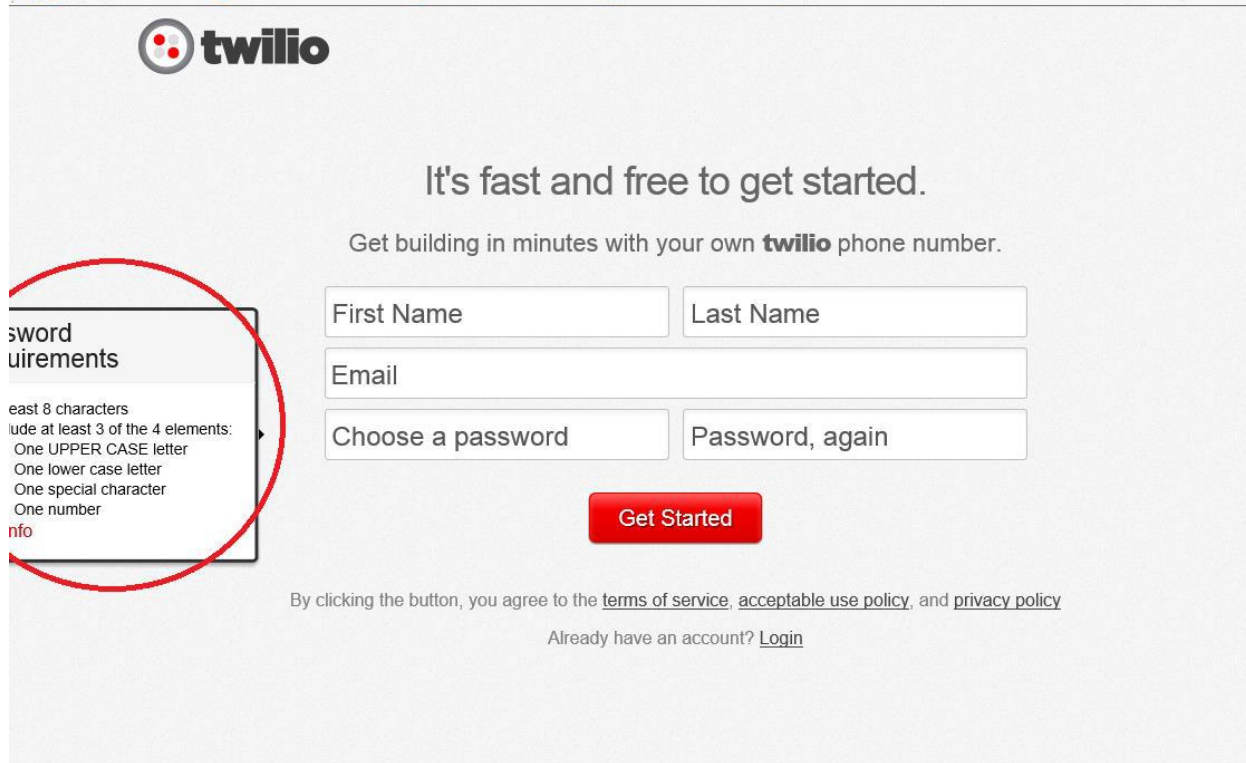


To Create a Twilio Account

Go to <https://www.twilio.com/>

In the top right corner, click on the **SIGN UP** button

You'll be taken to the following screen. Enter your first and last name along with email address. When selecting a password Twilio will give you the specifics required for a password.



The screenshot shows the Twilio sign-up page. At the top left is the Twilio logo. The main heading is "It's fast and free to get started." Below this is the sub-heading "Get building in minutes with your own **twilio** phone number." The form consists of several input fields: "First Name", "Last Name", "Email", "Choose a password", and "Password, again". A red "Get Started" button is centered below the form. At the bottom, there is a line of text: "By clicking the button, you agree to the [terms of service](#), [acceptable use policy](#), and [privacy policy](#)" followed by "Already have an account? [Login](#)". A red circle highlights a callout box on the left side of the form, titled "Password requirements". The callout box contains the following text: "At least 8 characters", "Include at least 3 of the 4 elements:", "One UPPER CASE letter", "One lower case letter", "One special character", "One number", and "info".

