

Twilio Integration for Alchemer Workflow

The Twilio integration is available for purchase as an add-on. If you are interested in purchase, please [contact us](#) for additional information.

Overview

In this guide, we'll walk you through how to set up and use the new 'Send via SMS' and 'Send via Twilio channel' merge codes in the 'Send invite' and 'Send email' steps. With these merge codes, you can configure the 'To' address of your messages to use SMS or other Twilio-supported channels, ensuring your communication reaches your audience where they're most likely to engage.

Demo Video

Your browser does not support HTML5 video.

Setup

This integration requires the use of a custom webhook that when fired will initiate the workflow in Alchemer.

Prior to configuring the Twilio integration within Alchemer, we recommend going into your external system and determining how the system will call the provided HTTPS endpoint and

initiate the workflow. At this time, also define the field names and values that you want pass to your Workflow as a part of the initiator.

1. Create a new Workflow.

The screenshot shows the Alchemer Workflow management interface. On the left is a dark sidebar with navigation options: Survey, Workflow (highlighted), Mobile, Audience, Design Library, Research Library, Integrations, Account, and Support Center. The main content area is titled 'Alchemer Workflow' and features a 'Create New Workflow' button at the top left. Below this is a list of workflows:

Workflow Name	Status	In Progress	Completed	Steps
Gold Demo Certification Process	Inactive	0	2	9
New Webpage Design- Feedback Program	Active	1	0	19
30/60/90 Employee Evaluation	Active	0	0	30

2. Name your Workflow.

The 'Create New Workflow' dialog box is shown. It contains the following text and elements:

Create New Workflow

* What would you like to name this Workflow?

Customer Service Feedback Workflow

Cancel Start Building

3. After creating a new Workflow, select Twilio as your Workflow initiator.

Select Initiator

from an event in Gladly | Alchemer | Prototype

- Microsoft Dynamics 365**
Start an Alchemer Workflow from an event in Microsoft Dynamics 365
- Salesforce**
Start an Alchemer Workflow from an event in Salesforce
- Scheduled**
Start the Alchemer Workflow on a schedule
- Share Link**
When a user clicks on a custom workflow link
- Shopify**
Start an Alchemer Workflow from an event in Shopify
- Survey Listener**
When a given survey is completed
- Twilio**
Alchemer integration with Twilio
- Zendesk**
Start an Alchemer Workflow from an event in Zendesk
- Zoho**
Alchemer integration with Zoho

Need Help? [Next](#)

4. Select "Custom webhook with send SMS via Twilio".

Select Action

- Custom webhook with send SMS via Twilio**
Start the Workflow from a webhook.
Adds send Twilio SMS support to the Workflow.

Need Help? [Previous](#) [Next](#)

5. Click next on the integration overview screen.

Configure Initiator

Webhook + Twilio | Webhook with SMS support

Start the Workflow from a webhook. Adds send Twilio SMS to the Workflow.

Need help? [Learn more](#)

v241216

Previous

Next

6. Configure your custom webhook. Copy the provided webhook URL and paste that URL into your external system. Set the method to POST

Configure Initiator

Webhook URL

- Set the webhook URL in your system to this URL
- Set the method to POST

Webhook URL

`https://[redacted].trayapp.io` 

Custom Fields

Add Custom Fields to define the fields this webhook should accept. At least one field that will contain the phone number to send the SMS message is required.

Custom Fields*

Warning: This field will send an empty array

Add to Custom Fields

Previous

Next

7. To pass Custom Fields into your Workflow, define which fields the webhook should accept. Fields can be passed as any combination of query parameters, and/or as JSON in the body of a POST request. These fields can then used in Survey Invite steps, Send Email steps, or other workflow actions.

At least one field that will contain the phone number to send the SMS message is required.

Configure Initiator

https://trayapp.io

Custom Fields

Add Custom Fields to define the fields this webhook should accept. At least one field that will contain the phone number to send the SMS message is required.

