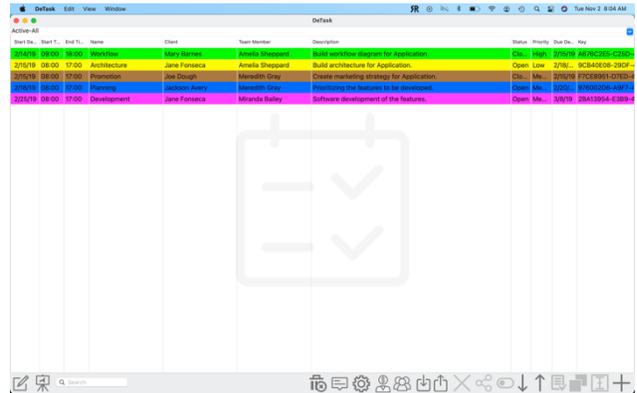


# Configure Twilio Integration in DeTask App for Mac

## Introduction

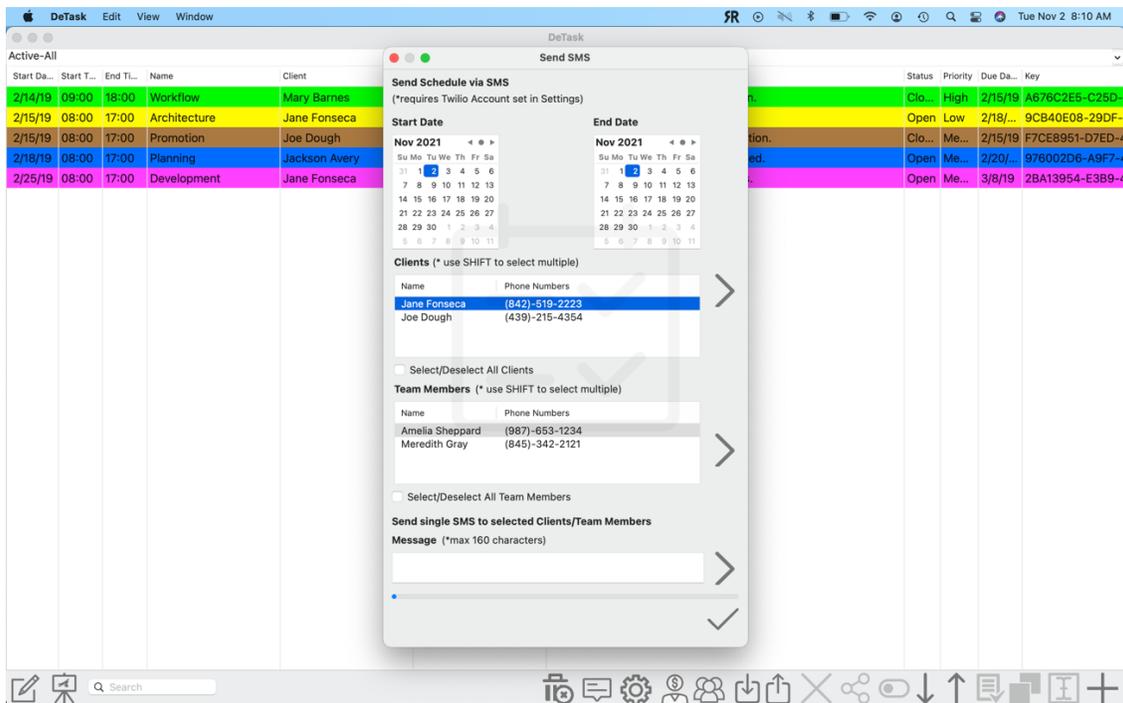
DeTask App for Mac allows you to integrate with your Twilio Account to send Tasks Schedules/Appointments or Text Messages via SMS to your Clients and or Team Members. You would want to send Schedules and Appointments to inform or remind your Clients and Team Members of future appointments or action items. SMS is a preferred sending method due to being able to be received and displayed by any cell phone, regardless of if it is a smartphone (iPhone or Android) or not.



