

Dynamica SMS Integration Solution User Guide

Contents

Manual Solution Installation	3
Solution Configuration.....	3
Twilio configuration.....	4
Twilio Account SID and Twilio Auth Token	6
Get a Twilio Number (Getting Started).....	7
Solution testing in Trial account.....	9
Buy number	11
How to use the Application.....	12
Restrictions	14

Manual Solution Installation

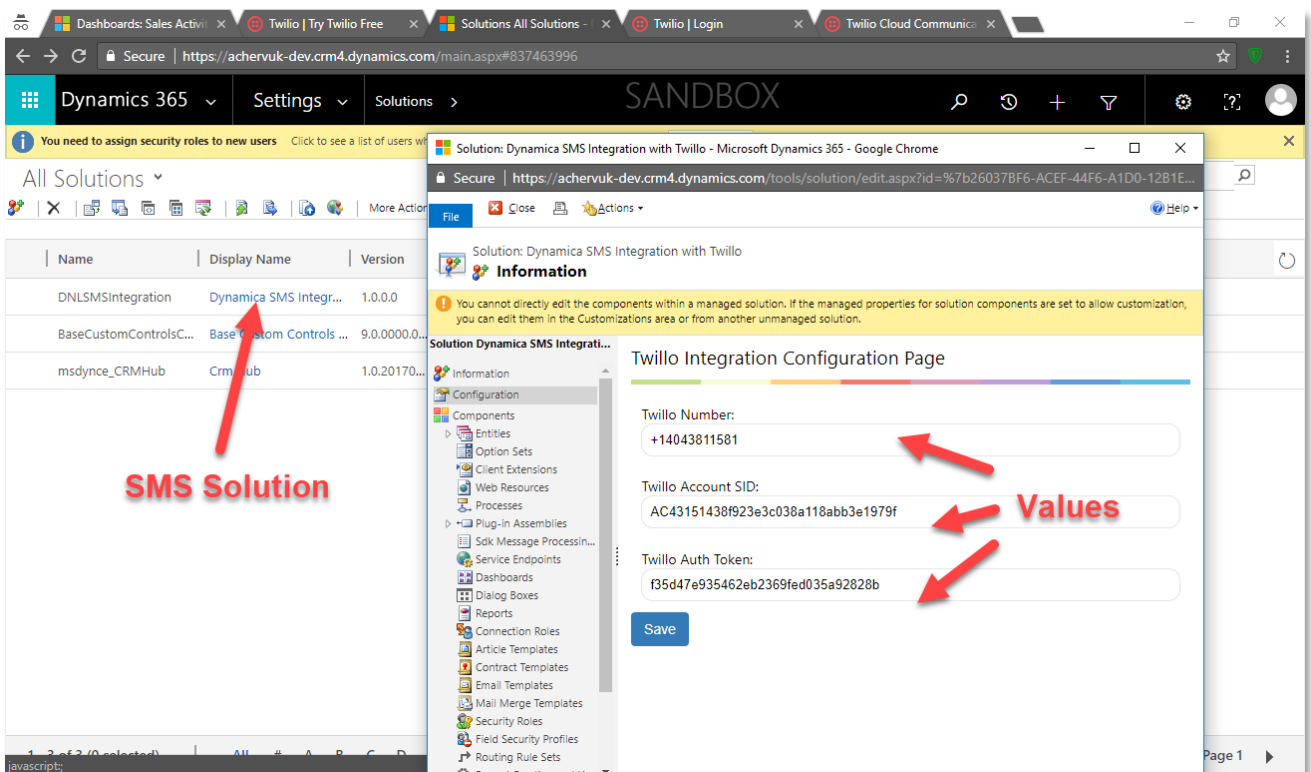
For manual solution installation, Go to: **Settings** -> **Solutions** -> Press **Import** button.

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.*

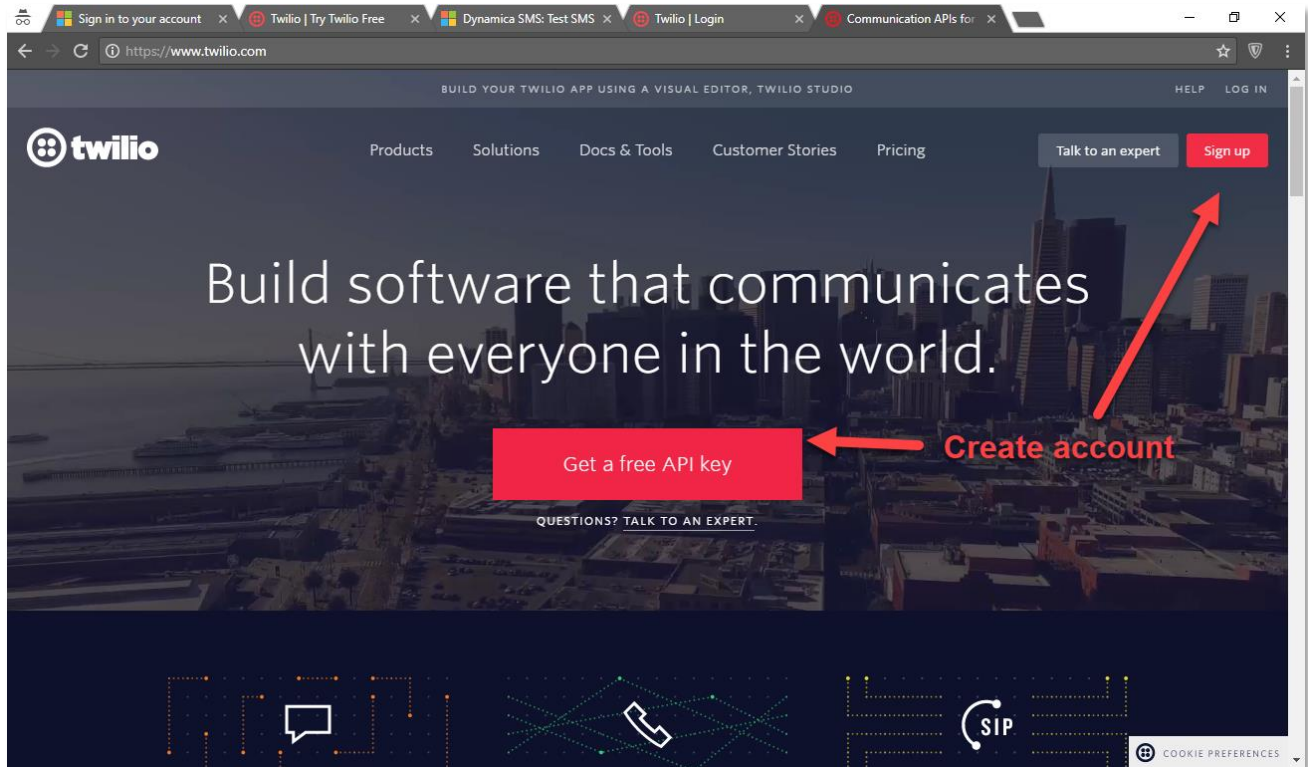
To Specify Twilio Account SID, Twilio Auth Token and Twilio Phone Number in the solution Go to **Solutions** -> **Configuration**. Set the values and click save



