

Integrating Twilio with Smart Service Cloud: A Step-by-Step Guide

Rev. June 2025

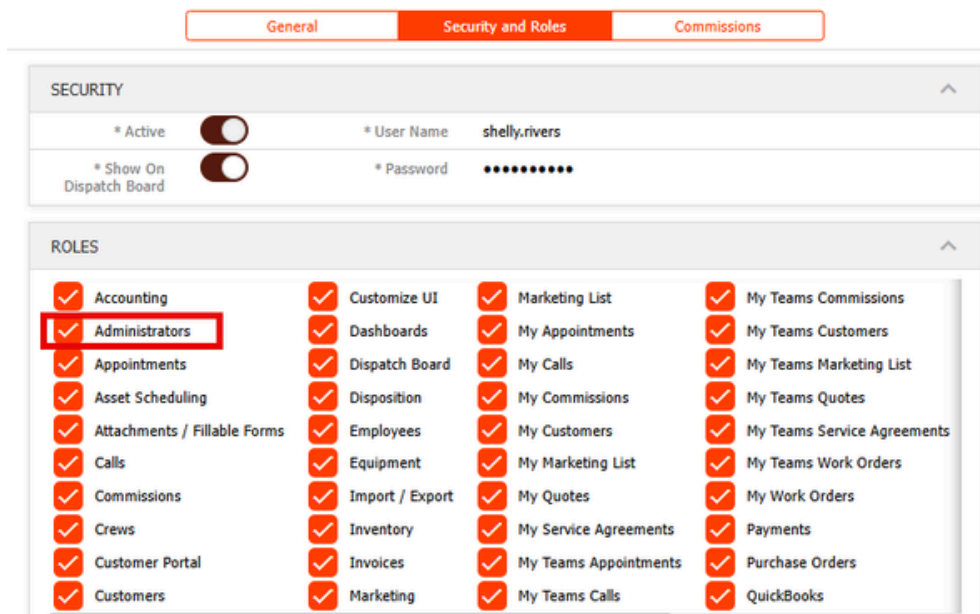
Twilio, a leading provider of cloud communication services, powers the enhanced text messaging functionality within the Smart Service platform. This feature enables seamless two-way communication, allowing you to effortlessly receive and respond to customer messages directly within the Smart Service 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



General	Security and Roles	Commissions
SECURITY		
* Active <input checked="" type="checkbox"/>		* User Name shelly.rivers
* Show On Dispatch Board <input checked="" type="checkbox"/>		* Password
ROLES		
<input checked="" type="checkbox"/> Accounting	<input checked="" type="checkbox"/> Customize UI	<input checked="" type="checkbox"/> Marketing List
<input checked="" type="checkbox"/> Administrators	<input checked="" type="checkbox"/> Dashboards	<input checked="" type="checkbox"/> My Appointments
<input checked="" type="checkbox"/> Appointments	<input checked="" type="checkbox"/> Dispatch Board	<input checked="" type="checkbox"/> My Calls
<input checked="" type="checkbox"/> Asset Scheduling	<input checked="" type="checkbox"/> Disposition	<input checked="" type="checkbox"/> My Commissions
<input checked="" type="checkbox"/> Attachments / Fillable Forms	<input checked="" type="checkbox"/> Employees	<input checked="" type="checkbox"/> My Customers
<input checked="" type="checkbox"/> Calls	<input checked="" type="checkbox"/> Equipment	<input checked="" type="checkbox"/> My Marketing List
<input checked="" type="checkbox"/> Commissions	<input checked="" type="checkbox"/> Import / Export	<input checked="" type="checkbox"/> My Quotes
<input checked="" type="checkbox"/> Crews	<input checked="" type="checkbox"/> Inventory	<input checked="" type="checkbox"/> My Service Agreements
<input checked="" type="checkbox"/> Customer Portal	<input checked="" type="checkbox"/> Invoices	<input checked="" type="checkbox"/> My Teams Appointments
<input checked="" type="checkbox"/> Customers	<input checked="" type="checkbox"/> Marketing	<input checked="" type="checkbox"/> My Teams Calls
		<input checked="" type="checkbox"/> My Teams Commissions
		<input checked="" type="checkbox"/> My Teams Customers
		<input checked="" type="checkbox"/> My Teams Marketing List
		<input checked="" type="checkbox"/> My Teams Quotes
		<input checked="" type="checkbox"/> My Teams Service Agreements
		<input checked="" type="checkbox"/> My Teams Work Orders
		<input checked="" type="checkbox"/> My Work Orders
		<input checked="" type="checkbox"/> Payments
		<input checked="" type="checkbox"/> Purchase Orders
		<input checked="" type="checkbox"/> QuickBooks

