

Twilio Account setup

Prerequisite:

- [Twilio account, paid account](#)
- [Make sure your Twilio number is allowed to call the region your calling](#)
- [Https//](#) to get this you need a vailed [ssl certificate](#)
- Installed [Perfex crm](#),
- Latest version of [Call log module](#)

Steps for outgoing calls:

Here we have to setup a TwiML app for incoming and outgoing calls and update a few settings here are the step-by-step process.

Step 1: - Login in your Twilio account console [CLICK HERE TO REGISITER OR LOGIN](#)

Step 2: - Open voice call console dashboard [CLICK HERE TO ACCESS CALL DASHBOARD](#)

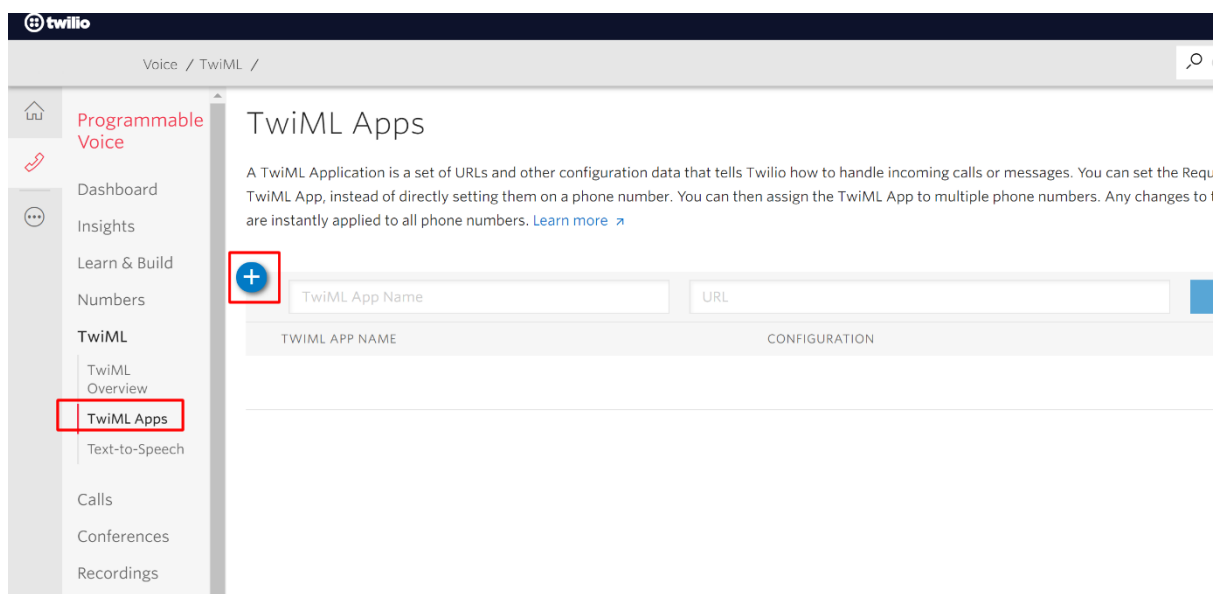
Step 3: go to Programme Voice > [TwiML > TwiML Apps](#), create an app enter the following, after that you will be presented with a SID number.

Make a note of the following:

- FRIENDLY NAME
- ISD
- REQUEST URL

Note:

- For the REQUEST URL you need to add the following into your domain `/call_logs/Twilio_request/new_call`
- Notice you need a `https://` protocol to use this if you don't currently have this the app will not working speak to your hosting to assign a `https://` certificate to you Perfex CRM.
- You can get a free ssl using <https://letsencrypt.org/getting-started/>
- The final url should look something like this https://replacewithyourdomain.com/call_logs/Twilio_request/new_call



twilio

Voice / TwiML / TwiML Apps /

Go to...

call_logs

Properties

FRIENDLY NAME

SID

Voice

REQUEST URL

HTTP GET

Call

show optional settings >

Messaging

REQUEST URL

HTTP POST

show optional settings >

Save Cancel Delete this TwiML App

Steps for receiving calls:

Step 4 receiving calls

Go to [MANAGE NUMBERS](#) OR enter this url <https://www.twilio.com/console/phone-numbers/PN0bda4afd04cbbf8f8a1d0a5f27de6ca1>

Make a note of the phone number and sid number

twilio

Phone Numbers / Manage Numbers / Active Numbers /

Go to...

(256) 561-9656

Configure Calls Log Messages Log Events Log Regulatory Information

Properties

FRIENDLY NAME

(256) 561-9656

PHONE NUMBER

+1 256 561 9656

PHONE NUMBER SID

TYPE

Local

CAPABILITIES

Voice, Fax, SMS, MMS

LOCATION

BOAZ, AL US

Scroll down the page

Cut and past the same url /call_logs/Twilio_request/new_call

For example: https://replacewithyourdomain.com/call_logs/Twilio_request/new_call

twilio

Phone Numbers / Manage Numbers / Active Numbers /

Go to...

Phone Numbers

Manage Numbers

Active Numbers

Released Numbers

Buy a Number

Verified Caller IDs

Port & Host

Regulatory Compliance

Tools

Usage

Getting Started

Voice & Fax

ACCEPT INCOMING

Voice Calls

CONFIGURE WITH

Webhooks, TwiML Bins, Functions, Studio, or Proxy

A CALL COMES IN

Webhook

HTTP GET

PRIMARY HANDLER FAILS

Webhook

HTTP GET

CALL STATUS CHANGES

HTTP POST

CALLER NAME LOOKUP

Disabled

EMERGENCY CALLING

Disabled:

Enable Emergency Calling

Hit save done

Now let's configure Perfex CRM and Call log module

Step 5 -Perfex crm settings SETUP > SETTINGS > SMS

/admin/settings?group=sms

Cut and past the information

General
Company Information
Localization
Email
Finance
Subscriptions
Payment Gateways
Mind Map
Mind Map
Appointments
Mailbox Settings
Mind Map
Perfex Chat Settings
Staff workload
Call Logs

Only 1 active SMS gateway is allowed

Clickatell

MSG91

Twilio

Twilio SMS integration is one way messaging, means that your customers won't be able to reply to the SMS. Phone numbers must be in format E.164. Click [here](#) to read more how phone numbers should be formatted.

Account SID

Auth Token

Twilio Phone Number

Active
☒ Yes ☐ No

Step 6. Call log settings

Cut and past the settings in the call log module settings SETUP > SETTINGS > CALL LOGS

/admin/settings?group=call_logs

Cut and past the information here from you Twilio app, refer to step 3

- FRIENDLY NAME
- ISD
- REQUEST URL

General
Company Information
Localization
Email
Finance
Subscriptions
Payment Gateways
Mind Map
Mind Map
Appointments
Mailbox Settings
Mind Map
Perfex Chat Settings
Staff workload
Call Logs
Customers

Allow non-admin staff members to create Type in Call Log create/edit area?
☒ Yes ☐ No

Allow non-admin staff members to create Call Type in Call Log create/edit area?
☒ Yes ☐ No

Non-admin Staff members daily number of calls

0

Non-admin Staff members monthly number of calls

0

twiML App Friendly Name

twiML App SID

twiML App voice request URL

For assistance with setup if you have trouble please send a requestion

Jay@weebdigital.com

With the following:

Without this we information we cannot create a ticket to help you.

- 1.Admin username and password for your Perfex CRM
- 2.Username and password for your Twilio account
- 3.FTP account for you Perfex crm hosting.

If you experience some issue:

- Try uninstalling and reinstall the module
- If call is not working check Twilio and follow steps above