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

A screenshot of the Twilio registration form (https://www.twilio.com/try-twilio). The form is titled "Sign up for free" and contains several input fields: "First name" (filled with "Andrew"), "Last name" (filled with "Brightwell"), "Company" (filled with "SkyJet"), "Email" (filled with "Andrew@SkyJet.com"), and "Password" (masked with dots). Below the password field is a strength indicator showing "Strong". The form also includes dropdown menus for "WHICH PRODUCT DO YOU PLAN TO USE FIRST?" (selected "SMS"), "WHAT ARE YOU BUILDING?" (selected "Order Notifications"), "CHOOSE YOUR LANGUAGE" (selected "I'm not a developer"), and "POTENTIAL MONTHLY INTERACTIONS (OVER SMS, CHAT, VOICE, & VIDEO)" (selected "Less than 100,000"). At the bottom, there is a checkbox for "I'm not a robot" with a CAPTCHA icon, a "Get Started" button, and a link to "legal policies". A footer note says "Already have an account? [login](#)".

3. Verify your phone number

A screenshot of a web browser showing the Twilio 'Verify your phone number' page. The browser's address bar displays 'https://www.twilio.com/signup/verify'. The page has a dark blue header with the Twilio logo and a user account dropdown. The main content area is white and contains the text 'We need to verify you're a human.' Below this is a form with a country selector (set to '+1'), a 'Phone Number' input field, and a red 'Verify via SMS' button. A note states: 'We will send a verification code via SMS to number above. Or, we [call you instead.](#)' There is an unchecked checkbox with the text: 'The phone number you provide will be used for authentication when you login to Twilio Console. A Twilio onboarding specialist may also use this number to reach out with free onboarding support. If you do not want to be contacted at this phone number, please check this box.' The footer includes '© 2018 Twilio, Inc. All rights reserved.' and links to 'Privacy Policy' and 'Terms of Service'.

4. Enter project name (anything you like)

A screenshot of the Twilio console 'Welcome to Twilio! Give Your Project a Name' page. The browser's address bar shows 'https://www.twilio.com/console/projects/name'. The page features a dark blue header with the Twilio logo, navigation links for 'CONSOLE' and 'DOCS', and a user profile 'Andrew Bright...'. The main content area is white and displays the heading 'Welcome to Twilio! Give Your Project a Name' with a subtext 'You can make changes later if you need to.' Below this is a 'PROJECT NAME' label and an input field containing 'SkyJet SMS'. A red 'Create Project' button is positioned below the input field. The footer contains '© Twilio, Inc. All rights reserved.' and links to 'Privacy Policy' and 'Terms of Service'.