1. Sign Up for a Twilio Account

Go to [Twilio.com](https://www.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.

What do you plan to build with Twilio?
Alerts & Notifications

Which Twilio product are you here to use?
SMS

Which best describes you/your organization?
☒ Business
☐ Nonprofit or government entity
☐ Sole proprietor / Self-employed
☐ Hobbyist or Student

Which best describes how you will use Twilio?
☒ Direct Brand
A company that communicates on behalf of our own products and services.
☐ Independent Software Vendor
A company that provides communication services to other businesses, who are represented by their own brands.

How do you want to build with Twilio?
☐ With code
Customize exactly what you want
☐ With minimal code
Build on top of our code samples
☒ With no code at all
Launch a starter app with no code

What is your goal today?
3rd party integrations

Your billing country is United States. (Change)

Get Started with Twilio

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.

Select a plan to get started with Twilio Comms

You can upgrade to pay as you go whenever you like.

[Continue as a Nonprofit or Government customer →](#)

Perfect for exploring	Recommended for scaling
Trial Twilio Explore Twilio by sending an SMS or making a call to yourself!	Pay as you go Unlocks communications in all regions - no restrictions, perfect for scaling today!
Continue with trial →	Continue with pay as you go →
Plan includes <ul style="list-style-type: none">✓ Limited usage✓ 1 pre-selected toll-free phone number✓ Send SMS to max 5 verified phone numbers✓ Inbound and outbound calls from verified phone numbers✓ Limited deliverability and quality features	Plan includes <ul style="list-style-type: none">✓ Unlimited usage✓ Choose your phone number✓ Send SMS to all phone numbers✓ Inbound and outbound calls from all phone numbers✓ Access to deliverability and quality features

[Learn more about each plan](#)

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.

Upgrade your account

2 - 5 minutes

Step 1

Customer profile

Not started yet

Create your customer profile now to improve your Twilio experience and unlock features faster. We prioritize identity verification for secure and compliant conversations.

What will I need?

☒ Your valid ID
 ☐ Personal or business details

Get started

Step 2

Main address

Can't start yet

This information will be used for taxation purposes. For US customers, this is your service address. For international customers, this is your permanent place of establishment (e.g. head office).

Add main address

Step 3

Starting balance

Can't start yet

Add a starting balance to your account to kickstart your journey with Twilio.

Add starting balance

Step 4

Payment details

Can't start yet

Simply add your payment method and you're all set!

What will I need?

☒ Credit card

Add payment details

3b. Enter Identity Type

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

Upgrade

☒ Customer profile
 ☐ Main address
 ☐ Starting balance
 ☐ Payment details

Cancel

Identity type

Tell us about how you will be using Twilio so we can create the right profile for you.

Is this account for business use or for individual use?

☒ Business use: For my company or organization to use Twilio's services.
☐ Individual use: For my own personal use of Twilio's services.

Are you a direct customer or Independent Software Vendor (ISV) Reseller, or Partner?

☒ Direct customer: A company that communicates on behalf of our own products and services.
☐ Independent Software Vendor (ISV) Reseller, or Partner: A company that provides communication services to other businesses, who are represented by their own brands.

Continue

3c. Enter Business Information and Address

Ensure the legal business name matches official registration.

Upgrade

☒ Customer profile
 ☐ Main address
 ☐ Starting balance
 ☐ Payment details

Cancel

Business information

Provide some details about your business.

