



A Quick Start Guide
For Freshdesk Integration
With BulkSMS.com



Welcome to BulkSMS.com

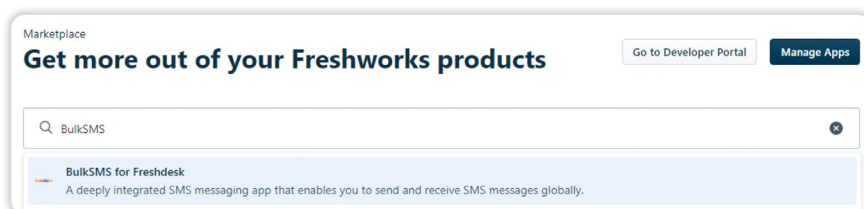
You've made the right choice.

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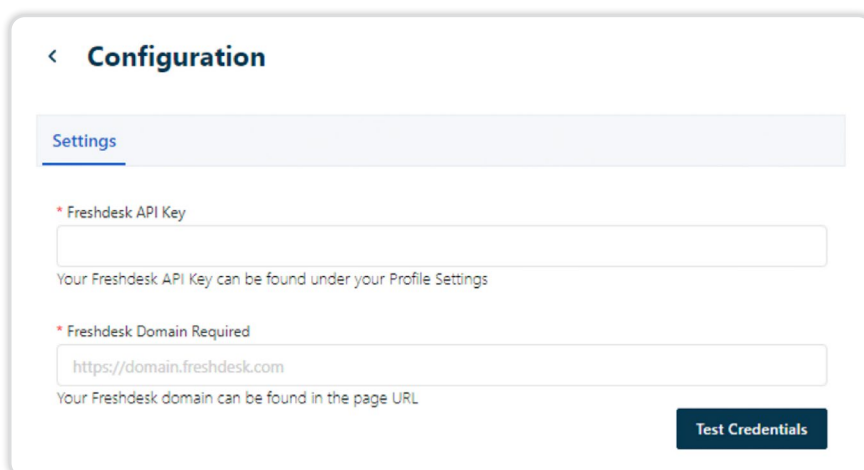
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Setup Integration

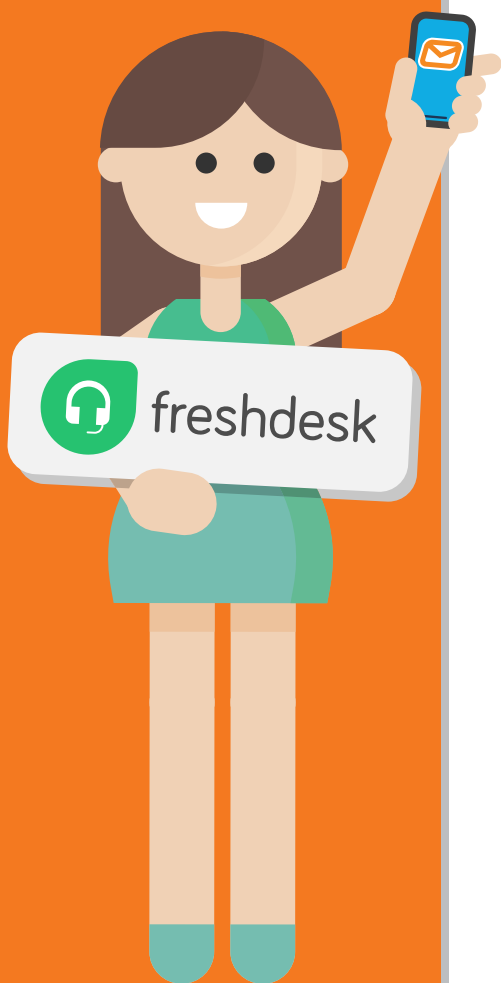
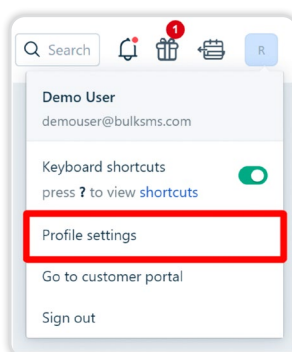
1. Login to your **Freshdesk** instance.
2. Navigate to Marketplace apps and search for **"BulkSMS"**.



3. Select "BulkSMS for Freshdesk" and then click install.
4. You will be prompted to enter your BulkSMS account details.
5. Next you will be prompted for your Freshdesk account details.