Password requirements:

At least 8 Characters and

Include at least 3 of the following 4 elements:

One Upper case letter

One special character

One lowercase letter

One number

After all information has been entered Select **"Get Started"** Button


Next is the Twilio verification process...

You will enter your phone number. It can either be a cell number or a home number. The website defaults to using a cell number and there's a **Text Me** option, however, if you are using a home number, you can select "call me instead" option



We need to verify you're a human.
Enter your phone number and we'll text you a verification code.

[Call me instead.](#)

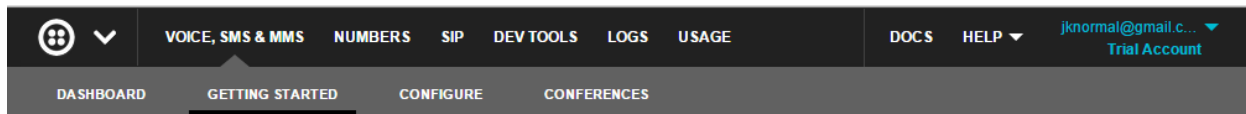
A red arrow pointing upwards towards the "Call me instead." link.

Once you have entered your number and clicked either "Text Me" or "Call you instead," you will receive a verification code. You will enter this code and hit **Submit**.



We need to verify you're a human
Please enter the verification code we sent to your phone. If you didn't receive a code, you can [try again](#)

Once you have been verified you will be then logged in to your Twilio account and land at the “Getting Started Page”. Then select “[Get your Twilio number](#)” in the upper left hand corner of the page



Get Started with Voice, SMS & MMS

[Show API Credentials](#)

Welcome Jerelyn Kennedy-Normal! Ready to begin?

[Get your Twilio number](#)



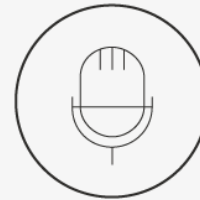
Build a Voice App

[Make a call](#) with the API Explorer.
Learn how to take [incoming calls with TwiML](#).



Build a Messaging App

[Send a message](#) with the API Explorer.
Learn how to [reply to incoming messages](#).



Build an App with Client

Download the [Twilio Client SDKs](#) for your [browser](#), [iOS](#), or [Android](#).

Helpful Documentation

[Verify](#) or [Buy](#) phone numbers
[Download API Libraries and SDKs](#) [↗](#)
Learn more about [how the free trial works](#) [↗](#)

Not ready to build? We can help you find the right solution. [Talk to sales](#) [↗](#)

Ready to remove trial restrictions and enjoy full benefits?

[Learn more about trial accounts](#) [↗](#)



[Upgrade your account](#)

If you don't like the first predefined number you also have the option to “[Search for a different number](#)”. You can enter your preference of area codes or phrases that you want incorporated into the number and search.

Get Started with Voice, SMS & MMS

[Show API Credentials](#)

Your first Twilio phone number.

 +1 (314) 375-3745   

[Choose this number](#)

Don't like this one? [Search for a different number.](#)

Helpful Documentation

[Meet TwiML: The Twilio Markup Language](#) [↗](#)
[Which countries does Twilio have numbers in and what are their capabilities?](#) [↗](#)
Learn more about [how the free trial works](#) [↗](#)

Not ready to build? We can help you find the right solution. [Talk to sales](#) [↗](#)

If a number is available you will be given a list to select from.

Get Started with Voice, SMS & MMS

[Show API Credentials](#)

Search for your new Twilio phone number.

Country United States (+1)

Number

begins with term

Search with three or more letters or numbers, like your name

Capabilities Any Voice SMS MMS

Different numbers have different communications capabilities. Select the ones your phone number needs.

Search

Don't like these? [Go back to your preselected number.](#)

Helpful Documentation

Meet TwiML: [The Twilio Markup Language](#)

[Which countries does Twilio have numbers in and what are their capabilities?](#)

[Learn more about how the free trial works](#)

Not ready to build? We can help you find the right solution. [Talk to sales](#)

Choose your new Twilio number or go back the predefined number

Get Started with Voice, SMS & MMS

[Show API Credentials](#)

Search for your new Twilio phone number.

