



FreshWorks
Freshdesk Twilio Integration User Manual
Version 2.0

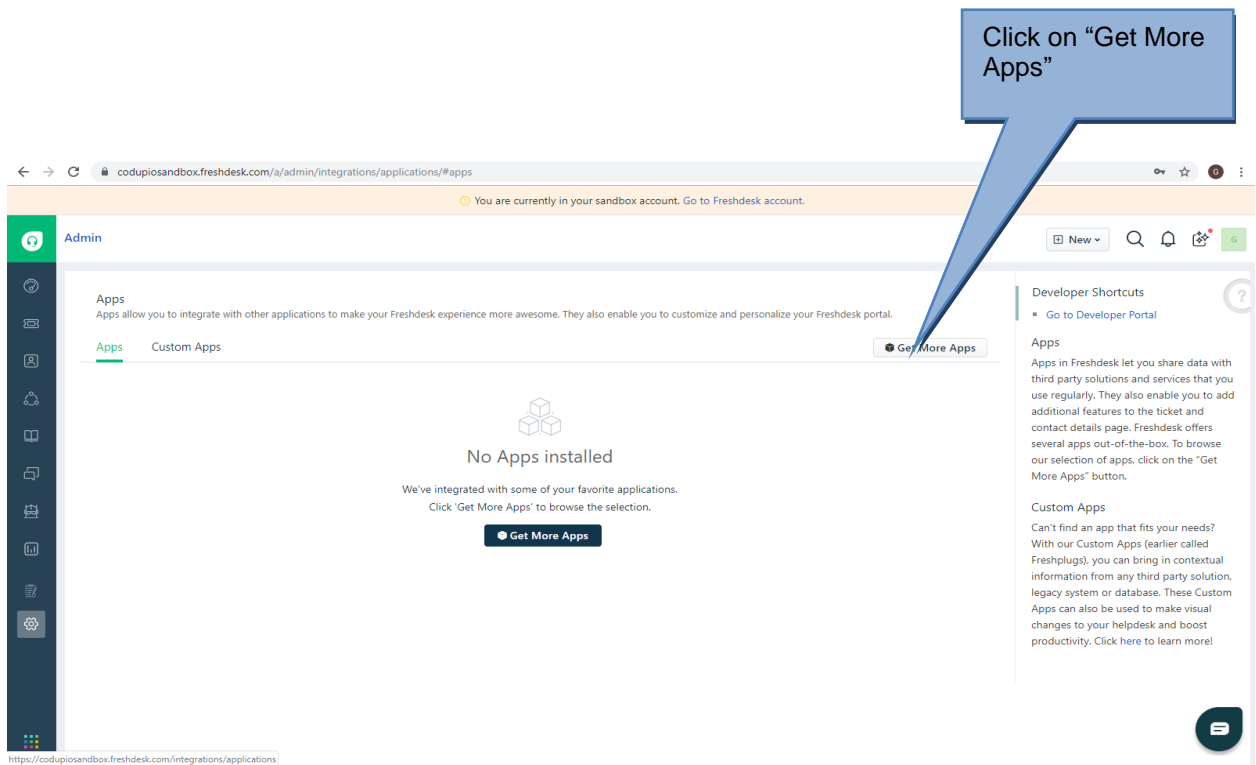
Table of Contents

1. Freshdesk Twilio Configuration	2
1.1 How to install	2
1.2 Sign up and Sign in	3
1.3 Configure Twilio Plus App	5
1.4 Custom SMS Templates	7
1.5 Incoming SMS Settings	8
2. Freshdesk Twilio Flow	10
2.1 SMS from customer to Twilio Number	10
2.2 SMS Came in Freshdesk as Ticket	11
2.3 Replied from Inside ticket	11
2.4 SMS Received by the sender	12

1 - Freshdesk Twilio Configuration:

1.1 - How to install Twilio Plus App:

This section will show you the steps on how to install and configure the Twilio Plus App.



