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Sending SMS updates to users using Zapier and Twilio Matthew Wray - 2024-08-21 - Sylwadau (0) - Using Deskpro

Deskpro has Clickatell and Twilio SMS apps to allow you to send ticket update notifications to Agents.

You can also leverage the third party integration app <u>Zapier</u> alongside these platforms to send SMS updates directly to users.

In this example we're going to run through using Zapier to link Deskpro to Twilio and allow you to send out ticket replies as SMS messages.

1) Create accounts for Zapier and Twilio

You can create accounts for both platforms on their websites:

https://zapier.com

https://www.twilio.com/

Both these companies offer a free trial period so you can setup and test out the integration before you need to sign up to a full account of either.

They are premium apps so there may be a cost associated to using them. You can check out their pricing structures on their websites as well.

https://www.twilio.com/pricing

https://zapier.com/app/billing/plans

2) Open up Zapier and go to the 'Zap' editor

Once you've signed up, log into Zapier and Hit 'Make a Zap' in the top right corner of your home page (a 'Zap' is a term Zapier use to describe each integration you create):

MAKE A ZAP

Once selected you will be taken to the Zap creation page.

It's structured along the lines of **Trigger > Action**

In this instance, we would like an occurrence in Deskpro to instigate an action in Twilio so

we will setup the Deskpro side of the integration first.

3) Setup the Deskpro Integration a) Choose app & event (Deskpro Event)

In this example, we're going to use a 'New ticket Reply' to instigate our SMS message but there are also options to send a message when a new ticket or person are created.

5 1. New Ticket Reply in Deskpro	
Choose App & Event	
Choose App (required)	
🧓 Deskpro	\checkmark
Choose Trigger Event (required)	
. New Ticket Reply	\checkmark
New Person	A
Triggers when a new person is created.	
New Ticket	
Triggers when a new ticket is created.	
New Ticket Reply	
Triggers when a ticket is answered.	

b) Choose Account

Choose 'Add new account' and you'll then be taken to an authentication page:

Allow Zapier to access your Deskpro Account?		
Platform (required)		
This is the full domain of your DeskPRO platform. Please include .deskpro.com if you're hosted on the cloud.		
https:// yoursupport.deskpro.com /		
API Key (required)		
You can create a new API key in the Apps / Api Key section of the admin of your Deskpro platform. See here for help.		
1:ABCDEFGHIJKLMNOP1234567890		
Yes, Continue Cancel		

Specify your helpdesk URL and your api key (there's information on generating api keys in our Guides if needed).

c) Find data

Once you've chosen your account you'll be given the option to Find Data. This step is important as it pulls sample data from your helpdesk into Zapier and defines the options that are available when setting up the Twilio side of the integration.

Hit Test and contine if you want to test the connection . Hit test and review if you want to take a look at the kind of data that's being pulled across or you want to Get more samples (you can read more about samples in <u>Zapier's own documentation</u> if you are interested):

Reply A Pulled in 3 mins ago	^
Q Search	
meta: data: ticket:	<u>^</u>
cc:	
labels:	
0:	-

Get More Samples

If all is well with your test you have completed the Deskpro side of the integration :-)

3) Setup the Twilio Integration

Once the test has been completed, click on 'Continue' and you'll be taken to the **Action** element of the integration. This is where you can select Twilio:

Action An action is an event a Zap performs after it starts	Learn more
App Event Do something in an app	Path Build different steps for different rules
	Filter Only proceed when a condition is met
	Format Change how incoming data is formatted
	Delay Pause actions for a certain amount of time

a) Choose app & event (Twilio Event)

Once the test has been completed, click on 'Continue' and you'll be taken to the **Action** element of the integration. This is where you can select Twilio:

Choose app & event	
(ii) Twilio	Change
Action Event	(required
Send SMS	8
CREATE	

b) Choose Account

Click on 'Sign in to Twilio'.

You'll then be taken to an authentication page to key in Account SID and Auth TOken which can be found on your <u>Twilio</u> account

:
Allow Zapier to access your Twilio Account?
Account SID (required)
https://www.twilio.com/user/account/settings
Auth Token (required)
Yes, Continue Cancel

c) Set up action