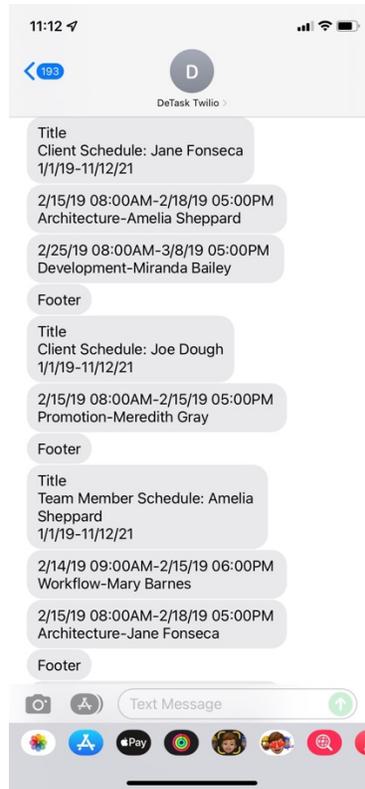
The functionality of SMS Sending Schedules and Messages can be accessed via the Send SMS icon.



This allows you to Select the time interval for the tasks to be included as well as which Clients and/or Team Members tasks to be included. Only the tasks assigned to selected Clients and or Team Members that have the start date within the selected interval will be sent.



Here are couple of examples of received Clients and Team Members Schedules.



The same Send SMS window allows you to also send a Single SMS message to any selected Clients and Team Members. This is especially useful if you want to send different reminders or announcements to one or multiple Clients and or Team Member. In that case only the text typed in the Message box will be sent.

DeTask allows sharing of only individual Tasks/Todos via other means as well, like iMessage, Mail or directly to other Applications. This can be accomplished by selecting any task from the table view and pressing the Share button.



## Twilio Account Creation

To be able to Send schedules and messages via SMS, you must have a Twilio Account. If you do not have one, it is simple to register for free and get one. You can do that by Signing Up at <https://www.twilio.com/>

The screenshot shows the Twilio website homepage. At the top right, there is a navigation bar with a US flag, phone number (844) 814-4627, SUPPORT, and LOG IN. Below this is a main navigation menu with links for Products, Solutions, Developers, Services & Support, and Pricing. Two buttons, 'Talk to an expert' and 'Sign up', are positioned to the right of the menu. A cookie consent banner is visible, with options to 'I consent to cookies', 'Want to know more?', and 'Read our Cookie Policy'. The main content area features the Twilio logo and the text 'Twilio Customer Engagement Platform' in red. Below this is the headline 'Intelligent customer engagement—at scale' in large blue font. A sub-headline reads 'Twilio powers personalized interactions and trusted global communications to connect you with customers.' A prominent blue button says 'Sign up and start building >'. A link 'Talk to sales' is located below the button. The background of the main content area is a collage of various digital interface elements, including a chat bubble with a notification, a graph, a recording icon, a video call window, and a feedback form.

Signing up for a trial will get a free sending phone number (for a limited time) and a small dollar balance to use for sending SMS. The Twilio trial will be enough to configure and get familiar with the DeTask SMS Schedule and Messages sending functionality. You may decide to use your own phone number rather than the one automatically generated and that will cost extra.

After your trial expires you will be able to choose either a pay as you go plan or volume discount plan. The Twilio SMS pricing is quite affordable.

Pay-as-you-go SMS pricing

NUMBER USED	TEXT MESSAGES		PICTURE MESSAGES		MESSAGING SERVICE FEATURES
	TO SEND <sup>115</sup>	TO RECEIVE <sup>15</sup>	TO SEND <sup>115</sup>	TO RECEIVE <sup>15</sup>	
LOCAL NUMBERS	\$ 0.0075	\$ 0.0075	\$ 0.0200	\$ 0.0100	INCLUDED
TOLL-FREE NUMBERS	\$ 0.0075	\$ 0.0075	\$ 0.0200	\$ 0.0200	INCLUDED
SHORT CODES	\$ 0.0075	\$ 0.0075	\$ 0.0200	\$ 0.0100	INCLUDED



### Configure DeTask to Use Your Twilio Account

After you have your Twilio Account created proceed with saving the ACCOUNT SID and the AUTH TOKEN (see screenshots below) as well as your Twilio Phone Number as you will need them afterwards.