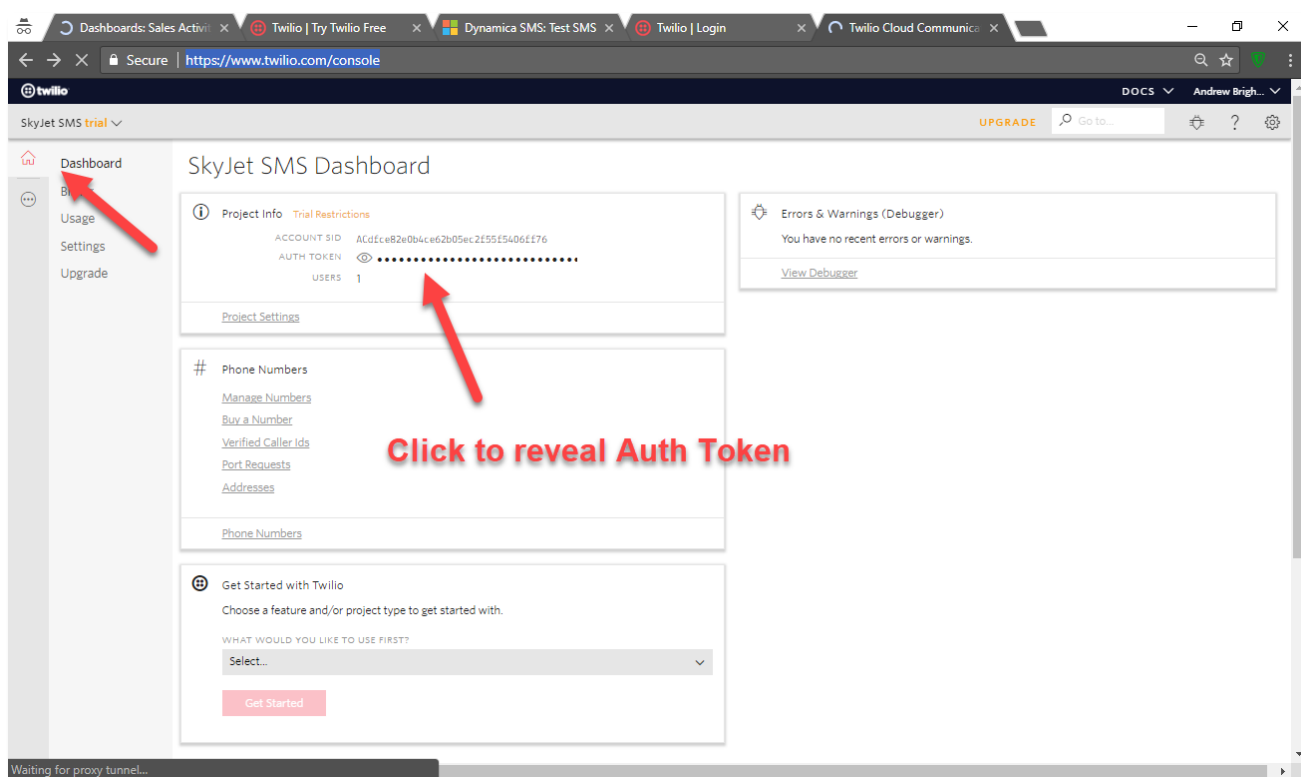
5. Congratulations! You have successfully created Twilio account.

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

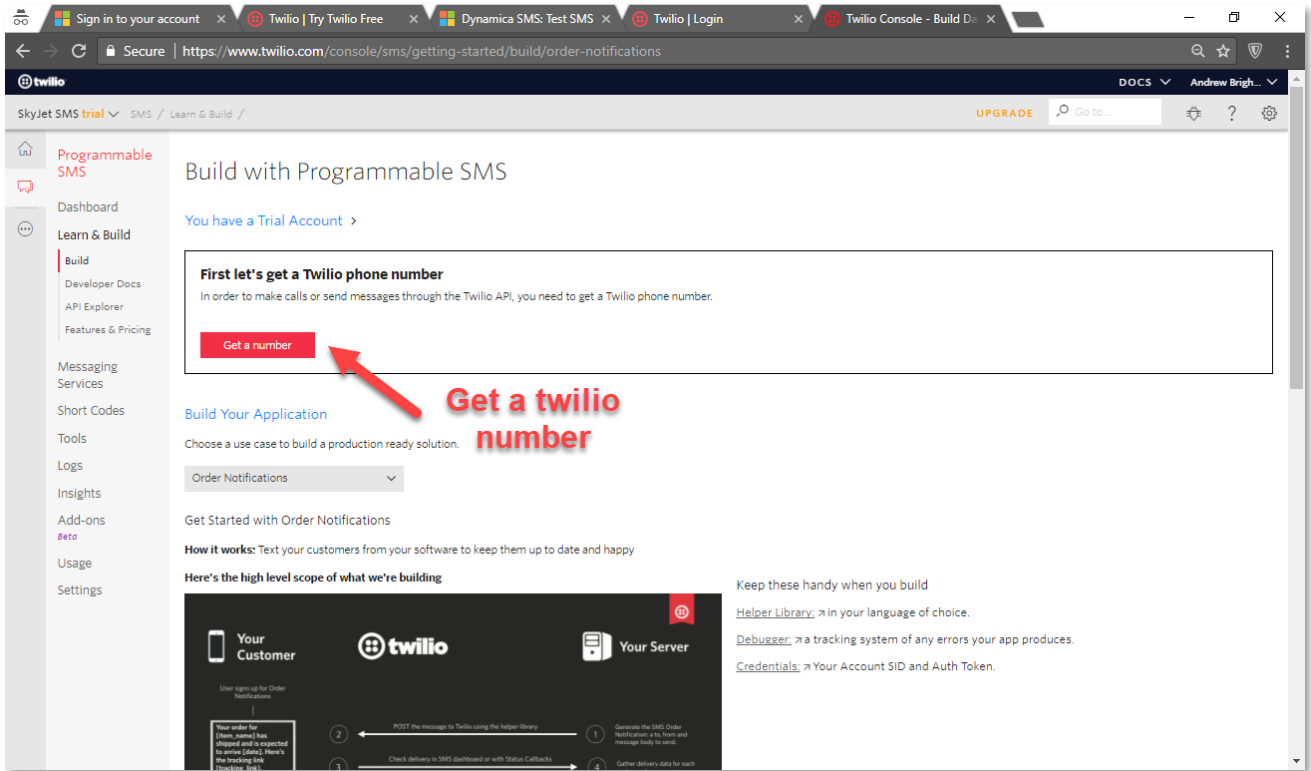
<https://www.twilio.com/console>



Copy this values into Dynamica SMS Solution configuration page.

