SMS / Texting Service

Updated 6/19/2017

SPOT version 7.0.5162
SPOT SMS / Texting Service

What is the SPOT SMS Service

The SPOT SMS service provides your company with SMS / Text messaging relay service to your customer’s cell phone. These messages may be sent individually, via batch process or automatically using SPOT workflow steps such as the Rack and Pickup process.

SMS is defined as an “Opt In” process by the carriers. Prior to SPOT sending messages the individual customers is required to “Opt In” and give permission to send SMS / Text messages to their mobile device. This process is managed by your staff as described in the “Customer Opt In” section below.

You have a configuration option to use a shared SMS profile and number for all stores or a unique SMS profile and number for each store. Using a unique profile provides you with maximum flexibility to customize your Opt In and SMS reply services. The phone number used with the service is provided by the service provider and is configured by you. The service provider will charge a minimal fee per text message sent.

Requirements

The following requirements need to be met prior to sending SMS to your customers

- SPOT SMS Service Account - Contact SPOT sales at sales@SPOTpos.com or 801-208-2212 to setup your service account.
- SPOT version 7.0.1700.10 or higher
- Twilio.com SMS service account – Signup at Twilio.com
  - Account SID
  - Key
  - Phone number
  - Other SMS configuration options listed below
- Customer must have a Cell/Mobile phone number defined in SPOT
  - Customer must explicitly “Opt In” to the SMS / Texting service via your staff or via CustomerConnect

Customer “Opt In”

Your customers must provide approval to use this service. Many customers are charged for SMS messages and others just don’t want to receive them. You have three options to enable a customer’s SMS service. (1) Your staff can act on a verbal approval making change at the counter, (2) Customers may login to CustomerConnect or (3) the customer can text “subscribe” to the published phone number. These options are outlined below.

Customer provides Verbal Approval

1. Verify the customer has a “Cell/Mobile” phone type defined on the customer view screen.
2. Update Customer View > Reminders Screen > Batch SMS to use the customers “PhoneSMS” number as shown below.

Customer sends “Subscribe” to your SMS number
(Option assumes the customer has a current Cell/Mobile number defined in SPOT)

1. Customer will send a text “Subscribe” to your stores service phone number.
2. Use the Tools > Email/SMS > SMS – View Replies to view customers that have submitted a request to subscribe to the SMS service.
3. Open the Customer View > Reminders Screen > Batch SMS and configure the customers defined “PhoneSMS” number as shown below.

Customer Enables via CustomerConnect

(CustomerConnect version 2.0.50 or higher is required)

1. Customer logs into CustomerConnect
2. Creates a cell phone number
3. Set the Available Options > “On Batch SMS Sent” option to “Phone SMS” as noted below.

**Twilio.com Account**

Creating a New Account

Navigate to www.Twilio.com and create a SMS texting user account. During the account creation process you will be prompted to select the phone number to be used by your SMS account. The phone number(s) you select will be the “Sending” phone number for your SPOT messages.
Please record the following information from the account. Information will be used to configure SPOT in a later step.

- Account SID
- Key
- Phone number

What if a Customer Replies to a Text Message?
If a customer replies to a SPOT generated text message, the Twilio service provides reply messages for your customer to view. Create a simple text file include the message you want your customer to receive. An example would be:

“Hello – Thanks for using the MyDryCleaner texting service. If you have any questions please contact the store at 123-456-7890.

If you would like to unsubscribe please call the store, text unsubscribe or login to CustomerConnect to disable this service.”

This text file named “Reply.txt” will be placed anywhere that is accessible to the Twilio service. Best practices would place this file on your website. Configure this file location in your Twilio account > Numbers > “SMS Request URL” setting shown below. The example shows a typical file path pointing to your company’s website. You may use any path and file name that is available to the Twilio service.

Can I setup call forwarding for my SMS number?
You can configure Twilio to forward calls to your SMS number to any number that you would like. The following settings will provide you call forward configuration details.

Configure SMS call forwarding
1. Open developer center > Dashboard > Developer center> TwimlBins > and create a new TwimlBin for using the name "Company Call Forward". Use the code below with the correct phone number

```xml
<?xml version="1.0" encoding="UTF-8"?>
<Response>
  <Dial>
    +1-XXX-XXX-XXXX
  </Dial>
</Response>
```
2. Goto Home > select “#” and select the number you want to configure call forwarding.
3. Navigate to the > “Voice & Fax” section of the account.
   a. Configure
      - Accept Incoming > Voice Calls”
      - Configure with > Webhooks/TwiML”
      - A Call Comes In > TwiML > Select the Correct call forwarding bin

How Many Messages am I Sending?
Login to your Twilio account and view the “Usage” tab for a detailed view of account activity.
SPOT SMS Configuration

Company Settings > Create a SMS service Profile
Goto Company Settings > SMS Settings > SMS Profiles and provide the service Account SID, Auth Key and Phone Number as shown below. If you created a service account for each store you will create a profile for each store.
Company Settings > Service Host Settings
Contact sales at sales@spotpos.com or 801-208-2212 to setup your service account. Support will email your services account name when configuration is complete.

