Twilio SMS Notification

Extension for Magento by Azaleasoft

User Guide

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1.Installation Process

1) Extension Purchased From Magento Marketplace

(The installation process via Component Manager)

● Login to your Magento Admin panel and navigate to
 System -> Web Setup Wizard.

● Enter marketplace authentication keys. For more information, please visit
http://devdocs.magento.com/guides/v2.0/installgde/prereq/connectauth.html.

● Navigate to **Component Manager Page** and click **Sync** button to update your purchased extension.

● Click **Install** in the Action Column to install the extension.
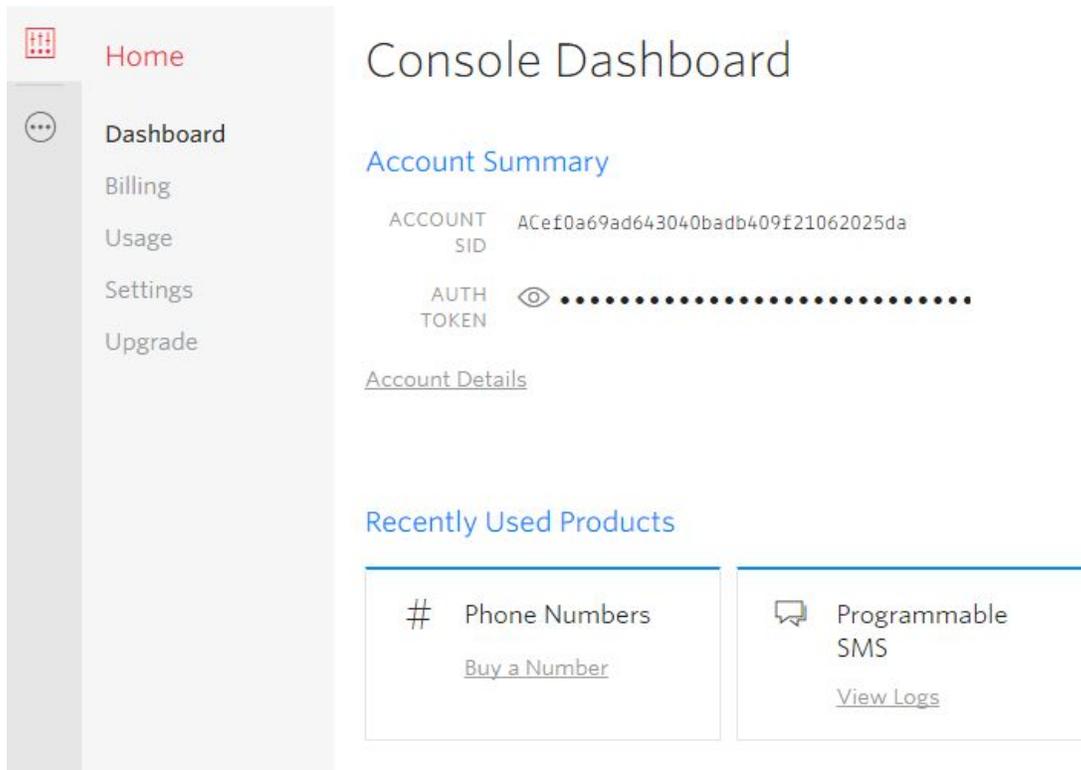
● Follow Web Setup Wizard Readiness Check

2) Extension Purchased From Azaleasoft Website

● Upload all extension files into the root of your Magento2 installation folder. Before installing this extension, go to your Magento installation root and install Twilio API library using Composer.
 *Command: **composer require twilio/sdk 5.***

● Upload all extension files into the root of your Magento2 installation folder.

● Run the command in the Magento2 root: "php bin/magento setup:upgrade".

● Run the second command in the Magento2 root: "php bin/magento setup:static-content:deploy".

● Login into the Admin and go to System->Cache Management. Select all of checkbox and click the "Flush Magento Cache" button.