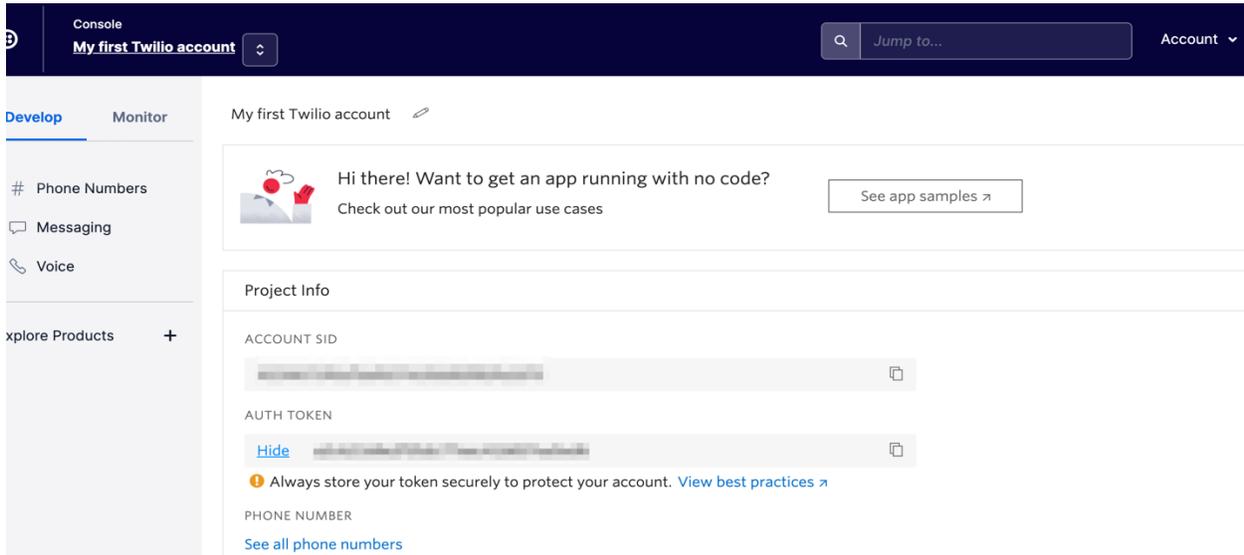


Figure 1 Twilio ACCOUNT SID & AUTH TOKEN

Console  
My first Twilio account

Develop Monitor

# Phone Numbers  
Manage  
**Active numbers**  
Released numbers  
Buy a number  
Verified Caller IDs  
Twiml apps  
Port & Host  
Regulatory Compliance  
Messaging  
Voice

## Active Numbers

Inventory Filters: Number [v] [ ] Configuration Filters: Voice URL [v] [ ] **Filter** Reset filters

Number	Friendly Name	Capabilities				Active Configuration
		Voice	SMS	MMS	Fax	
[redacted]	[redacted]	[phone icon]	[sms icon]	[mms icon]	[fax icon]	<b>Voice</b> Webhook (POST): https://demo.twilio.co <b>Messaging</b> Webhook (POST): https://demo.twilio.com/welcome/s