Country United States (+1)

Number

begins with term

Search with three or more letters or numbers, like your name

Capabilities Any Voice SMS MMS

Different numbers have different communications capabilities. Select the ones your phone number needs.

Search

Don't like these? [Go back to your preselected number.](#)

Number	Capabilities			Choose Number
	Voice	SMS	MMS	
+1 (706) 223-3186 FRANKLIN, GA				Choose Number
+1 (706) 223-3173 FRANKLIN, GA				Choose Number
+1 (706) 223-3126 FRANKLIN, GA				Choose Number
+1 (706) 223-3134 FRANKLIN, GA				Choose Number
+1 (706) 223-3127 FRANKLIN, GA				Choose Number

Helpful Documentation

Meet TwiML: [The Twilio Markup Language](#)

[Which countries does Twilio have numbers in and what are their capabilities?](#)

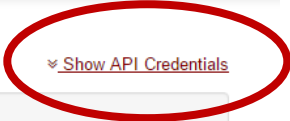
[Learn more about how the free trial works](#)

Not ready to build? We can help you find the right solution. [Talk to sales](#)



Once you have selected your Twilio number you will again be taken to your account's Getting Started Page. Make note of your Twilio number to enter into the TaxSlayer program. In the opt right corner of the page select the **Show API Credentials drop down arrow** to get the other necessary information to configure the Twilio feature in TaxSlayer.

Get Started with Voice, SMS & MMS

 [Show API Credentials](#)

Congratulations! Here's your first Twilio number: (706) 223-3122

Once the API information is displayed you have all the necessary information for the TaxSlayer program

Get Started with Voice, SMS & MMS

[Hide API Credentials](#)

API Credentials

To use the Twilio API you will need your AccountSid and Auth Token.

ACCOUNT SID AC8851a6c71396a763188c8b6ef9c34739 **AUTH TOKEN** d651b7e1063361c8e7eea659b1a872f2

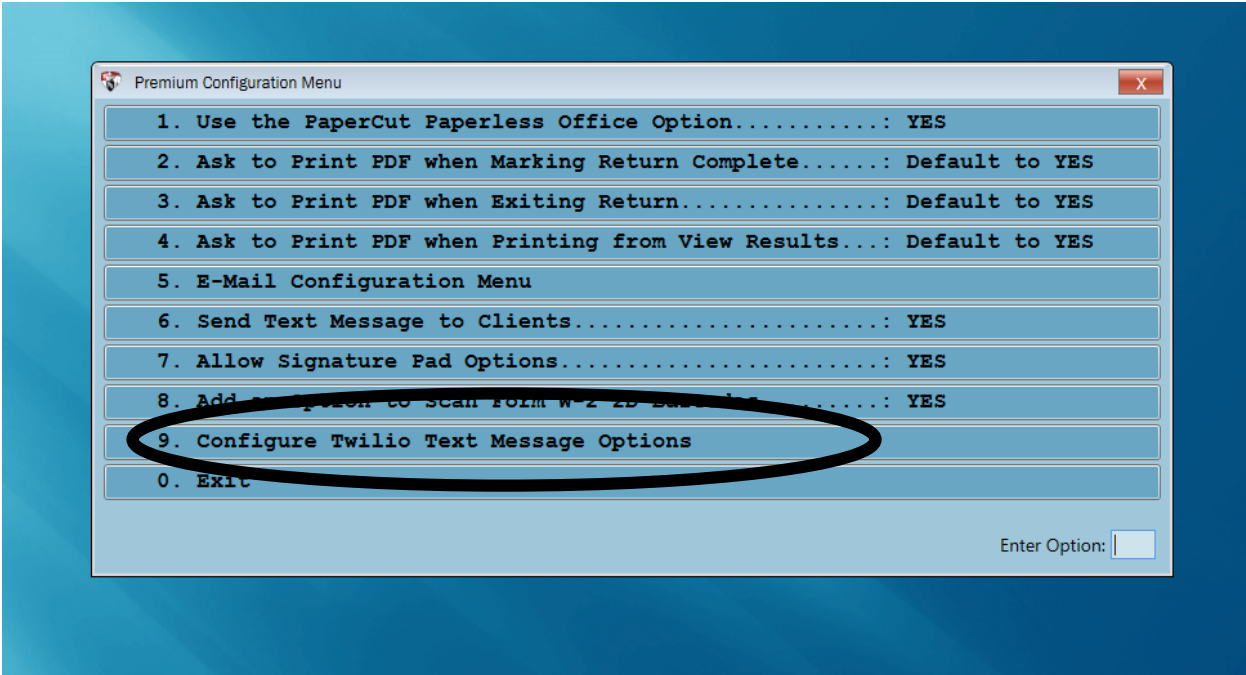
Congratulations! Here's your first Twilio number: (706) 223-3122

