



Twilio SMS Guide

How to Implement Twilio SMS in SessionM

Abstract

This guide demonstrates how to set-up and implement Twilio SMS provider in SessionM. It shows how to set up the provider configurations and campaigns.

It then demonstrates how to implement web or mobile app opt-ins for SMS utilizing SessionM APIs.

January 2020

Contents

Twilio SMS Implementation	3
Twilio Provider Pre-Requisites	3
SessionM Global SMS Set Up.....	3
SessionM SMS Opt-In Campaign Set Up	5
SessionM Set up an SMS campaign.....	7
Web or Mobile App SMS Opt-In via API	9

Twilio SMS Implementation

SessionM and Twilio SMS together provide the capability to schedule and trigger SMS messaging. SessionM supports both mobile and non-mobile (web or mobile app) opt-ins. SMS is a highly regulated channel and opt-in management is key to both user experience and regulatory compliance.

Twilio Provider Pre-Requisites

Prior to enabling Twilio SMS in SessionM the following are required.

- Procure bulk SMS messaging SOW with SessionM
- Procure short code rental from SessionM.
- SessionM delivery team is required to set up a new Twilio SMS messaging provider.

SessionM Global SMS Set Up

Create a Global SMS Campaign to set default SMS configuration (keywords, messages, etc.). In SessionM only 1 global SMS campaign is allowed per SessionM instance.

1. Navigate to Campaigns Module on the SessionM dashboard.

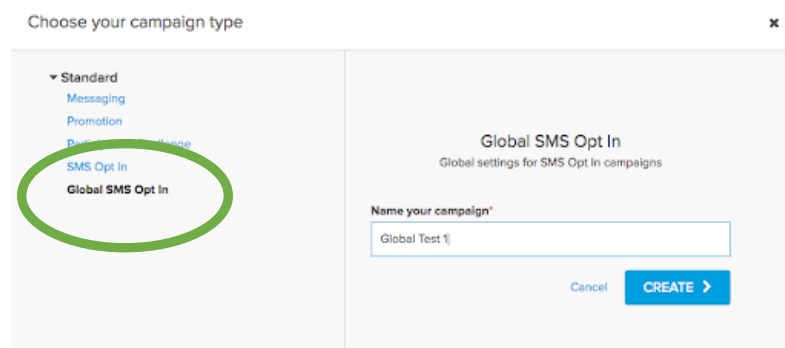
Campaigns & Content



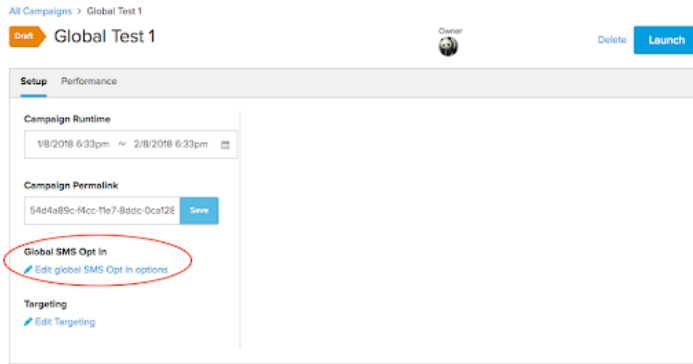
2. Click **Create Campaign**.



3. Click **Global SMS Opt-In**.



4. Click **Edit global SMS Opt in options**.



5. Configure the global options.

Welcome message
Thanks for the confirmation! you are all set!

