ServicePoint Text Messaging

This document describes the features and setup of text messaging within ServicePoint. Texts can be used to send appointment reminders to customers, notify technicians of scheduled jobs, send change notifications, request approval/followup requirements, etc. This type of communication is a great time-saving feature when implemented.

Setup Options

- **Control Information** – A tab exists in ServicePoint Control Information, labeled "Texting Setup".

Control File setup options are entered as follows:

SMS Gateway Provider – Domain name of the Email-to-SMS service to be used. It is required to register for a third-party service to allow us to send an email addressed to a mobile number, and have it converted to an SMS message. The service will determine the carrier for the number, send the text immediately, and allow responses to be sent to a specific mobile device, or to be sent back to an email conversation with the sender. The examples, "Textmagic.com", "sms.textp2p.com", and "sms.clicksend.com" were tested during development of this feature, and are compared further below in this document. Some providers will convert and send text-to-speech if a number is determined to be a landline, received responses may be directed/forwarded to multiple destinations, etc. There are other providers available, as well. The only requirement of the chosen provider is that they allow sending email to SMS.

Gateway registered email address – Each gateway service will allow the specification of valid "from" email addresses to be used with the service. Enter one of the valid email addresses registered with the service here.

Text body signature – Optional text that can be included in a sent message by using the keyword #TEXTBODYSIG# in the text layout file.
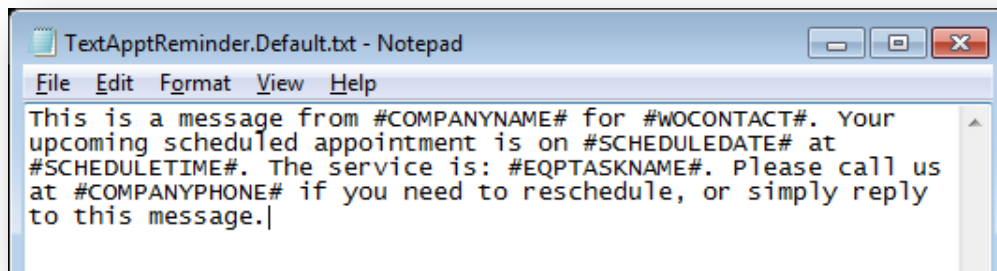
Default numbers – Select the phone number to be used for receiving texts by customers and technicians. Any of the phone numbers allowed in contact information setup in the interfaced accounting system may be chosen. A checkbox option exists to use the work order entered contact phone number preferentially, if it exists.

Note: To use the texting functionality in ServicePoint, the *Email Setup* tab in Control Information must also be set up and functional.

- **Report Layout Files** – For texting, flat text layout files are used. The content can include text characters, mixed with keywords that will be substituted with real-time data from the ServicePoint system. Two samples of default text layout files are provided in the ServicePoint server *Reports* folder. *TextApptReminder.Default.txt* is sample customer appointment reminder, and *TextTechNotify.Default.txt* is a sample technician notification, designed to notify a technician that they have been assigned to a task. You may modify these files and save as different names, or create your own from scratch. They use the same substitution parameters that can be used by .html files in the reports folder.

This sample file

Results in the following text
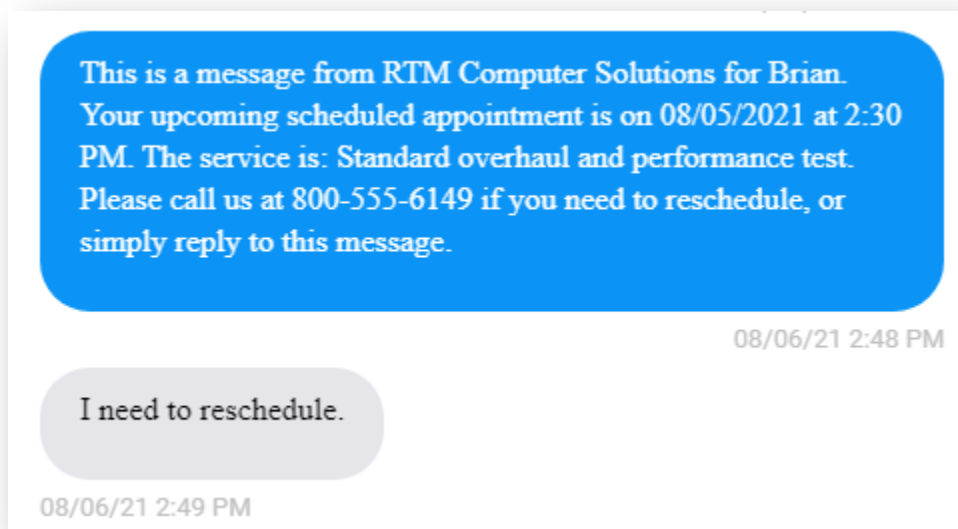
To use text messaging, a report layout file name ending in ".txt" must be set up for sending under one of the following setup options: Either a change to (or from) a work order status (as set up in *WO Status Codes*), or a *Forms Group*. Text messages can also be sent via the new reporting option, *Appointment Reminders*.

- **Work Order Status Code** – The option exits to send emails/messages when a work order changes from, or to, a specific status. Multiple recipients may be chosen, and various report formats may be chosen. If a Crystal Report format (.rpt) is selected, and email is sent with a pdf attachment of the resulting report. If an html layout file (.hmtl) is selected, and formatted in-line email is composed and sent. If a text layout file (.txt) is chosen, then a text message is processed according to the texting setup in the ServicePoint company.