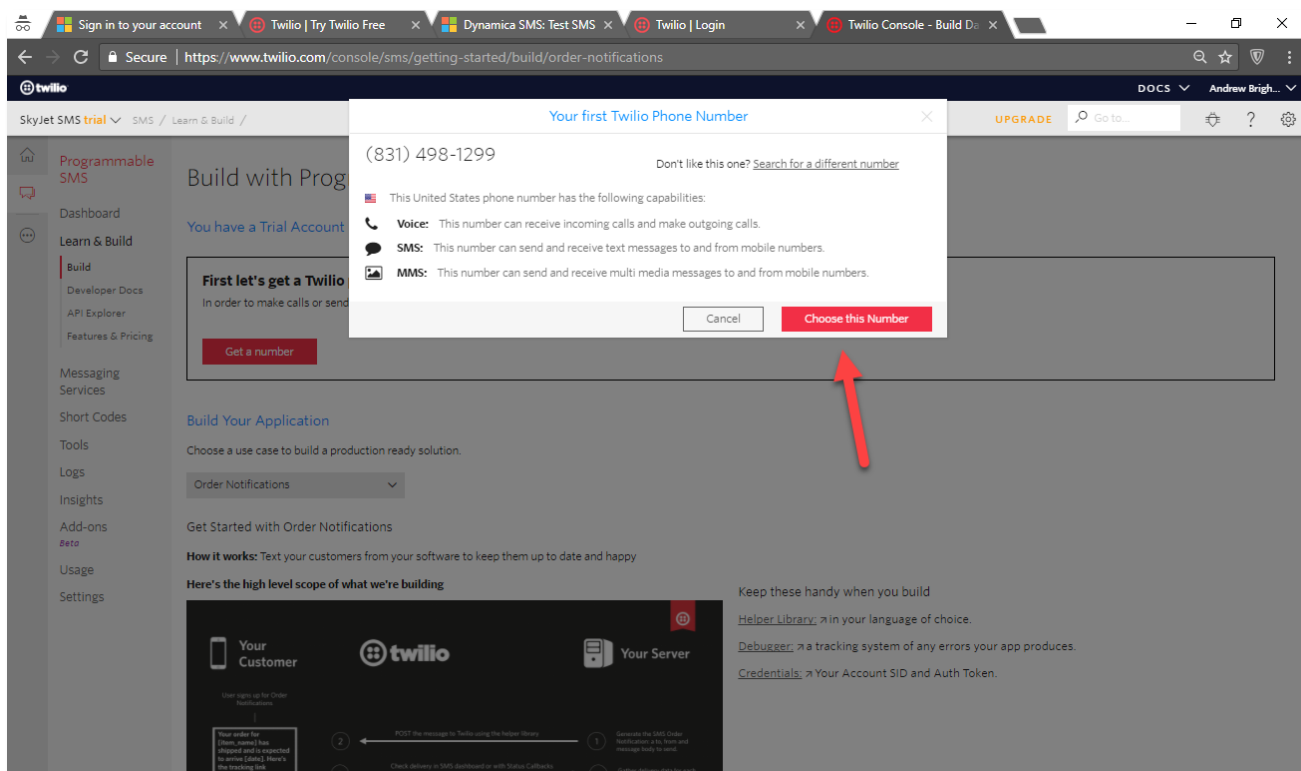
Get a Twilio Number (Getting Started)

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>

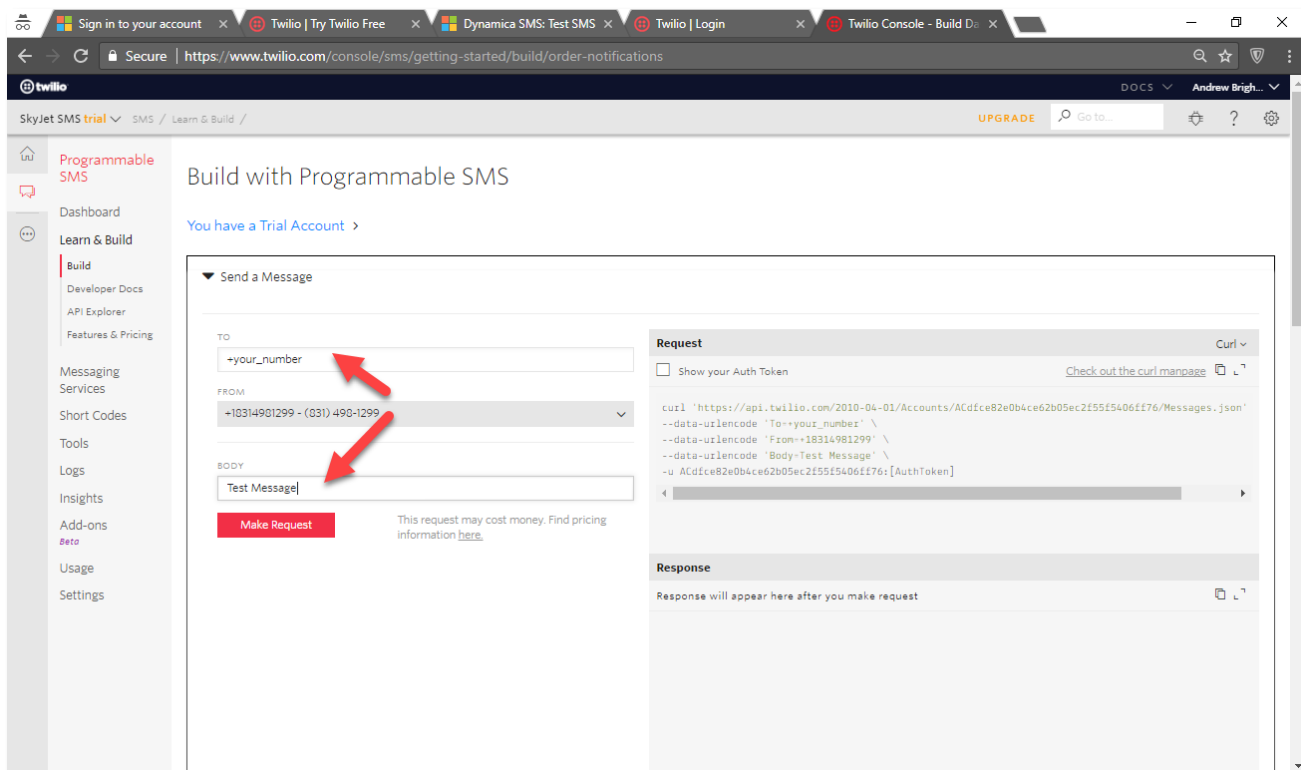


Note: you can get number later from Console Dashboards -> Buy Number page. More information in Buy Number Chapter.