2.How to use

2.1 Create Twilio Account

- Before setting up this extension, go to Twilio website (https://www.twilio.com/) to create a new account.

- Login to your Twilio account, you will find your Account SID and Auth Token on console dashboard.

- To send SMS using Twilio API, buy a virtual number.

2.2 Admin Panel

Check if the extension installs successfully, then navigate to **Stores -> Configuration** with the name **Twilio SMS Notification** under **AZALEASOFT EXTENSIONS** select menu.

Configuration

Store View: Default Config ▼ ❓

AZALEASOFT EXTENSIONS	⌃
Twilio SMS Notification	
GENERAL	⌄
CATALOG	⌄
CUSTOMERS	⌄
SALES	⌄
SERVICES	⌄
ADVANCED	⌄

General

Enable [store view]	No ▼
Account SID [store view]	
Auth Token [store view]	
Phone Number (Sender) [store view]	
	Phone number that you get from API service provider
Admin Phone Number [store view]	
	Phone number must include country code.

Enable	Yes: Enable this extension
Account SID	Account SID from Twilio account
Auth Token	Auth token from Twilio account
Phone Number(Sender)	A virtual phone number that is purchased from Nexmo account
Admin Phone Number	A phone number that will receive Admin SMS notification

* In this extension, there are three different phone numbers:
1) Phone Number (Sender): This number is purchased from Twilio account. All notifications will be sent from this number.
2) Admin Phone Number: This number is used to receive Admin notification. This number must include the country code (Ex: +12011234567).
3) Customer Phone Number: This number is from customer shipping/billing information.
- If phone number exists in shipping information, send notification to country code + the phone number;
- If phone number exists in billing information and does not exist in shipping information, send notification to country code + the phone number;
- If the phone number does not exist in both shipping and billing address, do not send notification to the customer.

Customer Event Settings

Create Order [store view]	Yes	▼
Cancel Order [store view]	Yes	▼
Create Invoice [store view]	Yes	▼
Create Shipment [store view]	Yes	▼
Create Credit Memo [store view]	Yes	▼
Contact Us [store view]	Yes	▼

Create Order	Yes: Send SMS notification to customer
Cancel Order	Yes: Send SMS notification to customer
Create Invoice	Yes: Send SMS notification to customer
Create Shipment	Yes: Send SMS notification to customer
Create Credit Memo	Yes: Send SMS notification to customer
Contact Us	Yes: Send SMS notification to customer

Admin Event Settings

Create Order [store view]	Yes	▼
Cancel Order [store view]	Yes	▼
Create Invoice [store view]	Yes	▼
Create Shipment [store view]	Yes	▼
Create Credit Memo [store view]	Yes	▼
Contact Us [store view]	Yes	▼

Create Order	Yes: Send SMS notification to Admin
Cancel Order	Yes: Send SMS notification to Admin
Create Invoice	Yes: Send SMS notification to Admin
Create Shipment	Yes: Send SMS notification to Admin
Create Credit Memo	Yes: Send SMS notification to Admin
Contact Us	Yes: Send SMS notification to Admin

Condition Settings

Customer Group
[store view]

> ALL GROUPS
> NOT LOGGED IN
> General
> Wholesale
> Retailer

Country
[store view]

> Afghanistan
> Africa
> Albania
> Algeria
> American Samoa
> Americas
> Andorra
> Angola
> Anguilla
> Antarctica

Minimum Order Amount
[store view]

> 0

Set criteria to send SMS notification to the customer

Customer Group	Allow to select all groups or several groups
Country	Allow to select multiple countries
Minimum Order Amount	Default value is 0