1.2 - Sign up and Sign in to Twilio Plus App:

The screenshot shows the Freshdesk Admin interface. On the left, a sidebar contains various icons. The main area displays the 'Marketplace' section. A search bar at the top right contains the text 'Twilio Plus'. A callout box points to the 'Buy App' button on the Twilio Plus app card, which is priced at '\$3 / agent / month'. Another callout box points to the search bar. The app card also shows the Twilio logo, version 1.0, and publisher Codup.io. Below the app card, there are links for 'Help and Support', 'support@codup.io', 'https://codupio.freshdesk.com', and 'Policy on third party apps'. The right side of the screen shows the 'Twilio Plus' app details, including an 'Overview' tab and a description of the app's functionality. A 'Twilio Paid one App' section is visible at the bottom right.

Click on "Buy App"

Search "Twilio Plus" App

Sign up on with
your email address
and login

You are currently in your sandbox account. Go to Production account.

Admin

New

Apps

Apps allow you to integrate with other applications.

Apps Custom Apps

Twilio Plus

Settings

Login

Email *

Password *

LOGIN

Forgot password

Don't have an account? Sign up

Install Cancel

1.3 - Configure Twilio Plus App:

This is the main screen where the configuration is done for integrating the Freshdesk and Twilio Plus App

- i. Key in the Twilio phone number that you have
- ii. Enter the Account SID (Account SID can be found in Twilio settings)
- iii. Put the Twilio Authentication token (Auth token can be found in Twilio Settings)

The screenshot shows the 'Twilio Plus' configuration page in the Freshdesk Admin interface. The page has a sidebar with 'Admin' and 'Apps' sections. The 'Apps' section is expanded, showing 'Twilio Plus' as the selected app. The 'Integration Settings' tab is active, displaying the following fields:

- Twilio Phone Number***: A text input field with a note: 'Enter your Twilio phone number with country code (Eg. +13345395653). For help on how to get this number, see help article here. Note: You can work with a trial number just to test this but you'll need to upgrade your Twilio account to use this app in a live environment.'
- Twilio Account SID***: A text input field with a note: 'Enter your Twilio Account SID* Where do I get this?'
- Twilio Auth Token***: A text input field.

At the bottom of the 'Integration Settings' tab are 'Install' and 'Cancel' buttons. The 'SMS Templates' tab is also visible, showing a list of tags for outgoing messages: <ticket_url>, <ticket_number>, <agent_name>, <customer_name>, <datetime>, <old_status>, and <new_status>. There are also checkboxes for 'Enable Status Change' and 'Enable New Reply/Public Note'.

- iv) Enter Freshdesk Domain e.g. example.freshdesk.com
- v) Enter Freshdesk API Key which can found in Freshdesk user profile settings
- vi) Enable/Disable SMS reply on status Change – When this is enabled SMS message template will automatically send SMS on ticket status change.
- v) Enable/Disable New reply/Public Note: When this is enabled then SMS message will be automatically send on new public note or a new reply added to a ticket.

The screenshot shows the 'Settings' page for a Freshdesk integration. It includes fields for Twilio Account SID, Twilio Auth Token, Freshdesk Domain, and Freshdesk API Key. There are also checkboxes for 'Enable Status Change' and 'Enable New Reply/Public Note'. Callouts from the text above point to these specific fields and options.

iv) Enter Freshdesk Domain

v) Enter Freshdesk API Key

vi) Enable Status Change

v) Enable New Reply/Public Note

Settings Serverless Logs

Note: This app works with a trial number just to get you started, but you'll need to upgrade your account to use this app in a live environment.

Twilio Account SID

Enter your Twilio Account SID Where do I get this?

Twilio Auth Token

Enter your Twilio Auth Token Where do I get this?

VALIDATE TWILIO ACCOUNT

Freshdesk Domain

Your Freshdesk Domain (Eg. example.freshdesk.com)

Freshdesk API Key

Enter your Freshdesk API Key Where do I get this?

