Dynamica SMS Integration Solution User Guide

Contents

# Manual Solution Installation

For manual solution installation, Go to: **Settings** -> **Solutions** -> Press **Import button**.

Solution Configuration

To use the solution, you have to create an account and configure SMS gateway first.

*Current version works with Twilio SMS gateway only. After Twilio account creation and configuration you will get **Twilio Account SID**, **Twilio Auth Token** and **Twilio Phone Numbers**. Find more information in this document below.*

To Specify Twilio Account SID, Twilio Auth Token and Twilio Phone Number in the solution Go to **Solutions** -> **Configuration**. Set the values and click save

Note: *remove any "-" and "()" (brackets) symbols from a telephone number or you might get an error. Spaces and "+" (plus symbol) are allowed.*

Twilio configuration

1. Go to https://twilio.com and click Sign up at the right upper corner or click on **Get a free API key**
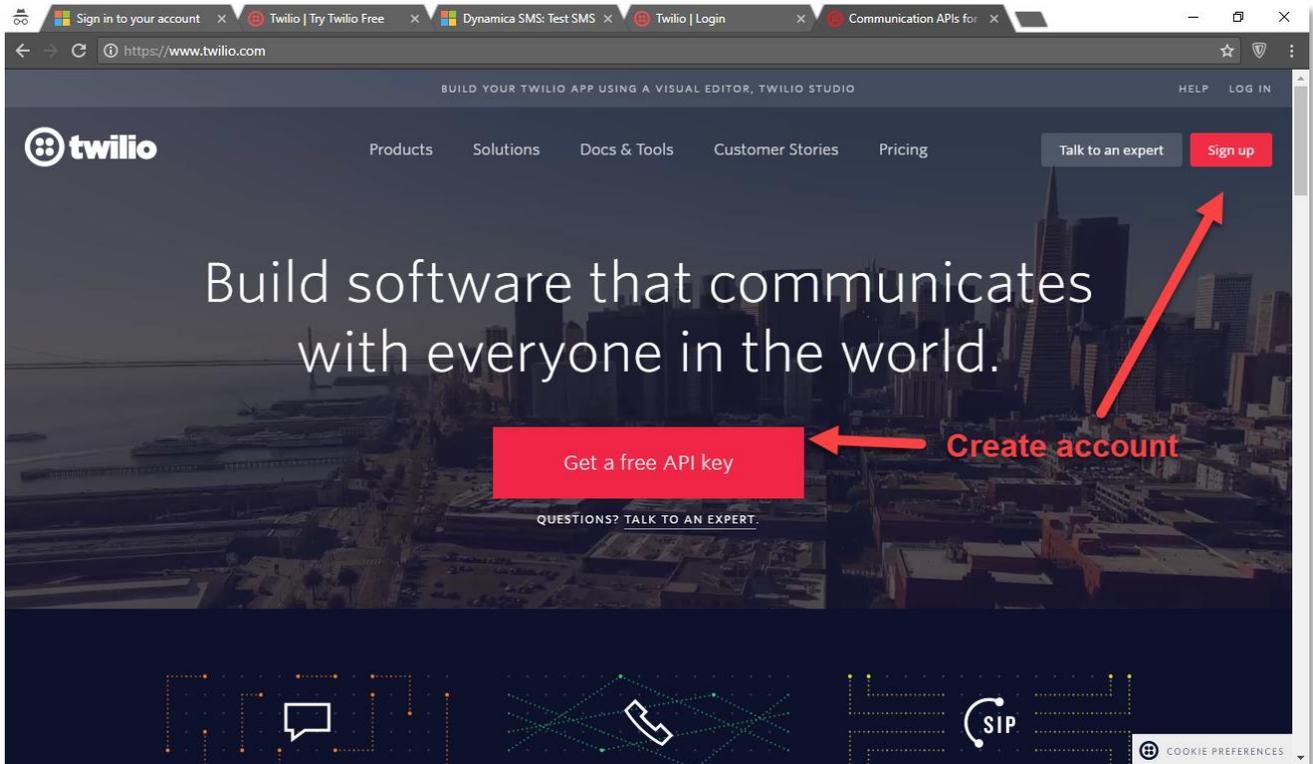
2. Fill in the registration form
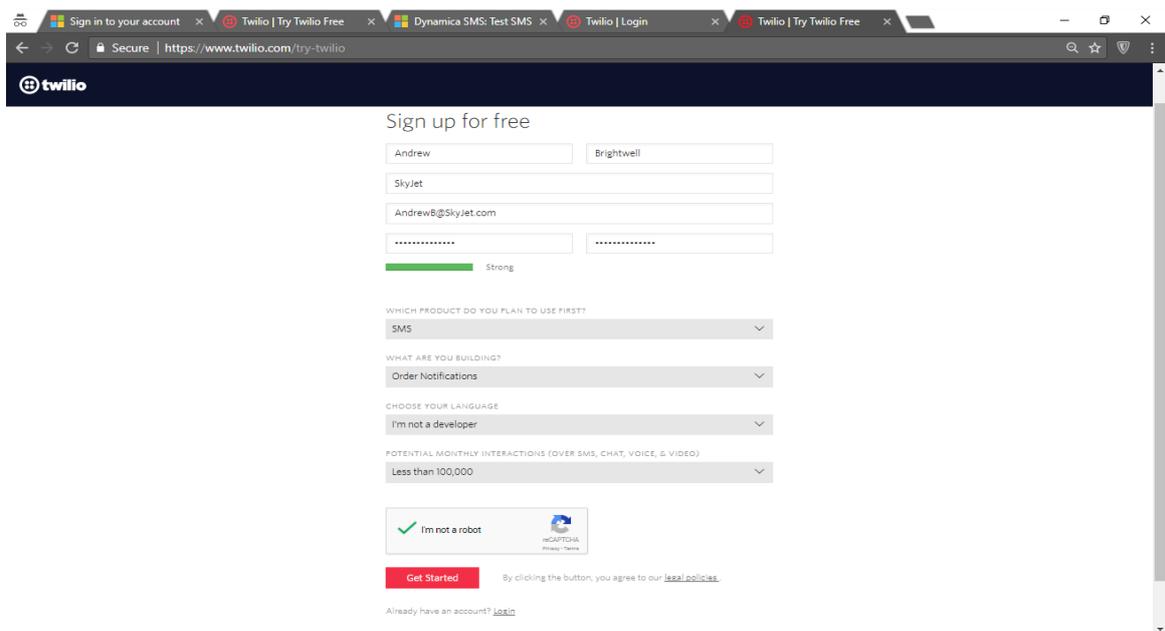
3. Verify your phone number
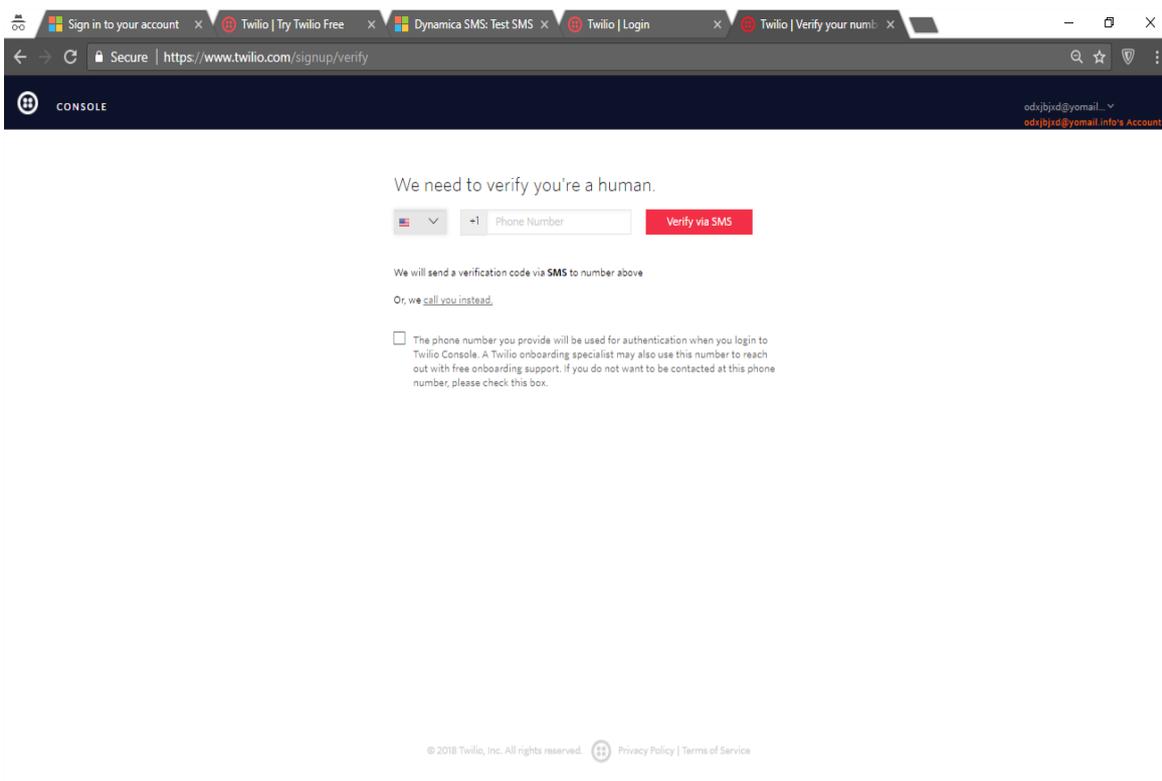
4. Enter project name (anything you like)
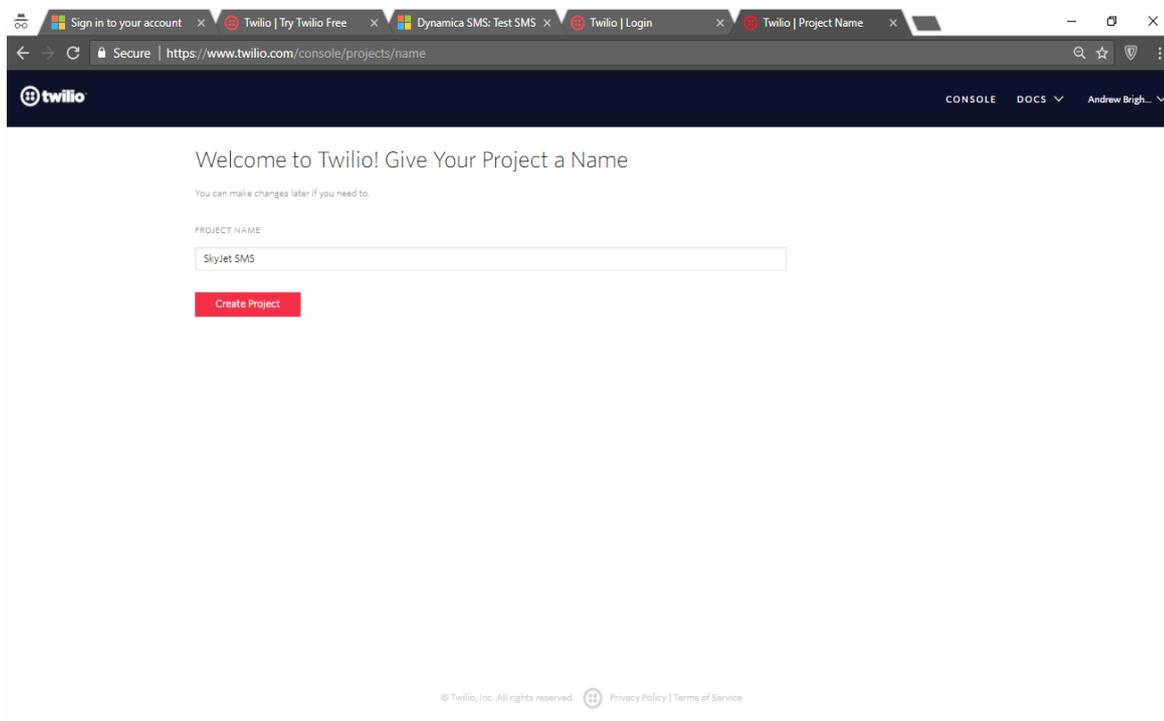
5. Congratulations! You have successfully created Twilio account.

Now you can get your **Twilio Account SID** and **Twilio Auth Token** as well as **Twilio phone number** to start using the solution. How to do that – read below.

