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QUICK START GUIDE

Freshdesk Integration

with BulkSMS.com

Connect Freshdesk to the BulkSMS Integration Gateway, see SMS and replies on your contacts and tickets, create message templates and send bulk SMS to your contacts.



Welcome to BulkSMS.com

Trusted, scalable SMS messaging for your business

IN THIS GUIDE

01 Get your Freshdesk API Key

02 Connect the Integration Gateway

03 Create templates and send bulk SMS

freshdesk

BULKSMS.COM INTEGRATION GATEWAY FOR FRESHDESK

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01 Foreword

The Freshdesk integration connects with your Freshdesk API Key. Before you start, make sure you have the following ready.

API Key
Freshdesk → your profile → Profile Settings

Instance URL
Your Freshdesk address, e.g. https://yourcompany.freshdesk.com

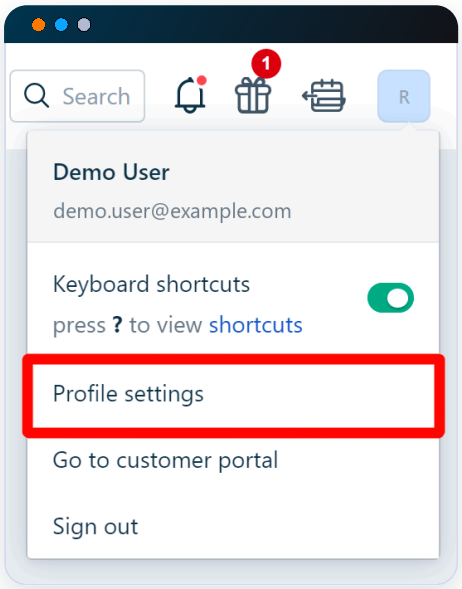
Country code
The country most of your contacts are in, e.g. 44 for the UK

The integration works with tickets as the agent whose API Key you use, so choose that agent with care—see Integration Rules.

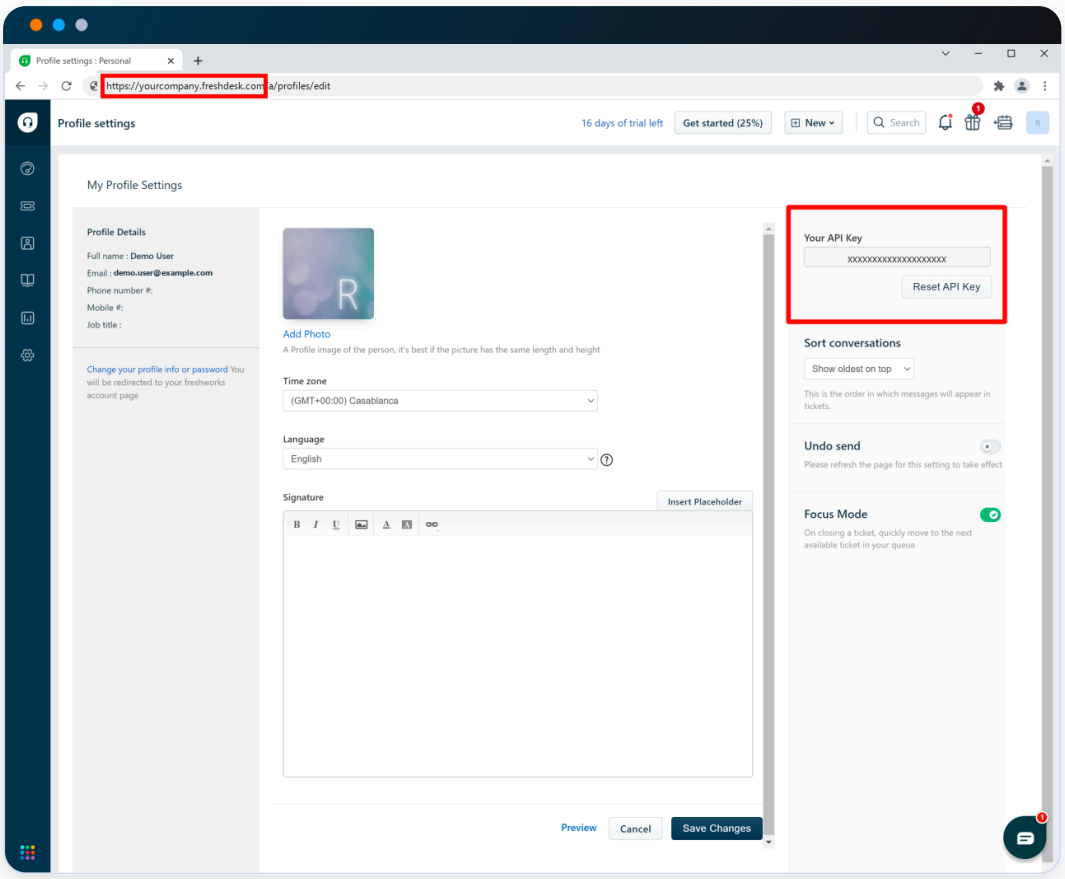
02 Freshdesk Credentials

API Key

1. Log in to your Freshdesk account at freshdesk.com/login.
2. Click your profile picture in the top right corner and select **Profile settings**.