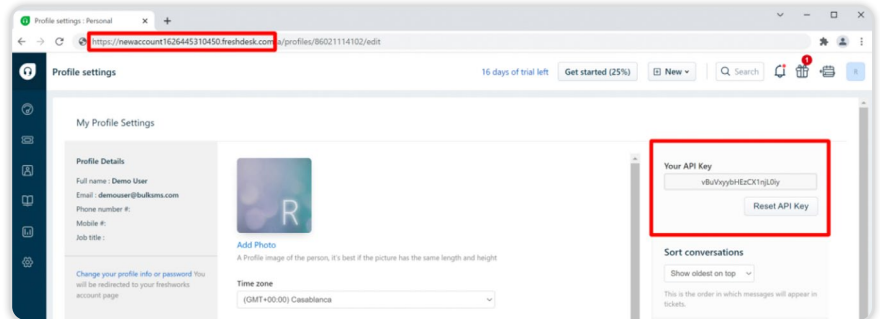
6. Your Freshdesk API Key can be found by clicking your profile icon and selecting "Profile Settings."



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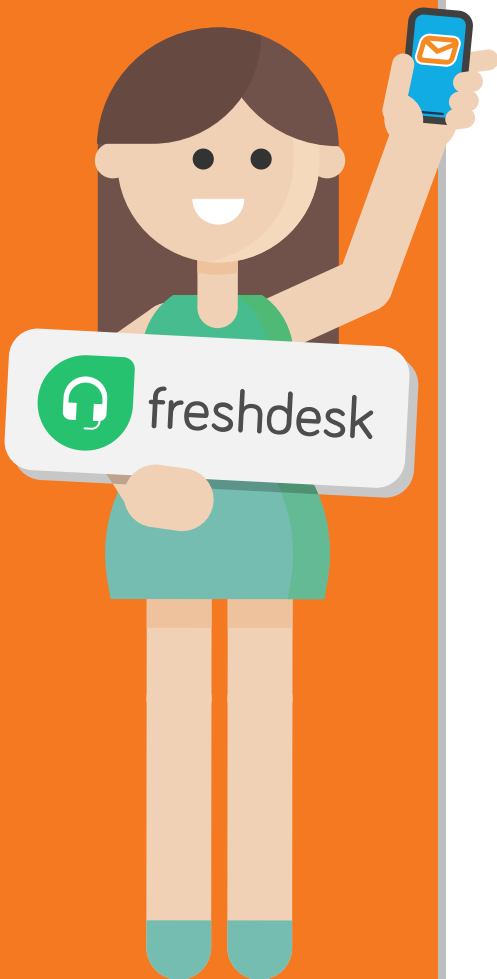
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- Copy and paste your API key.
- Your Freshdesk domain can be found in your instance URL. Copy and paste the relevant section.



- Click "Test Credentials" to validate the details.
- You'll be shown additional configuration options. Enter the required fields and click "Install".

You should now be able to send messages through BulkSMS.



Integration Rules

1. Sent Messages & Status updates

These will be added to the ticket and the contact's timeline. Please note that if multiple contacts share the same mobile number that only the first found will be updated.

2. Reply Messages

These will be added to the ticket conversations if an open ticket related to the contact exists. If there are no open tickets related to the contact a new ticket will be created – providing you enabled this feature.

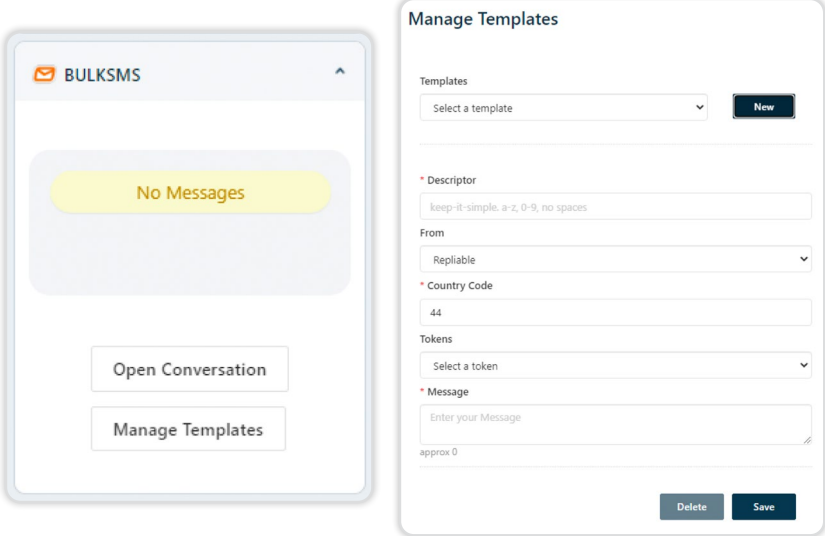
If there are multiple tickets associated with the contact, the most recently created one will be updated.