Custom Fields*

- 0
sms_send_to
- 1
sms_send_from

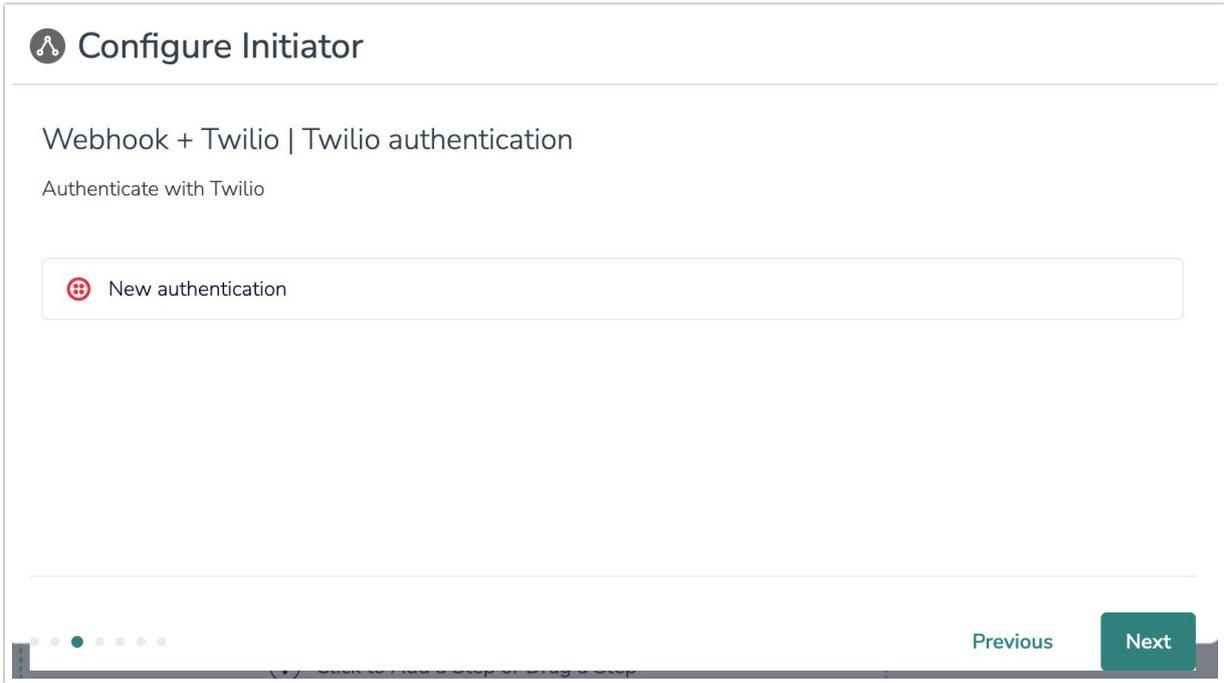
Add to Custom Fields

Previous Next

Important Information on Custom Fields

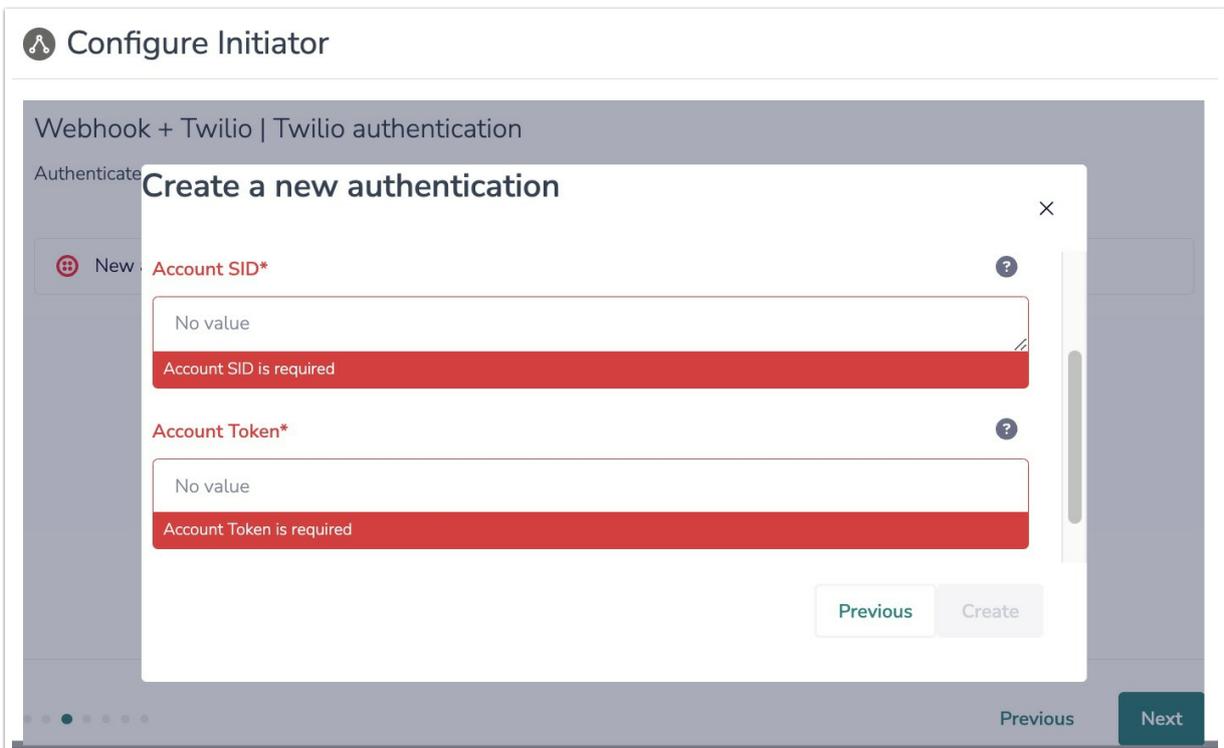
1. Field that are not configured in Alchemer, but are still passed by the external system, will be ignored.
2. The request must be in a flat key-value pair structure. Alchemer will ignore any nested objects and arrays in the JSON body.

