

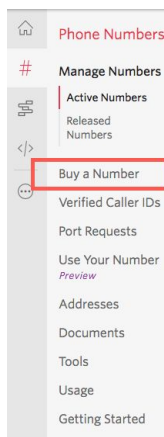
# SMS for Flows Implementation and User Guide

SMS for Flows allows you to send SMS text messages from Flow and Process Builder via the Twilio Messaging API. This document will walk you through the post installation configuration step and how to embed this functionality into your flows. To leverage this functionality, you'll need to first create a Twilio account.

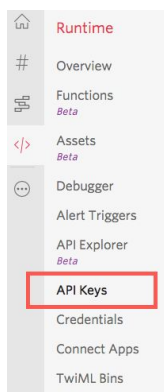
## Twilio Setup

Please follow the instructions on twilio's [website](#) to do the following:

1. Create a phone number if you don't already have one.

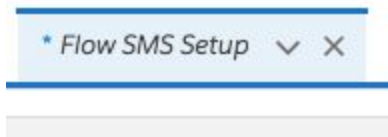


2. Create an API key and secret

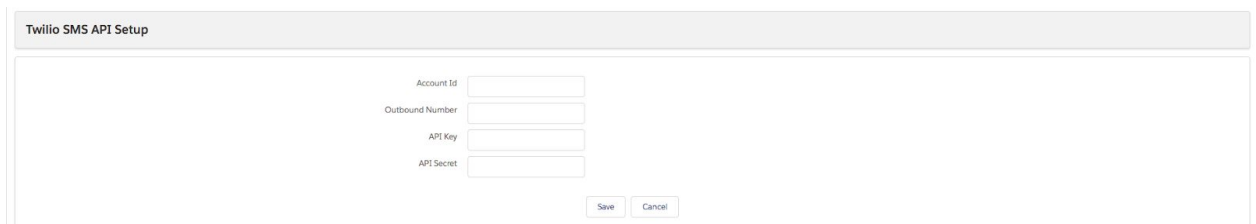


## Salesforce Configuration

1. Navigate to the Twilio SMS API Setup page on the Flow SMS Setup tab.

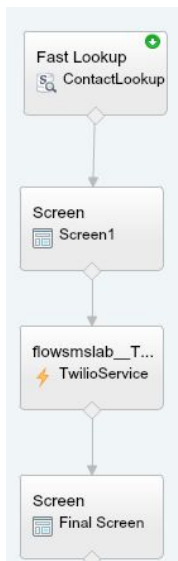


2. On the Twilio SMS API Setup page, enter the Account Id (SID), Outbound Number, API Key and API Secret that are tied to the twilio account. The outbound number is the number associated to the Twilio account and appears as the sender of the message.



## Flow

1. Create a flow that has phone number and message input fields. When embedding the flow in a Lightning app page, you can leverage the recordId variable and a look up the an object to default the phone number.



2. From the Element tag, drag the flowsmslab\_\_TwilioService Apex into the canvas. Set the input variables messageBody and toNumber to the message text and phone from the input screens.

flowsmslab\_\_TwilioService

Action name: flowsmslab\_\_TwilioService

Description:

General Settings

Name \* TwilioService

Unique Name \* TwilioService

Add Description

Inputs/Outputs

Inputs Outputs

Assign elements or values from your flow to the action's inputs.

| Target      | Source     |  |
|-------------|------------|--|
| messageBody | {!Message} |  |
| toNumber    | {!Phone}   |  |

Add Row

OK Cancel

- You can also choose to set the output fields. The available ones are sid, status, errorCode, and errorMessage. If the request was successfully sent to Twilio, you'll receive a sid. Refer to Twilio Messaging API documentation to understand the status and error messages.

flowsmslab\_\_TwilioService

Action name: flowsmslab\_\_TwilioService

Description:

General Settings

Name \* TwilioService

Unique Name \* TwilioService

Add Description

Inputs/Outputs

Inputs Outputs

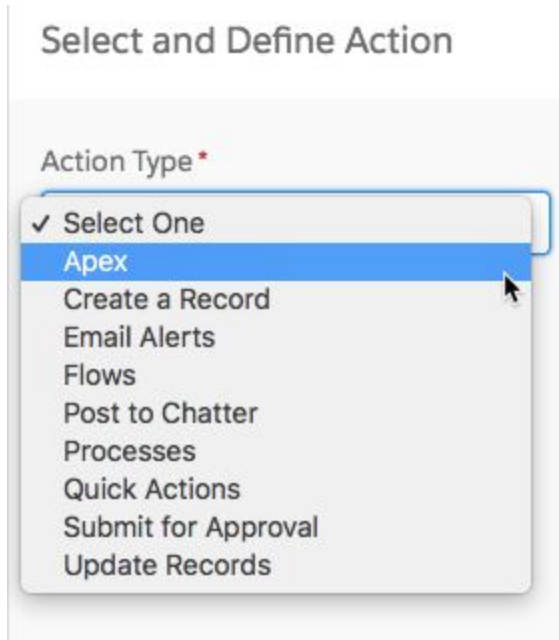
Assign the action's outputs to variables to reference them in your flow

| Source       | Target          |  |
|--------------|-----------------|--|
| errorCode    | {!errorCode}    |  |
| errorMessage | {!errorMessage} |  |
| sid          | {!sid}          |  |
| status       | {!status}       |  |

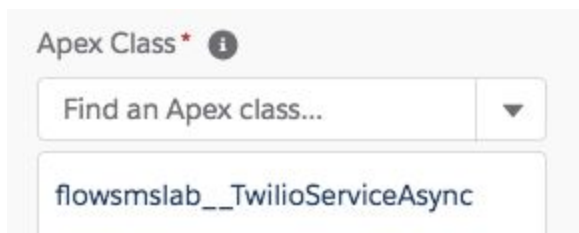
OK Cancel

## Process Builder

1. In your process builder create an Apex Action



2. Select the flowsmslab\_\_TwilioServiceAsync Apex method. You'll have to use the Async version (queueable apex) because this is performing a callout in a DML operation.



3. Set Variables