Global Opt Out Keywords
STOP END QUIT CANCEL UNSUBSCRIBE

Global Opt Out message
You have unsubscribed

Help Keywords
HELP

Help message
HELP FROM GLOBAL

No Match message
Message doesn't match any keyword

Save

Options include:

- Select an existing SMS service provider (this should be Twilio provider that was set up).
- Select a Target Phone Number (this is your short code).
- Add one or multiple Global Opt-In keyword(s).
- Add an Opt-In welcome message that triggers when a customer sends Opt-In via text message.
Sample message: "Welcome to {Description} Alerts! Msg&data rates may apply. {Message frequency} Reply HELP for help, STOP to cancel."
- Global Opt-Out Keyword defaulted to 'STOP' and is not editable.
- Add a Global Opt-Out message. Message triggers when a customer sends 'STOP' via text message.
Sample message: "This is {{Description}} Alerts. {you have now been opted-out} Reply JOIN to opt back in. For further information go to {{website}}."
- Help Keyword defaults as 'HELP' and is not editable.
- Add a Help message. The message triggers when a customer sends 'HELP' via text message.

Sample message: ““This is {{Description}} Alerts. {Message frequency} Reply STOP to cancel. For further information go to {{website}}.”

- Add a “No Match” message that triggers when a customer sends a keyword that does not match any keywords.

Sample message: “Sorry we did not understand that for more information please reply {enter your keywords} to subscribe, HELP or to stop: STOP {any other stop keywords}.
SessionM SMS Opt-In Campaign Set Up

SessionM SMS Opt-In Campaign Set Up

Create an SMS opt-in campaign to capture opt-in status for users. This campaign manages an SMS opt-in/out messaging preference that is referenced in subsequent marketing campaigns both scheduled or triggered.

SMS is a highly regulated communication channel. Not respecting user opt status can lead to your short code being terminated by mobile carrier or incurring regulatory fines.

Single Opt-in is recommended for mobile originated opt-ins. This is where a user texts a keyword like “join” to short code 1234-56

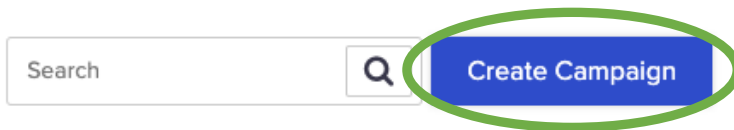
Double Opt-in is recommended for a non-mobile originated opt-in. This is where user’s opt-in to SMS via a web or mobile app. See Section “[Managing Opt-ins from Web or mobile App](#)”

1. Navigate to Campaigns Module on the SessionM dashboard.

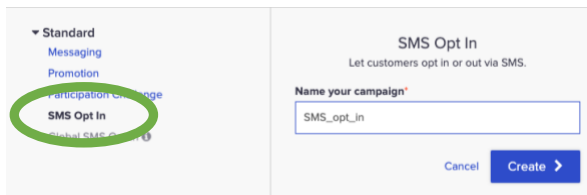
Campaigns & Content



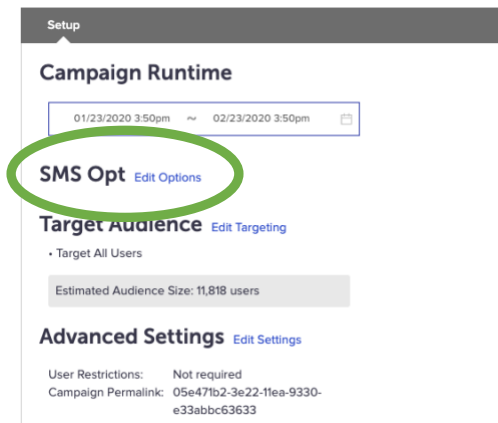
2. Click **Create Campaign**.