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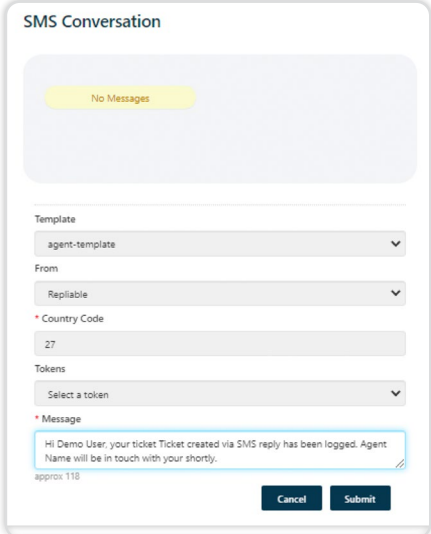
Message Templates

1. When you open a ticket in Freshdesk, look at the right-hand widgets, and you'll see the BulkSMS for Freshdesk extension. This is where you can view your conversation history with the requestor and also manage your message templates.
2. Click "Manage Templates" to open the Templates menu.

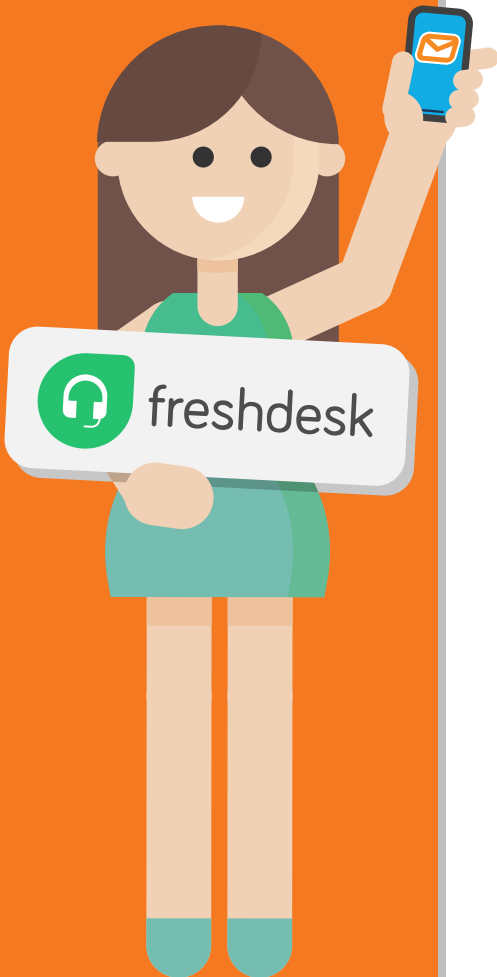


The image shows two screenshots. The left one is a widget titled 'BULKSMS' with a 'No Messages' indicator and buttons for 'Open Conversation' and 'Manage Templates'. The right one is the 'Manage Templates' form, which includes fields for 'Descriptor', 'From' (with a 'Repliable' dropdown), 'Country Code' (set to 44), 'Tokens' (with a 'Select a token' dropdown), and a 'Message' field. There are 'Delete' and 'Save' buttons at the bottom.

3. Here you can create personalised messages and select predefined options for Sender ID and Country Code, allowing you to create region specific personalised templates.
4. Once you have created and saved your template, click "Open Conversation" to prepare your message. Select the appropriate template and then click "Preview". This will show you the message before sending it.
5. The SMS conversation will show you the last 100 messages of your correspondence with the Requestor. You will also be able to view the details of these messages on the Ticket itself and the contact's timeline. In the left menu you will also find a BulkSMS icon. Click this to view your credits, integration status and automations.



The image shows the 'SMS Conversation' form. It has a 'No Messages' indicator at the top. Below it are fields for 'Template' (set to 'agent-template'), 'From' (with a 'Repliable' dropdown), 'Country Code' (set to 27), 'Tokens' (with a 'Select a token' dropdown), and a 'Message' field. The message field contains a preview: 'Hi Demo User, your ticket Ticket created via SMS reply has been logged. Agent Name will be in touch with your shortly.' There are 'Cancel' and 'Submit' buttons at the bottom.