- **Forms Group** – Forms groups can be defined under ServicePoint setup to predetermine a single or a group of reports to be printed together, pre-assigned to specific output destinations. In addition to routing to a specific printer, displaying in a preview window, or allowing the user to select a destination, a report may be sent directly to an email destination. If emailed, the rules for attaching, creating inline emails, and texting are followed, as outlined above. A ".txt" report should always be set up as an Email destination. Multiple reports, all with their own destinations, may be set up in a forms group.

- **Appointment Reminders** – A new report exists under ServicePoint / Reports / Management, called Appointment Reminders. The new menu selection, located under Management Reports, allows texting, emailing, and reporting regarding upcoming scheduled work orders. User selected groups of reminders may be texted or emailed to customers, or printed as an internal follow-up list. Using a text format file (.txt) will result in text messages, and html file (.html) will send emails, and a standard Crystal Report .rpt file will print a list of appointments. Full historical logging of all sent reminders is done, and the results stored in a folder called "ReminderLogs" under the ServicePoint server install location.
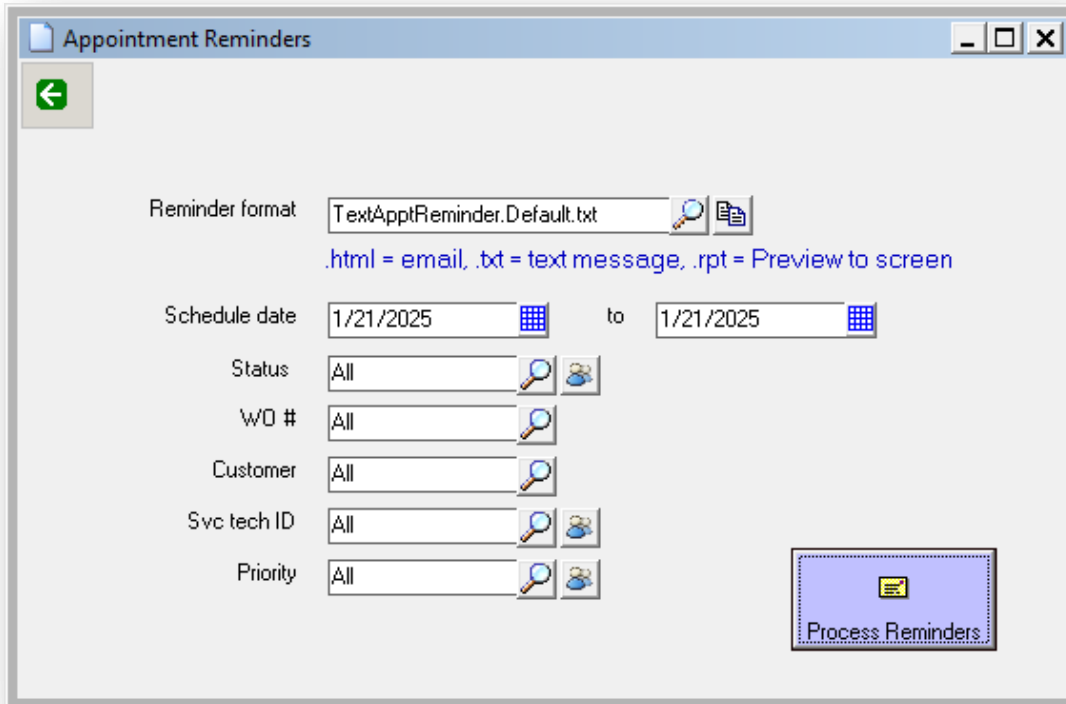
SMS Gateway Service Comparison

The SMS gateway services tested during development of the texting interface were TextMagic, TextP2p, and ClickSend. All of the services offer the following features:

- Competitive pricing models (pennies per text)
- The ability to use an existing phone number, or choose or be assigned a new local number
- Automatic opt-out of texting by receivers, using various keywords (such as "STOP" or "UNSUBSCRIBE",
- Voice calls back to the texting number can be automatically forwarded to a selected phone line of your choice
- Two-way messaging, forwarding the responses to the sending email address. Also, a dashboard, web-based conversation is available for each

A brief write-up of their individual features and functionality follows. All pricing is based on current models, as of 08/21.

TextMagic (TextMagic.com)

Pricing is a flat .04 per text, using a pay as you go model. Dedicated text phone number, provided by TextMagic, is $4 per month.

TextMagic has the ability to send a "failed to deliver" email to the sender if a message is unable to be delivered.

TextP2P (TextP2P.com)

Pricing is by prepaid blocks of texts per month. This allows scaling based on anticipated number of messages to be sent. The smallest default block is $21 for 500 messages, and includes a local texting phone number.

Configurable send/received receipts that are sent back to the originating email address.

TextP2P has the ability to do text-to-speech message delivery if the phone number the message sent to is a landline.

"Rollover credits" are available to allow prepaid message credits to continue to be available in the next month.

Incoming reply messages are free.

ClickSend (ClickSend.com)

Pricing: under 2,000 messages per month, prepaid or post-paid plans are .0257 per sent message. Dedicated number is 1.84 per month.

ClickSend features an auto-responder service that can be set up to respond to preprogrammed return texts.

Incoming reply messages are free.