3. Click an **SMS Opt-In**. Name the campaign. Click **Create**.

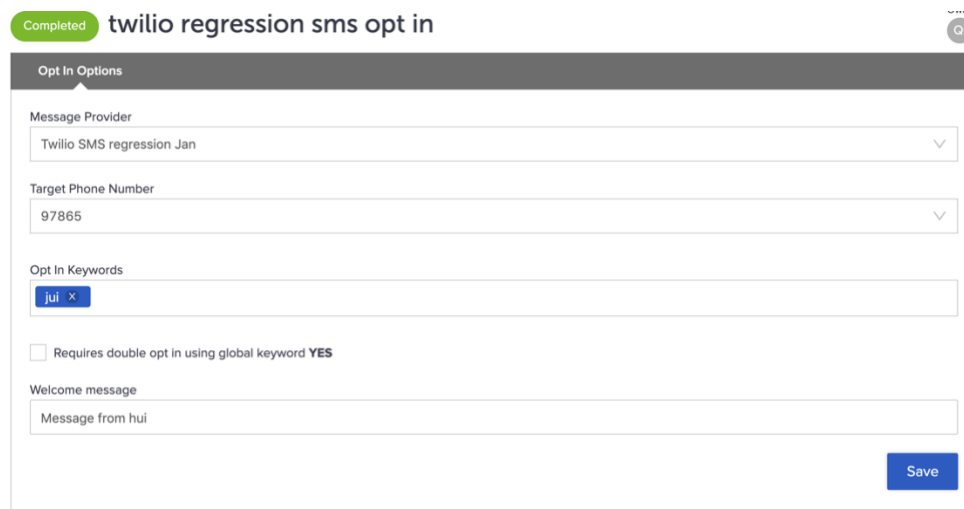


4. Click **Edit Options**.



The screenshot shows the 'Campaign Runtime' section of a setup page. At the top, there is a date range selector showing '01/23/2020 3:50pm' to '02/23/2020 3:50pm'. Below this, the 'SMS Opt' link is circled in green, with 'Edit Options' next to it. Underneath, the 'Target Audience' section shows 'Target All Users' and an 'Estimated Audience Size' of 11,818 users. At the bottom, the 'Advanced Settings' section includes 'User Restrictions: Not required' and a 'Campaign Permalink'.

5. Edit the Opt In options.



The screenshot shows the 'Opt In Options' configuration page. At the top, it says 'Completed twilio regression sms opt in'. The form includes several fields: 'Message Provider' set to 'Twilio SMS regression Jan', 'Target Phone Number' set to '97865', and 'Opt In Keywords' with 'hui' entered. There is a checkbox for 'Requires double opt in using global keyword YES' which is currently unchecked. A 'Welcome message' field contains 'Message from hui'. A 'Save' button is located at the bottom right.

Settings include:

- Select an existing SMS service provider (this should be Twilio provider that was set up).
- Select a target phone number (this is your short code).
- Add one or multiple opt-In keyword(s).
- If using a double opt-in, click **Requires double opt in using global keyword**. The welcome message now changes to a confirmation message
- Add an opt-In welcome message that triggers when a customer sends Opt-In via text message.

Sample message: “Welcome to {Description} Alerts! Msg&data rates may apply. {Message frequency} Reply HELP for help, STOP to cancel.”

6. Click **Save**.

SessionM Set up an SMS campaign

Once the global settings and opt-in/out campaigns are set up. You are now able to set up scheduled or triggered SMS marketing or communication campaigns