Twilio Account SID and Twilio Auth Token

You can find Twilio Account SID and Twilio Auth Token on the console dashboard

https://www.twilio.com/console
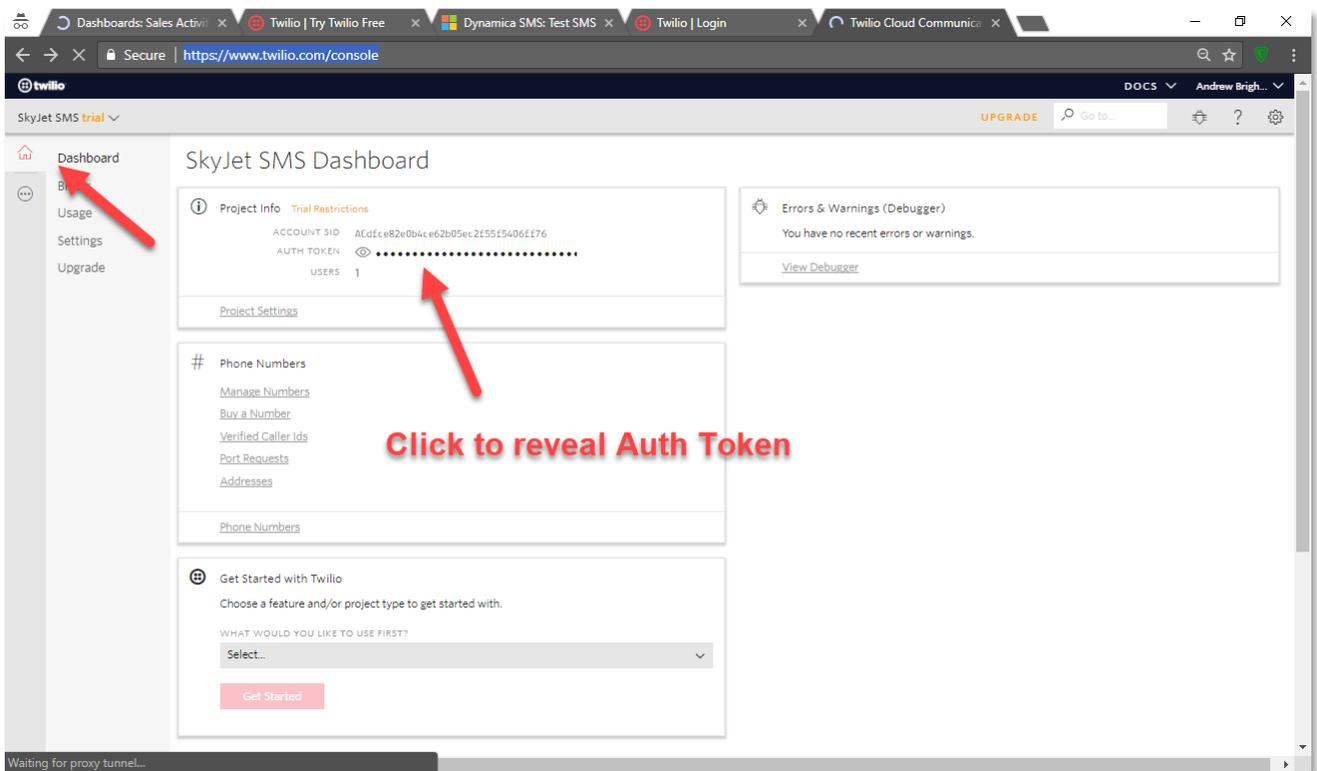
Copy this values into Dynamica SMS Solution configuration page.

Get a Twilio Number (Getting Started)

1. Click Get a number to get a number in order to send messages through Twilio API. You can do that on Learn and Build page here https://www.twilio.com/console/sms/getting-started/build
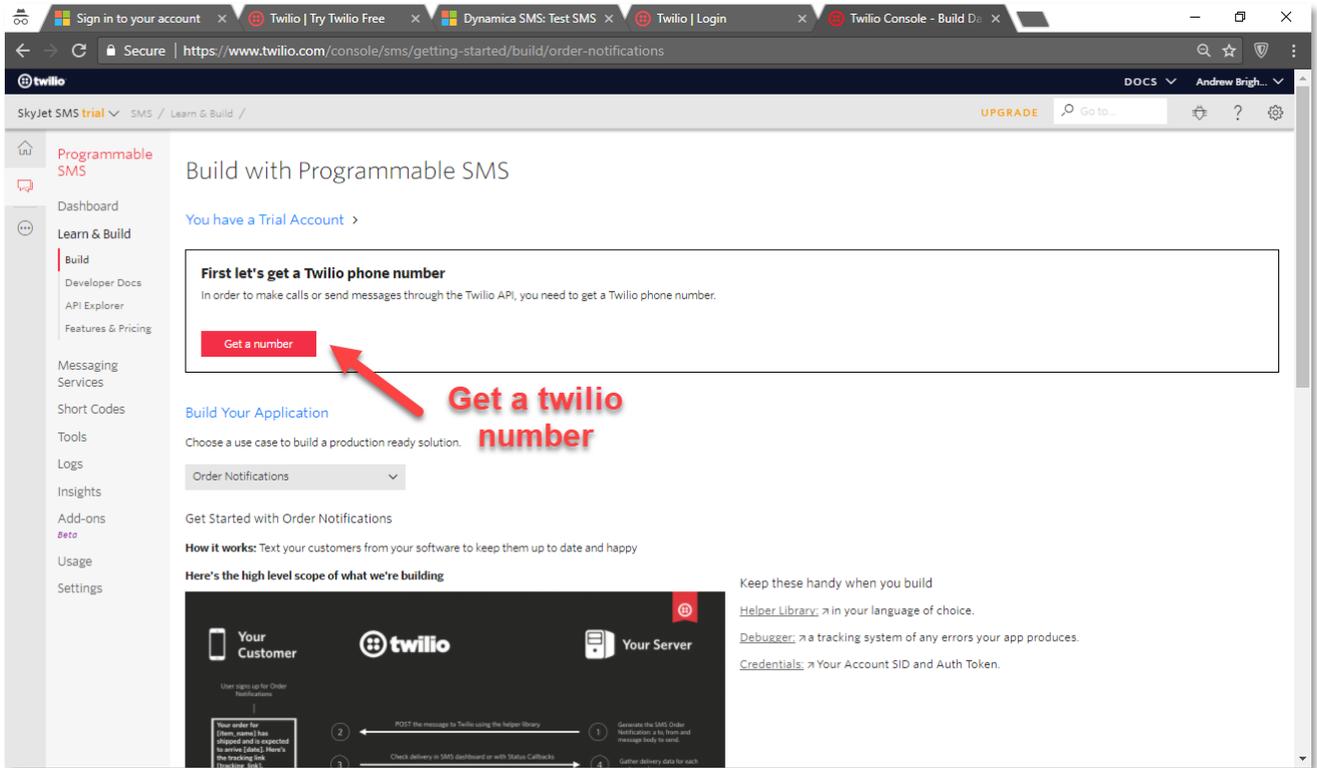
Note: you can get number later from Console Dashboards -> Buy Number page. *More information in Buy Number Chapter.*