VALIDATE FRESHDESK API KEY

the agent name - <agent_name>
the customer name - <customer_name>
current date & time - <datetime>
the old status of the ticket - <old_status>
the new status of the ticket - <new_status>

☒ Enable Status Change

Change in ticket status: Configure the body text for the outgoing SMS when the status of a ticket changes.

The status of your ticket #<ticket_number> has been changed from <old_status> to <new_status>. You can view the ticket at <ticket_url>

☒ Enable New Reply/Public Note

New Reply/Public Note: Configure the body text for the outgoing SMS when a new reply or public note is added to a ticket.

A new reply has been added to your ticket #<ticket_number>. You can view the ticket at: <ticket_url>

*Applicable for status change SMS template only

1.4 - Custom SMS Templates:

Functionality which provides a place where SMS templates can be saved with tags (placeholders). The same templates can be used to send SMS

u to integrate with other applica

Custom Apps

Test Twilio plus
Test Twilio plus

Message Media App
App to send message to user

Advisa
- Add reply on Ticket Page w

Test Twilio plus

Settings Serverless Logs

Integration Settings Custom SMS Templates Incoming SMS Settings

Add New Template

Enter Template Name

Enter Template Body

You can use these tags in your SMS template to display
the ticket URL - <ticket_url>
the ticket number - <ticket_number>
the agent name - <agent_name>
the customer name - <customer_name>
current date & time - <datetime>

CANCEL SAVE

Save Cancel

1.5 - Incoming SMS Settings:

Incoming SMS settings has functionality which will create new ticket when there is no activity within specified time duration which can be set from below mentioned settings

i) When selected this will create new ticket from SMS after specified time duration

ii) Twilio webhook which should be used in the Twilio active number configuration

The screenshot shows the 'Incoming SMS Settings' page in a web browser. The page has a sidebar with 'Admin' and 'Apps' sections. The main content area is titled 'Incoming SMS Settings' and includes the following elements:

- Create new ticket by sms:** Two radio buttons are present. The first, 'When user has no activity within specified time duration', is selected. The second is 'When user sends message in predefined format'.
- Time Duration:** A field showing 'HH' as '1'.
- Twilio:** A section with instructions: 'To create and update ticket via sms, copy and paste the url to your twilio number's webhook'. It includes a link to an article and a specific URL: <https://twiliopaidsmsapp.codup.io/29/sms/reply>.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

iii) When this is selected then ticket will be created by SMS in predefined format e.g. RHS format

Test Twilio plus

Logs Serverless Logs

Integration Settings Custom SMS Templates Incoming SMS Settings

Incoming SMS Settings

Create new ticket by sms

☐ When user has no activity within specified time duration

☒ When user sends message in predefined format

☒ Subject is required
Is subject required for incoming sms in order create new ticket.

Default subject

Sup!

Fallback subject when no subject is provided for new ticket.

☒ Email is required
Is email required for incoming sms in order create new ticket.

Error message

Wrong pattern!

Incoming sms format

New ticket

To create a ticket via sms customer needs to send message in the following format

NEW
Sub: subject of the ticket
Email: email of customer
ticket description

E.g.
NEW
Sub: Technical support needed
Email: customer@example.com
I am having problem with ...

Reply on ticket

In order to reply to existing ticket, customer need to send message according to the following format

