



Textlocal Messenger & Zapier

Zapier makes life easier by connecting Textlocal with over 500 other apps that businesses use every day





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Today, your business uses different systems for different tasks. Everything from sending marketing emails to running a customer helpdesk is managed with complex software; whether it's relying on a sophisticated CRM system to track every customer interaction or a simple spreadsheet where you manually update rows of customer information to keep your records up to date.

The challenge comes in trying to get these systems to connect and talk to each other. But not anymore.

What is Zapier?

Zapier is an online tool that helps you create simple software integrations with just a few clicks.

There are over 500 applications currently available via Zapier and users can connect any of them to their Messenger account quickly and easily.



Microsoft Dynamics



Why integrate Messenger with Zapier?

Zapier has been designed for use by non-developers; its self-serve portal includes a step-by-step guide to creating templated integrations with the most popular applications. Zapier makes it easy to integrate a variety of software systems, quickly delivering many benefits:

Simplicity

When software systems are integrated, it's much easier for users to work with them. There is no need to learn how to use a separate system, or log in to a different account to perform a new task. This means users are able to work within their familiar application of choice, making their task much simpler.

Zapier is also simple to use. You don't need to be a developer or know how each application works to connect them. Simply follow the on-screen prompts and your integrations will be up and running in just a few minutes.

Productivity

Automating tasks between applications can deliver big productivity gains. Users no longer need to duplicate routine tasks, such as data entry, as these streamlined processes now run automatically in the background - saving a lot of time and effort.

Integrations can be set up in minutes, by non-technical staff, so you don't need to worry about complex and time consuming development schedules, or outsourced resources to create the integrations you need.

Keep your IT specialists focussed on supporting business growth and processes. Zapier works in the background so teams are more productive without even knowing it.

Consistency

Integrated software systems provide consistent information across applications. This helps avoid duplication, reduce errors and gives better insight into your company data. Zapier's step-by-step process delivers a consistent experience, so you follow the same simple process for each integration - every time.

The possibilities are endless

Textlocal customers who want to make their day-to-day tasks easier by connecting their existing business systems with Messenger can benefit from a Zapier integration:

- The sales rep who wants to automatically create a lead in their CRM system when a customer texts in
- The business that wants to automatically send SMS reminders for appointments in Google Calendar
- The event organiser who wants to automatically text their customers when a new event is announced
- The service desk manager who wants customers to be able to text in their service requests
- The IT manager who wants to receive a text message if there is a systems monitoring alert triggered
- The car mechanic who wants to text customers with MOT reminders simply by updating a spreadsheet

Users can also create multi-step processes by integration more than one service. For example, > add a new contact in Microsoft Office 365 > then add this contact into your Messenger account > and send an SMS back to the contact to confirm they have been added into your contact database. All this and more can be done without writing a single line of code.

How to get started

Getting started with your Messenger and Zapier integration is easy. Simply go to www.zapier.com and create an account. You also need an active Messenger account with Textlocal. Your account should have sufficient credits to be able to action the new tasks, so it's a good idea to account for these when calculating how many credits you'll need. Zapier will guide you through each integration, so you'll quickly be up and running.

Automation Inspiration using Zapier

Here are some examples of how Messenger and Zapier can work smarter together.



Create a opportunities from new online customers

When a new customer makes a purchase on WooCommerce, create a Salesforce account, contact and opportunity. Send them a confirmation SMS for their order.



Invoice new customers

When a customer completes a WooCommerce order, add the purchaser to Pipedrive and FreshBooks, and send them an invoice. Send a payment reminder from Messenger.



Keep in touch with new contacts

When a contact submits a Typeform entry, add their responses to Google Sheets, then add them to MailChimp and Pipedrive. Send an SMS using Messenger to confirm they have been added.



How to set up Zapier

Zapier provides a really simple way to integrate Messenger with over 500 other applications.

It only takes a few simple steps to set up an integration, or 'Zap' – and you don't have to be a developer, or know how to code, to make it work.

Triggers & Actions

Zapier uses triggers and actions to determine how Messenger integrates with other apps. For example, when I receive an inbound SMS in Messenger (**trigger**), set up a new contact in Salesforce (**action**). These are the triggers and actions available from Messenger.

Textlocal triggers

- When a new SMS is received in an inbox
- When a new Textlocal contact is added
- When a message is sent via the API

Textlocal Actions

- Send an SMS
- Add a new contact

If you need help setting up your Zaps, please contact our customer support team on **01244 752299**

Step 1

Create an account at www.zapier.com

Step 2

Click on the "Make a new Zap" button

Step 3

Select the apps you want to connect, and your triggers and actions from the drop down selection.

Step 4

Connect your apps by providing your account details for each app.
The exact steps may depend on the apps you're connecting – if there are other requirements specific to the app in question, Zapier will ask for what it needs.

Step 5

Select the apps you want to connect, and your triggers and actions from the drop down selection.

Step 6

Zapier will test the connection.

Step 7

You are good to go!

Textlocal API key

An API key is an alphanumeric code that is unique to your Textlocal Messenger account. It allows applications like Zapier to share information securely. Zapier needs your Textlocal API key to create your Zaps.

To create your API key:

- Log in to your Textlocal account and head to **All Settings**
- Then navigate to **Connectivity > API Keys**
- Click "**Create New Key**"
- Give the key a helpful note, like "Used by Zapier", and leave IP Addresses empty;
- Click "**Save New Key**"
- Your API key will look something like: wIQvEIHXyZ-No9oWejeUjQpjYkffnrS3tLX0OLSeg





Textlocal is now
part of Webex

Textlocal is a leading provider of cloud-based mobile messaging services to business across the UK and Europe. Our award winning solution is at the forefront of business communications, allowing customers to harness the latest capabilities in mobile messaging to increase customer engagement and ROI.

Based in Chester and Malvern, Textlocal supports hundreds of thousands of businesses from local retailers and organisations to larger brands including Debenhams, Paddy Power, Greenpeace, Groupon and P&O Ferries.

For more information on Textlocal:

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