1. Navigate to Campaigns Module on the SessionM dashboard.

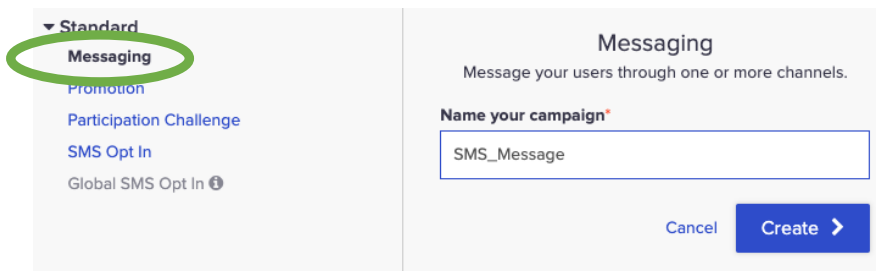
Campaigns & Content



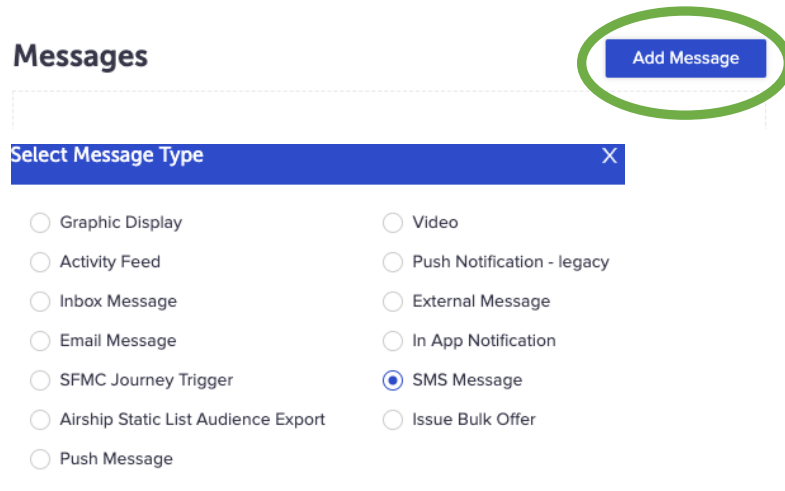
2. Click Create Campaign.



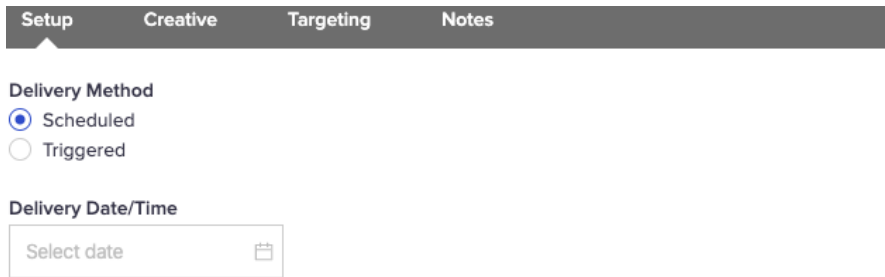
3. Create a messaging campaign for SMS.



4. Click **Add Message** and then select **SMS Message**.



5. On the Set Up tab, choose a **Scheduled** or **Triggered** SMS message.



Setup Creative Targeting Notes

Delivery Method

Scheduled

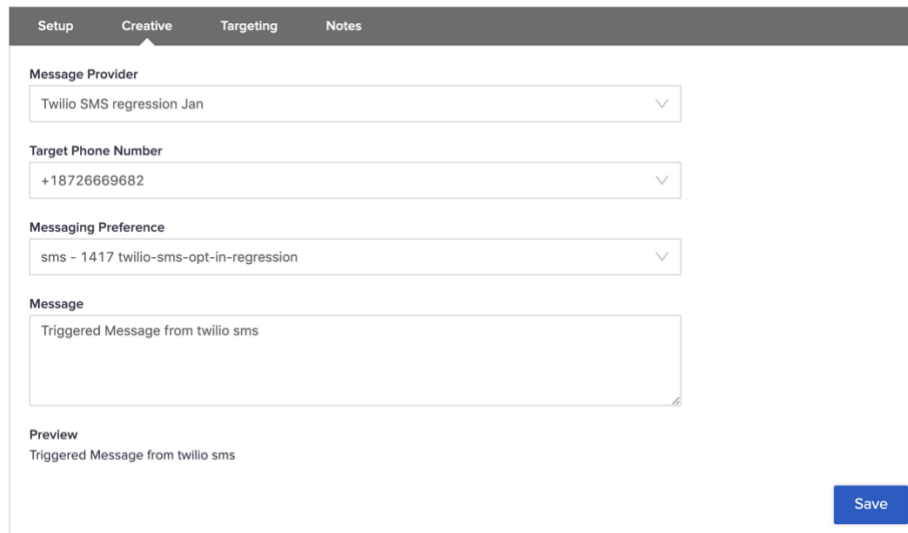
Triggered

Delivery Date/Time

Select date 

More information on setting up campaigns is available at <https://docs.sessionm.com/user/Content/Campaigns/CampaignsLP.htm>