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->

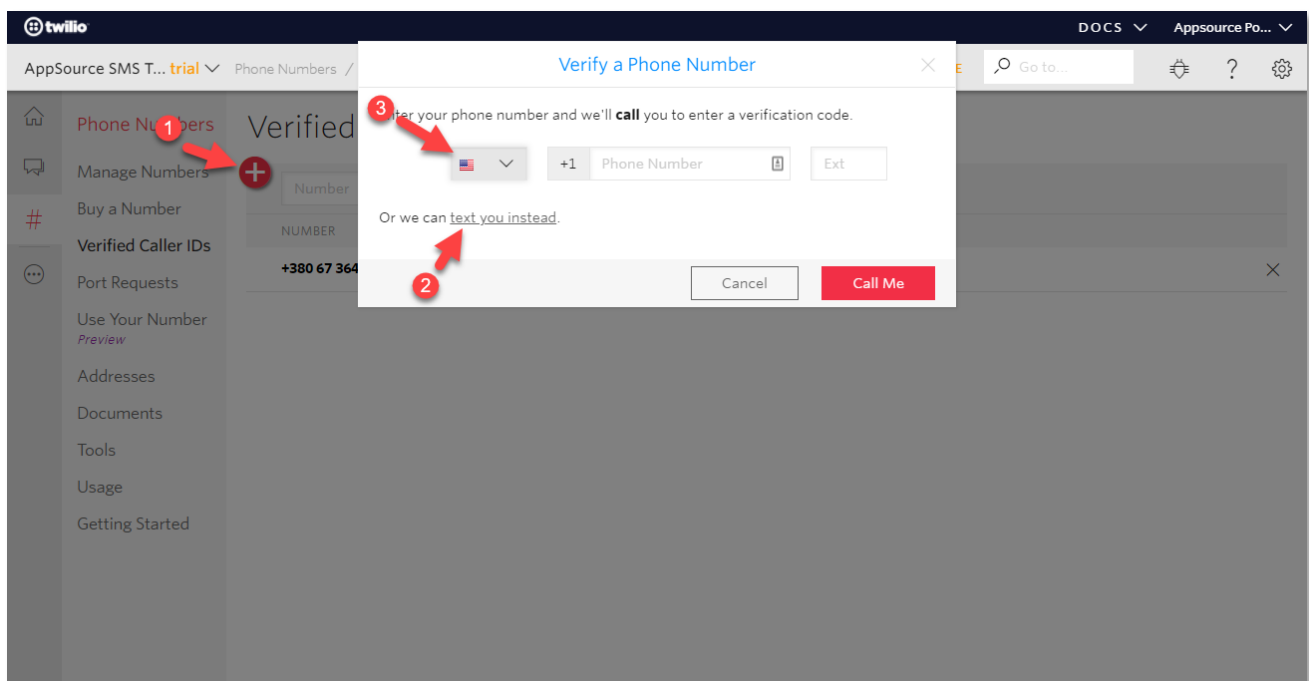
Solution testing in Trial account

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.

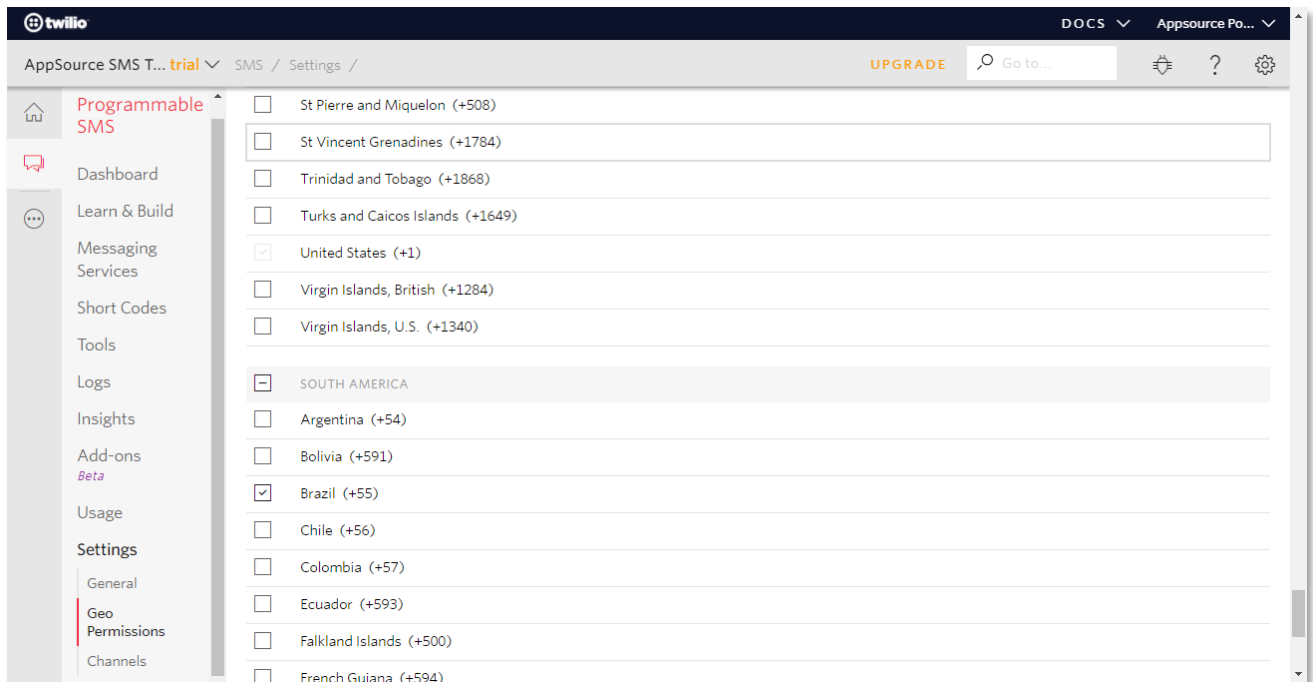
Also ensure that the permission to send an SMS has been enabled for the region.