2. Confirm a number or search for different one
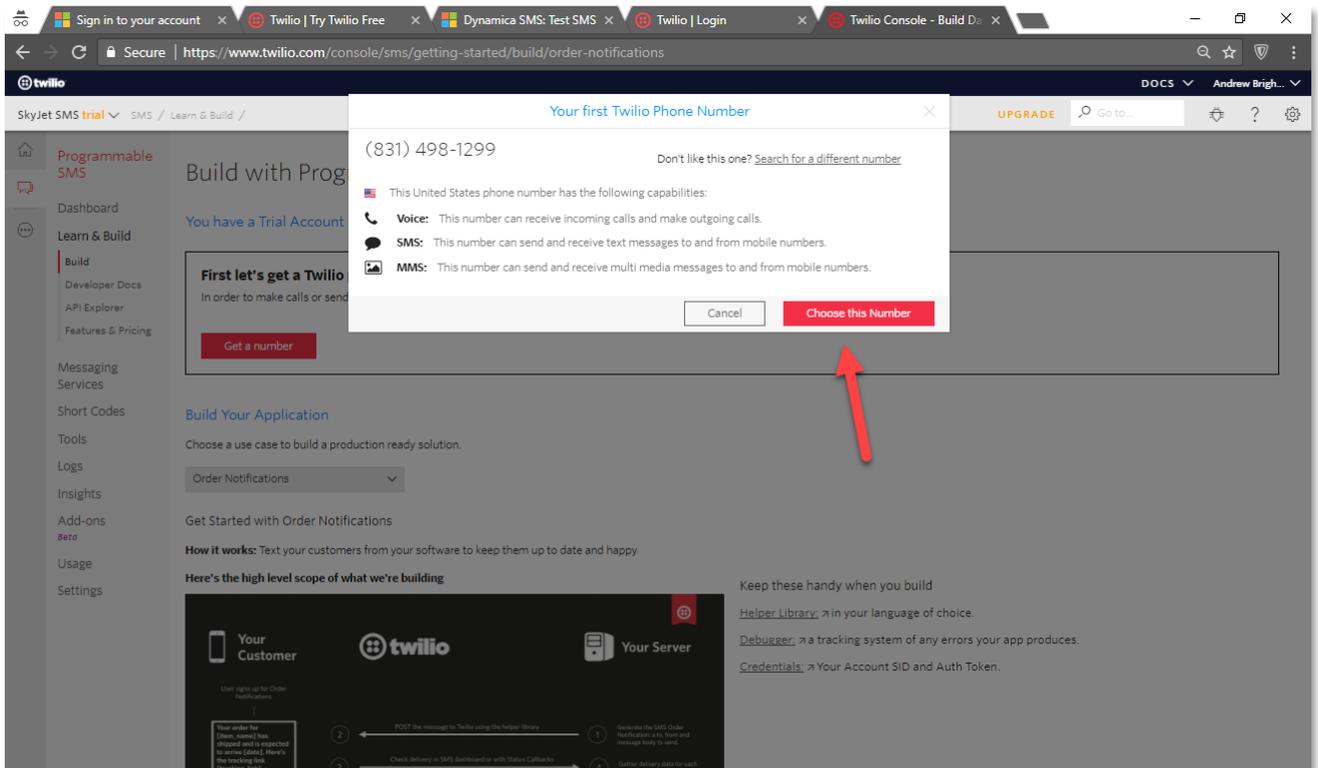
3. Now you can send a test message to your telephone number
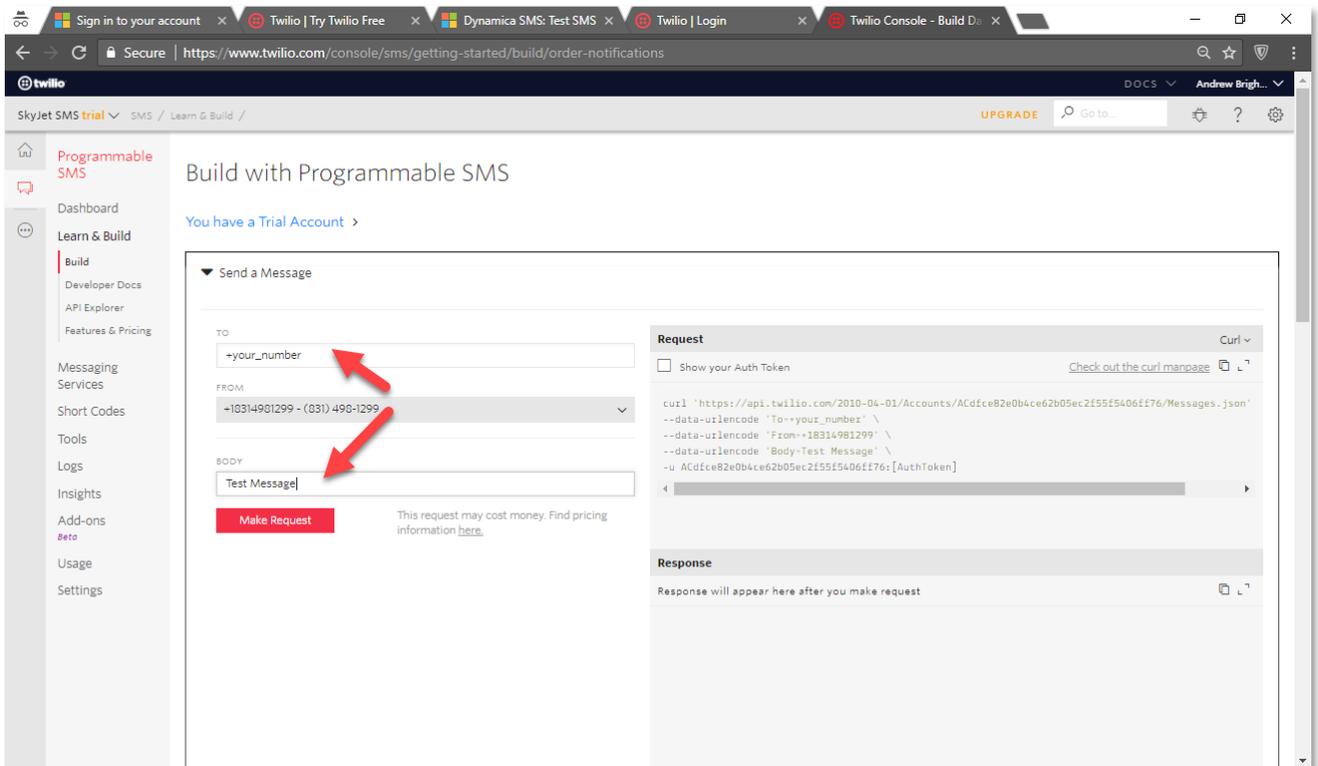
Note: *Initially, you've registered a trial version of Twilio. The trial version has a lot of restrictions. For more information about Trial please visit the link https://support.twilio.com/hc/en-us/articles/223136107-How-does-Twilio-s-Free-Trial-work-*