3 Copy **Your API Key** from the right-hand side of the page.

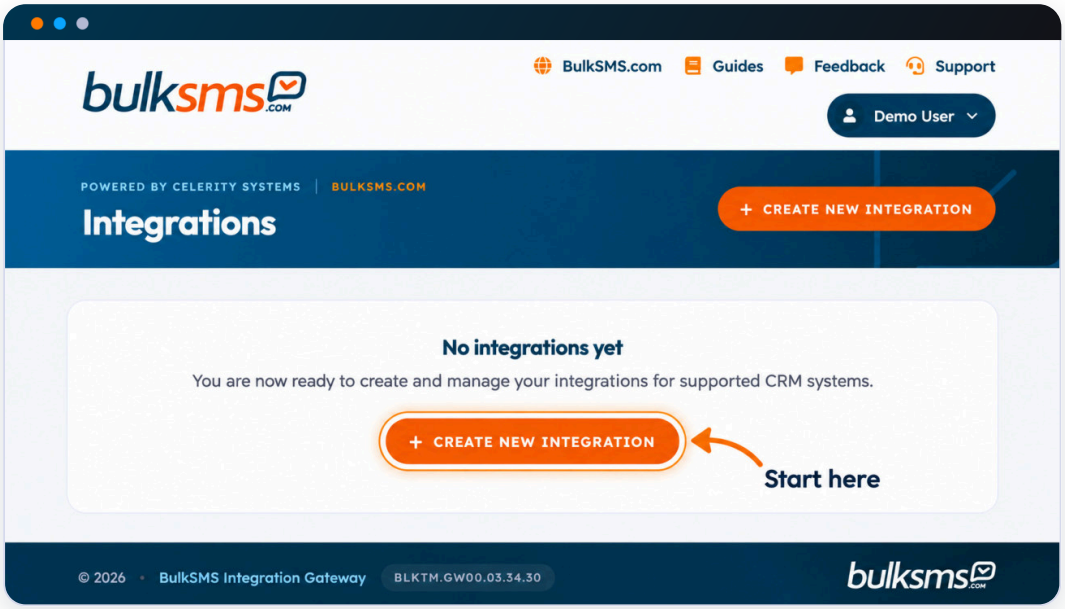


Instance URL

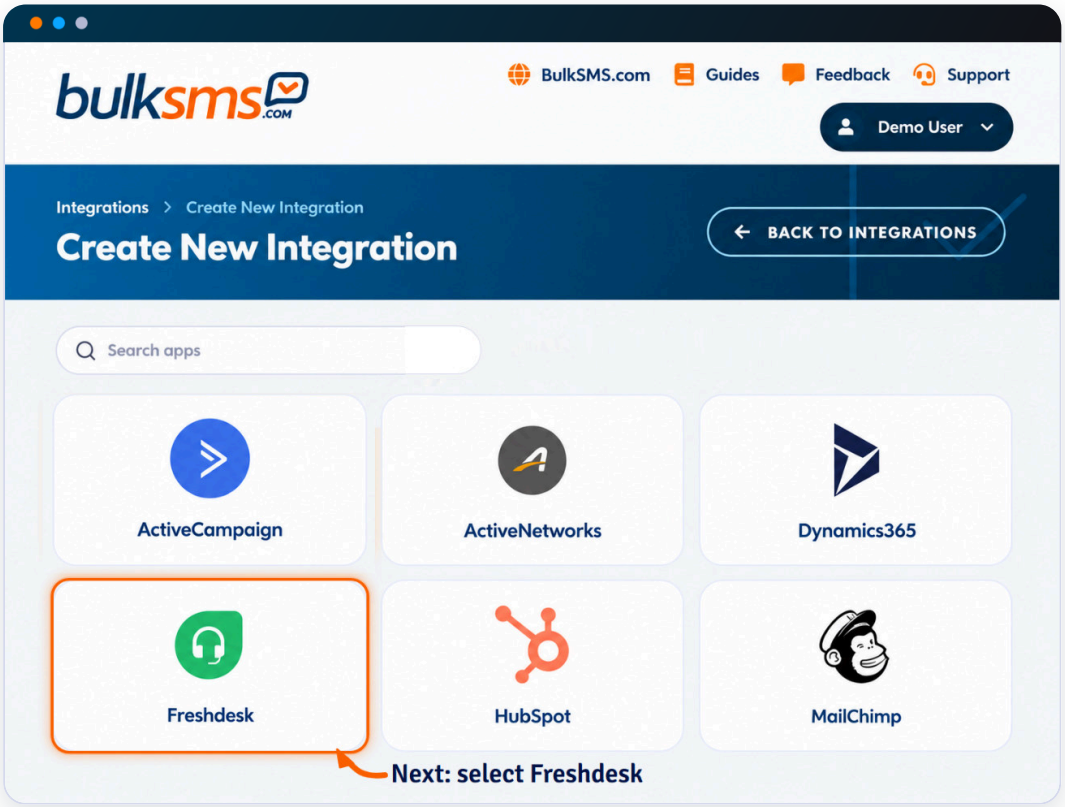
The Instance URL is the start of the address in your browser's address bar while you're logged in to Freshdesk (highlighted above), for example `https://yourcompany.freshdesk.com`. Copy it without anything after `.freshdesk.com`.

03 Integration Setup

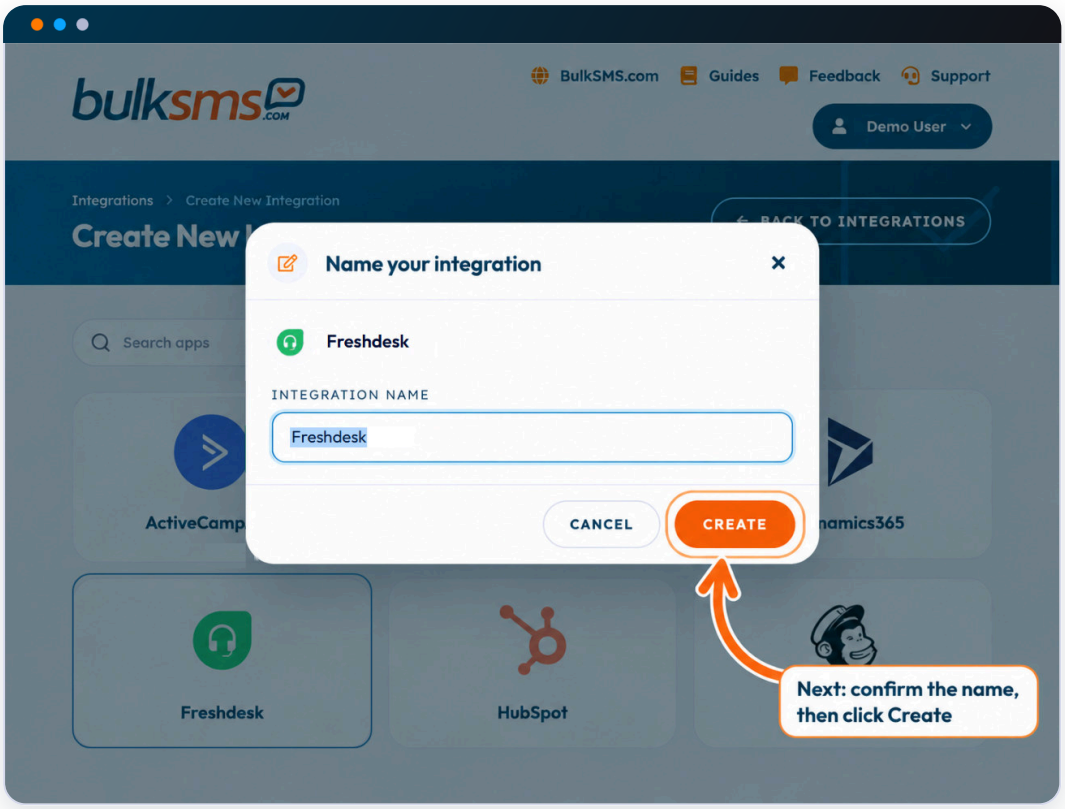
1 Sign up or log in to the BulkSMS Integration Gateway at bulksms.com/integration-gateway and click **Create New Integration**.