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



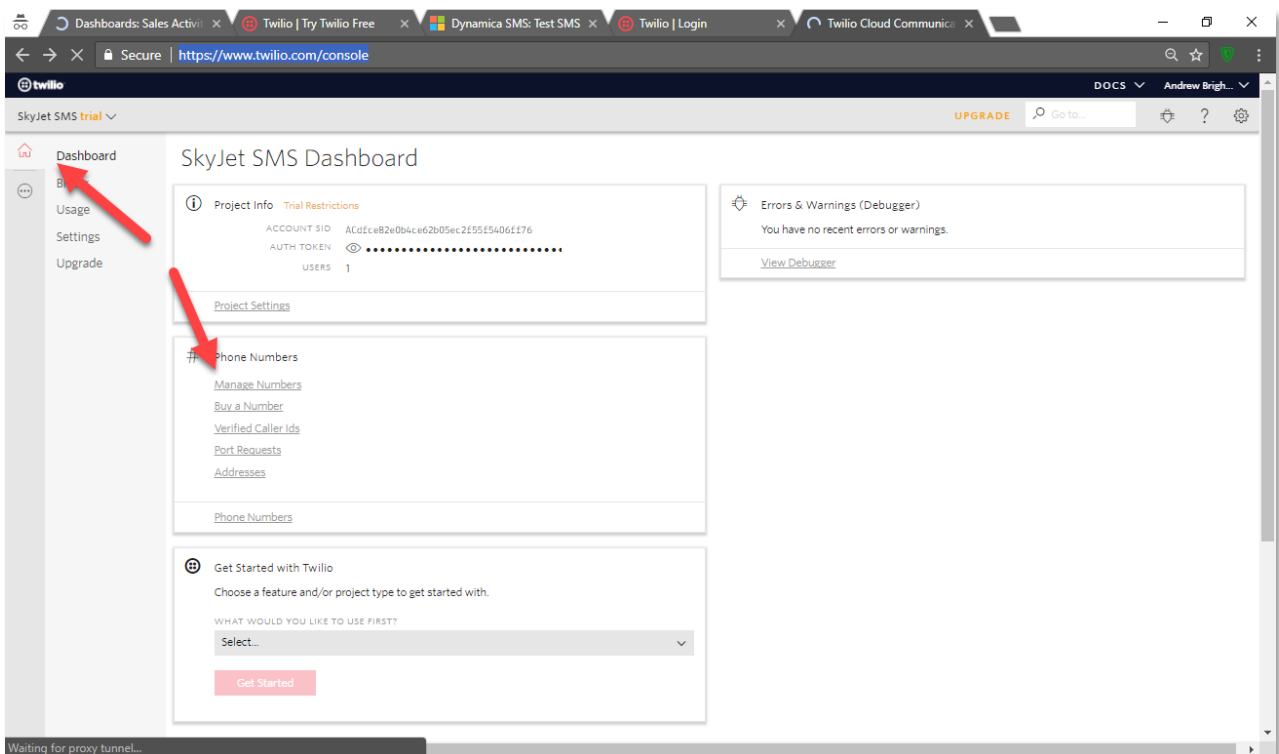
6. Visit <https://www.twilio.com/console/sms/settings/geo-permissions> and ensure that the permission to send an SMS has been enabled for the region