[Configure your number](#)

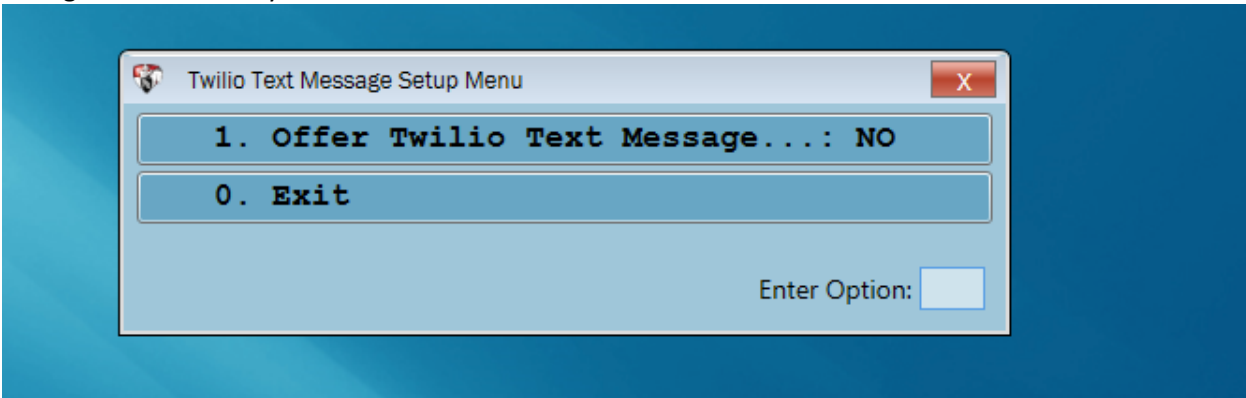
Now you can minimize Twilio and configure the feature in TaxSlayer Pro!

To configure Twilio in TaxSlayer Pro Premium

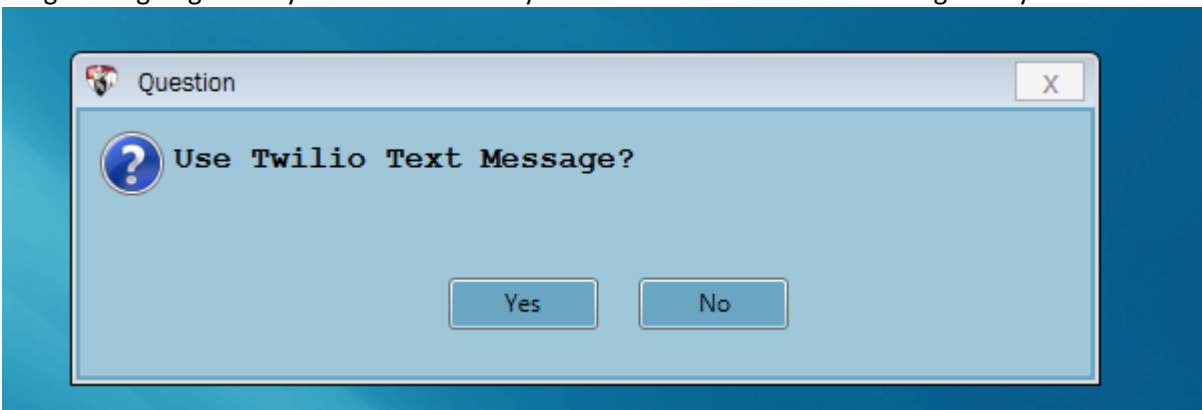
- Navigate to the main menu of TaxSlayer Configuration
- Configure Premium options
- Select to Configure Twilio Text Message Options