Legal business name

Smart Service

Business website URL

https://www.smartservice.com/

Industry

Professional Services

Business registration authority (recommended; leave this blank if not applicable or if you cannot find this information)

USA: Employer Identification Number (EIN)

Business registration number (recommended; leave this blank if not applicable or if you cannot find this information)

20-00000000

Continue

Back

Upgrade

☒ Customer profile
 ☐ Main address
 ☐ Starting balance
 ☐ Payment details

Cancel

Business address

Enter the operational address of the business. PO box addresses are not accepted.

Address

1 East Campus View Boulevard

Apt / Suite

Columbus

OH

43235

☒ I consent to Twilio reusing my information for approval of additional services

Submit

Back

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.

Customer profile

Main address

Starting balance

Payment details

Main address

This information will be used for taxation purposes. For US customers, this is your service address. For international customers, this is your permanent place of establishment (e.g. head office).

Country

United States

Address 1

1 East Campus View Boulevard

Address 2

City

Columbus

State

Ohio

Zip code

43235

← Back

Next →

Customer profile

Main address

Starting balance

Payment details

Starting balance

Balance

Phone code

Set your starting balance

You can always add more to your balance after you begin using Twilio.

Starting balance

\$20

An excellent choice for individuals ready to start exploring

\$50

Great for small and medium sized businesses ready to dive in

\$100

Perfect for larger enterprises looking to scale

Custom amount

Choose your starting balance

Explore our Voice pricing calculator

We're working on pricing calculators for our other services too, including SMS. In the meantime, you can find more information about these how we price these products on our pricing page.

Voice pricing calculator

Learn more about our pricing

Keep your account up and running

We recommend setting up a recurring top-up for your account once it falls below a certain amount.

Choose recharge amount based on expected use

Standard - When the balance falls below \$70, bring my balance back up to \$50

You can change this later if you want.

← Back

Confirm \$20.00 payment →

Customer profile

Main address

Starting balance

Payment details

Payment details

Card

Paypal

Payment method

Name on card

Card number

Expiry date

MM/YY

CVV

Is your billing address the same as your main address?

☒ Yes, my billing address is the same

Save card for future payments?

☐ Yes, save these details


← Back

Confirm \$20.00 payment →

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.

Upgrade

13/60



Your account is being upgraded!

It may take several minutes for the account to be fully upgraded.

How will your upgrade experience?

Meanwhile, you can continue exploring...

Get started

Check out your dashboard and explore all the features Twilio has waiting for you!

Go to dashboard

Tax information

Twilio collects tax on the services sold to its international customers located in certain foreign jurisdictions. Providing a valid business tax ID may help exempt you from taxes where applicable. [Learn more](#)

•

If you are exempt from sales or tobacco tax, please email your certificate and account ID to sales@twilio.com

