

Twilio Integration for Alchemer Workflow

Overview

Twilio is a cloud communications platform used by organizations to send and receive SMS, MMS, and other messages programmatically via API.

The Alchemer integration with Twilio supports Send Message and Send Message Using Content Template. The Alchemer Twilio integration allows Alchemer to use information from Twilio to get data, personalize workflow paths, enrich routing logic, create merge codes, and update information in Twilio without manual intervention.

Common uses for the Alchemer Twilio integration

- Personalize emails and workflow steps with information in Twilio
- Use Twilio information in workflow logic
- Trigger SMS or MMS notifications automatically when a workflow step is reached

What can the Alchemer Twilio integration do?

- Send Message
- Send Message Using Content Template

You will need

- Twilio API credentials (Account SID and Auth Token)
- An Alchemer plan that includes integrations and the Integration Manager permission enabled.
 - [Contact us](#) if you are unsure if your plan includes integrations.

Setup Alchemer Twilio integration in workflow

Twilio | Send Message

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You will need:

- Twilio API credentials (Account SID and Auth Token)
- Field containing the recipient phone number
- A Twilio phone number or Messaging Service SID to send messages from

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the Twilio connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **Twilio | Send Message**.
5. **Twilio | Authentication:** Select an existing authentication or create a new authentication.
6. **Twilio | Create message:** Select the fields in this workflow that contain the values you want to use to map to the Twilio fields. All fields are required.
 - **Note:** You can use a standard E.164 number format or a Twilio channel address. The 'From' field can be a messaging service SID
7. Save the action.

Status codes

- 200: Successfully sent message
 - 400: Failed to send message
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Twilio | Send Message Using Content Template

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You will need:

- Twilio API credentials (Account SID and Auth Token)
- Field containing the recipient phone number
- A Twilio phone number or Messaging Service SID to send messages from
- A Twilio Content Template SID
- Content variables (optional)

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the Twilio connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **Twilio | Send Message Using Content Template**.
5. **Twilio | Authentication:** Select an existing authentication or create a new authentication.
6. **Twilio | Create message:** Select the fields in this workflow that contain the values you want to use to map to the Twilio fields. All fields are required.
 - **Note:** You can use a standard E.164 number format or a Twilio channel address. The 'From'

field can be a messaging service SID.

7. **Twilio | Content variables:** Map the Alchemer fields for each of the content template variables you want to pass.

- Note: You will need to type the name of your variable on the right side of the mapper and select it.

8. Save the action.

Status codes

- 200: Successfully sent message
 - 400: Failed to send message
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Testing and Troubleshooting

Testing and Validation

How to test

- Trigger the workflow and monitor individual runs in monitor tab in your workflow
 - Click on individual workflow runs to see metadata outputs
- Confirm the expected message is sent via Twilio.
- Use metadata for verification and debugging.

How to verify results

- Check the message log in your Twilio console.
 - Ensure retrieved or updated values match expectations.
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Monitoring Integration Activity

Where to find logs

- Go to Monitor
- Select the integration step you want to inspect.

What logs display

- Input/Output
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Troubleshooting

Authentication issues

- Incorrect or expired credentials
- Missing permissions in Twilio

Lookup failures

- Invalid identifier values

- No matching records

Mapping errors

- Unsupported or invalid fields
- Incorrect formatting

API errors

- Validation issues
 - Endpoint restrictions
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FAQs

What permissions do I need?

Integration Manager in Alchemer and API permissions in Twilio.

When does the integration run?

When the workflow triggers and reaches the integration step.

Can I use multiple Twilio actions in one workflow?

Yes. Actions can work independently or together.

Why isn't my data updating?

Check the Action Log for lookup issues, mapping problems, or API errors.

What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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