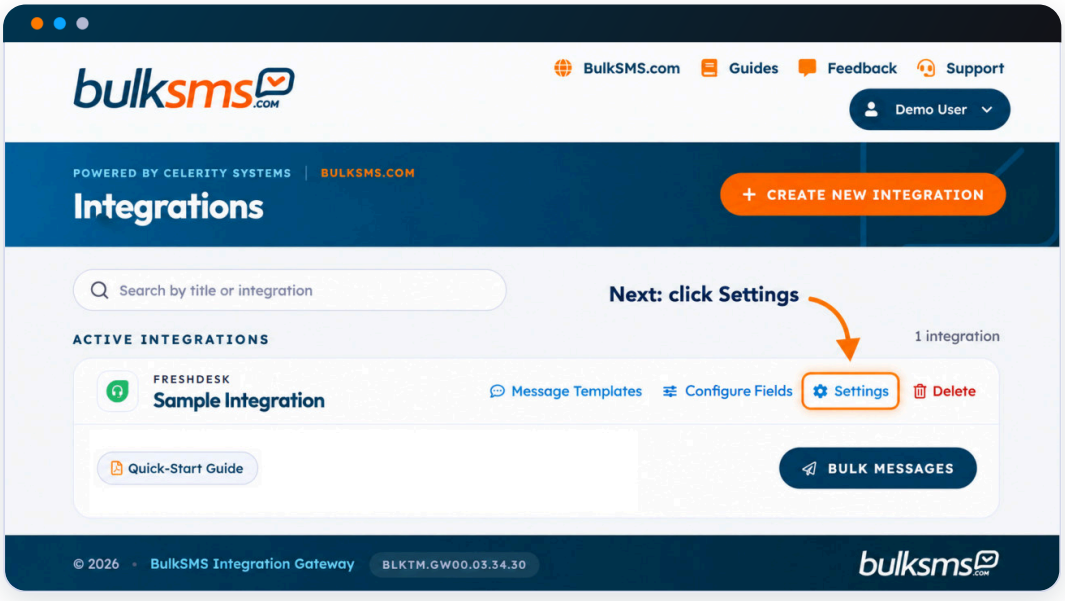
2 Select **Freshdesk**. You can type in **Search apps** to find it quickly.



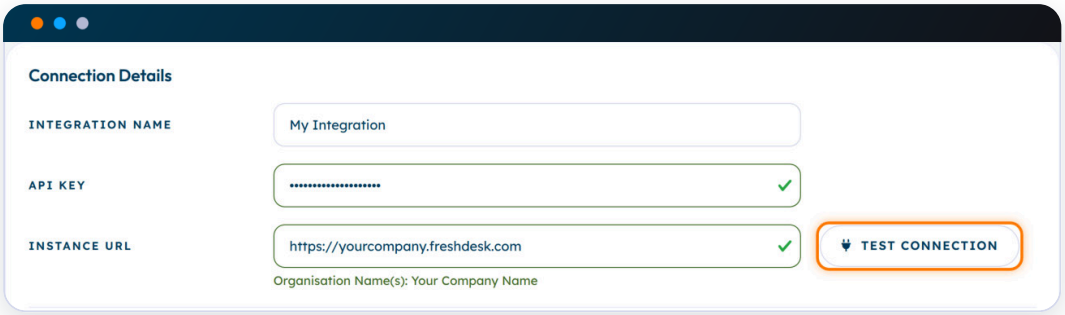
3 Give your integration a name, or keep the one suggested, and click **Create**. The name can use letters, numbers, spaces, hyphens and underscores, up to 40 characters.



4 Your integration now appears on the Integrations page. Click **Settings**.



5 Enter your **API Key** and **Instance URL** and click **Test Connection**. When the connection works, the fields turn green and the name of your Freshdesk mailbox is shown underneath as **Organisation Name(s)**.



6 Complete the rest of the page, then click **Save Settings**:

- **Default Country Code** – added to numbers that don't include one (see Sending Tips).
- **Force Country Code** – leave off unless all your contacts are in one country (see Sending Tips).
- **Notification Email** – where the Integration Gateway sends notifications about this integration.

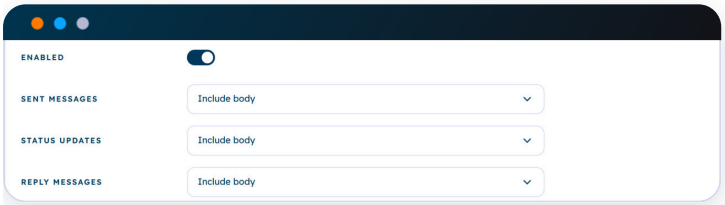
When you save for the first time, Activity Updates are switched on automatically, so SMS activity starts appearing in Freshdesk straight away. Return to Settings to change this—see the next section.

04 Activity Updates & Two-Way SMS

Activity Updates send what happens to your messages back to Freshdesk: when an SMS is sent, delivered or fails, and when a contact replies. They are recorded on the contact's timeline and in ticket conversations.

Choose what's recorded

Open **Settings** for your integration and scroll to **Activity Updates**. With **Enabled** ticked, each message type can be set to **Include body** (the message text is included), **Exclude body** (the event is recorded without the text) or **Disabled** (nothing is recorded). Click **Save Settings** when you're done.



OPTION	WHAT IT RECORDS IN FRESHDESK
Sent Messages	An **SMS Sent** event on the contact's timeline, and the message is added to the contact's open ticket if they have one.
Status Updates	An **SMS Delivered** or **SMS Failed** event on the contact's timeline.
Reply Messages	An **SMS Reply** event on the contact's timeline, and the reply is added to the contact's open ticket—or a new ticket is created.

Exclude body only hides the text on the contact timeline. Sent messages and replies are still added to tickets with their text.

Good to know

- Sent Messages includes every bulk message. If you send marketing messages to contacts who have open tickets, each message is added to their ticket. Set Sent Messages to **Disabled** if you don't want that.
- Contacts can only reply to messages sent from a **(repliable)** sender address or a phone number—not from a text sender name. See Sending Tips.
- If **Enabled** is unticked when you return to the page, the connection to your BulkSMS account needs setting up again—tick it and click **Save Settings**.

05 Integration Rules

These rules decide where each message and reply ends up in Freshdesk.

Which ticket is updated

The integration looks for the contact's tickets that are **New**, or **Open and assigned to the agent whose API Key you entered**. If there are several, the most recently created one is used. Tickets assigned to other agents, and pending, resolved or closed tickets, are never updated.

Sent messages

- The message is added to the ticket as a reply from the agent whose API Key you entered.
- If the contact has no matching ticket, nothing is added to tickets—the SMS Sent event is still recorded on the contact's timeline.

Replies

- The reply is added to the matching ticket as a reply from the contact.
- If there's no matching ticket, a new ticket is created with the subject **Ticket created via SMS**, status **Open** and priority **Medium**. Its description shows the original message and the reply.
- A reply is linked to the contact you last messaged on that number. If the reply can't be linked to a message you sent, the integration searches Freshdesk for a contact whose **Mobile** field matches the number in international format without the + (e.g. `447700900123`). If no contact matches, the reply isn't recorded in Freshdesk.

Delivery reports

SMS Delivered and SMS Failed events are added to the contact's timeline only. Failed events include the reason the message failed. Tickets aren't changed.

06 Configure Fields

Favourite fields let you choose which Freshdesk contact fields you work with. Click **Configure Fields** for your integration on the Integrations page.

Why it matters

- **Custom contact fields can only be used in custom queries once they are favourites.** The query builder always offers Active, CompanyID, Created At, Updated At and Tags, plus your favourite custom fields.
- The **Contact Tokens** list on the Prepare screen shows the standard contact fields plus your favourite custom fields.
- The **Tokens** list for templates shows every custom contact field until you choose favourites, then only your favourites.

Favourite Fields

1. On the **Favourite Fields** tab, select a field under **Available Fields** and click **Add**. To take a field out, select it under **Favourite Fields** and click **Remove**.
2. Click **Save**. You'll see **Configuration Updated**.

i Custom fields of the paragraph, phone number, URL and dropdown types aren't listed, because they can't be used in custom queries.