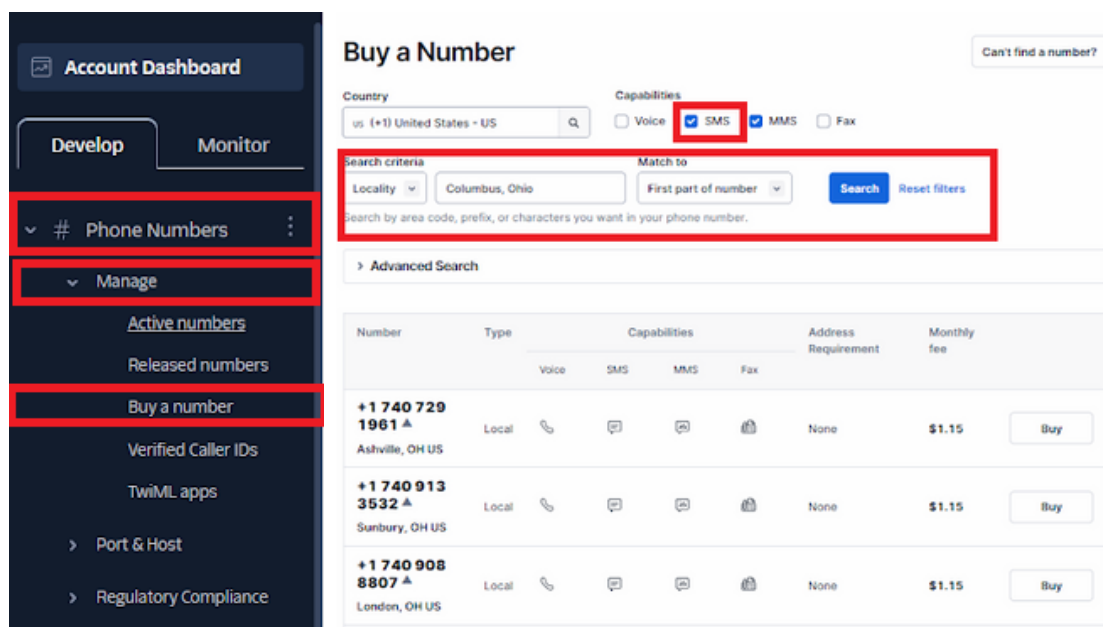
(888) 518-0818

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.



Buy a Number

Country:

Capabilities: ☐ Voice ☒ SMS ☒ MMS ☐ Fax

Search criteria: Locality: Match to:

Search by area code, prefix, or characters you want in your phone number.

> Advanced Search

Number	Type	Capabilities	Address Requirement	Monthly fee		
		Voice	SMS	MMS	Fax	
+1 740 729 1961 ▲ Ashville, OH US	Local					None \$1.15 <input type="button" value="Buy"/>
+1 740 913 3532 ▲ Sunbury, OH US	Local					None \$1.15 <input type="button" value="Buy"/>
+1 740 908 8807 ▲ London, OH US	Local					None \$1.15 <input type="button" value="Buy"/>

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>

+1 740 729 1842 \$1.15 monthly fee

Capabilities

- Voice** Receive incoming calls and make outgoing calls.
- Fax** Send and receive faxes.
- SMS** ▲ A2P 10DLC registration required Send and receive text messages.
- MMS** ▲ A2P 10DLC registration required Send and receive multi-media messages.

A2P 10DLC registration required for US messaging.
To send SMS/MMS messages to the US with this US local number, a registration process is required. This process can be performed after the number is purchased. [Learn more about A2P 10DLC registration](#)

Global Routing

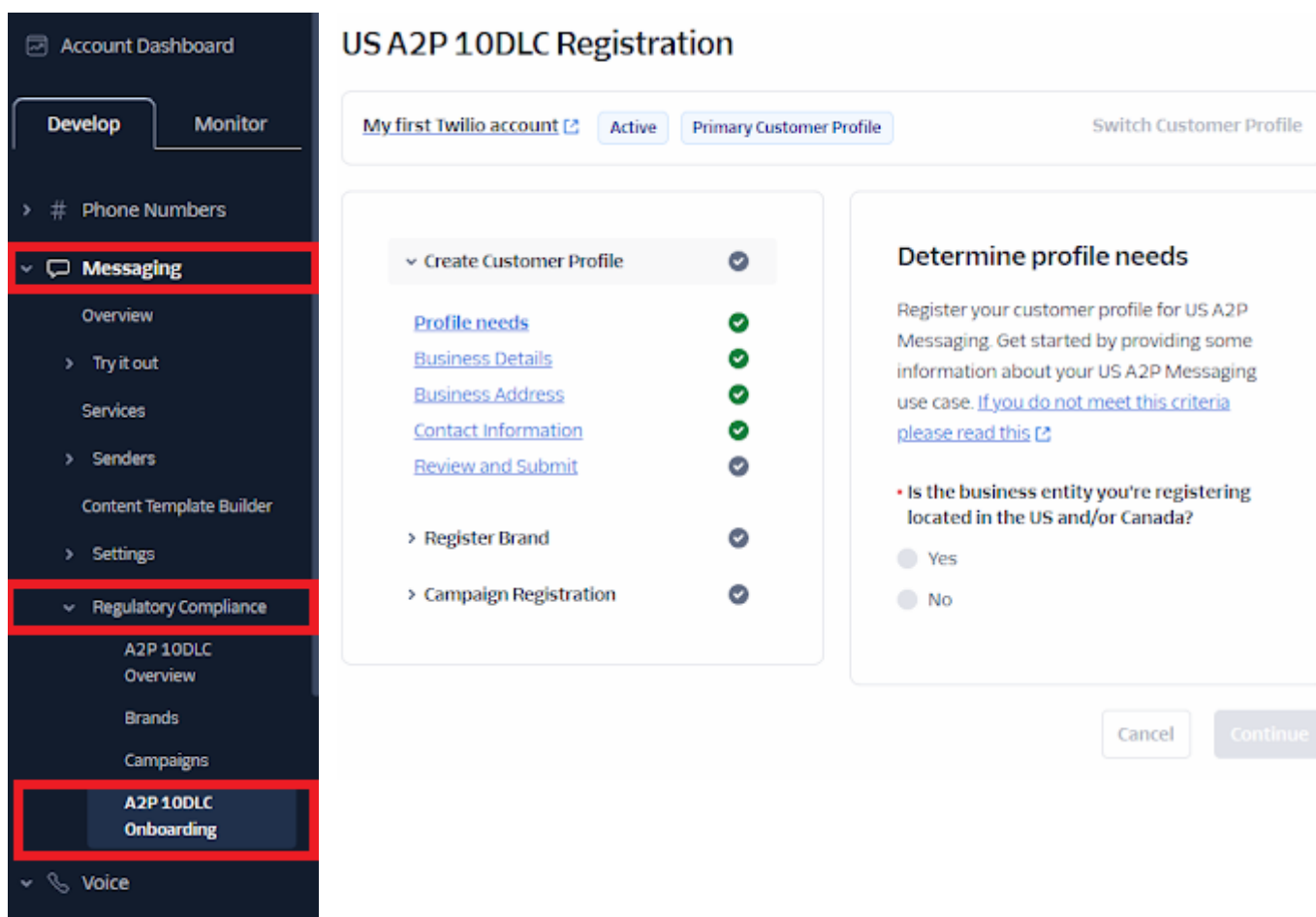
Routing ☒ Regional
Voice and Messaging will be routed to the United States (US1) Region. You can re-route in the number configuration after purchase.