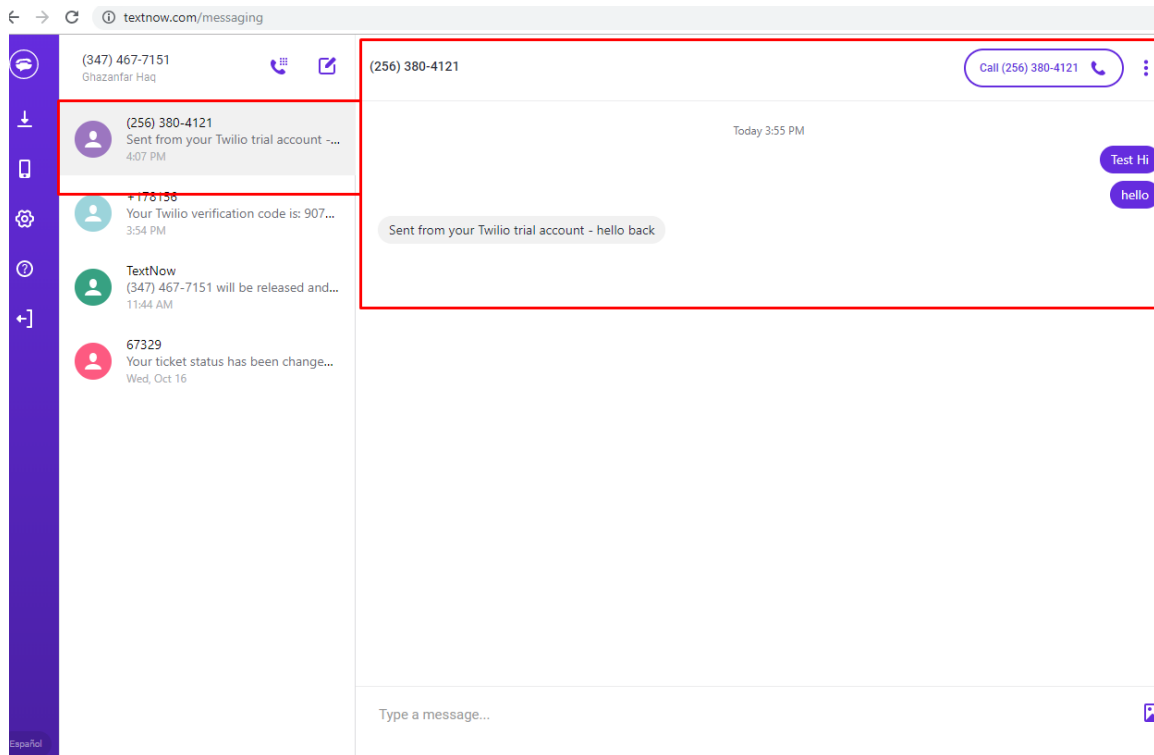
Ticket id
your message

E.g.
52
I have followed the instructions and ...

2 - Freshdesk Twilio Flow

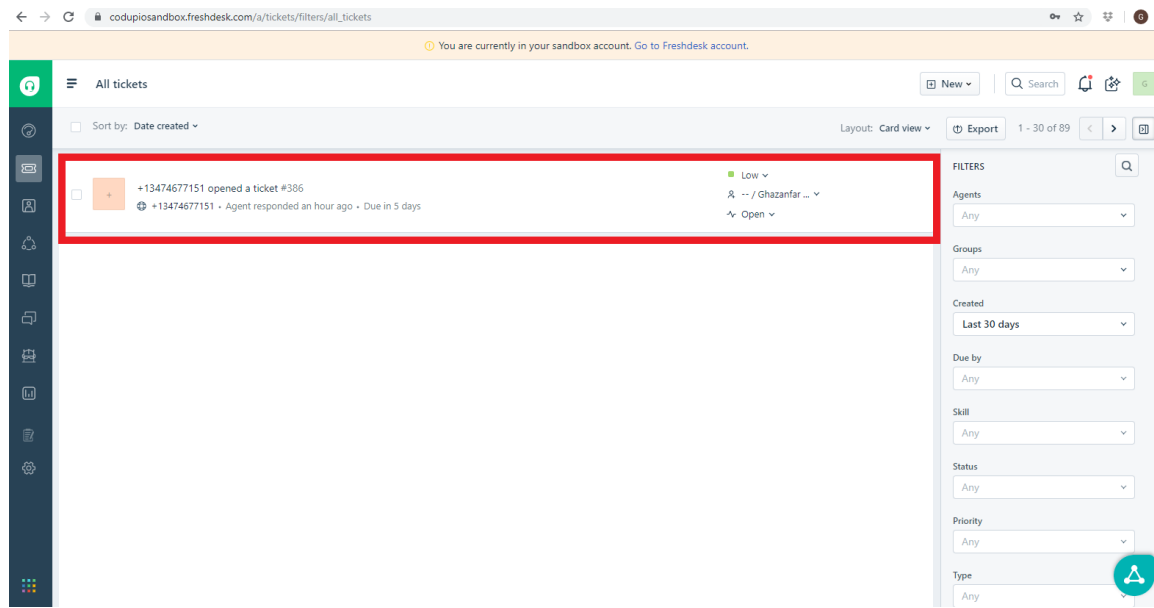
2.1 - SMS from customer to Twilio Number:

SMS is sent from client contact number to the Twilio number as mentioned below



2.2 - SMS Came in Freshdesk as Ticket:

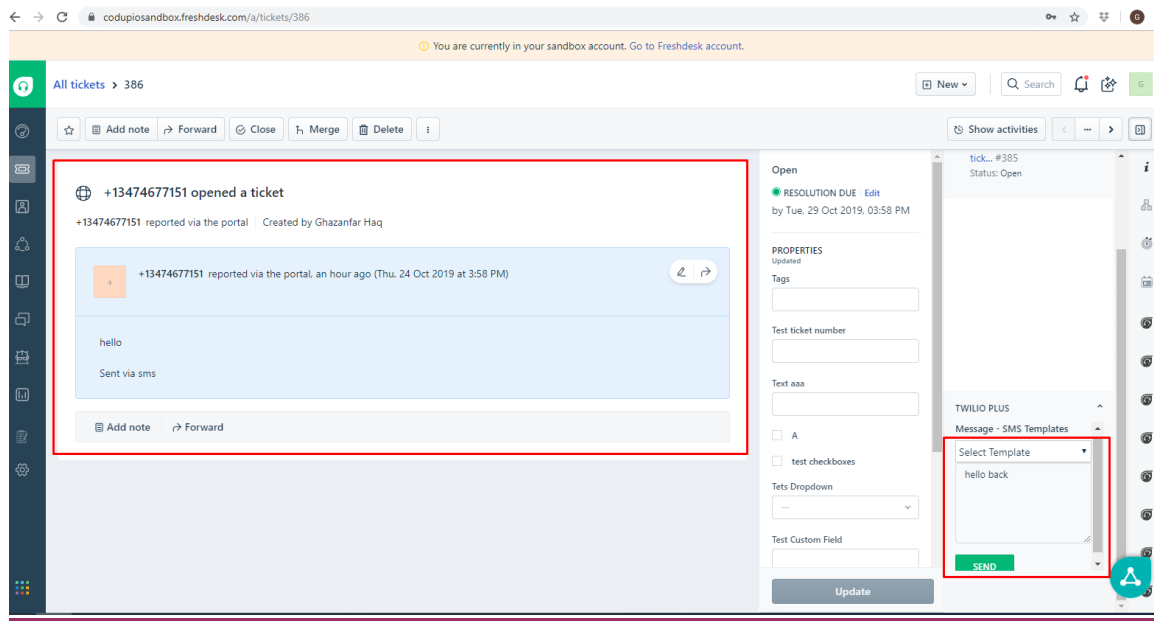
The SMS lands in the form of a ticket in Freshdesk as mentioned below



2.3 - Replied from Inside ticket:

When you open ticket in Freshdesk you can see the message as mentioned below

Twilio Plus App gets installed as shown below marked in red box. When admin type a message in the box and send it, it will be replied to the sender on the same number.



2.4 - SMS Received by the sender:

The reply which the sender has received is marked in orange oval shape as mentioned below