Favourite Values

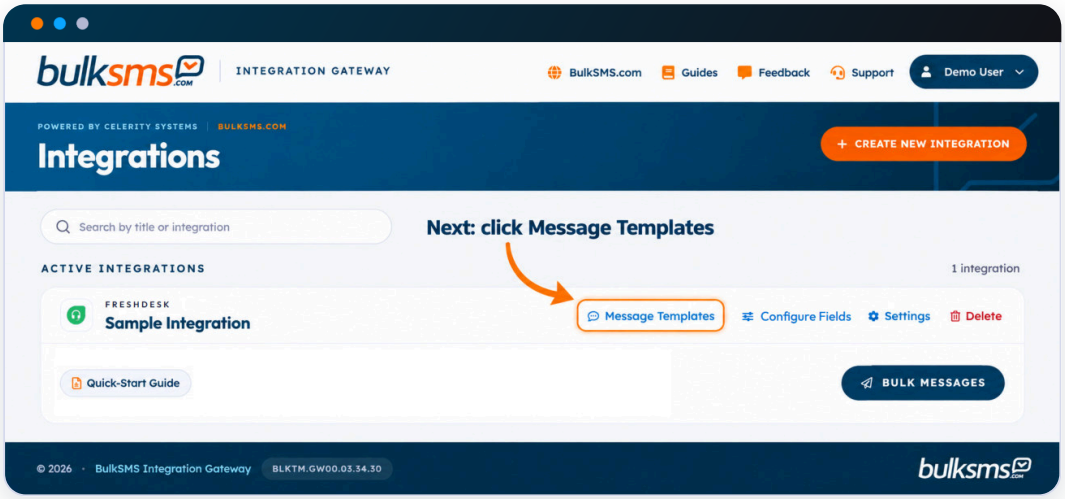
Favourite values give you a ready-made list to pick from when you filter on a text field in a custom query.

1. On the **Favourite Values** tab, select one of your favourite fields.
2. Type the values, separated by commas. Use `,,` to add a separator line and `[[ Section name ]]` to add a titled separator. **Auto-populate** fills the list with values from a sample of your existing contacts (not available for Tags).
3. Click **Save**. You'll see **Favorites Saved**.

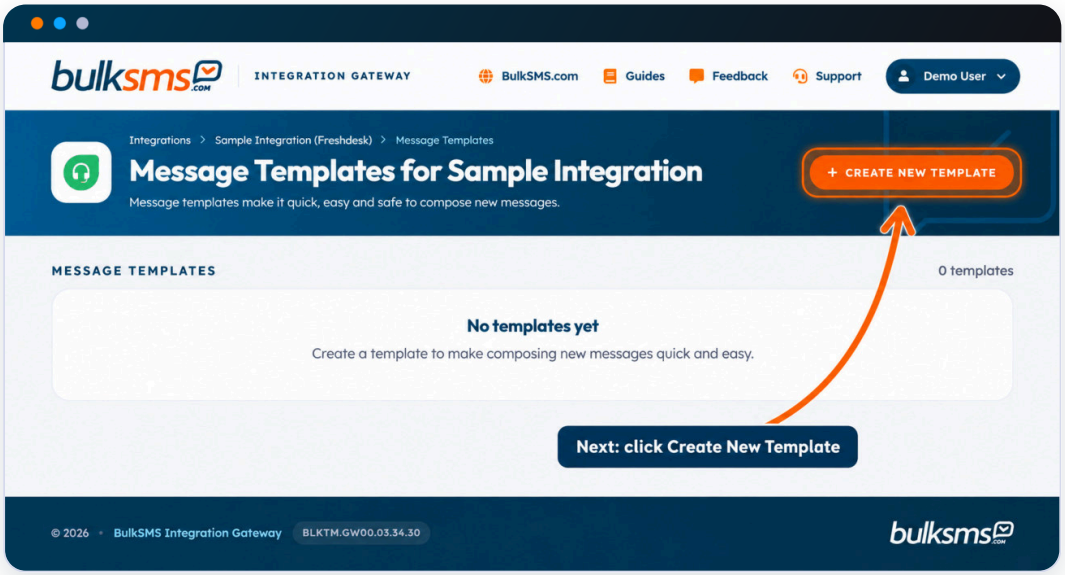
07 Message Templates

Templates let you save messages you send often, with tokens that personalise each message for the contact.