< Previous Next >

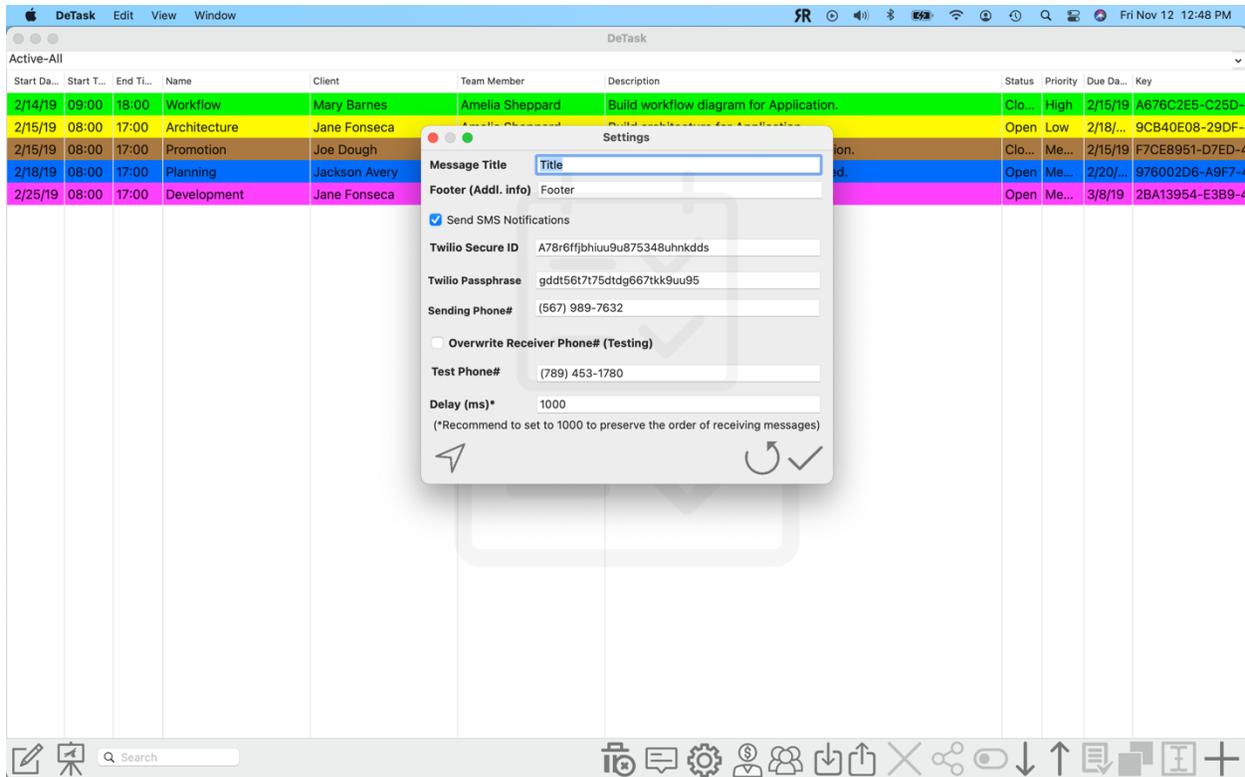
\* Can send/receive calls to domestic numbers only  
 † Can send/receive sms to domestic numbers only  
 ‡ This number does NOT support SIP Trunking

Figure 2 Twilio SMS Sending Phone Number

Now you can proceed with configuring the Twilio integration in the DeTask App. That can be accomplished by opening the Settings window via the Settings button.



Paste the Twilio ACCOUNT ID you saved previously into the DeTask “Twilio Secure ID” field and the Twilio AUTH TOKEN in the DeTask “Twilio Passphrase” field. Also paste the Twilio Phone Number into the DeTask “Sending Phone#” field. It is recommended to define a “Test Phone#” below so you can test the integration.



As soon as you configured this, you can test the configuration by pressing the “Sent Test Message” button.



If your configuration is proper, you should receive a test message with the word Test delivered to your Test Phone Number.

In this window, you can also define a Title and a Footer. If you do so, these will be included with each Schedule Sending.

The “Overwrite Receiver Phone # (Testing)” setting can be used to test the Sending Schedules via SMS functionality. By checking this box, and saving these settings, DeTask will know that next time you will use the Saving Schedules via SMS functionality to send all schedules to your defined “Test Phone#” instead of the real Clients and Team Members Phone Numbers. This can be used to test Sending Schedules vis SMS functionality if desired.

Unchecking “Overwrite Receiver Phone # (Testing)” and saving this setting will ensure that the schedules will be send to the real Clients and or Team Members Phone Numbers next time when using that functionality.

The Delay (ms) is set by default to 1000 ms. It is recommended to leave this as is to preserve the order of SMS messages sent. This is because Twilio limits the number of sent SMSs to one every second for each account.

Congratulations! You have configured the DeTask Twilio integration. Please make sure to email us at [larry@lauhe.com](mailto:larry@lauhe.com) if you have any question.

Thank you for using the DeTask App!