Solution testing in Trial account

You can test the solution using trial Twilio account but to be able to send SMS to phone number you will have to verify the phone number in Twilio.

Also ensure that the permission to send an SMS has been enabled for the region.

To do that:

1. Go to https://www.twilio.com/console/phone-numbers/verified

2. Click **Add New Number**

3. Chose verification method (Text or Call)

4. Find your country from drop-down list and enter your phone number

5. Verify Phone number
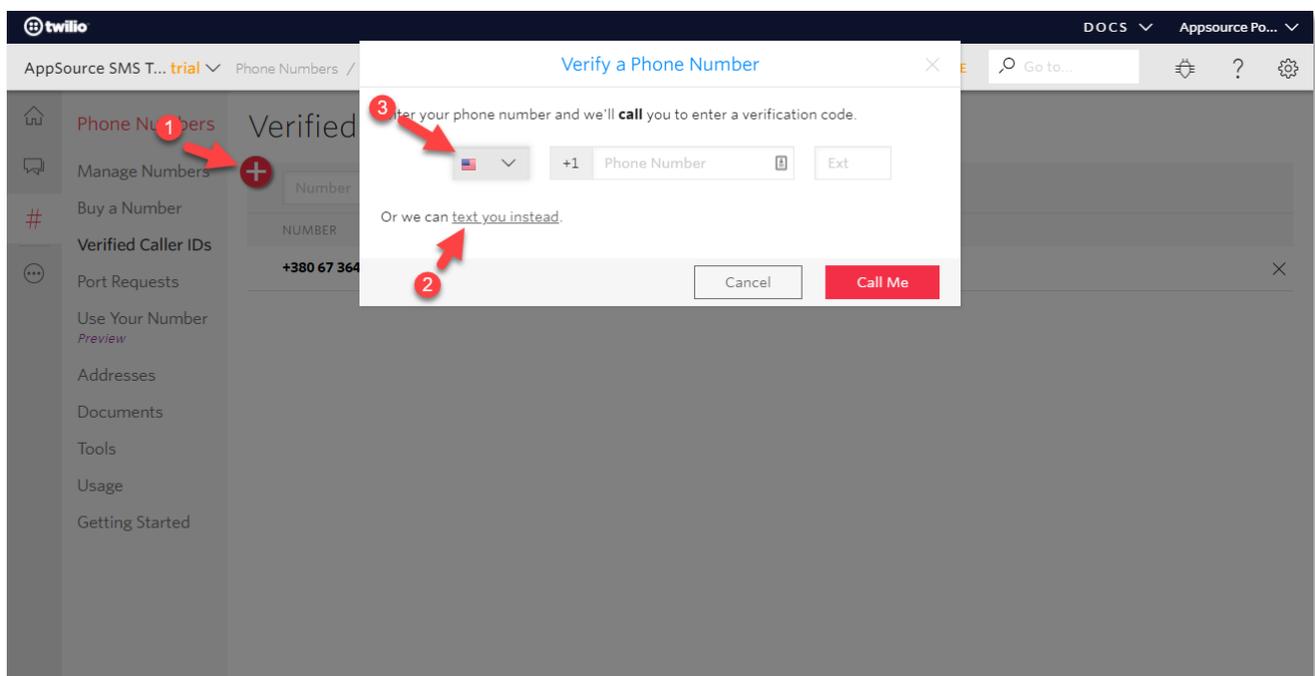
6. Visit https://www.twilio.com/console/sms/settings/geo-permissions and ensure that the permission to send an SMS has been enabled for the region
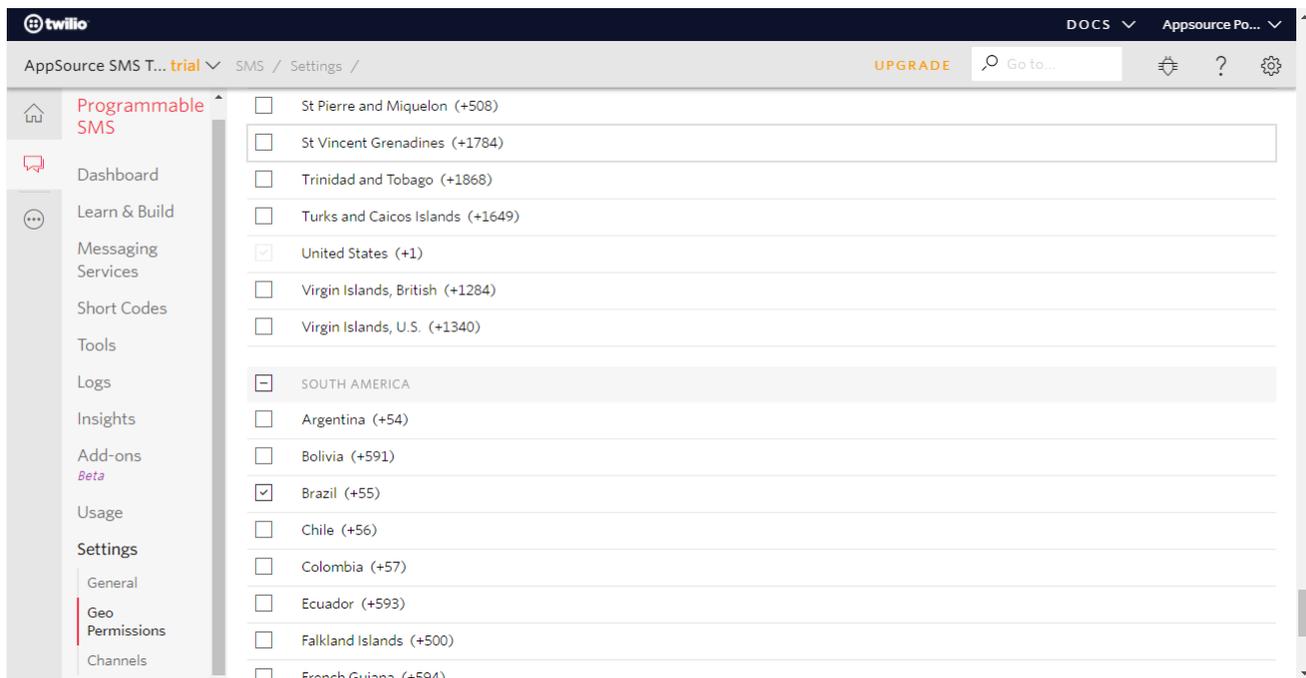
Buy number