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 screenshot displays the Twilio Account Dashboard with the 'Develop' tab selected. In the left-hand navigation menu, the 'Messaging' section is expanded, and the 'Regulatory Compliance' sub-section is highlighted. Within 'Regulatory Compliance', the 'A2P 10DLC Onboarding' option is selected. The main content area shows the 'US A2P 10DLC Registration' page. At the top, it indicates 'My first Twilio account' is 'Active' and is the 'Primary Customer Profile'. Below this, a progress bar shows the following steps: 'Create Customer Profile' (completed), 'Profile needs' (completed), 'Business Details' (completed), 'Business Address' (completed), 'Contact information' (completed), 'Review and Submit' (in progress), 'Register Brand' (in progress), and 'Campaign Registration' (in progress). To the right, the 'Determine profile needs' section prompts the user to register their customer profile for US A2P Messaging and asks if the business entity is located in the US and/or Canada, with radio buttons for 'Yes' and 'No'. 'Cancel' and 'Continue' buttons are at the bottom right.

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.

Message Body

Hello!

You are scheduled for service tomorrow.

Please reply with 'confirm' to lock in your Appointment

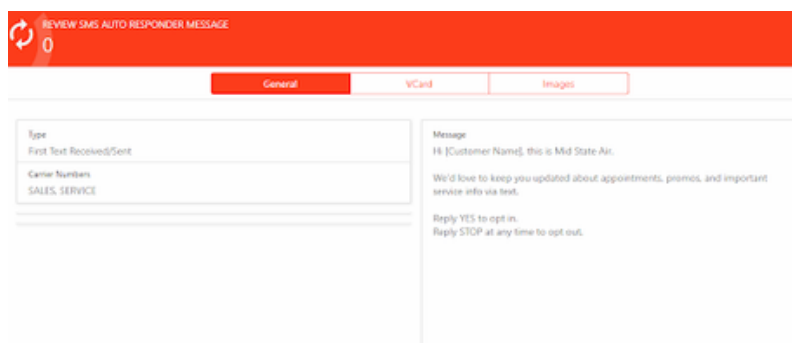
MIDSTATE AIR

Example of Marketing Message:

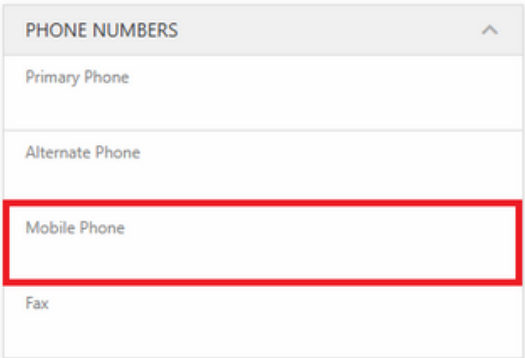
🔥 Spring Tune-Up Special! 🛠️ Get your A/C ready for summer with a \$69 system check-up from [Your Company Name]. Book now ➡️ [Link]

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



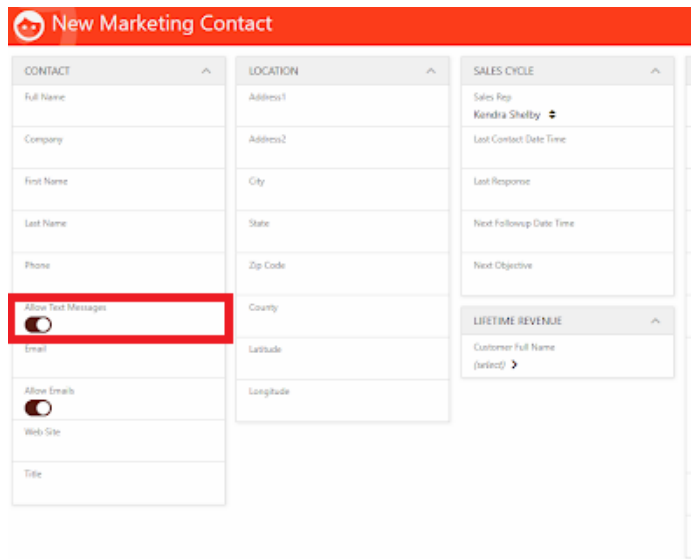
PHONE NUMBERS

Primary Phone

Alternate Phone

Mobile Phone

Fax



New Marketing Contact

CONTACT

Full Name

Company

First Name

Last Name

Phone

Allow Text Messages

Email

Allow Email

Web Site

Title

LOCATION

Address1

Address2

City

State

Zip Code

County

Latitude

Longitude

SALES CYCLE

Sales Rep

Kendra Shelby

Last Contact Date Time

Last Response

Next Followup Date Time

Next Objective

LIFETIME REVENUE

Customer Full Name (select) >

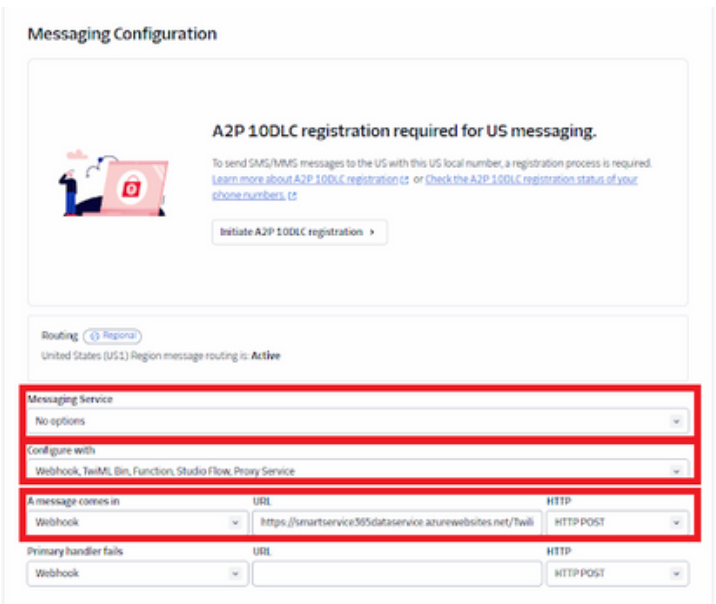
Opting In for Marketing: If you plan to use Smart Service for marketing messages, you can enable a toggle in the Smart Service Cloud to allow text messages for marketing purposes.