6. Click the **Creative** tab and configure the SMS Message content.



Setup Creative Targeting Notes

Message Provider

Twilio SMS regression Jan

Target Phone Number

+18726669682

Messaging Preference

sms - 1417 twilio-sms-opt-in-regression

Message

Triggered Message from twilio sms

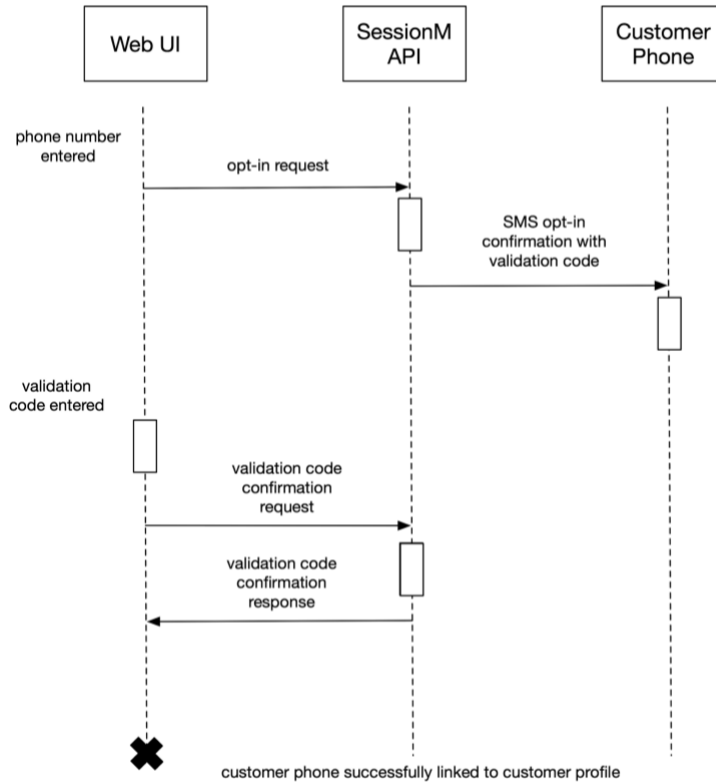
Preview

Triggered Message from twilio sms

Save

Web or Mobile App SMS Opt-In via API

This SessionM API sequence diagram depicts the flow web or mobile app SMS opt-in/out.



7. Using a web or mobile app, a user opts-in to SMS.
8. The web app calls the SessionM SMS Opt-in API from the web form or mobile API.

Request

```

/priv/v1/apps/{app_key}/messaging_events/sms/validatiton/request
{ "external_id": "{external_id}", "to_phone_number": "{phone_number}" }
  
```

Response

```

{
  "status": "ok"
}
  
```

9. The user receives a verification code on their mobile device.

10. The user enters this verification code through the web form and verifies their number.

Call SessionM SMS Validation API

Request

priv/v1/apps/{app_key}/messaging_events/sms/validatiton/confirm

```
{
  "external_id": "{external_id}",
  "to_phone_number": "{phone_number}",
  "validation_code": "{validation code received on the mobile device}"
}
```

Response

```
{
  "status": "ok"
}
```

11. The user receives a message that their number is verified and that they are now opted in for that offer. (This should be set up as a confirmation message in the sms opt-in campaign).

12. The user starts receiving SMS messages.

Notes

- This flow ensures that the users can opt in for SMS without having to opt in though their mobile phones and get their phone numbers verified.
- User will not receive SMS marketing messages unless they input the verification code through the webform. The user's number has to be verified before they are opted in to receive SMS messages.
- In case that the user has multiple phone numbers tied to their account, the user only gets opted in to receive offers for the first verified phone number.