To make full use of the solution, it is recommended to go to the full version. More detailed on https://support.twilio.com/hc/en-us/articles/223183208-Upgrading-to-a-paid-Twilio-project

1. Go to console dashboard in the left-upper corner and select Manage numbers, then Plus button to buy a number or click Buy Number from Dashboard
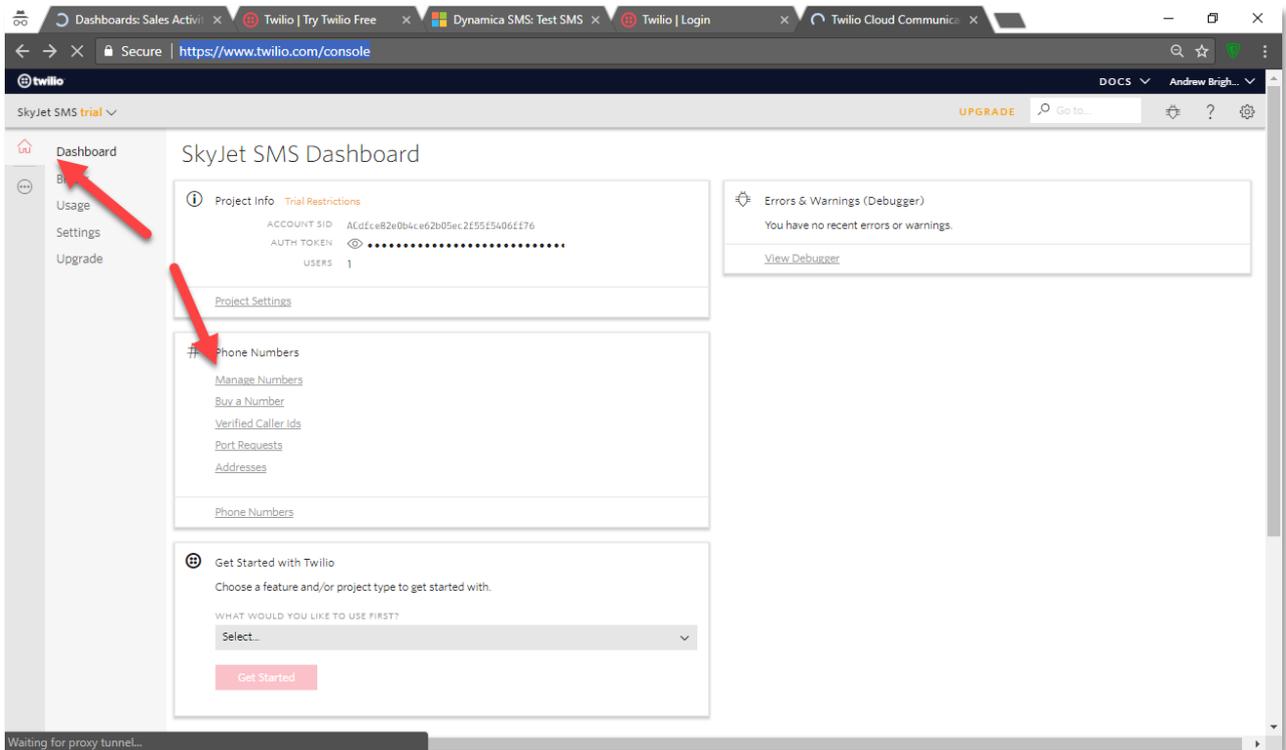

