

Integrate Twilio SMS

Seamlessly connect your Twilio account to AgentRoof CRM to send and receive SMS directly. This integration enhances your lead engagement by letting you manage all SMS conversations without leaving the CRM, ensuring faster responses, better follow-ups, and more meaningful conversations with your leads.

Follow these steps to connect Twilio to your AgentRoof CRM account.

1. Log in to AgentRoof CRM

1. Open the CRM login page using one of the following methods:
 - Click the **CRM Login** button at the bottom of your website, or
 - Open your browser and visit <https://crm.agentroof.com>
2. Enter your email address in the email field.
3. Enter your password in the password field.
4. Click the **Login** button.

2. Go to the Integration Section

1. In the left sidebar menu, click **Integration**.
2. You'll see the available integration cards, including **Facebook** and **Twilio**.

3. Connect Your Twilio Account

1. On the **Twilio** card, click **Connect Now**.
2. A **Configure Twilio Account** panel will open, showing a short walkthrough video and setup steps.
3. Click **Connect Twilio** to begin the setup.

4. Configure Twilio Account

1. Log in to your Twilio Dashboard.
2. Copy your **Account SID**, **Auth Token**, and **Phone Number**.
3. Paste these details into the corresponding fields in AgentRoof CRM.

Once connected, your Twilio number will be linked to your CRM account for sending and receiving SMS.

Key Features

- **Two-Way Messaging:** Instantly send and receive SMS within the CRM, keeping all lead conversations in one central place.

- **Automatic Lead Linking:** All SMS interactions are automatically tied to the corresponding lead profile, giving you a complete communication history.
- **Actionable Insights:** Use the campaign name as a source to trigger automated workflows, such as Action Plans, Listing Alerts, and other tasks, ensuring timely and effective engagement with your leads.
- **Custom Sender IDs:** Use your Twilio numbers to personalize your outreach and build trust with leads.
- **SMS Automation:** Trigger automated SMS campaigns, reminders, and alerts based on lead activity, saving you time while staying highly responsive.
- **Conversation Tracking:** View full conversation threads in the CRM, making it easy for your team to collaborate and maintain consistent communication.
- **Scalable Messaging:** Whether you're handling a few leads or thousands, Twilio integration ensures reliable, secure, and scalable SMS delivery.

Why Use Twilio Integration?

This integration helps you stay connected with leads in real time, ensuring you never miss an opportunity. By managing SMS conversations directly in the CRM, you streamline communication, improve response times, and build stronger relationships with prospects. Integrating Twilio with your CRM is the perfect way to modernize your lead communication strategy, making every interaction timely, personal, and impactful.

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