Save SMS History

Enable
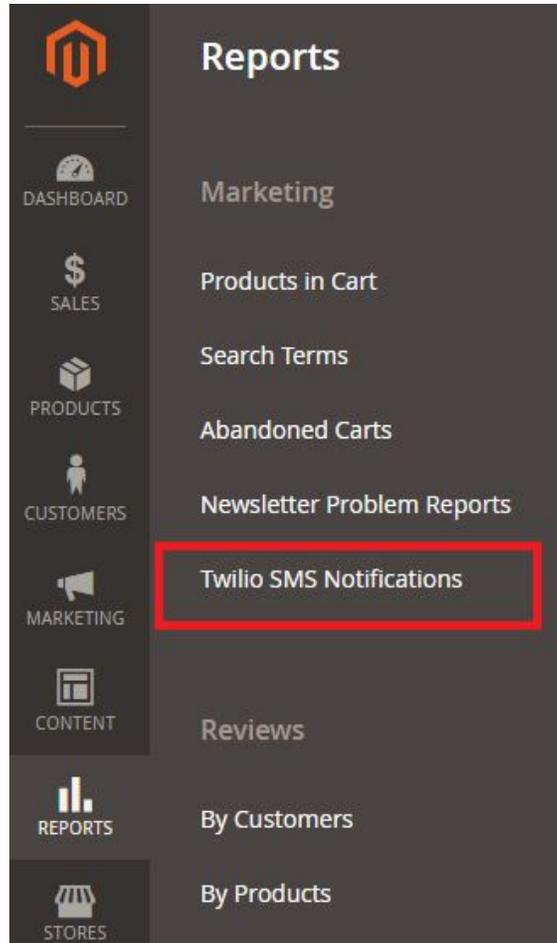[store view] — Yes

Cron

Enable
[store view] — Yes

Schedule
[store view] — 0 0 * * *

Automatically remove SMS history by cron. For example: 30 0 * * *

Days Saved in Log
[store view] — 60

[Save SMS History] Enable	Yes: Save SMS notification history into database
[Cron]Enable	Yes: Enable cron schedule to remove SMS notification history in database
[Cron] Schedule	Cron schedule setting
[Cron] Days Saved in Log	Default value is 60

The path of SMS notification history: **REPORTS->Marketing->Twilio SMS Notifications**

Twilio SMS Notifications

6 records found

	ID ↓	Store	API Service	Ref. No.	Customer ID	Transaction Type	Transaction Number	Text Message	Status	Error Message
☐	1	Default Store View	Twilio	SMaff776b2760d45cc80fc4c20f0cd718d	1	Invoice	000000047	Dear hugo, your invoice has been created for order 000000108.	Success	
☐	2	Default Store View	Twilio	SM9f316b846d5d4fd59c06579548ba36a0	1	Admin Invoice	000000047	Hi Admin, an invoice is creatd for order 000000108.	Success	
☐	3	Default Store View	Twilio	SM28edcaa0d7d64a58b9915e078d295ea7	1	Shipment	000000032	Dear hugo, your order[000000108] has been shipped. Your tracking number is [].	Success	
☐	4	Default Store View	Twilio	SMb9658eeed0a548f689284ec84045f8bb	1	Admin Shipment	000000032	Hi Admin, an order[000000108] has been shipped.	Success	
☐	5	Default Store View	Twilio	SMa51952b975d74ef1ac5bf428d423e55b	1	Credit Memo	000000019	Dear hugo, your refund request for order[000000108] has been accepted.	Success	
☐	6	Default Store View	Twilio	SM19556b0d47ba4093954aee0c3e01a8e9	1	Admin Credit Memo	000000019	Hi Admin, a credit memo is created for order 000000108.	Success	

Customer Message Tempate

The SMS you want to send is limited to 160 characters.

Create Order
[store view]

Dear ||CUSTOMER_FIRSTNAME||, thanks for shopping on our store. Your order number is ||ORDER_NUMBER||.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||, ||ORDER_QUANTITY||, ||CUSTOMER_FIRSTNAME||, ||CUSTOMER_LASTNAME||

Cancel Order
[store view]

Dear ||CUSTOMER_FIRSTNAME||, your order[||ORDER_NUMBER||] has been cancelled successfully.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||, ||ORDER_QUANTITY||, ||CUSTOMER_FIRSTNAME||, ||CUSTOMER_LASTNAME||

Create Invoice
[store view]