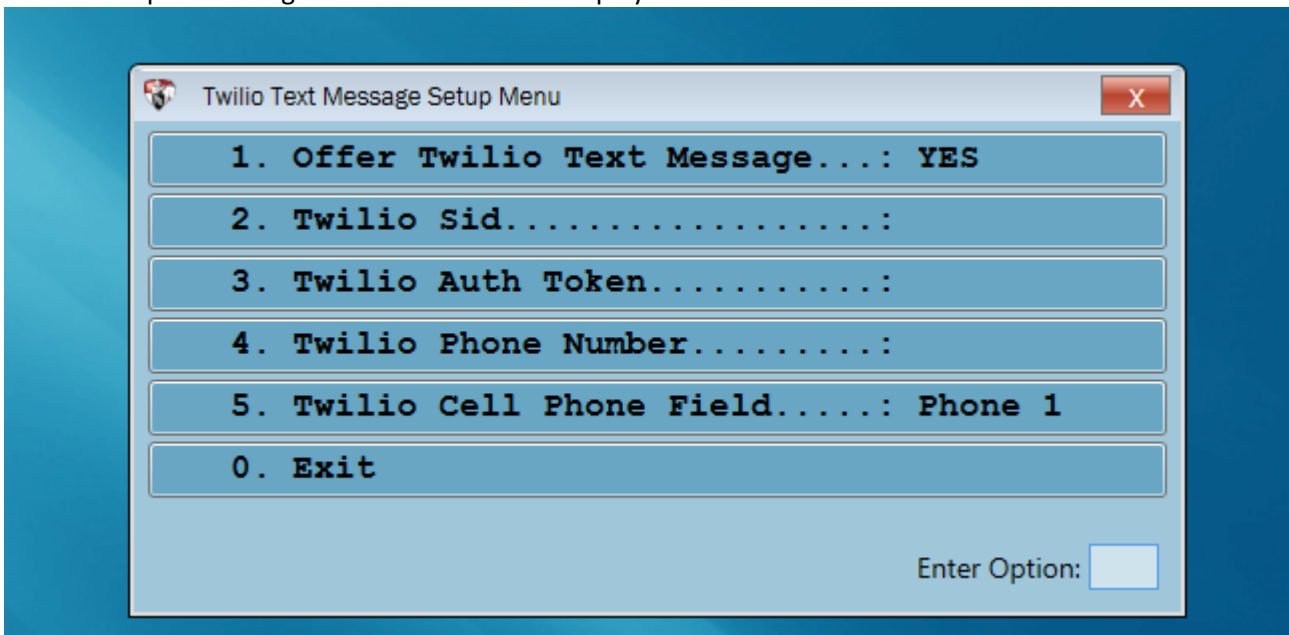
Change default NO to yes



Program is going to ask you to confirm that you want to use Twilio Text Message – Say YES



Now the required configuration information is displayed



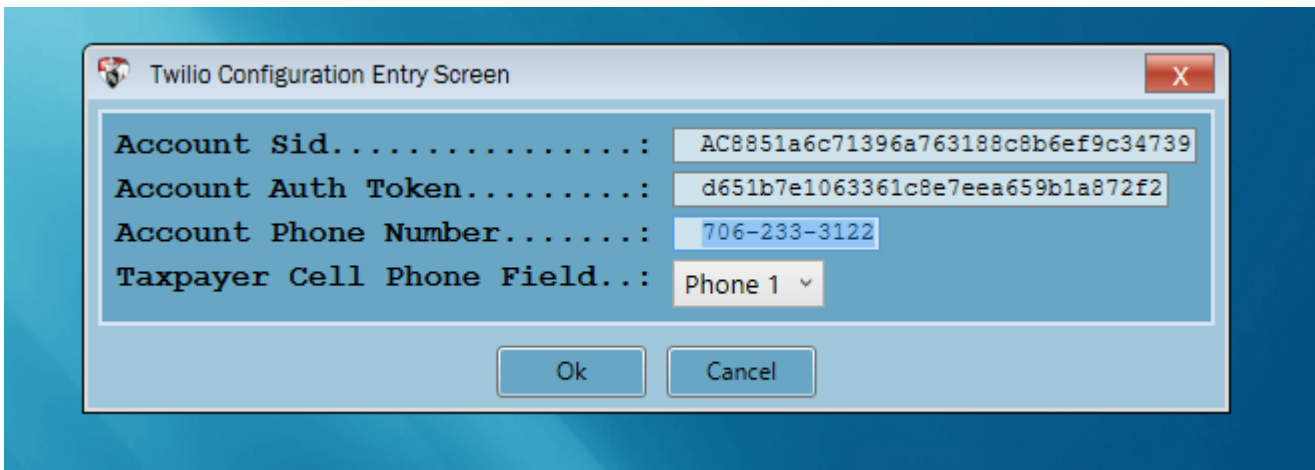
Navigate back to Twilio and copy the information from the API at the top of the page back into TaxSlayer. The copy and paste feature will work. Highlight the information from Twilio and paste it into the appropriate line in the program.