2. Manage numbers page
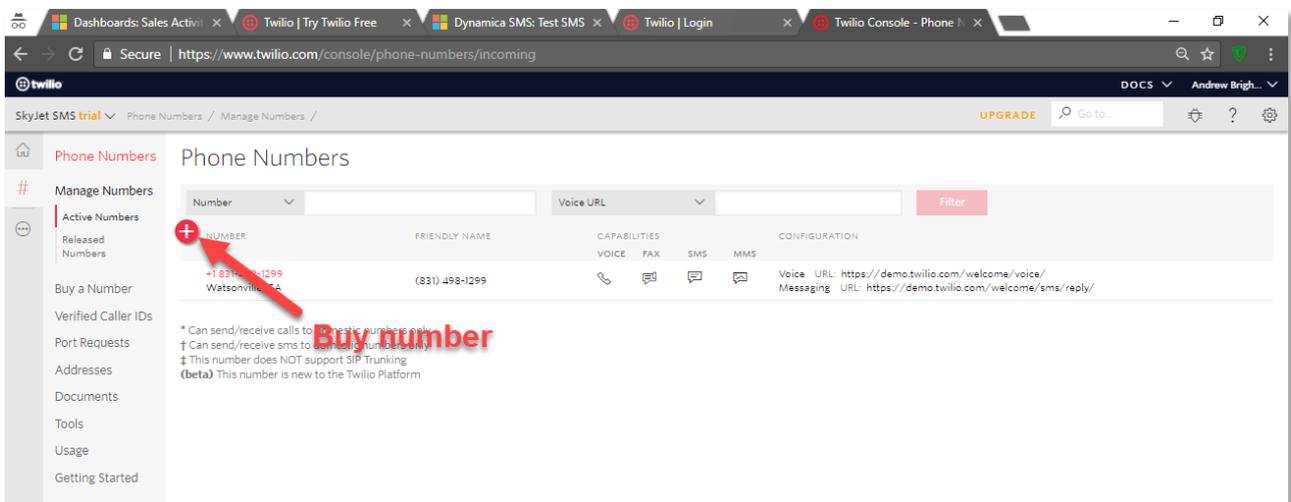
3. Select a country and click search to search the numbers
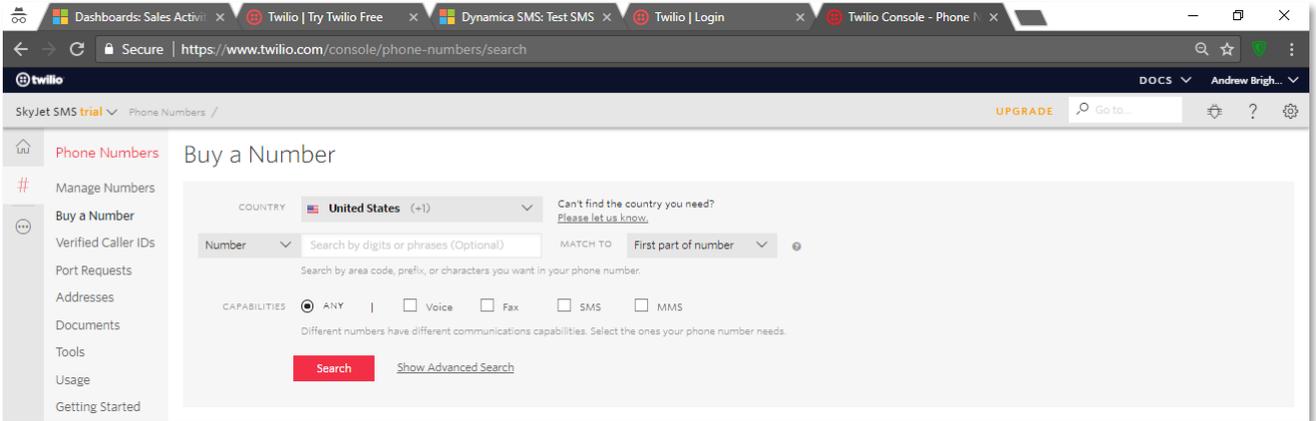

How to use the Application

1. To create and send SMS message – create Dynamica SMS Activity
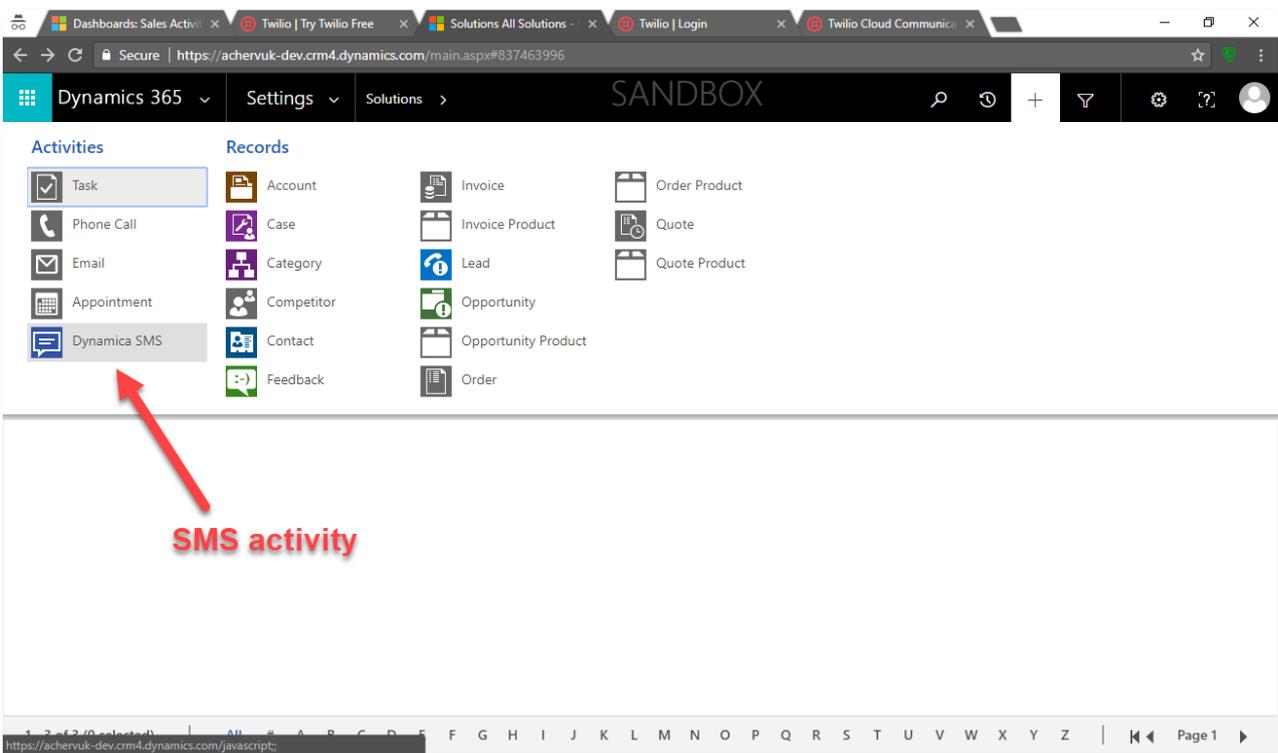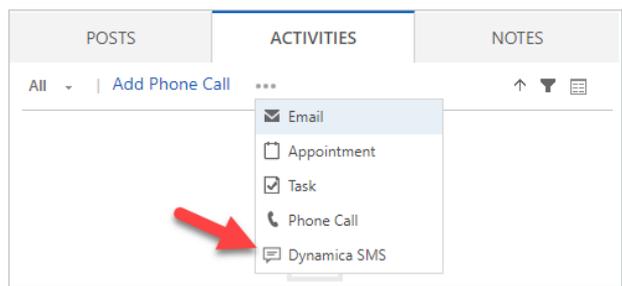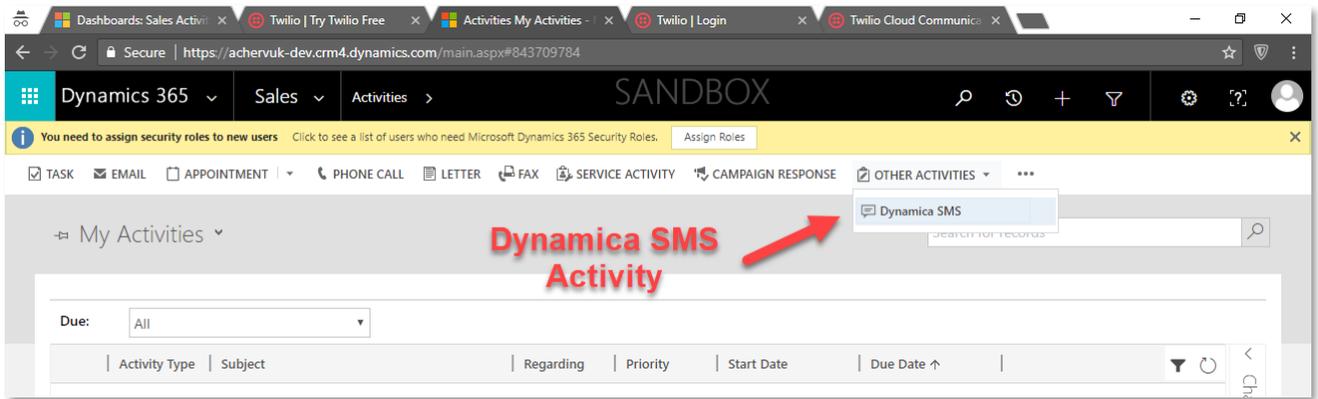
SMS activity