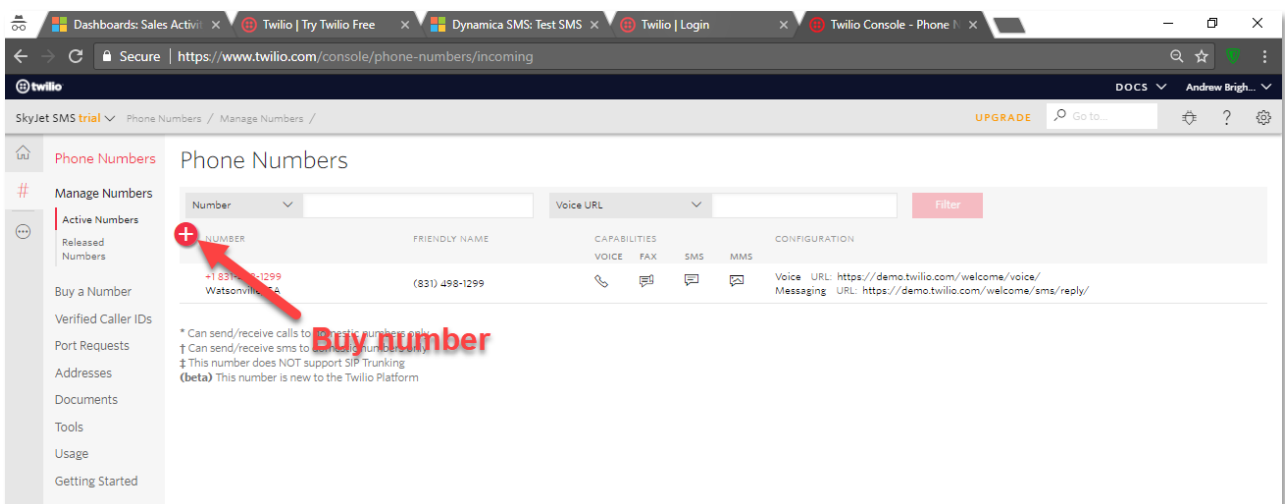
Buy number

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>

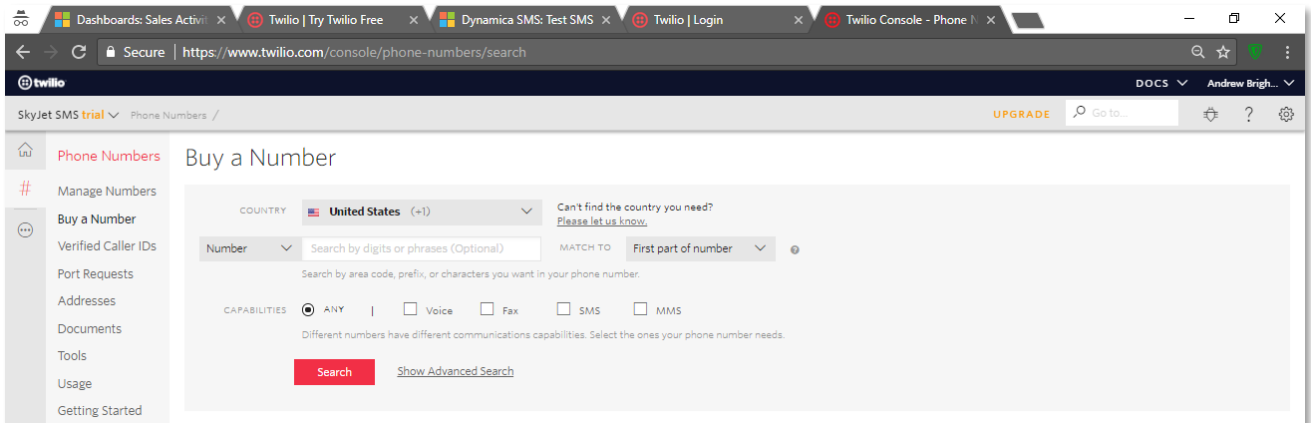
1. Go to console dashboard in the left-upper corner and select Manage numbers, then Plus button to buy a number or click Buy Number from Dashboard