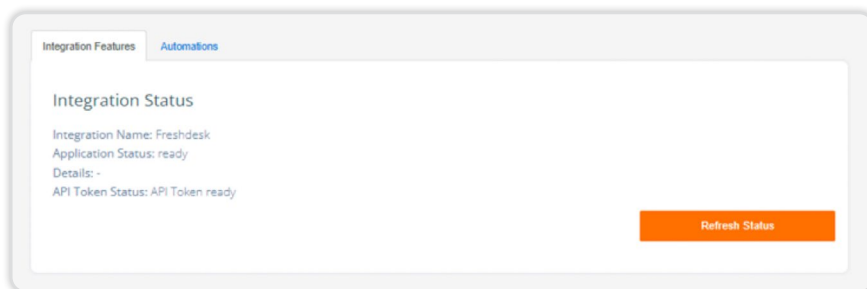


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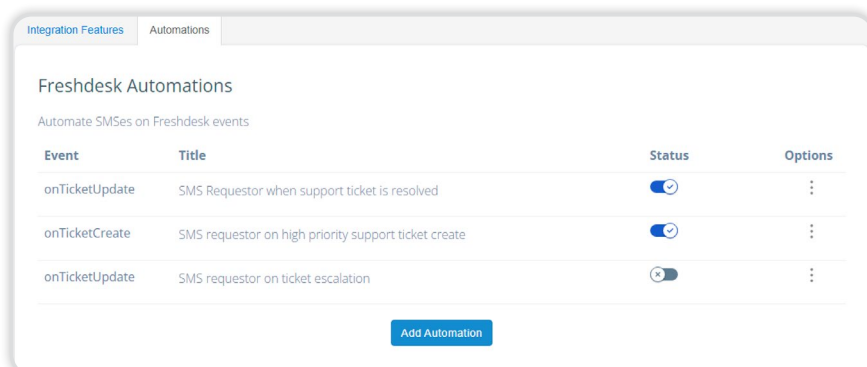
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Profile and Automations

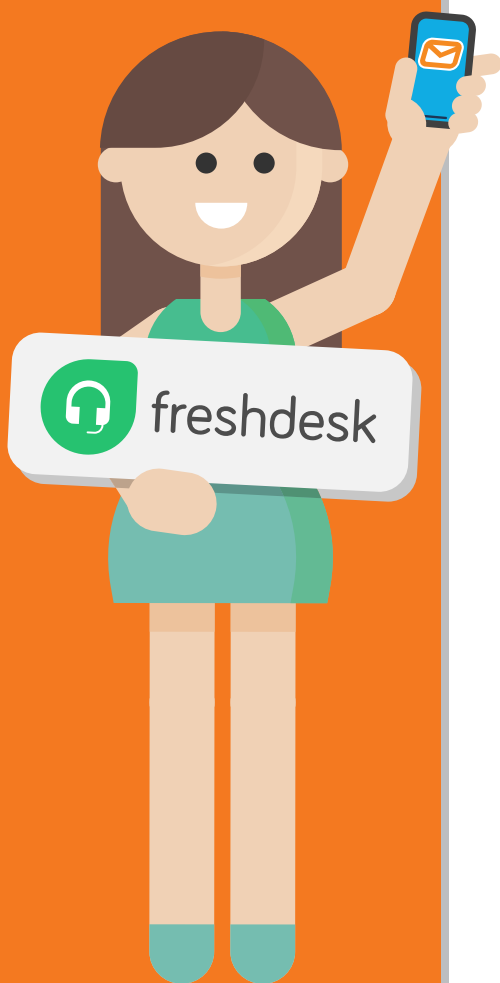
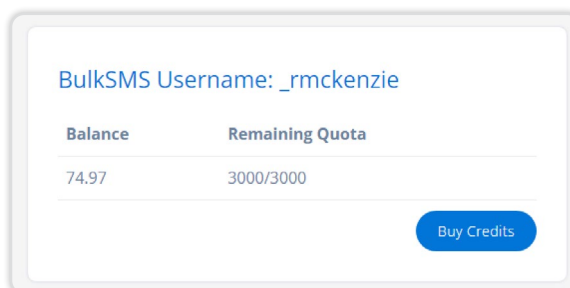
1. In the left menu you will also find a BulkSMS icon. Click this to view your credits, integration status and automations.
2. If you have any issues with your integration the Integration Status will assist you in troubleshooting the problem.



3. To configure or view your BulkSMS automations, go to the Automations tab.



4. In order to send messages, you will need to buy SMS credits. To do this click "Buy Credits".



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Support & Help

We're here to help you every step of the way.

For any support or assistance, please e-mail support@bulksms.com or visit www.bulksms.com for other contact options. Please be sure to mention your **username** and that you are using the **BulkSMS For Freshdesk App**.