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>



Messaging Configuration

A2P 10DLC registration required for US messaging.

To send SMS/MMS messages to the US with this US local number, a registration process is required. [Learn more about A2P 10DLC registration](#) or [check the A2P 10DLC registration status of your phone numbers](#).

Initiate A2P 10DLC registration >

Routing: Regional

United States (US1) Region message routing is: Active

Messaging Service

No options

Configure with

Webhook, TwiML, Bin, Function, Studio Flow, Proxy Service

A message comes in

Webhook

URL

<https://smartservice365dataservice.azurewebsites.net/Twilio>

HTTP

HTTP POST

Primary handler fails

Webhook

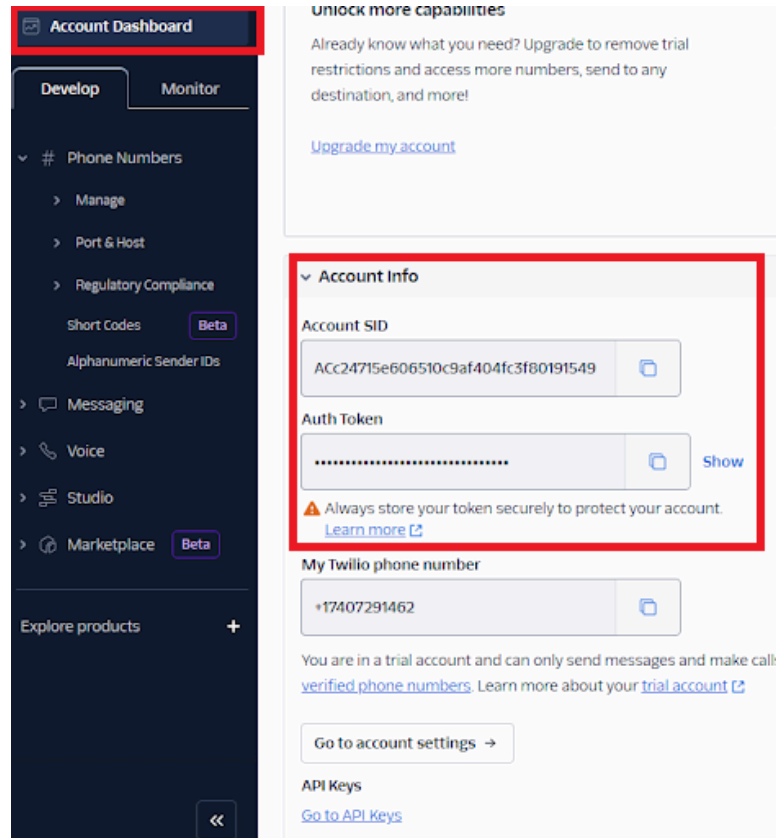