1 On the Integrations page, click **Message Templates** for your integration.

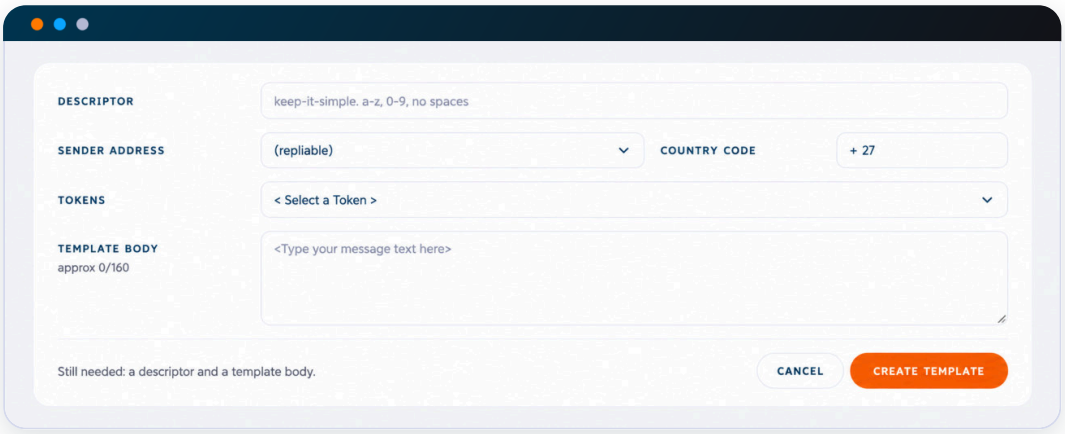


2 Click **Create New Template**.

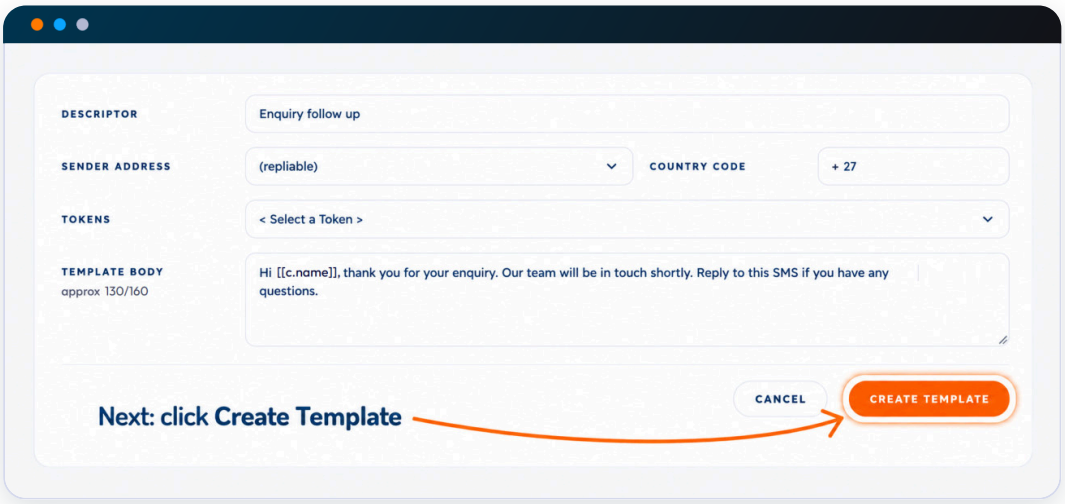


3 Fill in the template:

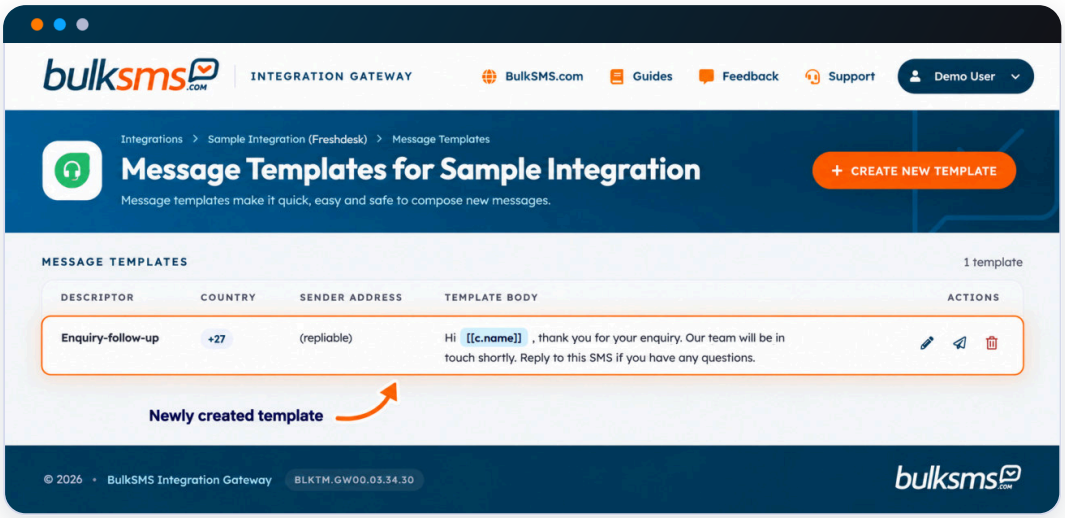
- **Descriptor** – a name for the template, using letters, numbers, spaces and hyphens (up to 30 characters).
- **Sender Address** – keep **(repliable)** if you want contacts to be able to reply.
- **Country Code** – the default for this template. You can change it when you prepare a message.
- **Tokens** – pick a field to insert it into the message. See Sending Tips.
- **Template Body** – your message. The counter shows the approximate length against 160 characters.



4 When the template is complete, click **Create Template**.



5 Your new template is listed under **Message Templates**. Use the icons on the right to **edit** it, **prepare a bulk message** from it, or **delete** it.



The BulkSMS for Freshdesk extension

Templates you create here are also available in the **BulkSMS for Freshdesk** extension, an app that runs inside Freshdesk. The Tokens list includes **Agent Fields** (e.g. `[[a.name]]`) and **Ticket Fields** (e.g. `[[subject]]`) for use in the extension.

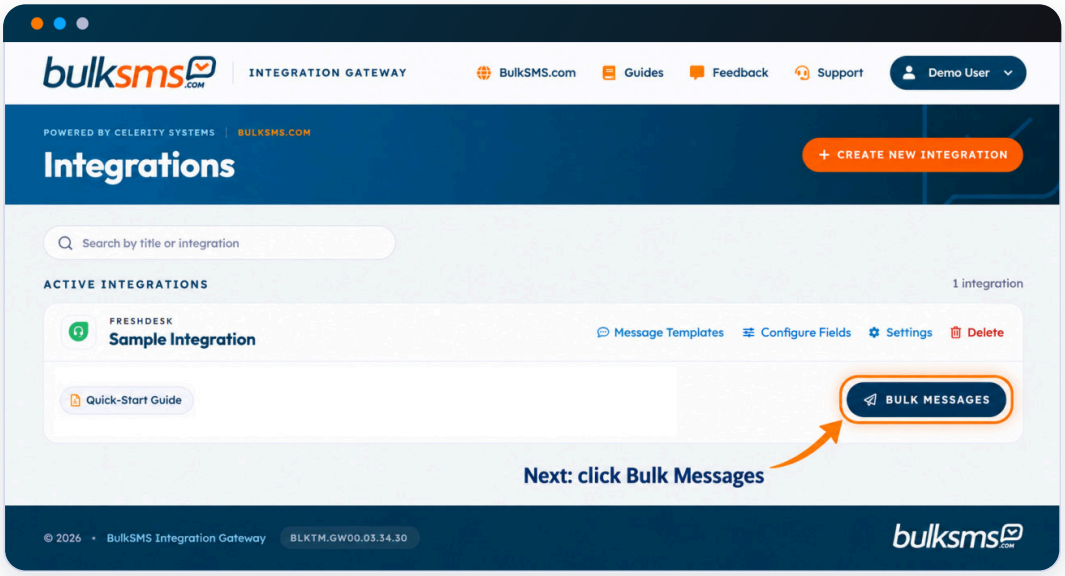
! Agent and ticket fields can only be used in the extension, not in bulk messages. The template editor and Prepare screen warn you if a message contains them. If you send one as a bulk message anyway, every contact is skipped.

08 Bulk Messaging

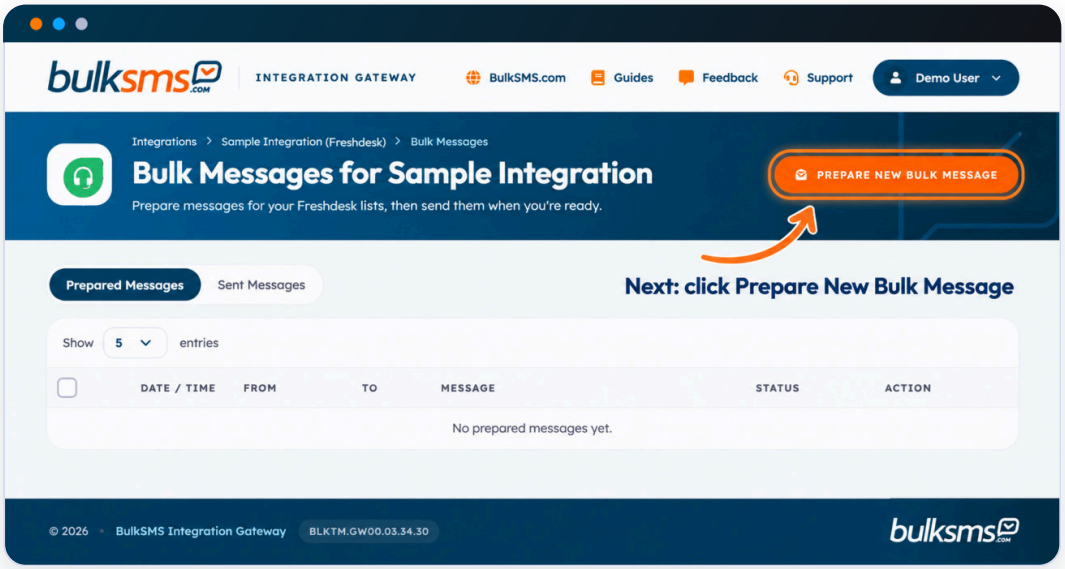
Send an SMS to all the contacts of a Freshdesk company, or to the contacts found by a custom query. You prepare the message first, check a sample, then send it.