API Credentials

To use the Twilio API you will need your AccountSid and Auth Token.

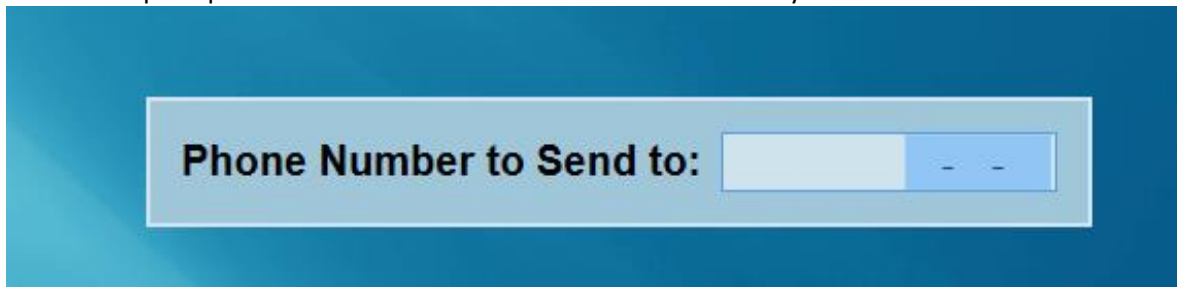
ACCOUNT SID AC8851a6c71396a763188c8b6ef9c34739 AUTH TOKEN d651b7e1063361c8e7eea659b1a872f2

Congratulations! Here's your first Twilio number: (706) 223-3122

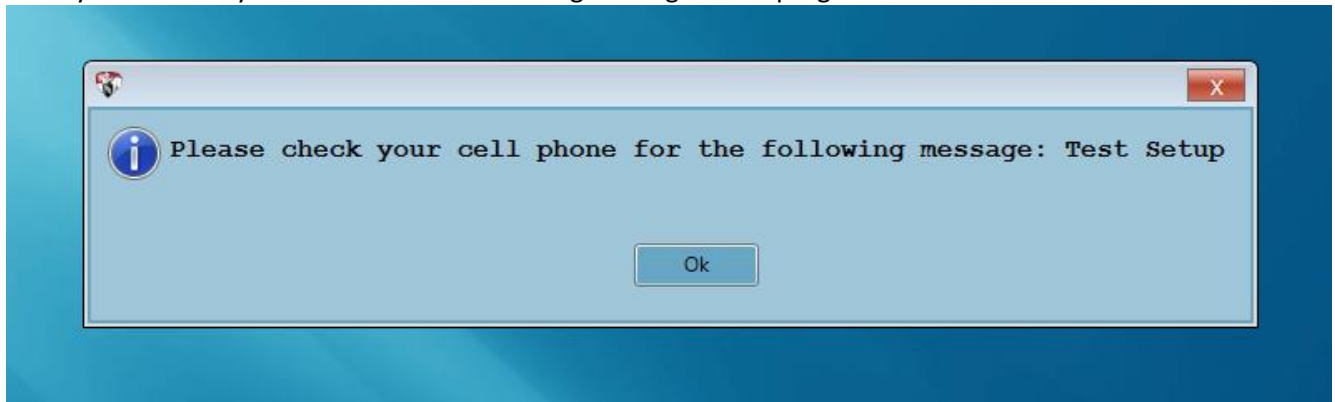


Once everything has been entered select "OK"