2. Fulfill activity form and click **Save button** -> **Send button** will appear
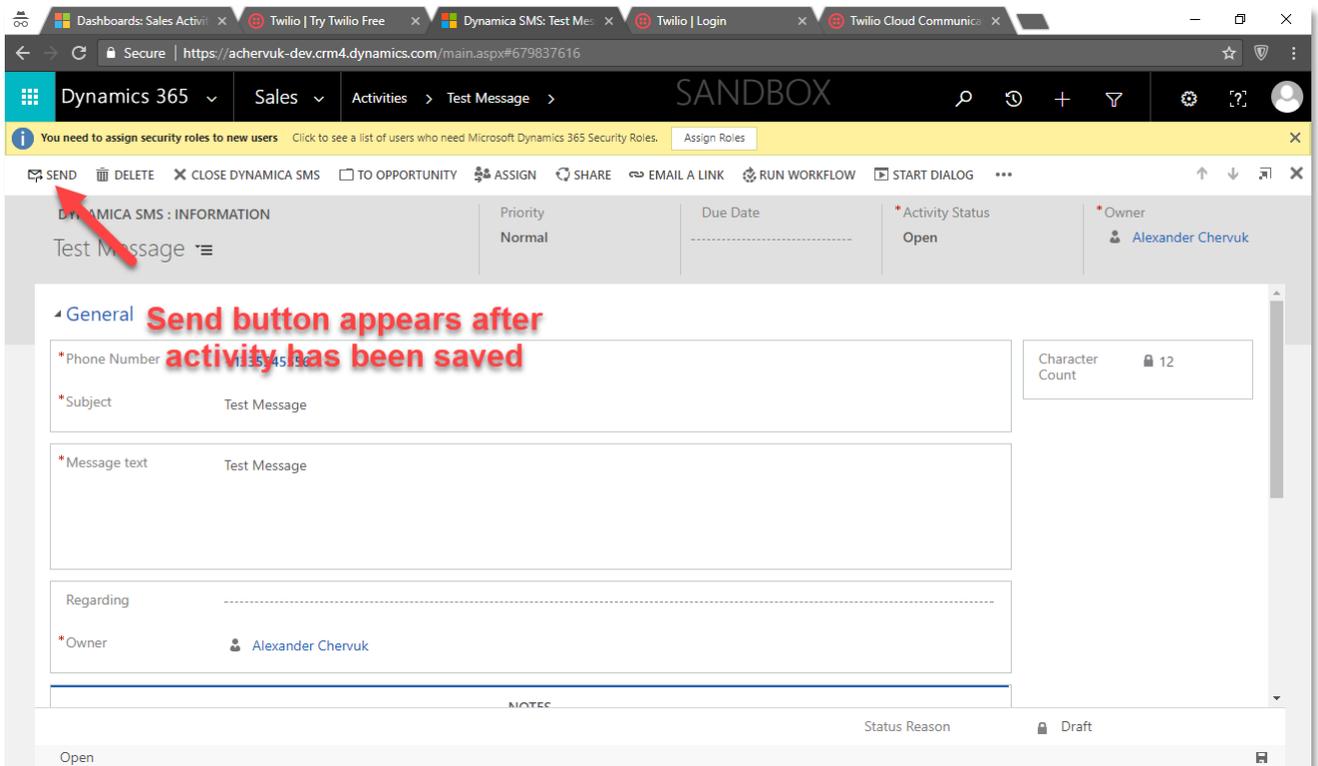
3. After sending a Message – refresh page to see Activity status changes

Restrictions

Gateways: currently the solution works with Twilio.com only.

Characters count: characters count is not updating in real-time. To recalculate – stop typing and unfocus message text area (click anywhere outside of message text area)

Message status: messages status is not updated in real-time. To see status changes – refresh a page.