Prepare the message

1 On the Integrations page, click **Bulk Messages** for your integration.

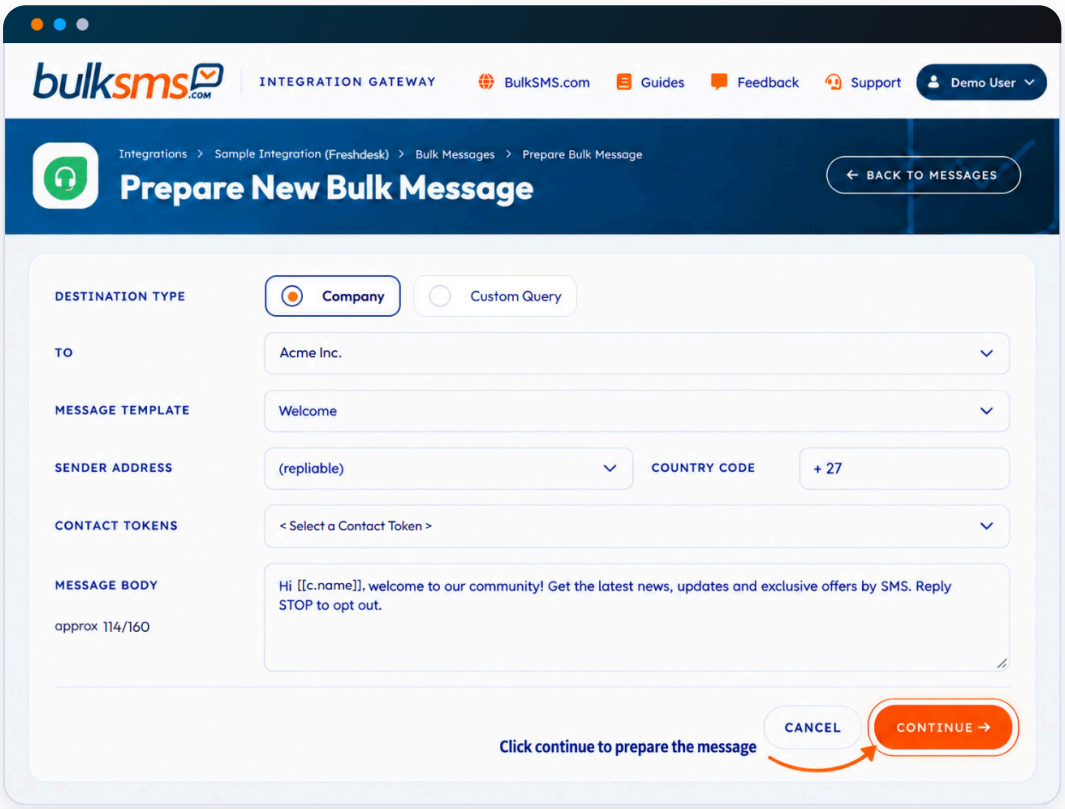


2 Click **Prepare New Bulk Message**.



3 Fill in the form, then click **Continue**:

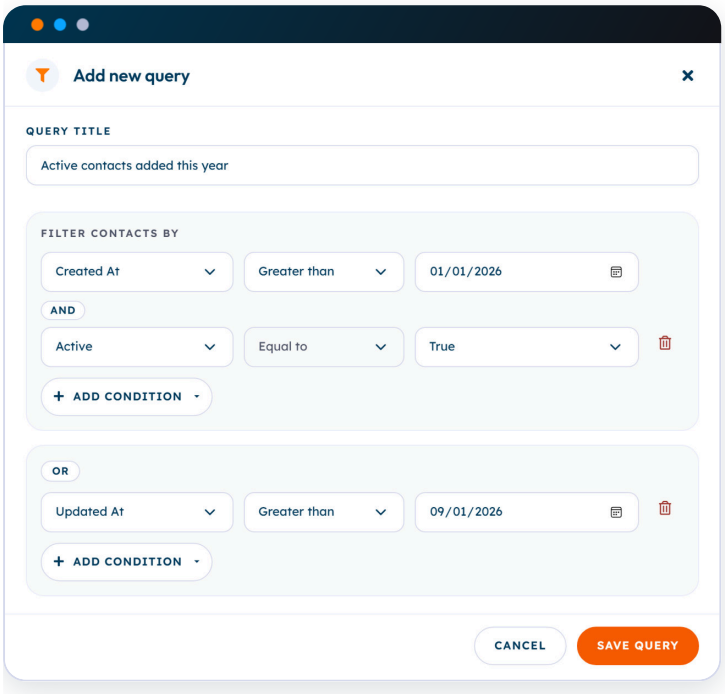
- **Destination Type** – **Company** sends to every contact of the company you choose under **To**. Type in the search box to find it, or click **<< Refresh Data >>** if a new company is missing. **Custom Query** sends to the contacts your query finds (see below).
- **Message Template** – optional. Choosing one fills in the message, sender and country code, and you can still edit them.
- **Sender Address** and **Country Code** – as for templates.
- **Contact Tokens** and **Message Body** – write or adjust the message, adding tokens as needed.



Custom queries

Choose **Custom Query**, then pick a saved query or click **New Query**. Use the edit icon next to the list to change or delete the selected query.

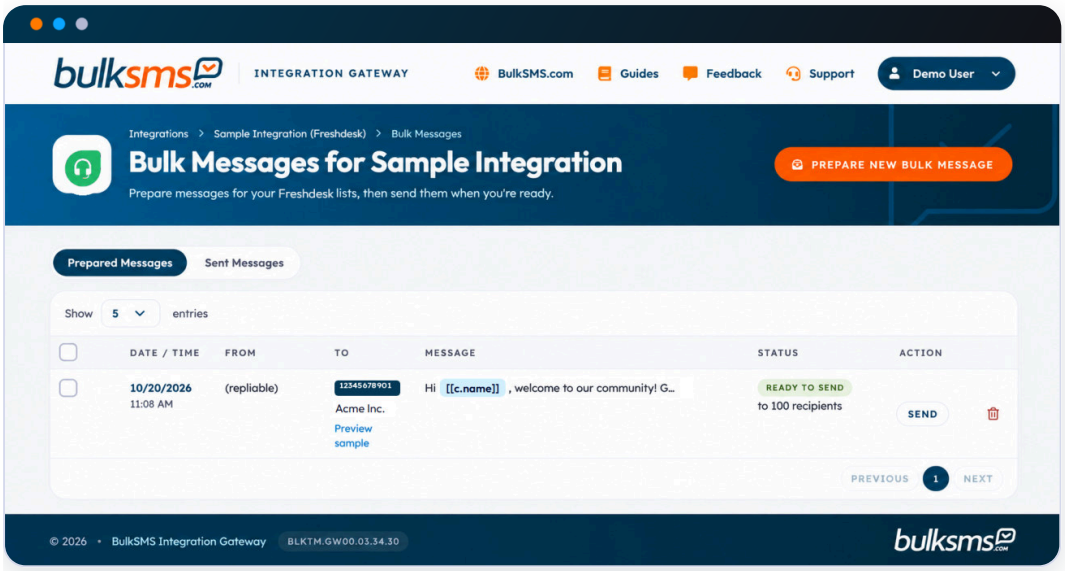
- Give the query a **Query Title**, then set a field, a condition (**Equal to**, **Greater than** or **Less than**) and a value.
- Under **Add condition**, **AND Add condition** adds a condition that must also match, and **OR Add group** adds an alternative set of conditions.
- Click **Save Query**. Hold your cursor over the selected query to see its full text.