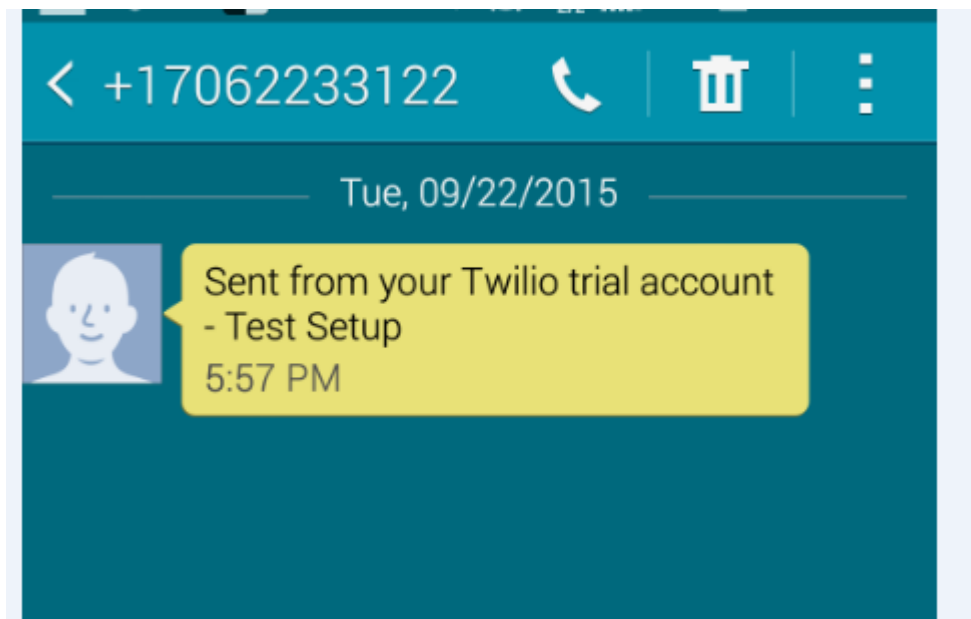
There will now be an option in the Twilio Text Message Setup Menu to **“Send Test Text”**
You will be prompted to enter a Phone Number to Send to: Enter your number to receive the test text



Once you hit enter you will receive the following message in the program



Please confirm receipt of text message from your Twilio number. When message has been received select OK



Using Twilio to Text an Individual Client –

Once you've created the tax return and you are at the Form 1040 Screen, you will now see an additional option to the left for Send Text Message

1. Personal Information
2. Income Menu
3. Adjustments Menu
4. Itemized Deductions Menu
5. Tax Computation Menu
6. Credits Menu
7. Other Taxes Menu
8. Payments, Estimates & EIC
9. Miscellaneous Forms
10. State Return
11. View Results
12. Mark Return Electronic
13. Diagnostic Warnings
14. Send Text Message

Enter Option: [] [Exit]

Form Finder Forms Completed

FORM 1040A

Phone 1 706-855-0985
Phone 2 - -
Phone 3 - -

1040 Department of the Treasury—Individuals
U.S. Individual Inc

For the year Jan. 1–Dec. 31, 2014, or other tax year beginning
Your first name and initial
TWILLIO
If a joint return, spouse's first name and initial

Home address (number and street). If you have a P.O.
252 EAZY STREET
City, town or post office, state, and ZIP code. If you have a
FORT WORTH, TX 76119
Foreign country name

Filing Status

1 Single
2 Married filing joint
3 Married filing sep and full name her

Check only one box.

It will take you to the Text Message Entry screen. You will enter the message you want to send to your client and hit Send Message.