Dear ||CUSTOMER_FIRSTNAME||, your invoice has been created for order ||ORDER_NUMBER||.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||, ||ORDER_QUANTITY||, ||INVOICE_NUMBER||, ||INVOICE_AMOUNT||, ||INVOICE_QUANTITY||, ||CUSTOMER_FIRSTNAME||, ||CUSTOMER_LASTNAME||

Create Shipment
[store view]

Dear ||CUSTOMER_FIRSTNAME||, your order[||ORDER_NUMBER||] has been shipped. Your tracking number is [||SHIPPING_CARRIER||]||TRACKING_NUMBER||.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||, ||ORDER_QUANTITY||, ||SHIPMENT_NUMBER||, ||SHIPPING_CARRIER||, ||TRACKING_NUMBER||, ||CUSTOMER_FIRSTNAME||, ||CUSTOMER_LASTNAME||

Create Credit Memo
[store view]

Dear ||CUSTOMER_FIRSTNAME||, your refund request for order[||ORDER_NUMBER||] has been accepted.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||, ||ORDER_QUANTITY||, ||CREDITMEMO_NUMBER||, ||CREDITMEMO_AMOUNT||, ||CUSTOMER_FIRSTNAME||, ||CUSTOMER_LASTNAME||

Contact Us
[store view]

Dear ||NAME||, we have received your request. Thanks for contact us.

You can use these shortcodes to replace contact information in the SMS: ||NAME||, ||EMAIL||, ||TELEPHONE||

Create Order	SMS template for customer
Cancel Order	SMS template for customer
Create Invoice	SMS template for customer
Create Shipment	SMS template for customer
Create Credit Memo	SMS template for customer
Contact Us	SMS template for customer

Admin Message Tempate

The SMS you want to send is limited to 160 characters.

Create Order
[store view]

Hi Admin, a new order[||ORDER_NUMBER||] is created.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||. ||ORDER_QUANTITY||, ||CUSTOMER_FIRSTNAME||. ||CUSTOMER_LASTNAME||

Cancel Order
[store view]

Hi Admin, an order[||ORDER_NUMBER||] is cancelled.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||, ||ORDER_QUANTITY||, ||CUSTOMER_FIRSTNAME||. ||CUSTOMER_LASTNAME||

Create Invoice
[store view]

Hi Admin, an invoice is creatd for order ||ORDER_NUMBER||.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||, ||ORDER_QUANTITY||, ||INVOICE_NUMBER||. ||INVOICE_AMOUNT||, ||INVOICE_QUANTITY||, ||CUSTOMER_FIRSTNAME||. ||CUSTOMER_LASTNAME||

Create Shipment
[store view]

Hi Admin, an order[||ORDER_NUMBER||] has been shipped.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||, ||ORDER_QUANTITY||, ||SHIPMENT_NUMBER||, ||SHIPPING_CARRIER||. ||TRACKING_NUMBER||, ||CUSTOMER_FIRSTNAME||. ||CUSTOMER_LASTNAME||

Create Credit Memo
[store view]

Hi Admin, a credit memo is created for order ||ORDER_NUMBER||.

You can use these shortcodes to replace order info in the SMS: ||ORDER_NUMBER||, ||ORDER_AMOUNT||, ||ORDER_QUANTITY||, ||CREDITMEMO_NUMBER||. ||CREDITMEMO_AMOUNT||, ||CUSTOMER_FIRSTNAME||. ||CUSTOMER_LASTNAME||

Contact Us
[store view]

Hi Admin, you have a new contact request from ||EMAIL||

You can use these shortcodes to replace contact information in the SMS: ||NAME||. ||EMAIL||. ||TELEPHONE||

Create Order	SMS template for Admin
Cancel Order	SMS template for Admin
Create Invoice	SMS template for Admin
Create Shipment	SMS template for Admin
Create Credit Memo	SMS template for Admin
Contact Us	SMS template for Admin

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If you have any questions or feature suggestions, please send email to admin@azaleasoft.com

Thank you!