Store Settings > SMS Settings > SMS profile
Select the appropriate profile from the drop down list provided. The profiles phone number will be used when sending SMS from this store. Each store is required to have a profile configured.
Company Settings > Customer Settings > Notification Settings > Batch SMS >
Configure the "PhoneSMS" to "Default No". If this is not set you will not see this option in your customer reminders list.
Sending Customer Based SMS Messages

Individual Customer

1. From the Customer View screen, select the “Send Email / SMS” button as shown below.

2. Select the “Send SMS” button. Type your message and hit the send button.
SMS – Batch
Located in Tools > Email/Messaging > Email/SMS – Batch this option provides the option to send a batch SMS message to a specific store or route. Security access is required to use the batch send option. Remember that a single text message is limited to 160 characters.
Sending Process Step Based SMS Messages

SPOT Configuration

If you intend on using SMS services and provide your customers with process step notification such as rack or pickup you will need to modify your process step configuration. This should be done with caution as improper configuration may cause your system to be nonfunctional. Please contact support if you have any questions on these configuration options.


2. Select the Post – Process Interceptor option and select the “SMS Notifier” option.
3. Paste the following content into the “Process Interceptor Construction String Field”. You may change the text included in the message as needed. (Remember you only have 160 characters per text message.)

   Rack~Hi @FIRSTNAME, Your Drycleaning Order is Ready! Total due $@PRICE~~~DUETODAY~SMS

4. Set your customer’s reminders to enable the corresponding reminder type. Listed below shows the order ready reminder configuration.
Managing Messages

**SMS Home Screen Alert**

You have the option of enabling a home screen alert that will alert you of incoming SMS replies. You will navigate to Store Settings > Site Defaults > Alerts (Special) > Enable SMS Replies.

Your staff will now have access to the “SMS Replies” alert with direct access to the reply manager.
Menu Option

SMS is a 2 way technology. Your customers may send you a message to “Subscribe” to the service or just ask a simple question. These messages are processed by the SMS provider and can be retrieved from the providers interface or in SPOT using the SMS - View Replies tool. This tool is found in Tools > Email/Messaging > SMS – View Reply screen.

Opening this tool will display all messages received for the stores SMS profile. The example below shows 3 separate text messages sent from a customer.

1. General question “How does this work?”
2. “Subscribe” request submitted by a customer
3. “Please stop SMS messaging”

You can reply to messages using the “Reply” button. Any reply sent to the customer will be recorded in the customers CRM logs.
**SPOT SMS Interactive Configuration**

When using the OTS interactive campaigns you will need to enable “programable SMS” for the Twilio account. This can be done following the steps outlined below

1. Login to your Twilio account. From the Dashboard/Home option navigate to the “Programable SMS” menu option on the left column
2. Select “Create new Messaging Service” from the screen.

3. Name the Service “Interactvice Message” and set the use case to “Mixed”
4. Set the “use Case”, Enable “Process Inbound Messages”, enter the “Request URL”, set “Request URL Type” and select “Save”. In the request URL type https://api.mydrycleaner.com/twiml?id="PublishableInstanceID". You will replace the sample “PublishableInstanceID” with your active ID. This can be retrieved by contacting support.

5. Navigate back to “Programable SMS” and select “Messaging Services”
6. Select the “Add an Existing Number” and select the number you are associating with the service and select the “Add Selected” button.

7. To test the configuration select your customer record in Spot and send a text message. You should see in the message in the “Customer View > Messages” tab your sms message. Replay back to the message to verify your configuration.
SMS Service Authorization Form

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**Acknowledgement**

By signing this authorization form I am authorizing the purchase and implementation of the SMS texting services.

I understand and agree to the current feature set, operation and implementation needs of each feature set as discussed in this document. I understand that the cost of the SMS service is based on the number of stores at my company. The cost of this service may change as the number of stores increase or decrease in my operation.

I am responsible for creating, managing and funding the required Twilio account(s) used by the SPOT SMS service.

SPOT Business Systems, LLC does not currently support or offer features outside the features/operations outlined in this document and published release notes.

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Please sign and return this form to the sales department at SPOT Business Systems, LLC at sales@spotpos.com or via fax at 801-495-1208 when you are ready to purchase and install the SMS service.