Freshdesk returns **no more than 300 contacts** for a custom query, so larger audiences are cut off. Use **Company** for larger sends.

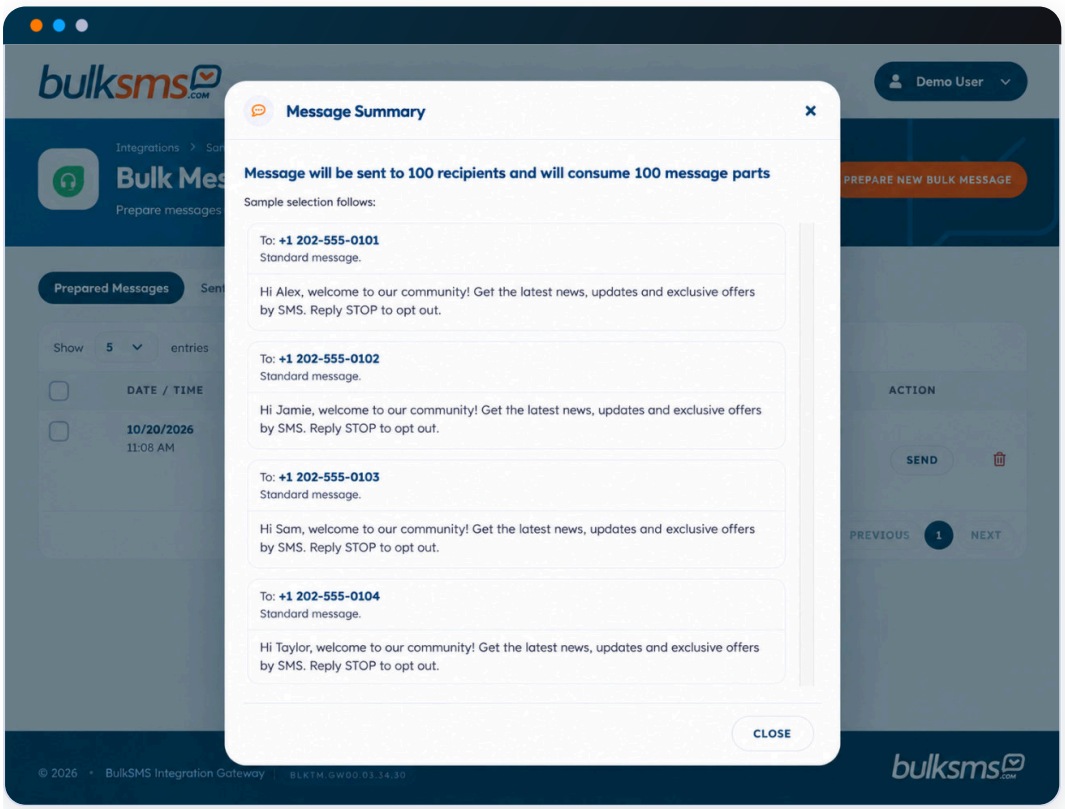
Check the prepared message

The integration collects your contacts and lists the message under **Prepared Messages**. When it shows **Ready to Send** you can preview it, send it, or delete it with the bin icon.

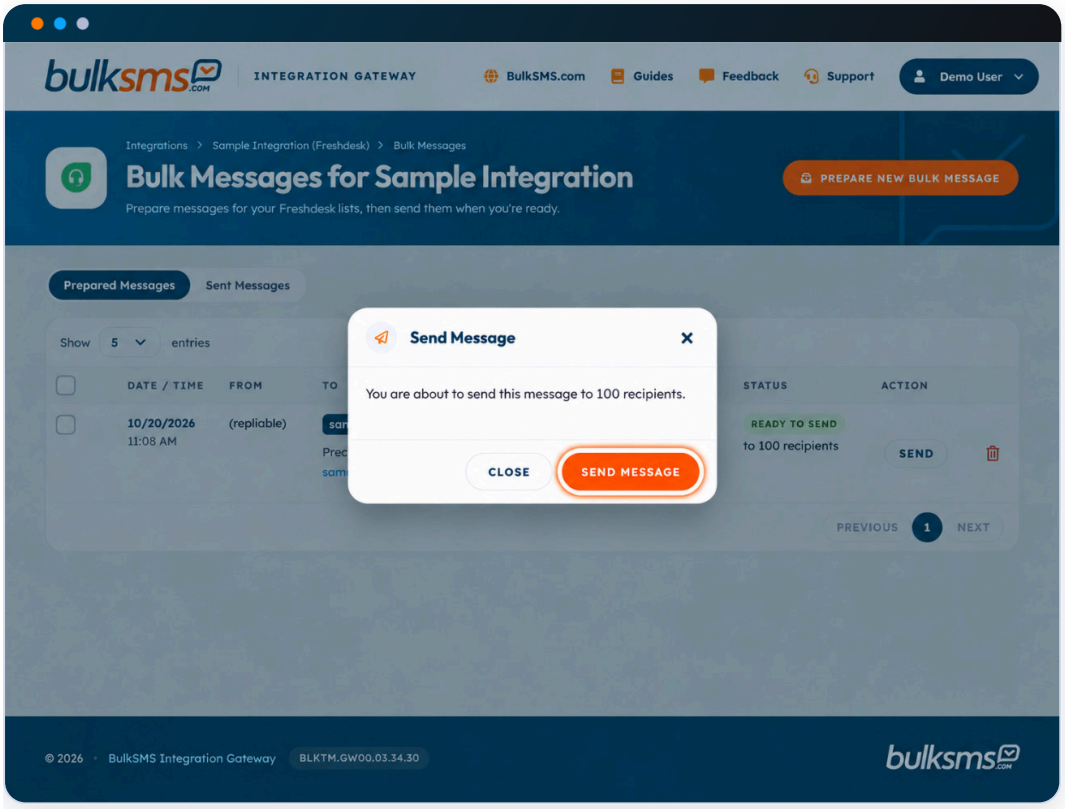


Preview and send

Click **Preview sample** to see how the message looks for a sample of up to 100 contacts, with each contact's tokens filled in. The summary also shows how many recipients and message parts the send will use.