2. Manage numbers page

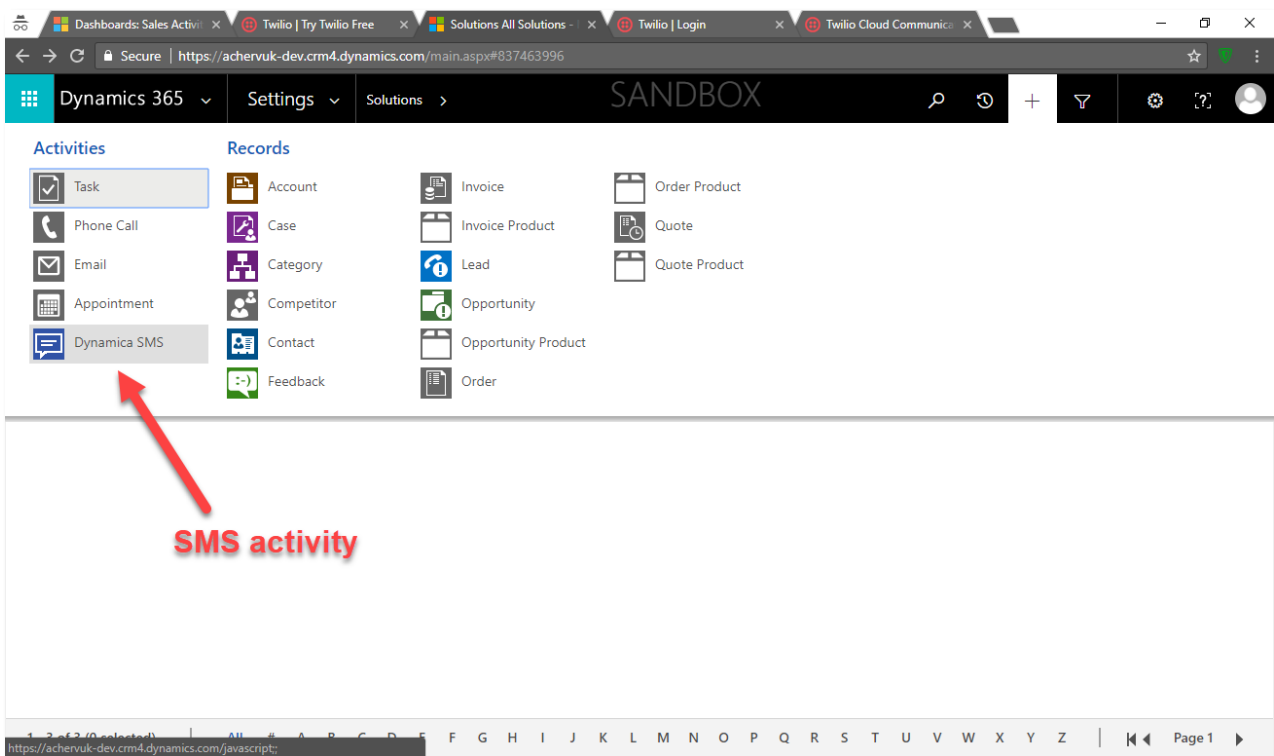


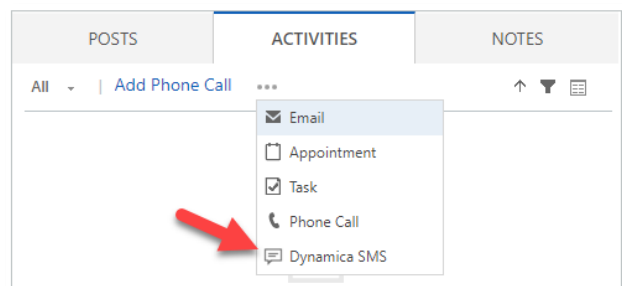
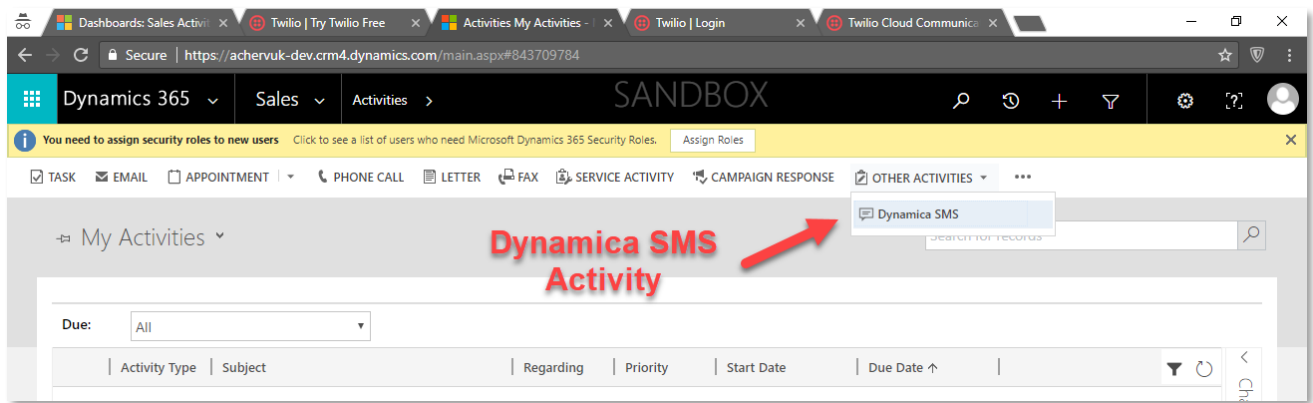
3. Select a country and click search to search the numbers



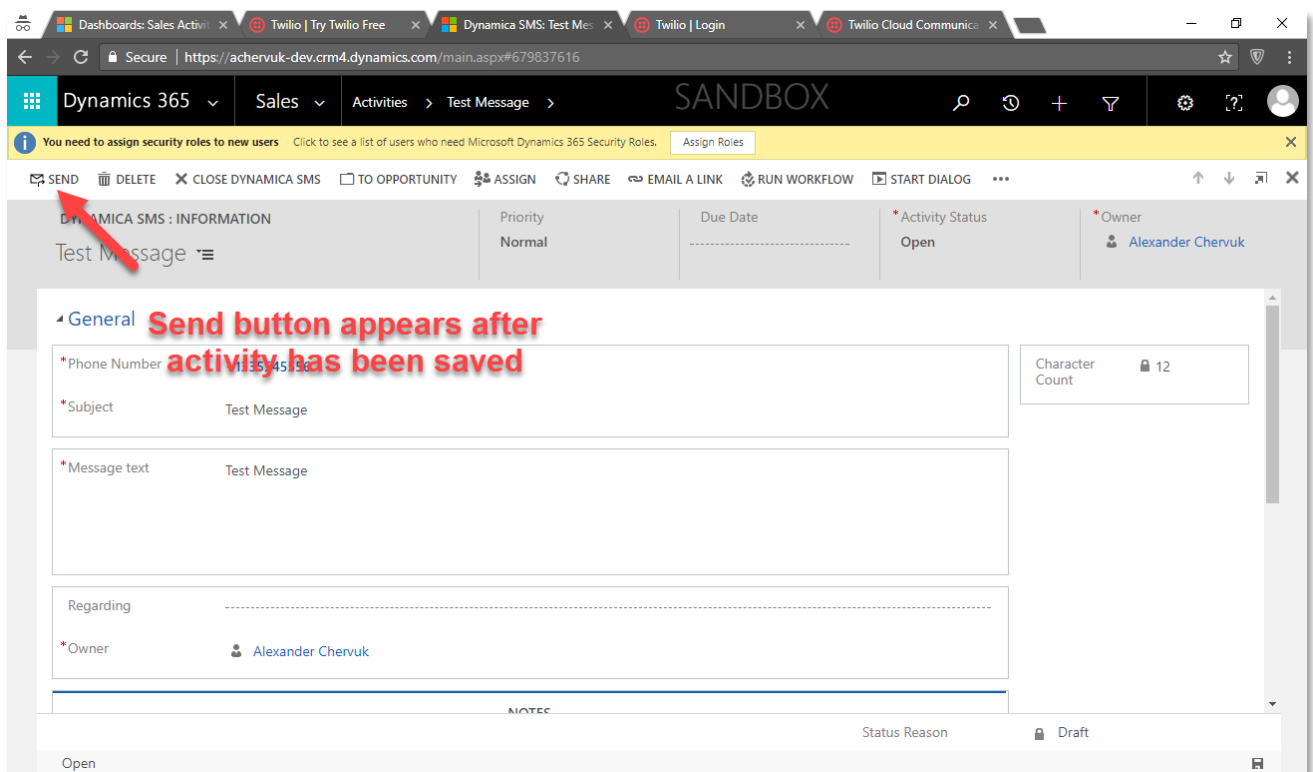
How to use the Application

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





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.