8. Authenticate with your Twilio account. Click new authentication.



9. Name your authentication. Then provide your Account SID and Account Token. Then click "create".

You can find your Account SID and Account Token in your Twilio Admin Console.



10. Select the send options you want to enable. The selected methods will be available as merge codes to send messages to in the workflow.

Configure Initiator

Webhook + Twilio | Select the send options to enable

Select the send options you want to enable. The selected methods will be available as merge codes to send messages to in the Workflow.

Select Twilio send methods to enable*

Type to search

- Enable 'Send via Twilio SMS'
- Enable 'Send via Twilio Channel'
- Enable both 'Send via Twilio SMS' and 'Send via Twilio Channel'

Previous Next

11. Choose the fields that will be passed to the initiator when this Workflow runs, which will contain the values for the Twilio 'To' and 'From' fields.

Configure Initiator

Select the fields that will be passed to this initiator when this Workflow runs that will contain the values you want to use for the Twilio 'To' and 'From' fields.

Set send via Twilio Channel 'To' field*

channel_send_to

The value passed to the webhook in this field will be used in the 'To' field in the send request to Twilio. The value passed must be a Twilio channel address. Example: whatsapp:+15552229999

Set send via Twilio Channel 'From' field*

channel_send_from

The value passed to the webhook in this field will be used in the 'From' field in the send request to Twilio. The value passed must be a Twilio channel address or a Twilio Messaging Service SID that is active within your Twilio account.

Previous Next

12. Click "Save" to complete configuration.

Merge codes for 'Twilio | Send via Twilio SMS' and/or 'Twilio | Sent via Twilio Channel' are now available to use in the workflow.

You can use these merge codes as the 'To' address in email steps.

Using the Twilio Integration

1. After configuring the initiator, add a Survey Invite and Survey Step to your Workflow.
2. Edit the survey invite step. Under the 'To' address click "Select a Merge Code".

Edit Action

PRIMARY SETUP ♥ Need Help?

If multiple recipients are required, add an additional Survey Invite step.

From Name:
Quick fills: [Me](#)
[Select a Merge Code](#)

From Address:

Reply To:

To:
Quick fills: [Me](#)
[Select a Merge Code](#)

Subject:

Your next step is ready. Please click the link below to continue!
[Continue on your journey](#)

Automatically generate plain-text version

3. Under Integration Fields select 'Twilio | Send via Twilio SMS' and/or 'Twilio | Sent via Twilio Channel'. Click Save after finishing the rest of the Survey Invite step.

PRIMARY SETUP ♥ Need Help?

Quick fills: Me
Select a Merge Code

From Address: @alchemer.com (Alchemer) ▼

Reply To:

To:

Quick fills: Me

Workflow

About Your Account

Integration Fields (8)

Twilio Send via Twilio Channel	Insert
Twilio Send via Twilio SMS	Insert
channel_send_from	Insert
channel_send_to	Insert
email	Insert
name	Insert

Subject:

FAQs

▶ What permissions do I need within Alchemer to set-up and use the Twilio integration?

▶ This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

Related Articles