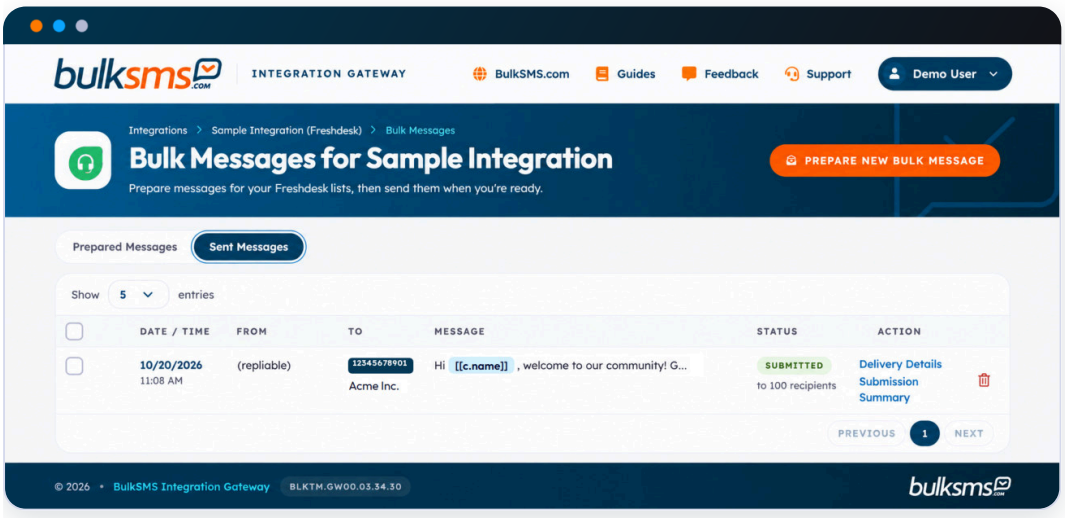


When you're happy, click **Send** and confirm with **Send Message**.



Track your message

Sent messages move to the **Sent Messages** tab. Click **Delivery Details** to see what happened to each message, or **Submission Summary** for totals, including any contacts that were skipped.



09 Sending Tips

Who receives a bulk message

- **Company:** every contact linked to the company. **Custom Query:** the contacts the query finds, up to 300.
- Messages go to each contact's **Mobile** field. The Phone field isn't used, so contacts without a mobile number are skipped.
- The integration doesn't check any opt-out or consent field in Freshdesk, and duplicates aren't removed: two contacts sharing a number will both be messaged.

Phone numbers and country codes

Numbers are sent in international format. If a mobile number in Freshdesk doesn't include a country code, the integration adds the country code from the message. **Force Country Code** on the Settings page changes when it is added. With a country code of 44:

MOBILE IN FRESHDESK	FORCE COUNTRY CODE OFF	FORCE COUNTRY CODE ON
`07700900123`	`447700900123`	`447700900123`
`7700900123`	`7700900123` (not valid)	`447700900123`
`12025550143`	`12025550143`	`4412025550143` (wrong)
`+12025550143` or `0012025550143`	`12025550143`	`12025550143`

The safest option is to store mobile numbers in Freshdesk with a **+** and the country code (e.g. +44 7700 900123). Only turn on Force Country Code if all your contacts are in one country and their numbers are saved without a country code.

Message length

- One SMS holds up to **160 characters**, or **70** if the message contains Unicode characters such as emoji or some accented letters.
- Longer messages are sent in several parts, and each part uses credits. The Prepare screen shows an approximate character count and a **Long Message** warning with the number of parts.
- A message can't be sent if it reaches 10 parts or more—the **Continue** button stays disabled until you shorten it.

Tokens

Contact tokens use the field's Freshdesk name with `c.` in front. Commonly used tokens:

TOKEN	INSERTS	TOKEN	INSERTS
`[[c.name]]`	Full name	`[[c.mobile]]`	Mobile phone
`[[c.email]]`	Email	`[[c.phone]]`	Work phone
`[[c.job_title]]`	Job title	`[[c.address]]`	Address

Custom contact fields work the same way, e.g. `[[c.membership_level]]`. `[[c.company_name]]` inserts the name of the contact's company.

If a contact has no value for a token, they are skipped. Smart token options let you control this:

OPTION	EXAMPLE	EFFECT
`:default=`	`[[c.job_title:default=customer]]`	Uses "customer" when the contact has no job title.
`:if(>n)`	`[[c.name:default=there:if(>20)]]`	Uses the default if the value is longer than 20 characters.
`:if(unicode)`	`[[c.name:default=there:if(unicode)]]`	Uses the default if the value contains Unicode characters, so the message stays at 160 characters per part.

Sender address

- **(repliable)** – contacts can reply, and replies come back to Freshdesk.
- **A phone number** – contacts can reply to that number.
- **A name** (e.g. your brand) – contacts **can't reply**.

Opt-outs: the Integration Gateway doesn't unsubscribe contacts who reply STOP, and bulk messages don't check any opt-out field. Replies such as "STOP" arrive in Freshdesk like any other reply—make sure your team removes those contacts from the companies and queries you send to.

10 Troubleshooting

YOU SEE	WHAT TO DO
“Please enter a valid API key.”	Paste **Your API Key** from Profile settings in Freshdesk, then click **Test Connection** again.
Test Connection shows an error, e.g. “(401) Unauthorized”	Check the API Key, and that the Instance URL is your Freshdesk address starting with `https://`, e.g. `https://yourcompany.freshdesk.com`.
“The API Key and Instance URL are required in order to enable activity updates.”	Enter both, click **Test Connection**, then tick **Enabled** again.
“Special characters are not allowed.” (Integration Name)	Use only letters, numbers, spaces, hyphens and underscores, up to 40 characters.
Activity Updates is unticked when you return	Tick **Enabled** and click **Save Settings** to set the connection up again.
Messages or replies don’t appear on a ticket	Only New tickets, and Open tickets assigned to the agent whose API Key you entered, are updated. Check that Sent Messages or Reply Messages isn’t Disabled. See Integration Rules.
A reply doesn’t appear in Freshdesk at all	Check the message was sent from a (repliable) sender or a phone number, and that the contact’s Mobile field holds their number.
A custom field is missing from the query builder or Contact Tokens	Add it as a favourite under **Configure Fields**. Paragraph, phone number, URL and dropdown fields can’t be used in queries.
Save Query does nothing	Check for “* Query title is required” or “* Filter value is required”. A query is also refused if its text is over 300 characters—use fewer conditions.
“Agent fields cannot be used for Bulk Messages.” or “Ticket fields cannot be used for Bulk Messages.”	Remove `[[a.…]]` and ticket tokens from the message. They only work in the BulkSMS for Freshdesk extension.
Contacts skipped: “MSISDN is invalid”	The contact has no mobile number, or it isn’t valid once the country code is applied. See Phone numbers and country codes.
Contacts skipped: “Missing data for … token.”	The contact has no value for a token in your message. Add a default, e.g. `[[c.job_title:default=customer]]`.
Continue is greyed out	Choose a destination, and check the message is under 10 parts.

You can download the list of skipped contacts, with the reason for each, from the Prepared Messages table.

Questions

We're here to help you every step of the way.

Please email **support@bulksms.com** or visit **www.bulksms.com** for other contact options.

Please be sure to mention **your username** and that you are using the **Integration Gateway for a Freshdesk integration**.

EMAIL SUPPORT

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