URL

HTTP

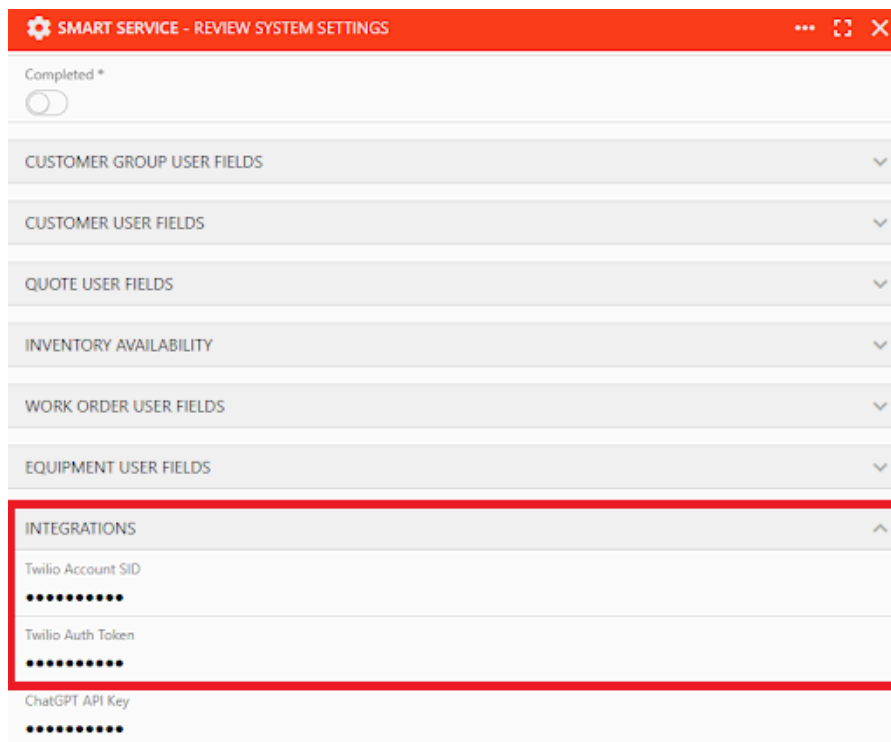
HTTP POST

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.



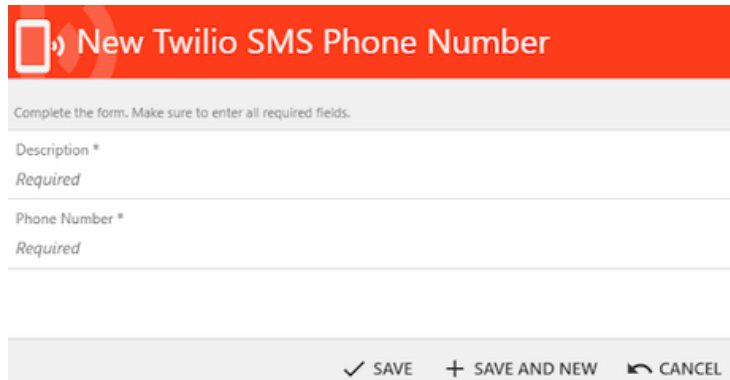
To integrate your Twilio account within Smart Service, first have your Twilio SID and Auth token then navigate to Administration > System Settings, click EDIT (bottom right corner), and scroll down to 'Integrations' to input these credentials. Then SAVE



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'



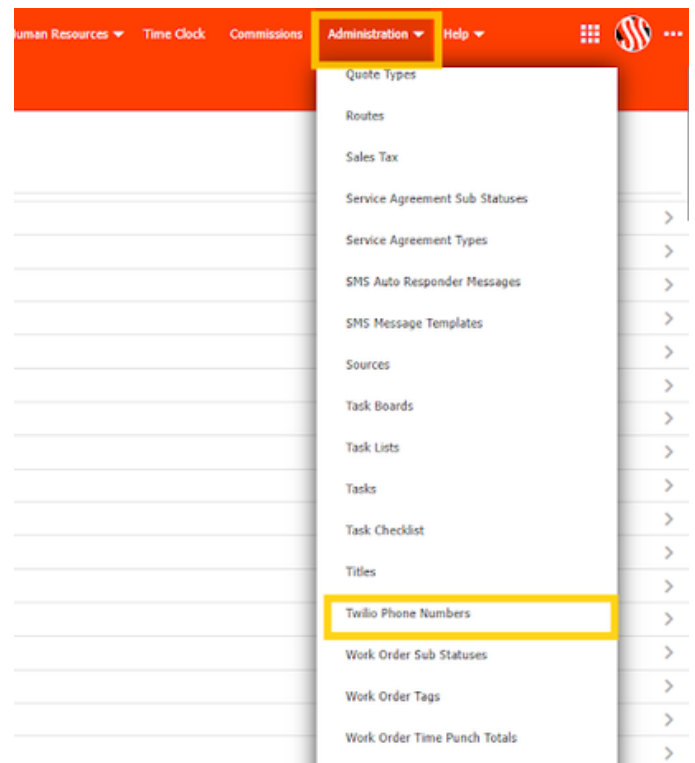
New Twilio SMS Phone Number

Complete the form. Make sure to enter all required fields.

Description *
Required

Phone Number *
Required

✓ SAVE + SAVE AND NEW ↶ CANCEL



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.