Text Message Entry

Text Message Body

Reminder your tax return has been emailed to you

Send Message Cancel

Hide Recipients

Recipient

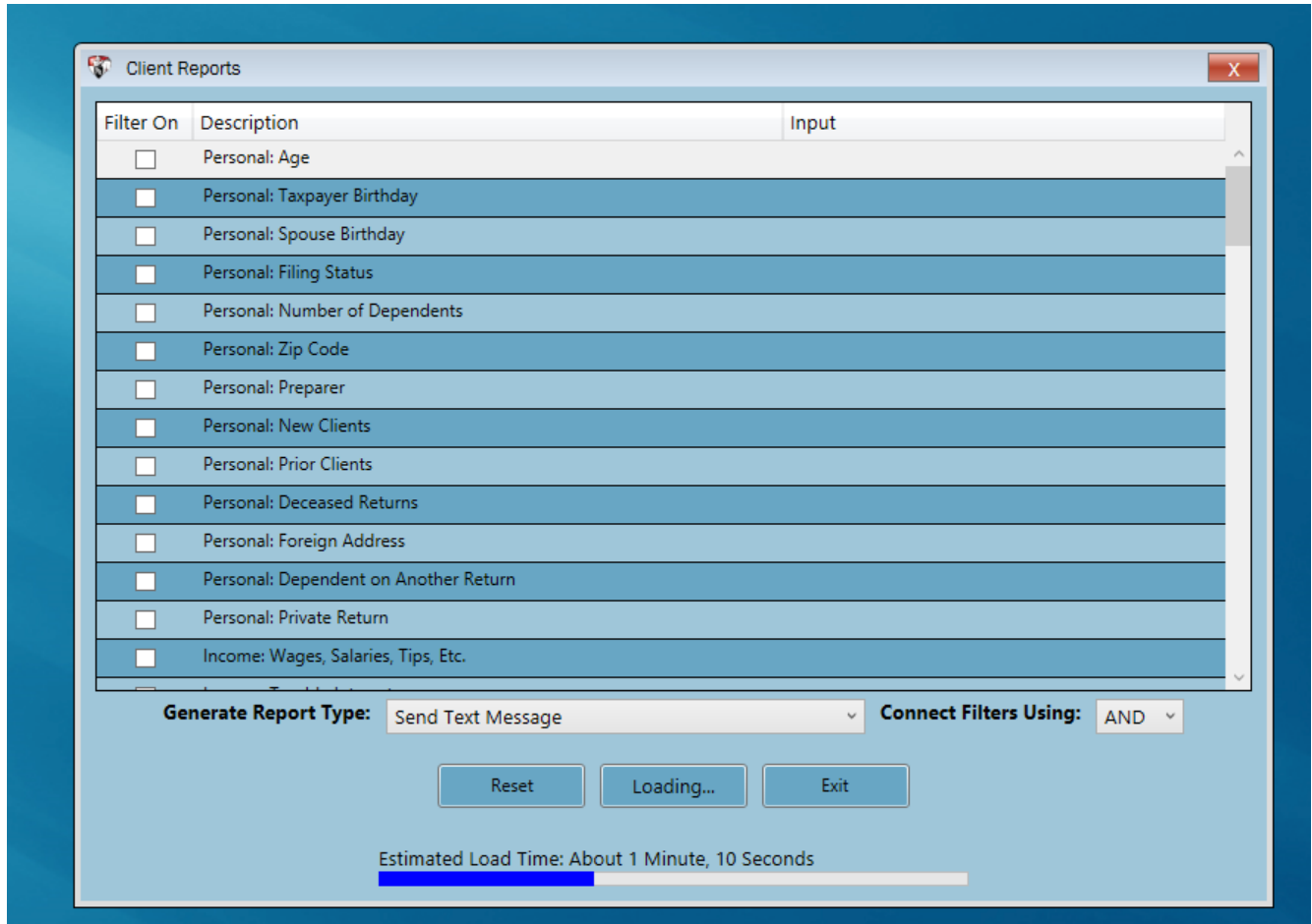
TWILLIO TEST 706-855-0985

Check All Uncheck All

Using Twilio to Send a Text Message to Multiple Clients at One Time –

From the main menu of the program, go to the Reports menu then select Client Reports.

You can choose which filter option you want to use by putting a check in the box. Then you will hit the down arrow next to View/Print Custom Report. You will see an option at the bottom of the list for Send Text Message. (Image is below)



You will get a message detailing the total number of clients on report

The next screen will allow you to enter your message as well as click "Show Recipients" to verify the recipients of the message. If you have someone selected that you do not wish to send a text message to, you can always uncheck their name. You will enter your message and if you are satisfied with the recipients, you will click Send Message.

