

Configuring SMS Service

This topic describes how to configure SMS to use for bulk messaging and two-factor authentication.

Prerequisites

You must have a **Twilio** account subscription with the following data:

- Account ID (SID)
- Authentication Token
- *Either* a From number, which can be any of the following:
 - The phone number associated with the Twilio account
 - A short number
 - An alias name
- Or a Message ID (MSID). For more information on the MSID, see [here](#).

Adding an SMS Account

To add an account:

1. Click the **Setup** gear in the top-right corner, go to **Email and SMS**, and click Configure under SMS Services.
2. Click New.
3. In the SMS Account screen, enter the Account Name and Label.
4. Enter the information from the Twilio account for the SID, Authentication Token, and the From or MSID fields.
5. Select the usage for the account:
 - **Mass Communication**
 - **Two Factor Authentication**
6. Enter a valid number to test the service and click Send Test SMS. If the number is outside of the USA, enter the country code with a + prefix, such as +01.
7. Use your device to confirm the test message sent successfully.
8. Click Finish.

Defining the Outbound Account

To define the outbound account:

1. Go to **Setup > Email and SMS** and click Define Default Outbound Account under Outbound SMS Settings.
2. Select a default account from the drop-down menu.
3. Optionally, enter a valid number to test the service and click Send Test SMS.
4. Click Finish.

Configuring SMS for Tables

Configure SMS for specific tables:

1. Go to **Setup > Email and SMS** and click Configure Outbound SMS under Outbound SMS Settings.
2. Select a table to define the SMS settings. Optionally select the Copy settings to all subtables checkbox. Click Next.
3. In the From Options tab, select the following:
 - a. The Groups who can see the SMS icon in the table view.
 - b. The outbound account to use for sending SMS messages
 - c. The Default Recipient Cell Number.
 - d. The Address to send bounced SMS messages to.
 - e. The Groups who can change the default SMS account when sending messages.
4. Click Finish.