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Sending SMS updates to users using Zapier and Twilio

Matthew Wray - 2024-08-21 - [Reacties \(0\)](#) - [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 [Zapier](#) 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.



When this happens ...
1. New Ticket Reply in Deskpro

?

...

Choose App & Event

Choose App (required)

 Deskpro

▼

Choose Trigger Event (required)

 New Ticket Reply

▼

New Person

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:// /

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.

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 continue 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 [Zapier's own documentation](#) if you are interested):



Reply A
Pulled in 3 mins ago



meta:

data:

ticket:

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

 Twilio

**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:



Action

2. Send SMS in Twilio

?

...

Choose app & event

 Twilio

Change

Action Event (required)

Send SMS

CREATE

Send SMS
Send a SMS to a number or numbers.

Call Phone
Call a number or numbers and say a message.

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 [Twilio](#) account



Allow Zapier to access your Twilio Account?

Account SID (required)
Log into your Twilio account and find "API Credentials" on this page
<https://www.twilio.com/user/account/settings>

Auth Token (required)
Found directly below your Account SID.

Yes, Continue

Cancel

c) Set up action