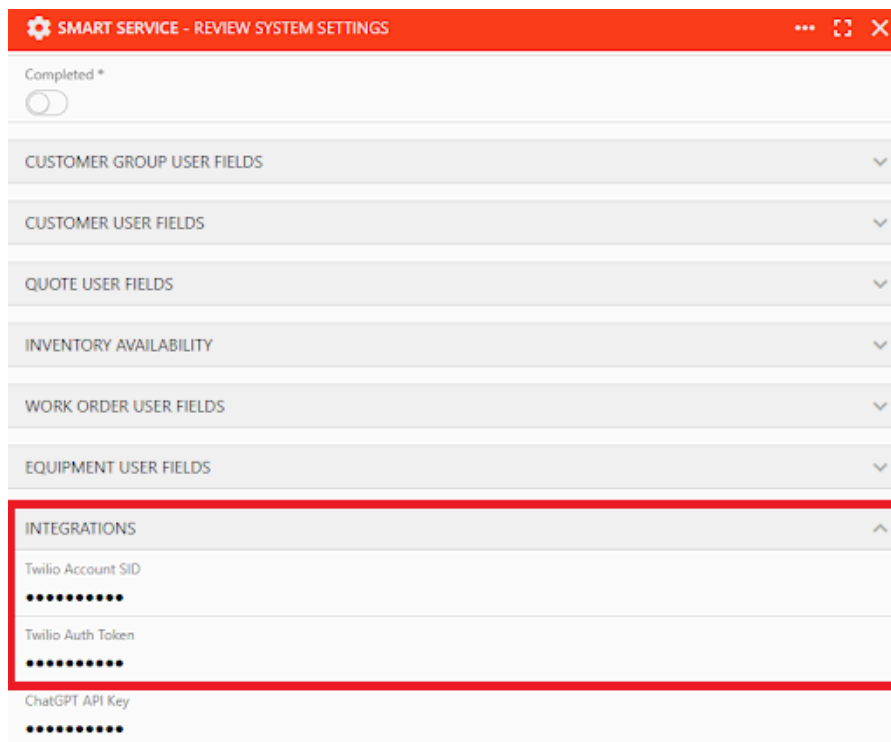
7a. Input Your Twilio Phone Number (s)

Now you can add your new texting phone numbers to Smart Service Cloud.

Under 'Administration', navigate to 'Twilio Phone Numbers'
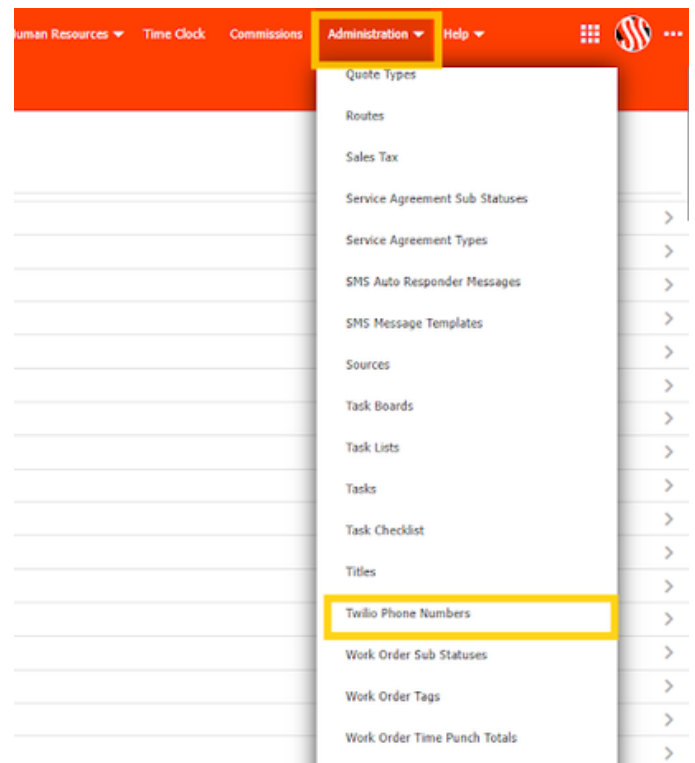
You have successfully integrated Twilio with your Smart Service Cloud Database.

To learn how to utilize Smart Service Cloud's Two-Way text messaging features, consult our Text Messaging Knowledgebase: https://www.smartservicekb.com/text-messaging-center

How to Contact Twilio Support

If you're experiencing issues related to initial setup, A2P 10DLC registration, or campaign vetting, follow the steps below to contact Twilio Support and get your messaging services up and running smoothly.

1. Log into Your Twilio Console
Go to https://www.twilio.com/console and sign in with your Twilio credentials.

2. Use the Support Widget (Fastest Option)
Once logged in, click the ? icon at the top right corner.
Select "Help Center" to launch the Support widget.
Choose a topic or type a question to start a support case.
If the automated options don't help, in the search bar, enter keywords like: *"A2P registration help", "Brand not approved", "Campaign stuck in pending"*

If you're on Twilio's basic support plan, you can still submit a ticket for select topics—such as A2P 10DLC registration, compliance, and billing issues—by first describing your issue in the Support Center search bar and then selecting the option to submit a ticket when prompted.

Additional Tips
Attach screenshots or error codes when submitting tickets.
Use the Twilio Status Page to check if there's an ongoing outage.
For urgent, high-impact issues, mention that clearly in the subject line.